

Wunderkind

2026 Consumer Insights Report

UK 



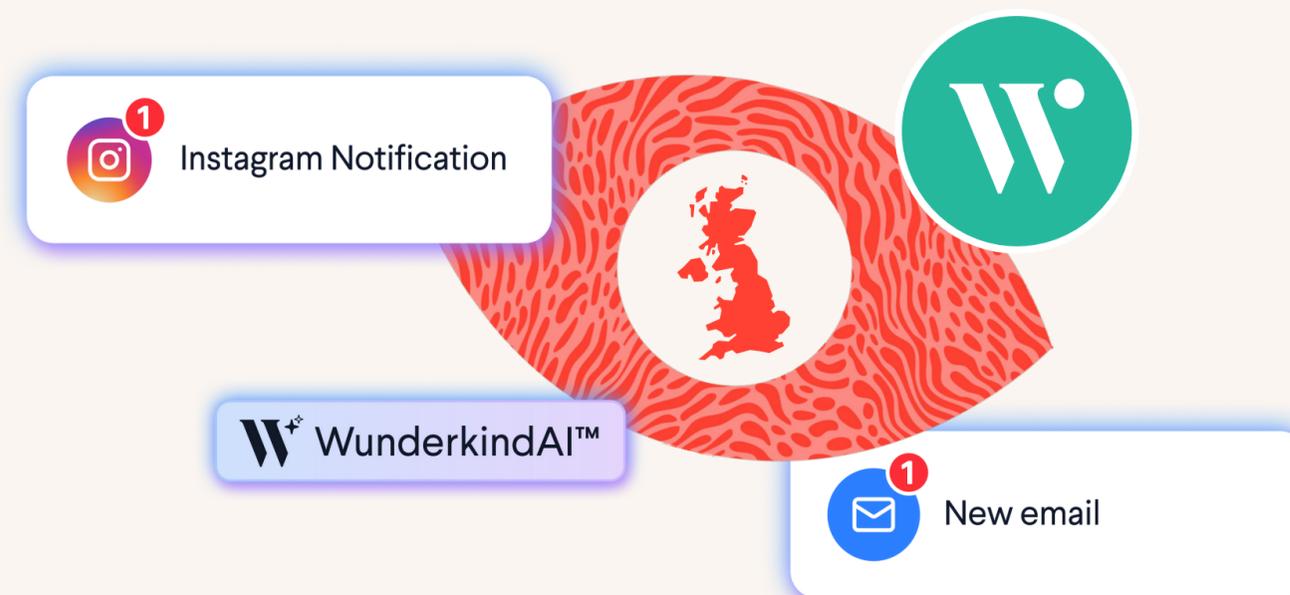
Executive Summary

As the UK enters 2026, brands are navigating a consumer landscape shaped by sustained economic pressure, political recalibration, and structurally changed shopping behaviour. While inflation has moderated from its peak, cost-of-living concerns remain front of mind, with household budgets still under strain from elevated interest rates, housing costs, and energy volatility. At the same time, the UK's post-election environment and ongoing trade and regulatory uncertainty continue to dampen consumer confidence, reinforcing cautious, value-led decision-making rather than signalling a return to pre-pandemic spending norms.

Against this backdrop, the 2026 UK Consumer Insights Report reveals a consumer who is not disengaging from digital commerce, but is increasingly selective about where, how, and why they spend. Online shopping is firmly embedded across all age groups, yet growth expectations are modest. Most UK consumers plan to shop online at similar levels to 2025, indicating a mature eCommerce market where incremental gains must be earned through relevance, trust, and experience rather than volume or frequency alone.

Mobile has become the baseline for participation, with near-universal smartphone usage across demographics. However, the persistence of desktop and tablet usage, particularly among older consumers and men, signals that UK shoppers move fluidly across devices depending on context and purchase intent. Brands that fail to recognise shoppers across devices or sessions risk disrupting momentum at critical decision points, particularly for higher-consideration purchases.

Marketplaces continue to dominate UK non-grocery online spend, driven by convenience, price comparison, and perceived safety during uncertain times. Yet this dominance is not absolute. Younger consumers, especially Gen Z and Millennials, show greater openness to buying directly from brands when the value exchange is clear. Better pricing, loyalty rewards, faster delivery, and genuinely personalised experiences meaningfully increase willingness to bypass marketplaces. In this environment, marketplaces function as efficient volume drivers, while long-term value creation increasingly depends on a brand's ability to build trusted, direct relationships.



Trust remains the decisive factor across channels. Secure payment, transparent data use, and consistent recognition across devices underpin confidence for UK shoppers. Importantly, consumers do not reject personalisation or AI-driven experiences outright. Instead, acceptance is conditional. AI-powered recommendations, price alerts, and triggered messages are welcomed when they clearly reduce effort, improve relevance, and respect consumer control. When these experiences feel excessive, opaque, or poorly timed, trust erodes quickly, particularly among younger audiences who are more sensitive to relevance and explanation.

Messaging tolerance reinforces this point. UK consumers consistently prefer fewer, more relevant interactions over higher-frequency communication. Email remains the most trusted re-engagement channel, while SMS, push notifications, and paid retargeting perform best when tightly linked to demonstrated intent. Brands that rely on broad, interruptive messaging risk accelerating fatigue in an already crowded attention economy.

For UK brands facing margin pressure, rising acquisition costs, and constrained consumer confidence, the path forward is clear. Growth in 2026 will not be driven

by louder marketing or expanded reach. It will come from intelligently orchestrated experiences that recognise consumers, respect their preferences, and engage only when it genuinely adds value. Brands that use identity to remember, AI to decide, and owned channels to build trust will be best positioned to convert stability into sustainable growth, regardless of economic or political headwinds.



TL;DR: 10 Quick Insights from Our 2026 Consumer Data

UK 

1. Mobile Is the Baseline, Not the Advantage

Smartphones are omnipresent, used regularly by 97% of consumers, with near-universal adoption among Gen X and Millennials (99%). Desktops (71%) signal high-intent research, while tablets (52%) 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

Almost half of Millennials (49%) and Gen X (48%) 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

UK consumers trust marketplaces (30%) and large online retailers (23%) most, with parity across ages. Older consumers show growing trust in brand-owned sites when experiences feel clear and secure, while emerging channels continue to lag.

4. Relevance and Urgency Drive Conversion

Onsite experiences that surface discount codes (56%), price drops (51%) and loyalty program offers (37%) 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 (33%), stock issues (19%), checkout complexity (18%), and trust gaps (13%) 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 (42%) and loyalty rewards (33%), while younger shoppers are drawn to exclusive access and personalisation, with trust strengthened by frequency control.

7. Email Leads and Mobile Follows for Re-Engagement, but Paid Retargeting it Out

Email (41%) remains the preferred way for brands to re-engage shoppers after browsing, especially among older consumers. MMS (14%) edges SMS (13%), 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 (37%), with (17%) stating they "love it." One-quarter (25%) are unsure, with reticence (21%) still a major blocker. 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 (18%), especially when it's permissioned (51%), 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 UK consumers. This report examines the latest shifts shaping online purchasing behaviour across the United Kingdom.

This year's research explores UK 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 UK consumers, additional insights into U.S. and Australian trends are available in our content hub.

Wunderkind X

 MX8 LABS

329

Insights are drawn from a representative sample of 329 UK consumers, reflecting diversity across gender, ethnicity, age, and household income. Data collection was completed 12-15 December 2025.

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

Which Devices Consumers Own and Use Regularly

Device Choice Reflects Intent, Not Preference

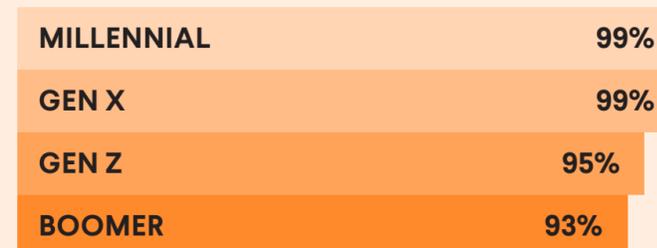
Device usage in the UK reflects intent rather than loyalty to a single screen. Smartphones are effectively universal, setting the baseline for digital participation across age and gender. Any friction in mobile experiences therefore limits reach by default, not just performance.

However, mobile dominance does not eliminate the role of other devices. Desktop remains central for more deliberate, research-heavy shopping moments, particularly among men and Millennials. Tablets play a meaningful supporting role, skewing toward mid-life stages and women, reinforcing the expectation that shoppers move fluidly between devices based on context, comfort, and task complexity.

Taken together, UK consumers exhibit mature, multi-device behaviour. Winning experiences in 2026 will be those that are mobile-first by design, but not mobile-only, preserving continuity, recognition, and depth as shoppers switch screens throughout the journey.

Key Insights

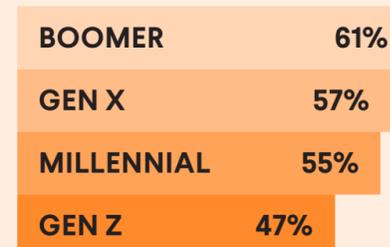
Mobile is the Baseline



97%

Smartphone usage is near-universal in the UK, making mobile performance table stakes rather than a competitive advantage. Any friction on mobile directly constrains participation across all demographics, not just younger consumers.

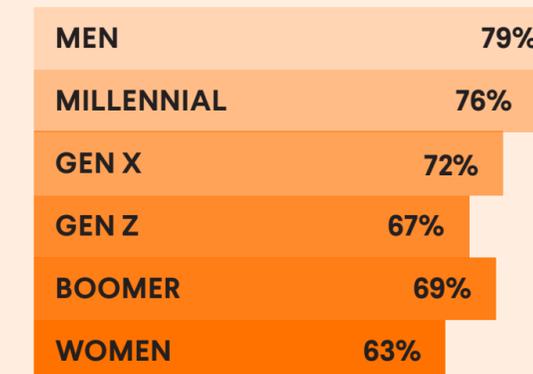
Tablets Skew Mid-Generation and Female



52%

Tablet adoption is strongest among Millennials and Gen X, with women over-indexing versus men. Tablets continue to function as a comfortable middle ground between mobile convenience and desktop depth, often used in relaxed but considered shopping contexts.

Desktop Signals Higher Intent Moments



71%

Desktop usage remains strong, particularly among men, and surprisingly, younger consumers, indicating that larger screens are still preferred for comparison, research, and higher-consideration purchases. This mirrors a more intentional mindset rather than casual browsing.

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

🔗 Strategic Takeaways

1. Reinforce Habits for High-Frequency Shoppers

Mobile journeys must be fast, intuitive, and conversion-ready. Given near-universal usage, mobile friction is not a segment issue, it is a growth limiter.

2. Use Desktop to Support High-Intent Decisions

Design desktop experiences to support research-heavy moments with robust product detail, side-by-side comparisons, and confidence-building signals that help shoppers finalise more deliberate, higher-value purchases.

3. Expect Cross-Device Journeys, Not Single Sessions

UK shoppers expect to effortlessly move between devices without losing context. Identity-driven recognition should preserve carts, preferences, and momentum as consumers switch screens 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 smartphone	93%	99%	99%	95%	98%	95%	97%
A personal desktop computer/laptop	69%	67%	76%	72%	63%	79%	71%
A tablet	41%	55%	61%	51%	57%	47%	52%

2 HOW OFTEN DO YOU SHOP ONLINE?

How Often Do Consumers Shop Online?

Shopping Frequency Signals Habit, Not Just Demand

Online shopping in the UK has moved beyond occasional convenience and into established routine, particularly for younger consumers. For Gen Z and Millennials, online purchasing is embedded into weekly life, reflecting always-on access, mobile familiarity, and comfort navigating digital retail environments.

However, frequency meaningfully shifts with age. Older consumers continue to shop online at scale, but with a more deliberate cadence. Their behaviour suggests planning and purpose rather than habitual browsing. This divergence points to a market where frequency reflects mindset as much as access: some shoppers expect brands to keep pace with their routine, while others expect brands to show restraint and relevance when engagement occurs.

For brands, this creates a clear challenge, and opportunity.

Growth is no longer about pushing everyone to shop more often, but about aligning cadence, messaging, and triggers with how different consumers already behave.

Key Insights

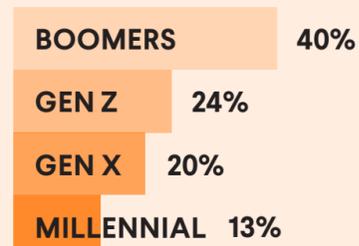
Several Times Monthly Shopping Remains a Secondary Rhythm



34%

Shopping five to six times per month reflects a more intentional pattern, particularly among older consumers. These groups balance familiarity with selectivity, engaging regularly but with clearer purchase intent and less tolerance for noise.

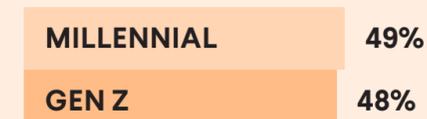
Older Shoppers Are More Deliberate



24%

Boomers are significantly more likely to shop online only every few months, double any other generation. This behaviour signals planned, needs-based purchasing where trust, clarity, and value reassurance matter more than urgency or novelty.

Younger Consumers Drive Weekly Frequency



42%

Nearly half of Millennials and Gen Z shop online two to three times per week, reinforcing digital commerce as habitual rather than event-driven. These consumers are more likely to expect timely reminders, personalised cues, and seamless re-entry into shopping journeys.

2 HOW OFTEN DO YOU SHOP ONLINE?

🔗 Strategic Takeaways

1. Reinforce Habits for High-Frequency Shoppers

For Millennials and Gen Z, lean into automation, triggered messaging, and timely reminders to support repeat behaviour. Replenishment cues, personalised offers, price-drop alerts, and relevant reminders help sustain frequency without increasing perceived pressure.

2. Reduce Friction for Deliberate Buyers

For older, lower-frequency shoppers, focus on clarity and confidence. Strong product information, transparent pricing, and reassurance at key moments help convert planned visits into completed purchases.

3. Match Messaging Cadence to Shopping Rhythm

Align communication frequency with shopping behaviour. Over-messaging risks fatigue among deliberate shoppers, while under-messaging misses opportunity with habitual buyers who expect brands to stay present and relevant. Leverage triggered emails and text campaigns to engage frequent shoppers with personalised promotions or timely reminders about deals. For less frequent shoppers, use messaging that addresses their specific needs or hesitations, such as abandoned cart notifications or limited-time offers on items they've browsed.



2 HOW OFTEN DO YOU SHOP ONLINE?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
2-3 times a week	28%	40%	49%	48%	42%	41%	42%
5-6 times a month	32%	39%	37%	28%	35%	33%	34%
Every few months	40%	20%	13%	24%	23%	25%	24%

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

2026 Online Shopping Plans

Online Growth Will Be Incremental, Not Transformational

Consumers enter 2026 with online shopping firmly embedded in everyday life. Most do not anticipate dramatic changes to their behaviour, signalling that eCommerce has reached a mature, stabilised phase.

Rather than rapid expansion, the coming year points to incremental shifts driven by specific segments rather than broad-based growth.

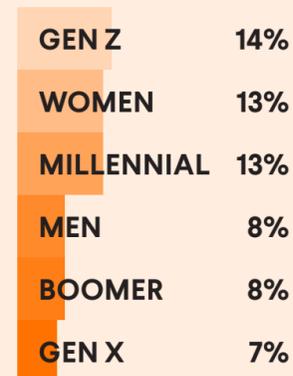
Younger consumers remain the primary source of upside. Gen Z and Millennials are far more likely to increase their online shopping, reflecting continued reliance on digital convenience and comfort with online-first purchasing. In contrast, older consumers anchor the market with consistency, providing dependable volume but limited growth.

Gender differences introduce a secondary layer of opportunity. Men show slightly higher intent to increase online shopping, suggesting greater responsiveness to efficiency-led value propositions.

Overall, growth in 2026 will be earned through experience optimisation, relevance, and retention, not new adoption.

Key Insights

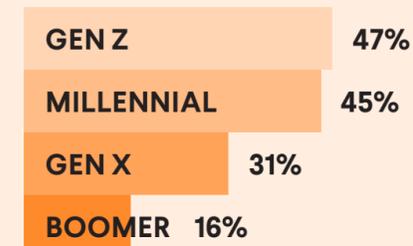
A Small Group Signals Pullback



11%

A minority of consumers plan to shop less online in 2026, skewing female and younger. This pullback suggests sensitivity to economic pressure and value perception rather than disengagement from digital commerce itself.

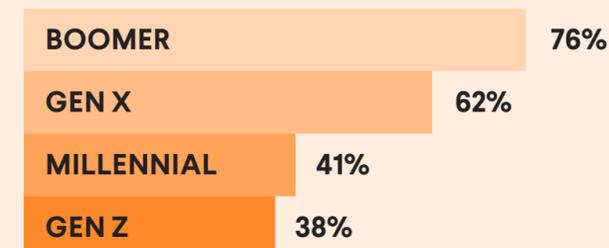
Younger Consumers Signal Growth



35%

Gen Z and Millennials are significantly more likely to plan increased online shopping, confirming their role as the primary drivers of incremental growth. This intent reflects both lifestyle reliance on digital channels and rising expectations for convenience and relevance.

Stability Is the Dominant Mindset



54%

A majority of UK consumers plan to shop online for about the same amount in 2026. The older the consumer, the more entrenched this stability becomes, reinforcing that online shopping is now habitual rather than exploratory.

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

+7 Strategic Takeaways

1. Convert the Stable Majority Into Incremental Growth

With most consumers holding steady, growth will come from nudging frequency and basket size. Timely reminders, replenishment cues, and relevant value messaging can turn consistency into marginal gains.

2. Prioritise Younger Audiences for Net-New Growth

Focus disproportionate investment on Gen Z and Millennials with mobile-first journeys, frictionless experiences, and messaging that rewards repeat engagement and increased reliance on digital channels.

3. Protect Reliability Among Older Consumers

Treat Boomers and Gen X as a dependable base. Reinforce trust, clarity, and predictability while selectively introducing convenience enhancements that reduce friction without forcing behavioural change.

4. Leverage AI and Identity Resolution for Undecided Shoppers

Use AI-powered insights and identity resolution to identify patterns in undecided shoppers' behaviours. Deliver personalised, timely promotions, such as exclusive discounts or limited-time shipping offers, to nudge these consumers toward greater engagement.



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
Shop the same amount online	76%	62%	41%	38%	53%	54%	54%
Shop more online	16%	31%	45%	47%	34%	36%	35%
Shop less online	8%	7%	13%	14%	13%	8%	11%
I don't plan to shop online in the next 12 months	0%	0%	1%	1%	0%	1%	1%

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

Where Consumers Plan to Spend Online

Marketplaces Dominate

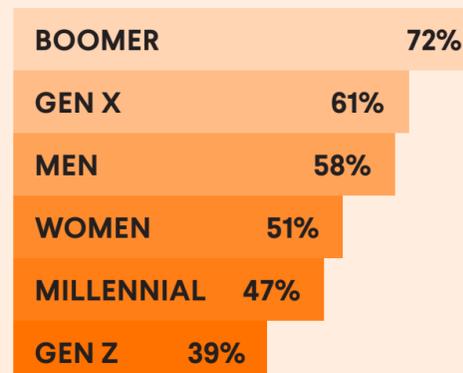
Online marketplaces remain the primary destination for non-grocery online purchases in the UK, driven by familiarity, scale, and perceived convenience. For many consumers, particularly older cohorts, marketplaces represent the lowest-effort path to purchase, offering breadth, trust, and predictable outcomes in an uncertain economic environment.

However, this dominance conceals meaningful generational shifts. Younger consumers are far more open to purchasing directly from brands, whether via websites, apps, or emerging channels such as social commerce. Their behaviour suggests a growing appetite for ownership, recognition, and differentiated value, provided brands can clearly justify the move away from marketplaces.

Rather than a zero-sum channel battle, UK consumer behaviour reflects a layered ecosystem. Marketplaces anchor volume, while brand-owned environments represent the clearest long-term opportunity to build loyalty, data, and lifetime value, especially with younger shoppers.

Key Insights

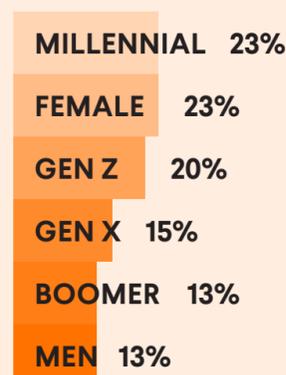
Marketplaces Are Dominant and Primary Volume Driver



54%

More than half of UK consumers plan to purchase most non-grocery items through online marketplaces. Reliance is strongest among Boomers, Gen X and men, reinforcing marketplaces as the default for convenience, trust, and efficiency.

Direct-to-Brand Skews Female and Younger

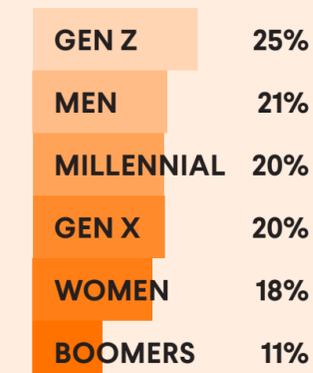


17%

(directly on a brand's website or app)

Younger consumers and women are significantly more likely to plan purchases directly with brands, signalling openness to brand-owned relationships when value, experience, or recognition is clear.

Retailers Have a Diminished Footprint



19%

Large online retailers such as Tesco, Sainsbury's, and John Lewis attract a share of planned spend. These platforms balance breadth and trust without the perceived impersonality of marketplaces.

Emerging Channels Are Gaining Visibility



2-5%

While still niche, social commerce and AI-assisted purchasing register most clearly among younger consumers. Their presence suggests early-stage experimentation rather than mainstream adoption.

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

+ Strategic Takeaways

1. Treat Marketplaces as Acquisition, Not Ownership

Continue using marketplaces for scale and discovery, but intentionally create pathways into owned environments where customer data, loyalty relationships, and lifetime value can be built and sustained over time.

2. Strengthen the Case for Direct-to-Brand

Invest in exclusivity, loyalty recognition, and personalised experiences that clearly differentiate brand-owned destinations, especially for Gen Z and Millennials already signaling openness to buying direct.

3. Optimise Retail Partnerships Strategically

Leverage large online retail platforms to reach shoppers who sit between marketplaces and DTC, while maintaining consistent brand experience, pricing discipline, and messaging across trusted retail environments.

4. Experiment Early With Emerging Channels

Test AI-enabled commerce and social purchasing through low-risk pilots to build early learning and capability, positioning brands ahead of behavioural shifts as these purchase destinations mature.



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 retail store (e.g. Tesco, Sainsbury's, John Lewis, etc.)	11%	20%	20%	25%	18%	21%	19%
At an online marketplace (e.g. Amazon, Temu, Rakuten, etc.)	72%	61%	47%	39%	51%	58%	54%
Directly on a brand's website	8%	5%	16%	13%	14%	7%	10%
Directly in a brand's app	5%	10%	7%	7%	9%	6%	7%
Within AI tool (e.g. ChatGPT Instant Checkout)	3%	1%	0%	6%	2%	3%	2%
Social Media (e.g. Instagram, Facebook)	0%	2%	10%	9%	5%	5%	5%
Other	1%	1%	0%	1%	1%	1%	1%

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

Reason for Favored Purchase Destinations

Convenience and Value Lead, but Relevance Differentiates

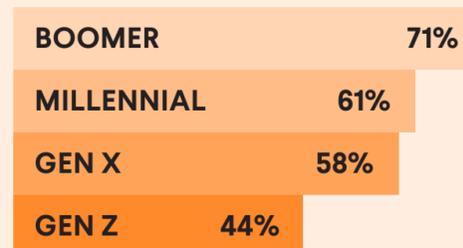
Consumers primarily choose where to buy online based on ease. Convenience remains the dominant driver across all demographics, reinforcing that low friction, familiarity, and speed are now baseline expectations rather than differentiators.

However, convenience alone does not secure long-term preference. Younger consumers, in particular, layer additional expectations onto their channel choices. Loyalty recognition, relevant recommendations, and responsive support increasingly influence where they choose to transact. This signals a shift from purely transactional decision-making toward experiences that feel adaptive and personally rewarding.

Taken together, channel preference reflects a hierarchy of needs: convenience opens the door, but value, relevance, and recognition determine where repeat purchasing consolidates over time.

Key Insights

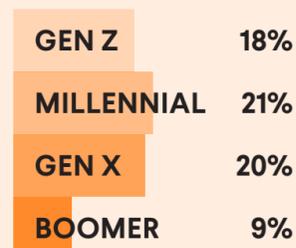
Convenience Is a Key Primary Driver



58%

Convenience edges discounts as the leading reason consumers choose where to purchase, with clear generational differences. Older shoppers prioritise familiarity and efficiency, while younger consumers are more willing to trade convenience for added value or relevance.

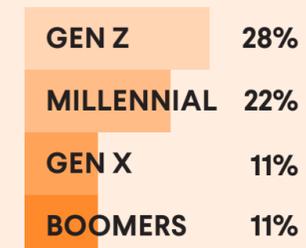
Recognition Skews Younger



17%

Younger shoppers are nearly twice as likely as Boomers to prioritise loyalty recognition. This indicates that repeat engagement increasingly depends on feeling acknowledged and rewarded, not just on transactional incentives.

Younger Consumers Expect Personalisation



22%

Younger consumers place significantly more weight on relevant recommendations when choosing where to buy. This highlights rising expectations for personalisation as a standard component of the purchase experience rather than a nice-to-have.

Value Reinforces Channel Choice

57%

Better brand offers or discounts meaningfully influence channel selection across all age groups, reinforcing continued price sensitivity even as online shopping becomes habitual.

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

✦ Strategic Takeaways

1. Remove Friction as a Baseline Requirement

Speed, simplicity, and familiarity are non-negotiable. Any friction in navigation, checkout, or fulfillment risks immediate channel defection.

2. Compete on Value Without Racing to the Bottom

Use targeted discounts, exclusive offers, and brand-specific incentives to reinforce preference and channel choice, rather than relying on broad price cuts that undermine margins and long-term brand value.

3. Make Loyalty Visible and Meaningful

Especially for younger consumers, recognition must be explicit. Loyalty benefits should be clearly communicated and felt at the moment of engagement, not buried in programme mechanics.

4. Use Relevance to Earn Repeat Choice

Invest in recommendations and messaging that clearly reflect past behaviour and intent. Relevance is increasingly the lever that differentiates channels once convenience expectations are met.



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	59%	54%	60%	56%	56%	58%	57%
Better loyalty recognition	9%	20%	21%	18%	20%	15%	17%
More relevant recommendations	11%	11%	22%	28%	18%	17%	18%
Faster support	11%	17%	17%	17%	13%	18%	15%
Convenience	71%	58%	61%	44%	59%	58%	58%
None of these	4%	6%	0%	1%	2%	3%	3%

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

Most Trusted Places to Buy Online

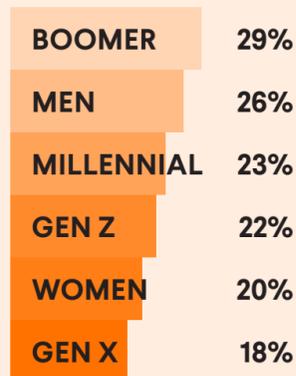
Trust Concentrates Around the Familiar, but Is Slowly Fragmenting

Trust remains a decisive factor in online purchasing, and it continues to cluster around familiar, established environments. Online marketplaces and large retail sites still command the greatest confidence, benefiting from scale, perceived buyer protection, and habitual use, particularly among older consumers. That said, trust is no longer monolithic. Younger consumers are increasingly willing to trust brand-owned websites and apps, signalling a gradual shift toward direct relationships when experiences feel transparent, consistent, and secure. Emerging destinations, such as social platforms and AI-enabled tools, remain marginal, highlighting that trust is earned slowly and unevenly as new channels mature.

Overall, trust in 2026 reflects a balance between institutional reassurance and experiential credibility. Scale still matters, but it is no longer sufficient on its own.

Key Insights

Retailers Provide Reassurance Without Complexity



23%

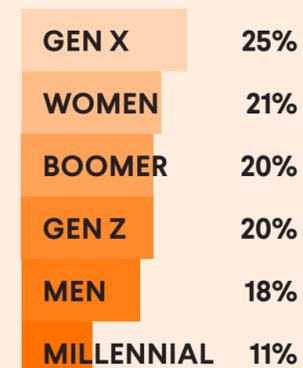
Large online retailers such as Tesco, Sainsbury's, and John Lewis continue to hold strong trust positions. They offer accountability and familiarity without the perceived risk or fragmentation of navigating individual brand sites.

Direct-to-Brand Skews Female and Younger

30%

Online marketplaces are the most trusted destination overall among all consumers who value predictability, buyer protection, and familiarity when purchasing online.

Brand-Owned Websites Build Trust With Older Consumers and Women



22%

Direct brand websites command meaningful trust, particularly among consumers comfortable engaging directly when brands demonstrate reliability, transparency, and consistent experience delivery.

Emerging Channels Are Gaining Visibility



3-6%

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.

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

🔗 Strategic Takeaways

1. Reinforce Trust Signals Everywhere

Prioritise visible security, transparent data practices, and consistent experiences across all purchase destinations to reduce hesitation and reinforce confidence at the moment of purchase.

2. Use Scale to Borrow Trust, Then Convert

Leverage trusted marketplaces and major retailers to establish credibility, then intentionally guide shoppers toward brand-owned destinations where relationships, data, and lifetime value can grow.

3. Invest in Direct Trust-Building for Younger Audiences

Strengthen brand sites and apps with recognition, clarity, and reliability to meet older consumers' growing willingness to buy directly when trust expectations are met.

4. Treat Emerging Destinations as Trust-Building Labs

Approach social and AI-enabled commerce as learning environments, prioritising transparency, education, and controlled experimentation before pushing for broader adoption or scale.



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

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
An online retail store (e.g. Tesco, Sainsbury's, John Lewis, etc.)	29%	18%	23%	22%	20%	26%	23%
An online marketplace (e.g. Amazon, Temu, Rakuten, etc.)	32%	31%	28%	30%	29%	32%	30%
Directly on the brand's website (e.g. marksandspencer.com, nike.com/gb, samsung.com/uk, etc)	24%	31%	13%	18%	25%	18%	22%
Directly in the brand's app	15%	15%	18%	14%	19%	11%	15%
Within AI tool (e.g. ChatGPT Instant Checkout)	0%	1%	7%	5%	1%	5%	3%
Social Media (e.g. Instagram, Facebook)	0%	1%	11%	10%	4%	7%	6%
None of these	0%	2%	0%	1%	2%	0%	1%

Reasons for Trusted Purchase Destinations

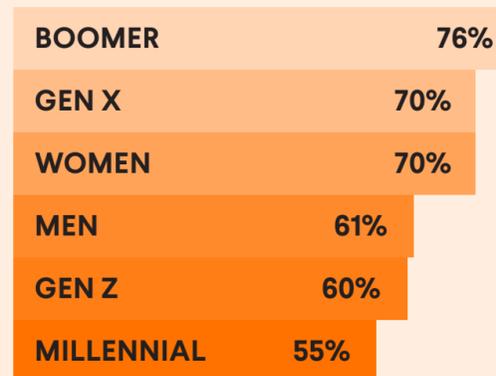
Trust Is Built on Safety First, Then Reinforced Through Recognition and Relevance

Trust in online commerce is anchored first in safety, but increasingly shaped by experience. Secure payment and strong security protections remain the foundation across all demographics, particularly for older consumers. However, security alone is no longer sufficient to differentiate trusted destinations.

Younger consumers, in particular, layer additional expectations onto trust. Consistent recognition across devices, relevant communication, and credible social proof all play growing roles in reinforcing confidence. This shift signals that trust is becoming less institutional and more experiential, earned through repeated demonstrations that a brand or platform understands, remembers, and respects the shopper. In this environment, trust is not won once; it is maintained through consistency, restraint, and relevance.

Key Insights

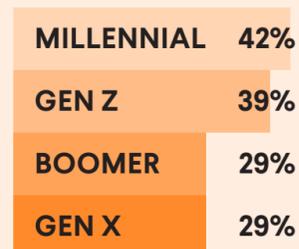
Security Is the Trust Baseline



65%

Safe payment and strong security protections are the single most important trust driver overall. Importance skews older, reinforcing that risk reduction and financial reassurance remain critical for mature consumers.

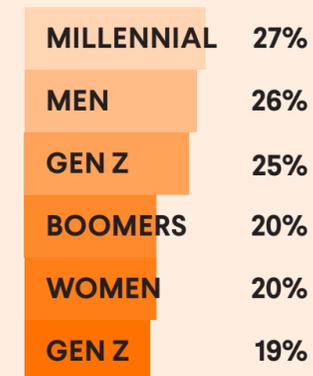
Reviews Validate Decisions



35%

Customer reviews remain a powerful trust signal, particularly for younger consumers. Reviews help reduce uncertainty and confirm decision-making when purchasing online.

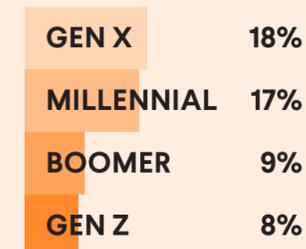
Recognition Builds Confidence



23%

Cross-device recognition is no longer a nice to have, it's a necessity. Younger consumers are more likely to trust purchase destinations that consistently recognise them across devices and allow control over preferences, reinforcing expectations for continuity and personalisation.

Fewer Irrelevant Messages Build Authority



13%

Reducing irrelevant messages builds trust, 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.

7 I TRUST BUYING THESE PURCHASE DESTINATIONS BECAUSE

+7 Strategic Takeaways

1. Make Security Visible, Not Assumed

Clearly surface payment security, privacy protections, and data practices at key decision points so shoppers feel confident and reassured, rather than needing to search for or infer protections.

2. Use Recognition to Reinforce Trust

Consistently recognise shoppers across devices and sessions to make experiences feel personal and cohesive, reinforcing confidence that the brand understands and respects individual preferences.

3. Leverage Reviews as Confidence Builders

Prominently surface reviews and social proof at high-intent moments to reduce hesitation, validate product claims, and support confident purchasing decisions, especially for higher-consideration purchases.

4. Lead With Transparency for Younger Audiences

Clearly explain why shoppers are seeing messages or offers and how data is used. Transparency builds long-term trust and reduces skepticism among digitally native consumers.

5. Build Trust Through Multi-Channel Integration

Incorporate cohesive multi-channel strategies that create seamless transitions between email, text, and onsite experiences. By integrating identity signals, brands can deliver a consistent and personalised journey that resonates across generations.



7 I TRUST BUYING THESE PURCHASE DESTINATIONS BECAUSE

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Transparency on data use	9%	19%	28%	17%	17%	20%	18%
Control over preferences	11%	18%	10%	21%	13%	17%	15%
Consistently recognises me across devices	20%	19%	27%	25%	20%	26%	23%
Fewer irrelevant messages	9%	18%	17%	8%	14%	12%	13%
Safe payment / good security	76%	70%	55%	60%	70%	61%	65%
Reviews from previous customers	29%	29%	42%	39%	36%	33%	35%
None of these	12%	6%	2%	1%	6%	5%	5%

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

Motivators for Purchasing Directly from Brands Over Marketplaces

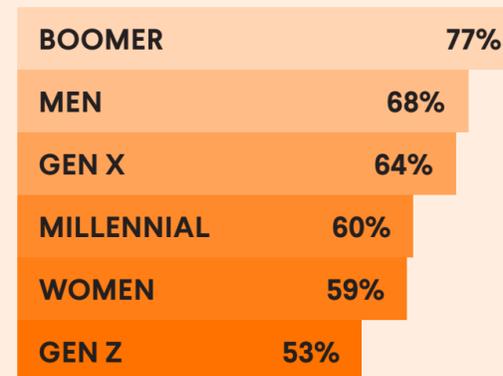
Direct-to-Brand Requires a Clear Value Exchange

Convincing consumers to move away from marketplaces and purchase directly from brands requires more than availability, it requires a compelling value exchange. Price remains the strongest lever, but it is no longer sufficient on its own. Faster delivery, loyalty rewards, and personalized experiences increasingly shape willingness to buy direct, particularly among younger shoppers.

As consumers become more accustomed to convenience and choice, they expect brand-owned destinations to deliver incremental benefits that justify the switch. This shift underscores a broader dynamic: direct-to-brand success depends on how effectively brands combine economic incentives with relevance, recognition, and control. Brands that clearly articulate and consistently deliver this value are better positioned to reclaim demand from marketplaces over time.

Key Insights

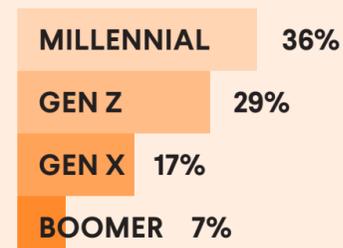
Unfortunately, Price is King



63%

Better pricing or exclusive discounts are the most powerful motivators for buying direct. Sensitivity skews older and male, reinforcing that clear economic advantage remains a prerequisite for channel switching.

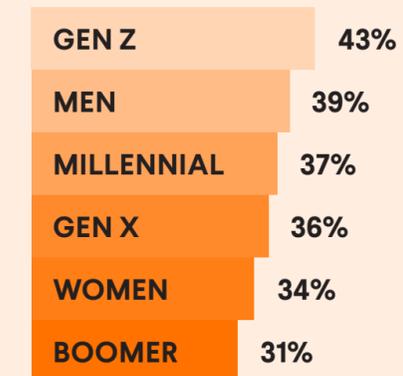
Personalisation Tips the Scale



22%

Younger consumers (4-5x that of Boomers) are significantly more motivated by personalised shopping experiences and relevant messages, highlighting personalisation as a key lever for direct-to-consumer growth.

Loyalty Drives Engagement



37%

Loyalty rewards are a strong motivator for younger consumers and men, signalling appetite for recognition and long-term value in exchange for direct relationships.

Speed is the Name of the Game

38%

Faster delivery options materially increase willingness to shop direct. Marketplace speed has set expectations that brands must now meet, or clearly offset with other value.

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

🔗 Strategic Takeaways

1. Lead With Economic Incentives

Use exclusive pricing, bundles, or brand-only discounts to create an immediate, rational reason to bypass marketplaces particularly for older and value-driven shoppers.

2. Compete on Speed Where It Matters

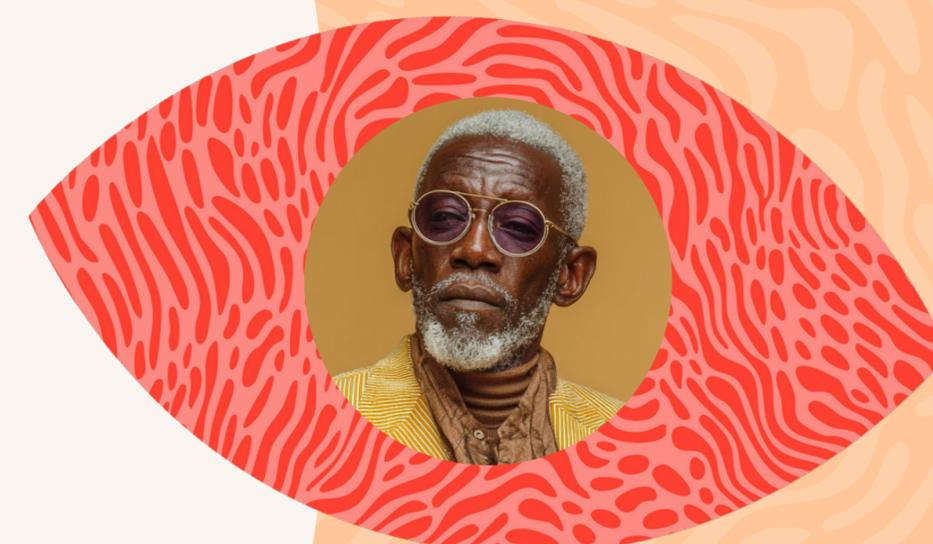
Invest in faster fulfilment or clearer delivery expectations for high-intent shoppers to reduce marketplace advantage.

3. Make Loyalty Tangible and Visible

Loyalty rewards should be easy to understand and surfaced early. Recognition must feel immediate, not deferred or abstract.

4. Use Personalisation to Justify the Switch

Deliver relevant recommendations and tailored messaging that make brand-owned experiences feel meaningfully better, not just different from marketplaces. Use first-party data to craft tailored shopping experiences that resonate with consumers. Offer curated recommendations, customisable options, and personalised rewards to strengthen engagement and loyalty.



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
Better pricing or exclusive discounts	77%	64%	60%	53%	59%	68%	63%
Faster delivery options	36%	39%	45%	33%	39%	37%	38%
Better loyalty rewards	31%	36%	37%	43%	34%	39%	37%
A more personalised shopping experience	19%	25%	29%	31%	30%	22%	26%
More relevant, personalised messages based on what I browsed	7%	17%	36%	29%	22%	23%	22%
Let me set message frequency/quiet hours.	1%	5%	11%	11%	8%	7%	7%
None of these	8%	8%	5%	2%	7%	5%	6%

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

Factors Influencing Brand Purchase Decisions

Familiarity Opens the Door, Value and Validation Close the Sale

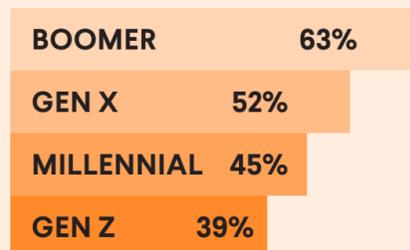
When UK consumers choose to buy directly from a brand, their decision-making is grounded less in inspiration and more in reassurance. Prior experience with a brand is the strongest driver, signalling that familiarity reduces perceived risk when stepping outside the safety of marketplaces and large retailers.

However, familiarity alone is not enough. Price, shipping value, and social proof play critical supporting roles, particularly for younger consumers and women, who rely more heavily on reviews to validate brand claims. Advertising, while still secondary overall, plays a disproportionate role for Gen Z, highlighting that discovery and signalling still matter even within direct environments.

Direct-to-brand purchasing in 2026 is therefore a balance of trust and justification. Brands win when they combine recognition with clear economic and confidence-building cues.

Key Insights

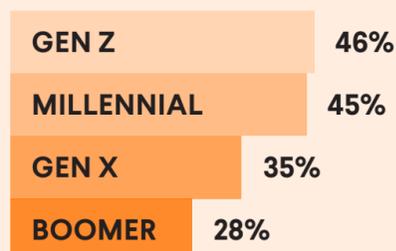
Familiar Brands Beat Cheaper Prices



50%

Past purchase experience is the leading factor influencing direct brand purchases. This effect is strongest among older consumers, reinforcing that trust and familiarity materially lower the barrier to buying direct.

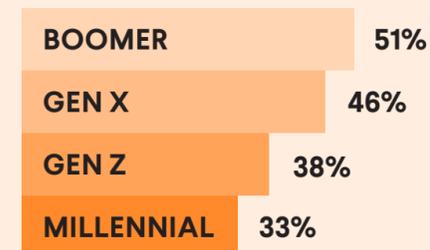
Reviews Matter More to Younger Shoppers



38%

Younger consumers rely more heavily on reviews when purchasing direct, using social proof to validate brand claims and reduce uncertainty.

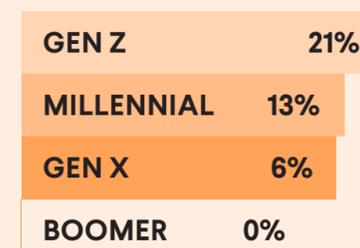
Price Remains a Gatekeeper



42%

Low price continues to play a significant role across demographics, particularly among older and male shoppers. Even loyal customers expect a clear economic rationale for bypassing marketplaces.

Advertising Influences Discovery



10%

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

Shipping Value Supports Conversion

30%

Shipping deals meaningfully influence direct purchase decisions, underscoring that total cost, not just product price, remains central to evaluation when buying directly from brands.

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

🔗 Strategic Takeaways

1. Prioritize 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. Reinforce Value Without Undermining Trust

Maintain competitive pricing and shipping offers that clearly reward direct purchase, while avoiding excessive promotions that can weaken brand equity or condition shoppers to wait for discounts.

3. Surface Reviews at High-Intent Moments

Integrate reviews prominently within product pages and checkout flows to reduce uncertainty, validate brand claims, and support confident decision-making, particularly for younger and less familiar shoppers.

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	63%	52%	45%	39%	48%	51%	50%
I prefer to purchase from brands that offer the lowest price	51%	46%	33%	38%	40%	44%	42%
I prefer to purchase from brands that offer the best shipping deals	27%	24%	39%	30%	30%	30%	30%
I prefer to purchase from brands that have the best advertisements	0%	6%	13%	21%	11%	10%	10%
I prefer to purchase from brands that have the best reviews	28%	35%	45%	46%	38%	39%	38%
Other (Please specify)	1%	2%	1%	0%	2%	0%	1%
None of these	4%	2%	1%	0%	2%	1%	2%

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

What Matters Most When Purchasing Directly from Brands

Direct-to-Brand Decisions Are Driven by Value, Not Brand Image

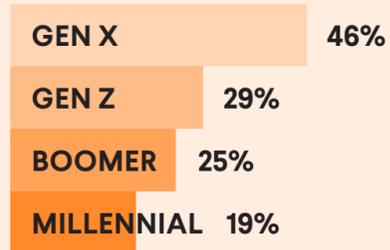
When consumers are forced to prioritise a single factor in direct-to-brand purchases, practical value clearly outweighs emotional or aspirational drivers. Price, shipping, and delivery-related considerations dominate decision-making, reinforcing that brand equity alone is not enough to earn direct transactions.

While younger consumers introduce additional nuance, placing more importance on delivery speed, brand recognition, and convenience, their choices still centre on utility rather than storytelling. Direct channels are evaluated through a cost-benefit lens: consumers expect brands to earn the direct purchase by reducing friction, cost, or uncertainty.

This positions direct-to-brand success as a justification exercise, not a persuasion challenge. Brands win when they make the direct option feel smarter, easier, and more rewarding.

Key Insights

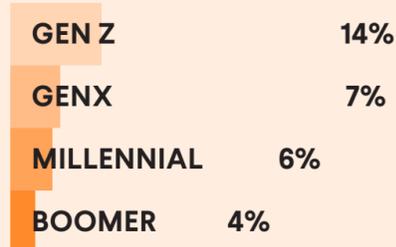
Price Sets the Decision Floor



30%

Best price is the single most important factor overall, particularly for Gen X. Even in direct relationships, consumers remain highly price-aware and unwilling to trade value for proximity to a brand.

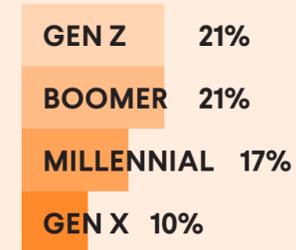
Brand Recognition and Reviews Are Secondary, but Not Irrelevant



8%

Brand name recognition and reviews matter most to Gen Z, signalling that reassurance and validation still influence younger consumers when buying direct, even if they are not the primary trigger.

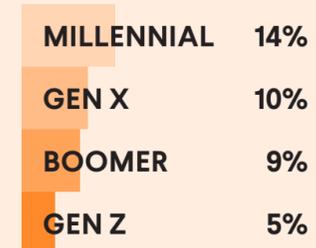
Free Shipping Is a Critical Conversion Lever



17%

Free shipping ranks as one of the top deciding factors, underscoring how delivery costs disproportionately influence direct purchase decisions across age groups.

Convenience and Experience Play a Supporting Role



9%

Convenience-related factors remain relevant but are rarely decisive on their own. They function as hygiene factors rather than differentiators once value expectations are met.

Delivery Speed Matters

8%

While not the top driver overall, delivery time plays a more meaningful role, reflecting expectations shaped by marketplace and on-demand commerce standards.

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

✦ Strategic Takeaways

1. Treat Price and Shipping as Strategic Levers

Competitive pricing and free shipping should be viewed as conversion tools, not margin sacrifices, especially for value-driven and older consumers.

2. Optimise Delivery Expectations for Younger Audiences

Clearly communicate delivery timelines and offer faster options where possible to meet younger shoppers' speed expectations.

3. Reinforce Confidence at the Point of Decision

Use reviews, ratings, and recognition cues to support reassurance, particularly for Gen Z shoppers who seek validation even when value thresholds are met.

4. Assume Brand Equity Is Not Enough

Direct channels must consistently justify themselves through tangible benefits. Emotional affinity alone rarely closes the sale.



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

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Best Price	25%	46%	19%	29%	29%	32%	30%
Discount	9%	4%	14%	8%	9%	8%	9%
Popularity of item	0%	5%	4%	0%	2%	2%	2%
Reviews	12%	6%	11%	9%	11%	8%	9%
Brand name recognition	4%	7%	6%	14%	7%	9%	8%
Convenience	9%	10%	14%	5%	10%	9%	9%
Delivery time	7%	6%	10%	10%	7%	9%	8%
Free Shipping	21%	10%	17%	21%	19%	15%	17%
Ability to pick up in store	11%	4%	4%	5%	5%	6%	6%
Other (Please specify)	1%	2%	0%	0%	1%	1%	1%
None of these	0%	1%	1%	0%	1%	1%	1%

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

Factors Influencing Online vs. In-Store Purchase Decisions

Online Wins When It Clearly Saves Time, Effort, or Money

For consumers, the decision to buy directly from a brand online rather than in-store is fundamentally pragmatic. Online channels are favoured when they deliver clear advantages over physical retail, most notably around cost savings, convenience, and access.

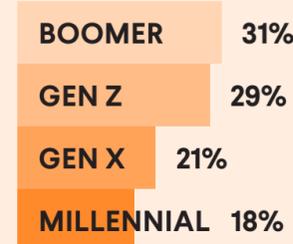
Free shipping and exclusive online value play an outsized role, particularly for older and more value-conscious shoppers.

Younger consumers, meanwhile, are more influenced by speed, flexibility, and payment options, reflecting expectations shaped by on-demand and mobile-first commerce. Across all ages, the choice is rarely emotional: consumers go online when it is demonstrably easier or better than going to a store.

This reinforces that online direct channels must outperform physical retail, not merely replicate it.

Key Insights

Speed Matters



25%

Delivery speed increasingly tips the balance toward online purchasing for Boomers and Gen Z, reflecting expectations shaped by fast, on-demand commerce.

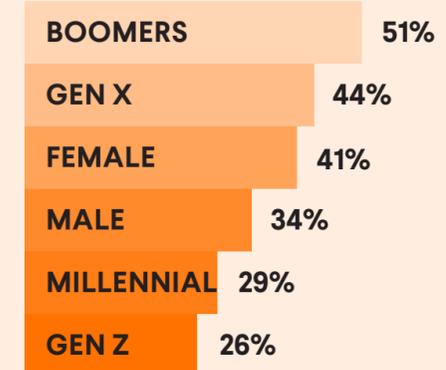
Availability Drives Digital Preference



27%

Product availability plays a major role for Boomers, reinforcing online channels as the default when inventory access and selection matter most.

Free Shipping Is the Strongest Online Advantage



37%

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.

Exclusive Online Offers Drive Digital Preference

33%

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. Love for this is universal.

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

🔗 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 shoppers' expectations and reduce the perceived advantage of immediate in-store purchase.

5. Expand Convenience Beyond Checkout

Offer flexible payment options, easy returns, and online-only access to reinforce digital convenience throughout the purchase experience, not just at the point of payment.

6. Custom Targeting

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



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
Convenience	25%	31%	28%	26%	26%	29%	28%
Price comparisons	32%	23%	20%	30%	23%	29%	26%
Product availability	36%	24%	24%	26%	24%	31%	27%
Delivery speed	31%	21%	18%	29%	26%	24%	25%
Free shipping	51%	44%	29%	26%	41%	34%	37%
Exclusive online discounts or bundles	33%	31%	33%	33%	33%	32%	33%
Easy and free returns	31%	32%	33%	26%	36%	25%	30%
Access to online-only products or early releases	7%	14%	14%	11%	14%	10%	12%
Detailed product information & reviews	20%	18%	36%	20%	26%	20%	23%
Flexible payment options (buy now/pay later)	5%	18%	25%	25%	23%	14%	19%
None of these	3%	5%	0%	0%	2%	2%	2%

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

What Helps the Most When Making Online Purchase Decisions

Urgency and Relevance Outperform Inspiration

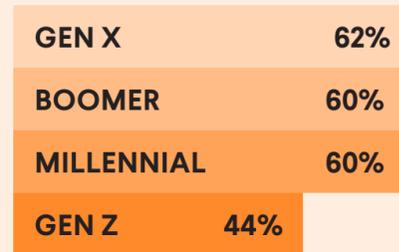
UK consumers are most likely to convert when onsite experiences reduce uncertainty and create clear, timely value. Functional signals, such as price drops and availability cues outperform more inspirational or editorial content, reinforcing that shoppers prioritise confidence and momentum over discovery when approaching purchase.

Younger consumers are more responsive across a wider range of experiences, particularly those rooted in personalisation and guidance. Older consumers, meanwhile, are more selective, responding primarily to direct economic signals. This highlights a clear divide between conversion accelerators and nice-to-have enhancements.

Overall, the most effective onsite experiences are those that feel helpful, timely, and grounded in shopper intent, not those that simply add more content to the page.

Key Insights

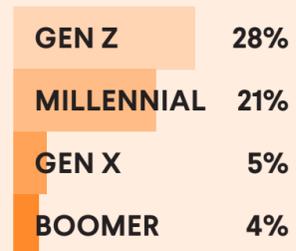
Price Drops Drive Action



56%

Price-drop alerts are the single most effective onsite experience overall. Their impact is strongest among older and value-conscious consumers, underscoring the continued importance of economic reassurance at the moment of decision.

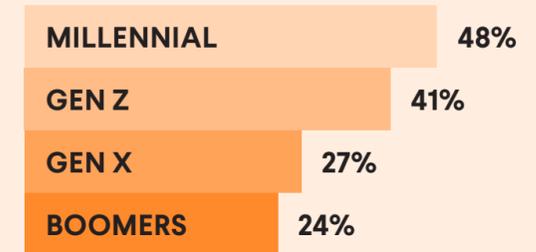
Generic Experiences Fall Flat



13%

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

Personalisation Resonates With Younger Shoppers



35%

Personalised recommendations based on browsing behaviour significantly increase purchase likelihood for younger consumers (2x that of Boomers). This reflects expectations for relevance and guidance as standard components of digital shopping.

Availability Signals Create Urgency

25%

Low-stock and back-in-stock alerts (both 25%) meaningfully increase purchase likelihood, especially among younger shoppers who respond to scarcity and availability cues.

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

🔗 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.



12 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
Personalised recommendations based on browsing	24%	27%	48%	41%	34%	37%	35%
Alerts when items are low in stock	16%	20%	27%	36%	25%	25%	25%
Back-in-stock notices	17%	24%	26%	33%	30%	20%	25%
Price-drop alerts	60%	62%	60%	44%	56%	57%	56%
Styling or usage recommendations	8%	19%	33%	25%	21%	22%	21%
None of these	28%	15%	4%	5%	13%	12%	13%

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

Barriers to Completing Online Purchases

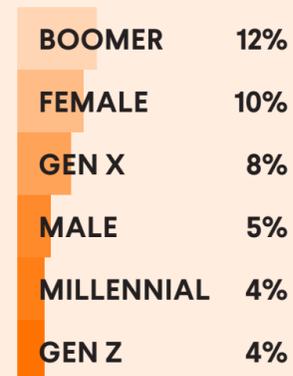
Cost and Confidence Break Momentum Late in the Journey

Cart abandonment on brand-owned sites is driven less by lack of interest and more by friction introduced late in the purchase journey. For consumers, unexpected costs, trust concerns, and checkout complexity are the most common reasons to walk away, often after intent has already been established.

Older consumers are more sensitive to cost-related friction, while younger shoppers are more likely to disengage when experiences feel confusing, restrictive, or poorly explained. Across all age groups, these blockers are largely preventable, reinforcing that many lost conversions stem from execution issues rather than demand shortfall. In a mature eCommerce environment, conversion is increasingly won, or lost in the final steps.

Key Insights

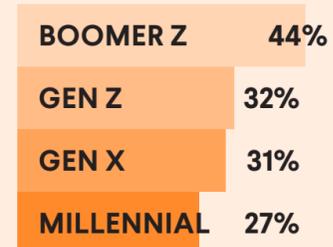
Confusion Undermines Confidence



7%

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

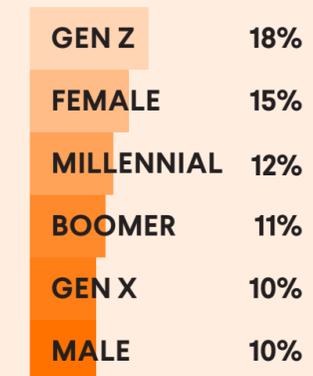
Unexpected Shipping Costs Are the Leading Conversion Killer



33%

Unexpected or high shipping costs are the most cited reason for abandonment. Sensitivity is strongest among Boomers, highlighting how late-stage cost surprises disproportionately erode trust and intent.

Trust Gaps Stop Younger Shoppers



13%

Lack of trust in the brand disproportionately affects Gen Z (1.5x any other age group), signalling that younger shoppers require stronger reassurance, transparency, and validation before completing a purchase.

Checkout Friction Still Breaks Momentum

18%

Complicated checkout processes remain a meaningful blocker across age groups, signaling that even motivated shoppers will abandon when effort outweighs perceived reward.

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

🗝️ Strategic Takeaways

1. Address Shipping Costs Transparently

Minimise surprise fees by clearly communicating shipping costs earlier in the journey, using thresholds, incentives, or bundled offers to preserve perceived value through checkout and prevent late-stage abandonment.

2. Reinforce Trust Before the Final Click

Surface trust signals, such as reviews, guarantees, and security indicators earlier in the experience to reassure younger shoppers and reduce hesitation driven by uncertainty at the moment of purchase.

3. Simplify Checkout Relentlessly

Streamline checkout flows by reducing steps, limiting required inputs, and supporting preferred payment methods to maintain momentum and prevent friction from outweighing purchase intent.

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.

5. Recovery Messaging

Implement automated emails and push notifications reminding shoppers about items left behind with tailored incentives like free shipping.



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
High shipping costs	44%	31%	27%	32%	34%	33%	33%
Lack of trust in the brand	11%	10%	12%	18%	15%	10%	13%
Complicated checkout process	19%	20%	18%	16%	18%	19%	18%
Items out of stock	20%	19%	20%	15%	15%	22%	19%
Not enough payment options	3%	10%	5%	13%	10%	5%	8%
Confusion about why I'm seeing an offer	4%	8%	12%	5%	4%	10%	7%
None of these	0%	2%	6%	1%	4%	1%	2%

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

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

Retention is Driven by Utility and Value

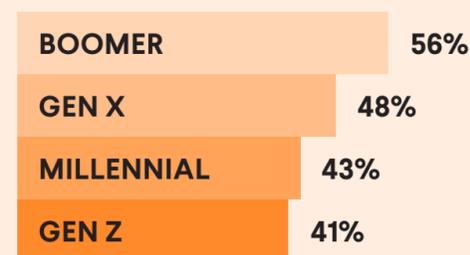
Consumers return to brand-owned sites and apps when content delivers clear, repeatable value. Practical incentives, such as promotions, loyalty rewards, and credible social proof far outweigh brand storytelling or inspirational content in driving ongoing engagement.

Younger consumers show broader appetites, responding not only to value but also to relevance and personalisation. Older consumers, meanwhile, are more selective, gravitating toward content that clearly signals savings or reward. Across all groups, content that feels optional or “nice to have” struggles to create habitual return behaviour.

Repeat visitation is therefore earned through usefulness, not novelty. Brands that treat content as a service, rather than a brand expression are best positioned to sustain engagement.

Key Insights

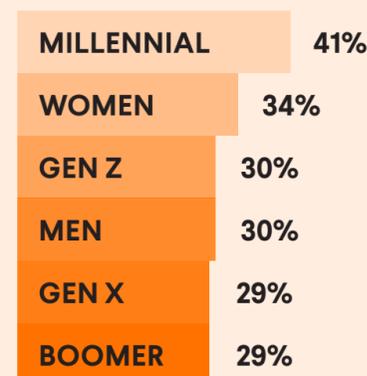
Promotions Drive Repeat Visits



47%

Upcoming sales and promotions are the strongest reason consumers revisit brand sites or apps. This is especially true for older consumers, reinforcing price sensitivity and deal-led engagement.

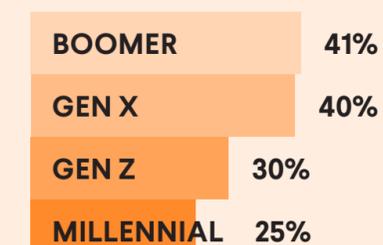
Reviews and Social Proof Matter—Especially for Younger Consumers



32%

Customer reviews and testimonials are a strong driver of return visits, particularly among Millennials. This reflects ongoing need for reassurance and validation, even post-discovery.

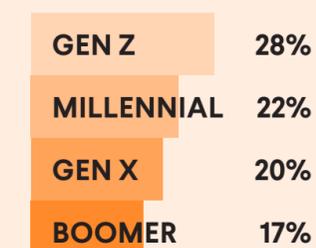
Loyalty Rewards Create Stickiness



34%

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

Personalisation Pulls Younger Shoppers Back



22%

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

Utility Content Is Secondary



11%

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.

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

🔗 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. Make Recognition Visible After Checkout

Acknowledge past purchases and preferences in post-purchase messaging to reinforce familiarity and relevance, particularly for younger shoppers who expect brands to remember and recognise them.

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.

6. Deliver Personalised Promotions to Younger Shoppers

Create targeted campaigns featuring upcoming sales, exclusive rewards, and personalised discounts. Leverage email and text to ensure these offers reach Millennials at the right time.



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

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Product guides or how-to tips	5%	12%	12%	13%	11%	10%	11%
Behind-the-scenes brand stories	4%	5%	7%	10%	6%	7%	7%
Customer reviews or testimonials	29%	29%	41%	30%	34%	30%	32%
Upcoming sales or promotions	56%	48%	43%	41%	48%	46%	47%
Actions offering me loyalty points or rewards	41%	40%	25%	30%	35%	34%	34%
Personalised recommendations based on what I browsed	17%	20%	28%	22%	23%	20%	22%
Restock/low-stock alerts for items I care about	8%	13%	20%	18%	17%	13%	15%
None of these	11%	12%	2%	5%	7%	8%	7%

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

Motivating Consumers to Opt-In for Brand Communications

Opt-In Is Transactional First, Relationship-Building Second

UK consumers are willing to opt into brand communications, but the value exchange must be immediate and clear. Practical incentives, particularly those that reduce cost remain the strongest motivators. Free shipping, in particular, stands out as the most compelling opt-in trigger across all age groups.

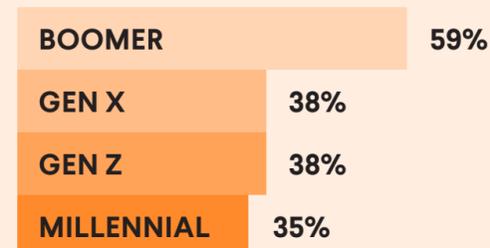
That said, younger consumers apply a broader lens. While they still respond to discounts, they are more motivated by early access, exclusive experiences, and personalised content.

This indicates that opt-in behaviour reflects both economic need and relationship readiness, depending on life stage.

Overall, permission is earned when brands respect consumer expectations: deliver tangible value upfront, then sustain engagement through relevance and control.

Key Insights

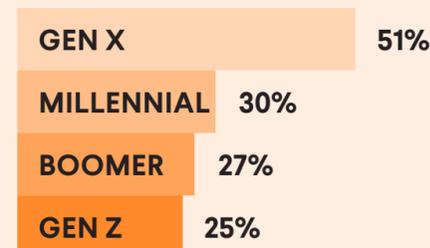
Free Shipping Is the Most Powerful Opt-In Incentive



42%

Free shipping is the leading reason consumers opt into emails or texts. Its appeal is strongest among Boomers, reinforcing that cost certainty and savings are foundational to permission-based engagement.

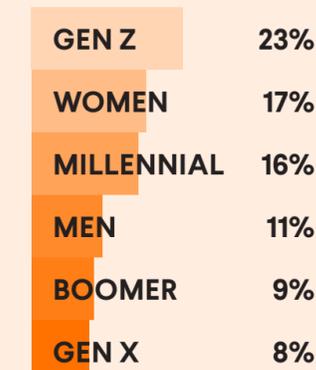
Loyalty Rewards Appeal to Mid-Life Shoppers



33%

With consumers tightening their belts, loyalty points redeemable for rewards strongly motivate opt-in across age groups, particularly Gen X, signaling appetite for ongoing, accumulative value rather than one-time incentives alone.

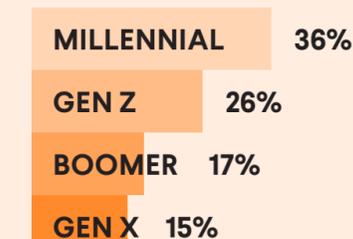
Personalisation Matters More to Younger Audiences and Women



14%

Personalised content, not just discounts, meaningfully increases opt-in likelihood among younger shoppers and women, reinforcing expectations for relevance over volume.

Younger Shoppers Want Early Access



24%

Early access to new products is significantly more motivating for younger consumers and men, highlighting demand for exclusivity and insider status as opt-in incentives.

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

+ Strategic Takeaways

1. Truly-Personalize Offers

Use identity-driven tools to segment incentives by shopper profile, prioritising 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.

2. Lead With Immediate, Practical Value

Anchor opt-in prompts around free shipping or loyalty rewards to clearly communicate tangible benefits, especially for older and value-conscious consumers who require a strong, immediate reason to share contact information.

3. Combine Rewards With Long-Term Value

Position loyalty points as an ongoing benefit rather than a one-time perk, reinforcing that opting in unlocks cumulative value over time and strengthens repeat engagement.

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.

5. Give Shoppers Control From Day One

Clearly communicate frequency expectations and offer controls upfront to reduce opt-in hesitation and build trust, particularly with younger consumers wary of message overload.



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

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
One time discount	37%	29%	23%	20%	27%	27%	27%
Free shipping	59%	38%	35%	36%	43%	41%	42%
Loyalty points later used for rewards	27%	51%	30%	25%	35%	32%	33%
Exclusive access to content	11%	13%	25%	16%	15%	18%	16%
Early access to their new products	17%	15%	36%	26%	25%	22%	24%
VIP warranty service	4%	8%	7%	8%	4%	10%	7%
Control over frequency/quiet hours	5%	4%	11%	16%	7%	11%	9%
Personalised content--not just discounts	8%	8%	16%	23%	17%	11%	14%
None of these	13%	10%	1%	3%	9%	5%	7%

Where Consumers Discover Deals and Promotions Online

Owned Channels Lead, but Discovery Still Matters

UK consumers show a clear preference for learning about offers through brand-owned and permissioned channels, with email and brand websites leading overall. These environments are trusted, controllable, and familiar, allowing consumers to access offers on their own terms rather than encountering them unexpectedly.

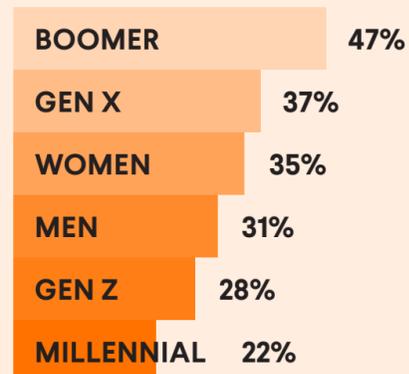
However, discovery is not limited to owned channels alone.

Younger consumers rely more heavily on social ads, influencer content, and recommendations from friends and family, reflecting a more socially mediated discovery journey. This creates a dual dynamic: owned channels anchor trust and reliability, while external channels play a supporting role in awareness and inspiration.

For brands, the implication is clear. Offers perform best when they are delivered directly, but reinforced indirectly through discovery channels that meet consumers where they already are.

Key Insights

Email Remains the Primary Discovery Channel



33%

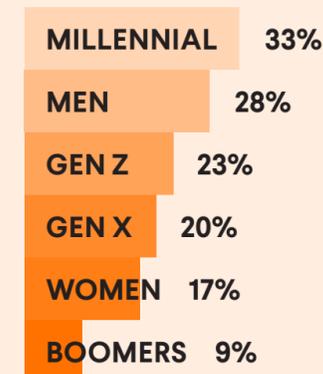
Email is the most preferred way to learn about offers overall, particularly among older consumers and women, reinforcing its role as a trusted, permission-based communication channel.

Brand-Owned Properties Drive Engagement



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



22%

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

Offline Still Influences Awareness



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

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

🔗 Strategic Takeaways

1. Prioritize Owned Channels for Offer Discovery

Anchor offer communication in email, brand websites, and apps to meet consumers where trust and intent are highest, using these environments to control experience, relevance, and frequency.

2. Enhance Social Media Strategies for Younger Shoppers

Develop targeted social ad campaigns with visually engaging and authentic content to capture Gen Z and Millennial attention. Leverage organic social feeds and user-generated content to build trust and drive discovery among younger audiences.

3. Segment Discovery by Age and Expectation

Lean into email and website-led discovery for older consumers, while investing in apps, personalisation, and behaviour-driven surfaces to meet younger shoppers' expectations for relevance.

4. Use Personalization to Surface, Not Interrupt

Deploy browsing-based signals to surface offers contextually, ensuring discovery feels helpful and timely rather than disruptive or overly promotional.

5. Reinforce Digital With Physical and Social Signals

Support digital discovery with in-store promotions and shareable offers that encourage word-of-mouth, reinforcing awareness across both online and offline environments.



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

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Text	7%	7%	6%	2%	5%	6%	6%
Email	47%	37%	22%	28%	35%	31%	33%
Search	19%	23%	18%	8%	16%	18%	17%
Brand's own website	45%	46%	34%	24%	36%	39%	37%
Brand's own app	19%	15%	23%	25%	19%	22%	21%
Brand's organic posts	1%	6%	11%	14%	7%	9%	8%
Brand's ads on social based on my browsing	9%	17%	33%	28%	23%	20%	22%
My preference center/brand account	8%	17%	17%	16%	13%	16%	14%
Influencer content	0%	5%	20%	22%	15%	9%	12%
In-store promotions	15%	20%	17%	21%	20%	17%	18%
TV ads	11%	8%	12%	11%	11%	11%	11%
Direct mail	16%	7%	6%	10%	11%	8%	10%
Friends or family recommendations	19%	25%	35%	37%	32%	25%	29%
None of these	5%	4%	1%	1%	4%	2%	3%

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?

Preferred Channels to Get Consumers Back to Buy

Email Leads Re-Engagement, Mobile Follows With Conditions

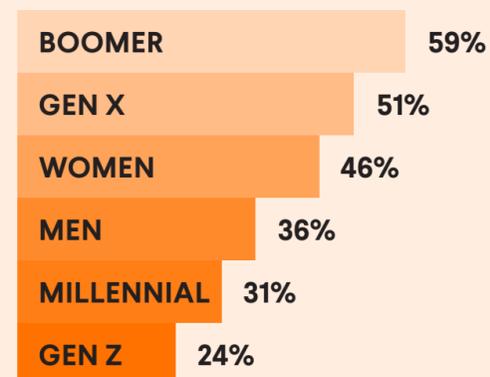
When UK consumers are re-engaged after browsing, they strongly favour direct, familiar, and low-intrusion channels. Email clearly dominates as the preferred method, reflecting its role as a controllable, information-rich environment where offers can be reviewed on the consumer's own terms.

Mobile channels play an important but secondary role. Younger consumers show greater openness to push notifications and rich media messaging, while older consumers remain cautious about anything that feels interruptive. Paid retargeting ranks lowest overall, reinforcing that permissioned channels outperform paid reminders when intent already exists.

Re-engagement works best when brands respect context: reaching out in ways that feel expected, proportionate, and easy to ignore if the timing is wrong.

Key Insights

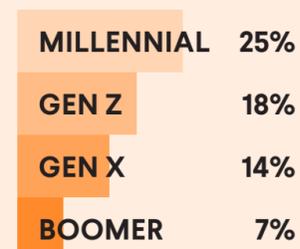
Email Is the Default Re-Engagement Channel



41%

Email is the preferred re-engagement channel across all age groups, particularly among older consumers and women. Its dominance reflects trust, familiarity, and perceived control over when and how messages are consumed.

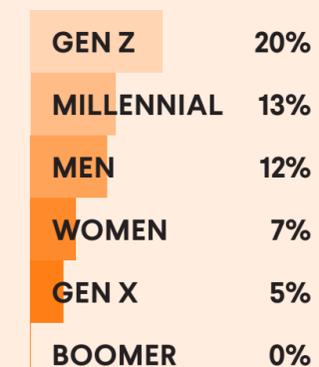
Push Notifications Appeal to App-Engaged Users



16%

Push notifications are more attractive to younger and male consumers, particularly those already invested in a brand's app. Their effectiveness depends heavily on relevance and restraint.

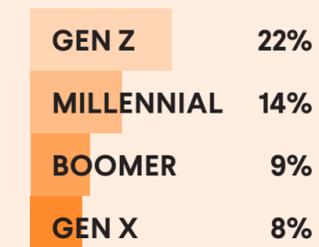
Paid Retargeting Is Least Preferred



10%

Targeted ads on social or third-party sites rank lowest overall, even though Gen Z shows comparatively higher tolerance. This reinforces that paid retargeting underperforms owned channels once intent has been established.

Rich Media Messaging Skews Younger



14%

MMS (text with imagery or video) resonates most with Gen Z, indicating openness to richer, more visual formats when relevance is high and frequency is limited.

SMS Remains a Niche, Utility-Led Channel

13%

Text-only SMS appeals to a small minority and is relatively consistent across age groups. This suggests SMS should be reserved for high-value or time-sensitive messages rather than standard browse-abandonment follow-ups.

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?

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 maximise 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. Prioritize 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
Send an email	59%	51%	31%	24%	46%	36%	41%
Send a short text-only message to my mobile phone (SMS)	16%	12%	11%	15%	15%	12%	13%
Send a text message with imagery or video to my mobile phone (MMS)	9%	8%	14%	22%	13%	14%	14%
Send a push notification via their app I downloaded	7%	14%	25%	18%	15%	18%	16%
Target me with an ad placed on social media or a website that is not the brand's website	0%	5%	13%	20%	7%	12%	10%
None of these	9%	10%	5%	1%	5%	8%	6%

18 HOW MANY MESSAGES PER WEEK FEEL ACCEPTABLE FROM A FAVORITE BRAND?

Messaging Cadence

Less Is More, and Channel Matters

Consumers show a clear preference for low, controlled messaging frequency, with tolerance varying meaningfully by channel.

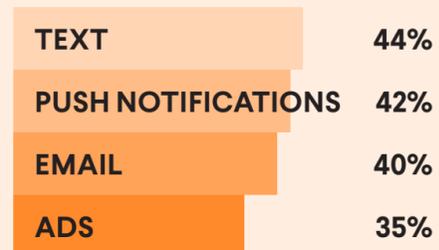
One message per week is the dominant comfort zone across email, text, push notifications, and paid ads. As frequency increases beyond this point, acceptance drops sharply.

Younger consumers are modestly more tolerant of higher frequency, particularly for mobile-first channels such as text and app notifications, but even among Gen Z, enthusiasm for heavy messaging is limited. Paid ads are the least tolerated at higher volumes, reinforcing that interruption-based channels face a much lower frequency ceiling than permissioned ones.

Overall, frequency is not just an operational setting, it is a trust signal. Brands that exercise restraint are rewarded with tolerance; those that over-message risk rapid fatigue.

Key Insights

One Message Per Week Is the Safe Baseline

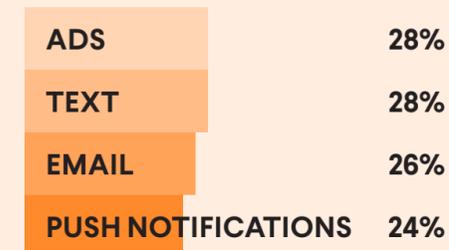


Across channels, one message per week is the most acceptable frequency. This preference is consistent across age groups and genders, establishing weekly cadence as the baseline expectation for favourite brands.

Paid Ads Have the Lowest Frequency Ceiling

Paid ads on social media or websites see the steepest drop-off as frequency increases. Even at two messages per week, acceptance falls below owned channels, reinforcing lower tolerance for interruption-based messaging.

Two Messages Per Week Is Tolerated, but Not Preferred



Two messages per week remains acceptable for a meaningful minority, particularly among Millennials and Gen Z. However, this represents tolerance rather than enthusiasm and should be reserved for high-relevance moments.

Younger Consumers Are More Flexible, but Not Unlimited

Gen Z and Millennials are slightly more open to higher frequency for text and push notifications. However, even among these groups, heavy messaging (4+ per week) remains broadly unwelcome.

18 HOW MANY MESSAGES PER WEEK FEEL ACCEPTABLE FROM A FAVORITE BRAND?

+7 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, Earn More

Anchor messaging at one send 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.



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?

Messages That Would Persuade a Consumer to Purchase Directly

Specific, Item-Level Value Drives Action

Consumers are most persuaded to complete a purchase when follow-up messages are directly tied to the item they viewed and deliver clear economic value. Broad brand promotions are far less effective than messages that feel personalised, timely, and grounded in demonstrated intent.

Price-based nudges dominate overall, but loyalty offers and reminders also play an important role, particularly for younger and mid-life consumers. Generic discovery messages or post-purchase suggestions are notably weaker, reinforcing that persuasion works best when it reduces friction or reactivates existing intent, rather than attempting to inspire something new. In short, conversion messaging succeeds when it feels earned, not imposed.

Key Insights

Discount Codes and Price Drops Lead Conversion

DISCOUNT CODES	56%
PRICE DROP ON VIEWED ITEM	51%

Discount-led messages are the most persuasive overall, especially when tied to a specific product the shopper already showed interest in.

Product-Specific Beats Brand-Wide

GENERAL BRAND SALE	24%
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Messages tied to a specific item outperform general brand sales by more than 2x, reinforcing that relevance outweighs scale in post-visit persuasion.

Reminders and Availability Signals Support Intent

BACK-IN-STOCK NOTICES	21%
CART REMINDERS	19%

Cart reminders and availability notifications play a supporting role, helping capture delayed intent rather than creating new demand.

Loyalty Matters

GEN X	49%
MILLENNIAL	37%
GEN Z	33%
BOOMER	28%

37%

Loyalty programme offers meaningfully increase willingness to buy direct, particularly among Gen X. This signals that accumulated value and recognition can tip decisions when price alone is not decisive.

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?

🔗 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. Reinforce Value Through Loyalty Recognition

Surface loyalty program benefits in post-visit messaging to reward engagement and encourage direct purchase, particularly for Gen X receptive to ongoing value exchanges.

4. 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.

5. 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
Price drop offer on a single item I viewed	75%	48%	41%	40%	50%	51%	51%
General brand sale across many items	28%	25%	28%	14%	25%	22%	24%
Discount codes	60%	61%	49%	53%	63%	48%	56%
Reminders for items I left in my cart	12%	10%	27%	29%	20%	19%	19%
Loyalty program offers	28%	49%	37%	33%	36%	38%	37%
Notice that an item I viewed online is back in stock	13%	20%	26%	24%	24%	18%	21%
Notice that an item I viewed online is low in stock	7%	12%	16%	11%	13%	10%	11%
Recommendations for alternatives when an item is out of stock	13%	7%	16%	17%	16%	11%	13%
New items that are similar to what I viewed previously	16%	13%	11%	16%	13%	16%	14%
Post-purchase recommendations for what to buy next	3%	8%	14%	13%	7%	12%	10%
None of these	3%	4%	1%	3%	2%	3%	3%

Improving Cart Abandonment Messaging

Relevance and Restraint Matter More Than Timing

Consumers are clear that message helpfulness is driven less by when or where brands show up, and more by how well messages align with intent. The strongest signal by far is relevance, specifically receiving fewer messages that are clearly connected to personal needs or behaviour.

Younger consumers place additional emphasis on interaction-triggered messaging and transparency, while older consumers lean more heavily on restraint. Across all age groups, consumers consistently reward brands that reduce noise and demonstrate understanding, rather than those that simply optimise delivery mechanics.

This reinforces a recurring theme throughout the data: helpfulness is earned through respect and relevance, not volume.

Key Insights

Triggered Messages Meaningfully Increase Helpfulness



32%

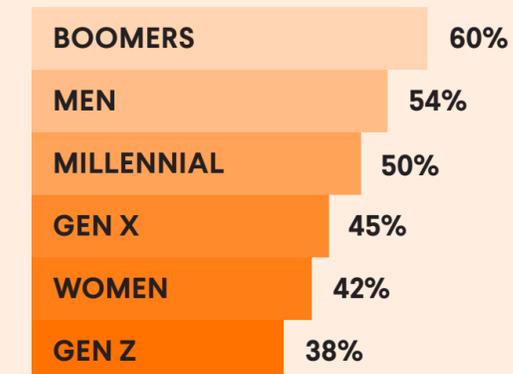
Messages triggered by consumer interactions are significantly more helpful to younger shoppers, reinforcing expectations for responsiveness tied directly to behaviour.

Channel Preference Still Plays a Role

25%

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

Fewer, More Relevant Messages Matter Most



48%

Nearly half of consumers say messages would feel more helpful if there were fewer of them, and if those messages were more relevant. This is especially pronounced among Boomers, reinforcing low tolerance for noise.

Transparency Supports, But Doesn't Lead

28%

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 Behavior

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. Optimize Channel Preference Second

Use preferred channels to enhance delivery once relevance is established, recognising 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.



20 WHICH WOULD MAKE BRAND MESSAGES MORE HELPFUL?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Sent at better times for me	9%	19%	25%	26%	21%	20%	20%
Sent in my preferred channel	23%	21%	27%	29%	24%	25%	25%
Fewer but more relevant	60%	50%	45%	38%	42%	54%	48%
Clearer "why I got this" explanations	20%	27%	35%	30%	26%	30%	28%
Messages triggered by my interactions with the brand	21%	30%	37%	38%	31%	32%	32%
None of these	16%	10%	4%	3%	12%	4%	8%

21 FOR ITEMS YOU VIEW, WHICH ALERTS WOULD YOU WANT?

Preferred Alerts for Abandoned Carts

Price Leads, but Availability and Relevance Sustain Interest

Consumers are clear about which alerts they find valuable, and the hierarchy is decisive. Price-driven alerts dominate, reflecting continued sensitivity to value and deal visibility.

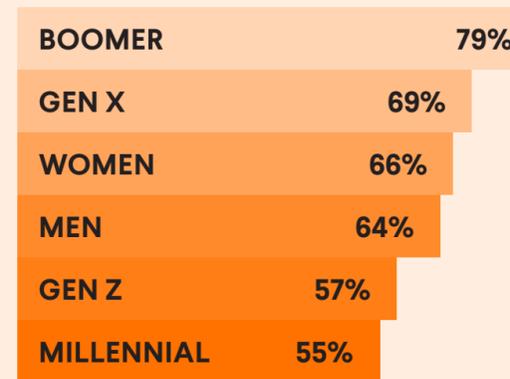
However, availability-based alerts and relevant follow-ups play an important supporting role, particularly for younger consumers who expect brands to help them navigate choice and scarcity.

Rather than wanting more notifications, consumers want better-timed, purpose-driven alerts that clearly reduce effort or uncertainty.

Alerts that feel informational and helpful, rather than promotional are far more likely to sustain engagement and drive return visits.

Key Insights

Price Drops Are the Primary Alert Consumers Want



65%

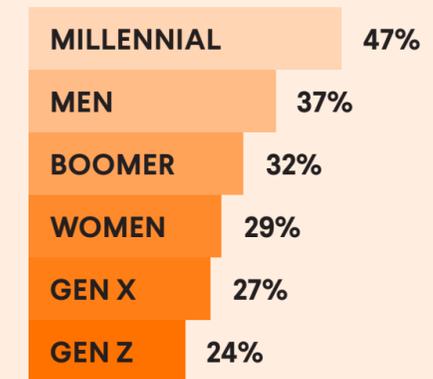
Price-drop alerts are by far the most desired notification type. Demand is strongest among Boomers and women, reinforcing that value reassurance remains the most powerful re-engagement trigger.

Back-in-Stock Alerts Sustain Consideration

35%

Back-in-stock alerts meaningfully influence all shoppers, signaling willingness to delay purchase when brands help them track availability.

Complementary Items Add Value Post-Purchase



33%

Alerts recommending complementary items after purchase appeal most to Millennials and men, highlighting opportunity to extend value through relevance rather than urgency.

Urgency Alone Has Limited Pull

11%

Low-stock alerts rank lower overall, indicating that online consumers are savvier than ever, and scarcity without clear value or intent alignment is less effective at driving engagement.

21 FOR ITEMS YOU VIEW, WHICH ALERTS WOULD YOU WANT?

+7 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 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.



21 FOR ITEMS YOU VIEW, WHICH ALERTS WOULD YOU WANT?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Price drop	79%	69%	55%	57%	66%	64%	65%
Low stock	4%	15%	10%	16%	17%	6%	11%
Back in stock	27%	38%	35%	38%	35%	34%	35%
Similar alternatives if out of stock	19%	25%	27%	38%	28%	27%	27%
Complementary items after purchase	32%	27%	47%	24%	29%	37%	33%
None of these	7%	2%	4%	3%	3%	5%	4%

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

Consumer Sentiment to Personalized Brand Ads on Social Channels

Ads Are Accepted When They're Relevant, Restrained, and Controlled

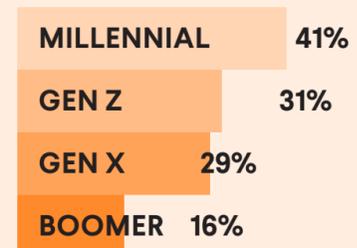
Consumers are not uniformly opposed to seeing social ads from brands they've opted into, but acceptance is highly conditional. Relevance and frequency determine whether ads feel helpful or intrusive. Rather than driving broad enthusiasm, social retargeting polarises sentiment based on execution quality.

Younger consumers are markedly more open, particularly when ads feel timely and aligned with their interests. Older consumers skew more negatively, with annoyance outweighing perceived value. This reinforces that paid social is no longer a blunt reach tool; it is judged as part of the overall brand experience.

In this context, social ads succeed not by being louder or more frequent, but by feeling coordinated, intentional, and respectful of consumer tolerance.

Key Insights

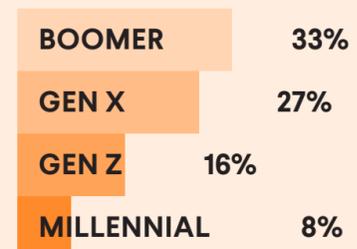
Relevance and Frequency Decide Sentiment



29%

Nearly one-third of consumers say their reaction depends on frequency and relevance. This rises sharply among Millennials and Gen Z, confirming that execution, not channel determines acceptance.

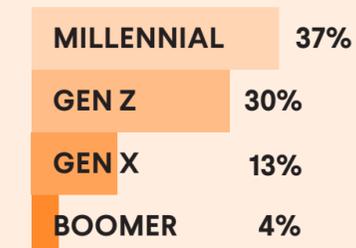
Neutral Reactions Equal Positives



21%

Neutral responses suggest tolerance rather than engagement. For this group, social ads neither help nor harm, but also fail to move behaviour meaningfully.

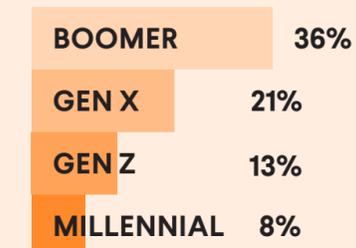
Clear Helpfulness Is Limited but Skews Younger



21%

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

Annoyance Increases With Age



17%

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

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

🔗 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
Helpful	4%	13%	37%	30%	22%	21%	21%
Neutral	33%	27%	8%	16%	21%	22%	21%
Annoyed	36%	21%	8%	13%	18%	21%	19%
Depends on frequency/relevance	16%	29%	41%	31%	31%	28%	29%
None of these	11%	10%	5%	10%	9%	9%	9%

Improving the Ad Experience for Consumers

Control and Relevance Matter More Than Explanation

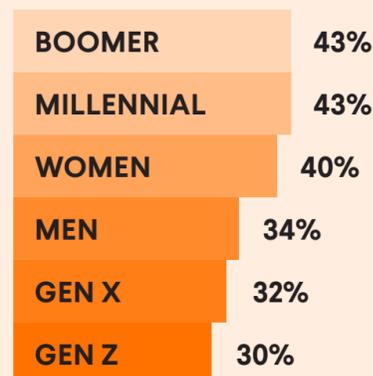
Consumers are clear about what would make paid ads feel more acceptable, and it is not more messaging or better creative. The strongest levers are control, relevance, and restraint. Consumers want fewer ads, clearer choice, and the ability to shape how paid media fits alongside owned communications.

Notably, explanation alone (“why am I seeing this”) plays a secondary role. While transparency helps, it does not outweigh the desire to reduce volume or opt out selectively. Younger consumers, in particular, expect advertising to adapt to them, not the other way around.

This reinforces a broader pattern across the dataset: consumers do not reject advertising outright, but they increasingly expect agency. Ads feel better when they feel optional, intentional, and aligned with personal boundaries.

Key Insights

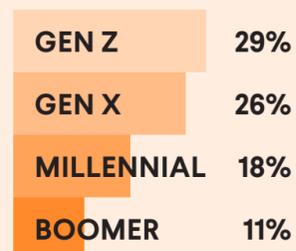
Opting Out of Ads Without Losing Owned Channels Is the Top Lever



37%

The most powerful improvement is the ability to opt out of ads while still receiving emails or texts. This highlights a clear distinction consumers make between paid interruption and permissioned communication.

Transparency Helps, but Is Not Sufficient



21%

Clear explanations of why an ad is shown do improve comfort, particularly for younger and Gen X consumers. However, explanation alone ranks below control- and relevance-based improvements.

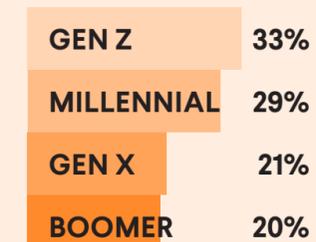
Fewer, More Relevant Ads Drive Acceptance



34%

Over one-third of consumers say ads would feel better if there were simply fewer of them, and if those shown were more relevant. This reinforces that frequency reduction is as important as targeting quality.

Category-Level Control Resonates With Younger Consumers



26%

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

A Minority Rejects All Options

13%

A small segment, trending older, indicates none of these changes would improve ads, suggesting a hard ceiling for paid media effectiveness with some consumers regardless of execution.

🔗 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. Use Transparency as Reinforcement, Not a Fix

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.



23 WHAT WOULD MAKE THOSE ADS FEEL BETTER?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Clear "why am I seeing this"	11%	26%	18%	29%	22%	20%	21%
Fewer, more relevant ads	23%	35%	41%	37%	33%	35%	34%
Ability to opt-out of ads but keep emails/texts	43%	32%	43%	30%	40%	34%	37%
Only see ads for categories I choose	20%	21%	29%	33%	25%	27%	26%
None of these	20%	17%	5%	9%	8%	17%	13%

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?

Consumer Sentiment on AI Personalization in Shopping

Acceptance Is Conditional, Not Automatic

UK consumers are not broadly resistant to AI-powered personalisation, but their acceptance is highly conditional.

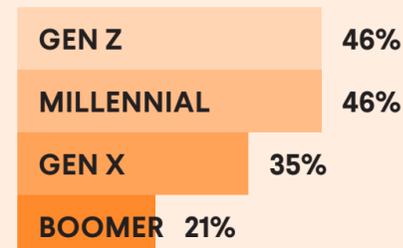
Enthusiasm exists, particularly among younger audiences, yet it is outweighed by a strong desire for control, transparency, and clear justification. Rather than a simple pro- or anti-AI divide, attitudes cluster around how AI is used, not whether it is used.

Younger consumers are significantly more open, especially when AI improves relevance and reduces effort. Older consumers, meanwhile, remain cautious or uncomfortable, signalling that trust has not yet caught up with technology. Importantly, even among receptive segments, passive personalisation is insufficient. AI is welcomed when it feels helpful, explainable, and governed by consumer choice.

This positions AI not as a blanket accelerator of engagement, but as a trust-sensitive lever. Brands that treat AI as invisible optimisation risk alienation; those that frame it as a controllable, value-adding service are far better positioned to earn permission.

Key Insights

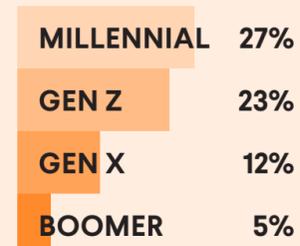
Control Turns AI Into a Positive



37%

Over a third of consumers are positive about AI-driven recommendations only if they can control frequency, timing, and topics, and understand why they are receiving a message. Among Millennials and Gen Z, this rises to nearly half, underscoring that transparency and agency are prerequisites for trust, not optional features.

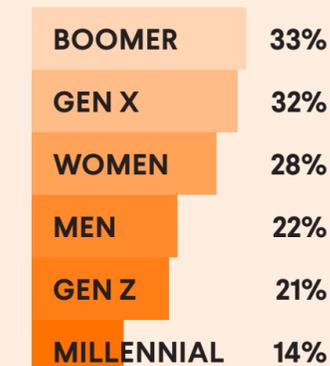
Enthusiastic Adoption Is a Minority View



17%

Only a small share of consumers say they “love it” outright. While enthusiasm is concentrated among younger audiences, even Gen Z is far from universally excited. This suggests AI should be positioned as supportive and assistive, not dominant or overly assertive.

Uncertainty Remains



25%

A large share of consumers remain unsure about AI personalisation, especially Boomers, signaling opportunity for education and reassurance rather than aggressive rollout.

Discomfort Concentrates Among Older Consumers



21%

Resistance to AI-driven personalisation is meaningfully higher among Boomers, highlighting the need for restraint, transparency, and optionality for older audiences.

Strategic Takeaways

1. Make Control the Entry Point for AI

Introduce AI-powered personalisation with clear controls over frequency, timing, and content so consumers feel empowered rather than observed, increasing comfort and long-term acceptance.

2. Move From Campaign Execution to Autonomous Decisioning

Wunderkind AI enables brands to shift from manually orchestrated campaigns to autonomous, always-on decisioning that adapts in real-time to consumer behaviour. By unifying identity, intent, and activation, brands can reduce operational complexity while delivering consistently relevant experiences that scale without increasing manual effort.

3. Demonstrate Value Before Scaling

Use AI first in clearly beneficial moments, such as better recommendations or reduced noise, to prove usefulness before expanding personalisation more broadly across the experience.

4. Segment AI Experiences by Age and Comfort

Lean into richer AI-driven personalisation for younger shoppers while offering simpler, more transparent experiences for older audiences who require reassurance and optional participation.

5. Normalize AI Through Transparency

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



24

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

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
I love it, bring it on	5%	12%	27%	23%	16%	18%	17%
I'm positive, as long as I can control frequency, timing, and topics, and see why I'm getting a message	21%	35%	46%	46%	36%	38%	37%
I'm not sure yet	33%	32%	14%	21%	28%	22%	25%
I don't feel comfortable with this	40%	21%	13%	10%	20%	22%	21%

25 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

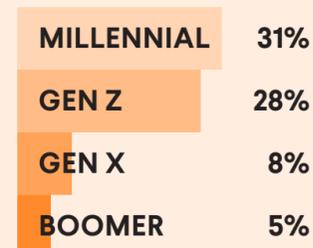
Recognition Is Welcome When It Feels Permissioned

Consumers largely accept cross-device and cross-session recognition, but only when it is clearly framed as a benefit they control. The dominant response is not unconditional enthusiasm, but pragmatic approval tied to preference management. Consumers are willing to trade recognition for consistency, as long as it feels consensual and adjustable.

Younger consumers show the strongest comfort, with Gen Z in particular viewing recognition as a natural extension of a seamless digital experience. Older consumers, however, remain more divided, with a meaningful minority still uncomfortable. This reinforces that identity-driven experiences are most effective when positioned as memory and continuity, not tracking. Overall, cross-device recognition is not a trust-breaker by default. It becomes one when brands fail to communicate control, consent, and value clearly.

Key Insights

Unconditional Enthusiasm Is Limited



18%

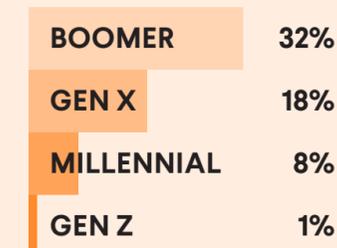
Fewer than one in five consumers say they “love it” outright. While enthusiasm skews younger, even among Gen Z recognition is welcomed more as a functional benefit than an emotional positive. This underscores that identity should feel useful, not spotlighted.

Control Unlocks Comfort With Recognition

51%

Over half of consumers are comfortable with cross-device recognition if they can control preferences. There’s general parity across age and gender, yet acceptance peaks among Gen Z, where recognition is increasingly expected as part of a modern, joined-up experience rather than viewed as invasive.

Discomfort Has Not Disappeared



15%

Resistance is heavily skewed toward older shoppers, with almost no Gen Z feeling uncomfortable. This reinforces the need for optional participation and visible controls rather than one-size-fits-all identity activation.

Uncertainty Skews Older

16%

A notable share of consumers remain unsure how they feel about being recognised across devices. This uncertainty is concentrated among older cohorts and women, suggesting opportunity for reassurance through clearer explanation of benefits and safeguards.

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

🔗 Strategic Takeaways

1. Frame Identity as Continuity, Not Tracking

Position cross-device recognition as a way to remember preferences, preserve context, and reduce repetition, not as surveillance or behavioural monitoring.

2. Make Preference Control Explicit and Visible

Preference management should be easy to find and simple to use. Control is the single biggest driver of acceptance across all age groups.

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.



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
Love it	5%	8%	31%	28%	17%	20%	18%
Fine with it if I control preferences	44%	48%	51%	60%	48%	53%	51%
Unsure	19%	26%	10%	11%	22%	11%	16%
Not comfortable	32%	18%	8%	1%	13%	16%	15%

Conclusion

Turning Consumer Expectation into Sustainable Advantage

The 2026 UK consumer landscape is no longer defined by novelty, but by expectation. Shoppers have settled into mature digital behaviours, where online purchasing is habitual, mobile is the baseline, and tolerance for friction, irrelevance, or excess has sharply declined. Growth is still available, but it is conditional, earned through experiences that feel timely, respectful, and genuinely useful rather than louder or more frequent. As this report shows, consumers across age and gender are not disengaging; they are becoming more selective, rewarding brands that demonstrate understanding, memory, and restraint.

Across generations, a clear pattern emerges: convenience opens the door, but relevance and trust determine whether shoppers stay. Younger consumers drive incremental growth, yet they do so with heightened expectations for personalisation, recognition, and control. Older consumers anchor volume through consistency, prioritising clarity, value, and reassurance. What unites these groups is a shared demand for experiences that reduce effort and uncertainty while respecting individual preferences. In this environment, generic messaging and static journeys are no longer just ineffective, they actively erode trust.

This is where the opportunity for brands becomes strategic rather than tactical. The data reinforces that identity works best when it feels like memory, not tracking, and AI is welcomed when it improves relevance without removing control. These expectations align directly with Wunderkind's approach: using identity to recognise shoppers across devices, AI to decide the optimal moment, message, and channel, and autonomous orchestration to replace rigid, rules-based campaigns. Rather than forcing consumers into fixed journeys, brands can meet them in real-time with adaptive, behaviour-driven experiences that feel helpful instead of intrusive.

Ultimately, winning in 2026 will not come from doing more, but from doing smarter. Brands that leverage autonomous decisioning to reduce noise, personalise at scale, and preserve consumer agency will be best positioned to convert stability into incremental growth. By remembering who shoppers are, responding to what they need in the moment, and operating with restraint as a core capability, brands can turn rising expectations into durable advantage, protecting trust, strengthening lifetime value, and driving performance in an increasingly selective market.

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.

