# Wunderkind

2026 Consumer Insights Report

U.S.

Executive Summary

As the U.S. enters 2026, brands are operating in an environment defined by sustained uncertainty. Macroeconomic pressure, from persistent inflation, shifting interest rates, and the reintroduction or expansion of tariffs continues to influence household spending behavior. At the same time, global instability and geopolitical tensions are reshaping supply chains, pricing strategies, and consumer confidence. For marketers, these dynamics compound an already challenging landscape: rising acquisition costs, fragmented attention, and diminishing returns from over-reliance on paid media.

Against this backdrop, the 2026 U.S. Consumer Insights Report reveals a consumer who is not disengaging, but is becoming more selective. Shoppers are still spending, still engaging digitally, and still open to brand relationships. However, they are increasingly intolerant of friction, irrelevance, and excess. Growth is no longer driven by reach alone; it is earned through relevance, restraint, and trust.

Shopping behavior has stabilized across much of the population, signaling a mature digital commerce environment. Mobile is now the baseline for participation, while desktop and tablet usage persist for higher-consideration moments. Consumers move fluidly across devices based on intent and context, raising the bar for continuity. Brands that fail to recognize shoppers across sessions or devices risk breaking momentum at critical moments in the journey.

Younger consumers, particularly Gen Z and Millennials, represent the clearest source of incremental growth, but they come with heightened expectations. They demand speed, personalization, and recognition, while also expecting transparency and control over how their data is used. Older consumers, meanwhile, remain value-driven and trust-oriented, placing greater emphasis on clarity, cost certainty, and restraint. Across generations, one signal is consistent: fewer, more relevant interactions outperform higher frequency and broader targeting.This expectation is especially pronounced as AI and identity-driven experiences.

Instagram Notification

WunderkindAI™

New email
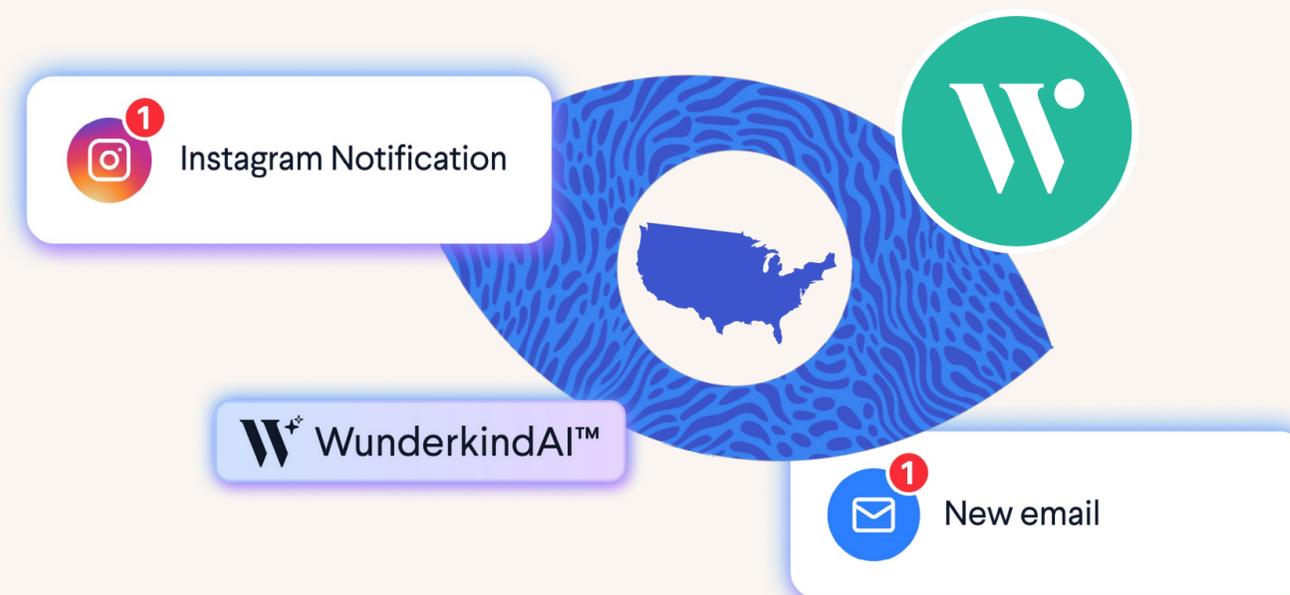
become more visible. Consumers are not resistant to these technologies; rather, their acceptance is conditional. AI-powered personalization, cross-device recognition, and automated decisioning are welcomed when they demonstrably improve relevance, reduce noise, and preserve consumer choice. When these capabilities feel opaque, excessive, or disconnected from clear value, trust erodes quickly. The opportunity for brands lies not in deploying more technology, but in deploying it more intelligently.

The report also underscores a shift in how consumers evaluate purchase destinations. Marketplaces continue to command trust and convenience, particularly amid economic uncertainty. However, direct-to-brand opportunities are expanding, especially among younger shoppers when brands justify the shift with tangible value, loyalty recognition, and seamless experiences. In this environment, marketplaces function as acquisition engines, while long-term value is built in owned, identity-driven environments.

For brands facing rising media costs, tariff-driven pricing pressure, and intensified competition for attention, the path forward is clear. Winning in 2026 will not come from louder marketing or heavier spend.

It will come from orchestrated experiences that recognize consumers, respect their preferences, and engage only when it truly matters. Brands that use identity to remember, AI to decide, and orchestration to connect every interaction will be best positioned to protect margin, earn trust, and drive sustainable growth, regardless of economic headwinds.

TL;DR: 10 Quick Insights from Our 2026 Consumer Data | U.S.

1. **Mobile Is the Baseline, Not the Advantage**
   Smartphones are ubiquitous, used regularly by 95% of consumers, with near-universal adoption among Gen Z and Millennials (98%). Desktops (71%) signal high-intent research, while tablets (45%) 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**
   Over half of Gen Z (54%) and Millennials (51%) shop online 2–3 times per week, reinforcing digital commerce as a routine behavior rather than an occasional activity. Leveraging loyalty programs and truly personalized triggered offers can help sustain these habits.

3. **Trust Still Lives With the Familiar**
   Consumers place the most trust in marketplaces (32%) and large online retailers (25%), especially older shoppers, while younger consumers show growing trust in brand-owned sites when experiences feel clear, consistent, and secure. Emerging destinations still face a trust gap.

4. **Relevance and Urgency Drive Conversion**
   Onsite experiences that surface price drops (57%), availability signals (29%), and personalized recommendations (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 (35%), stock issues (18%), checkout complexity (15%), 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 (45%) and loyalty rewards (36%), while younger shoppers are drawn to exclusive access and personalization, with trust strengthened by frequency control.

7. **Email Leads and Mobile Follows for Re-Engagement, but Paid Retargeting it Out**
   Email (38%) remains the preferred way for brands to re-engage shoppers after browsing, especially among older consumers. SMS (21%) has a prominent footprint, with MMS emerging (15%), with younger shoppers particularly receptive when outreach is timely, relevant, and permission-based. Paid retargeting is the least popular medium at just 9%.

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 personalization when they can control frequency, timing, and topics (36%), with a quarter (25%) stating they "love it." A further quarter (25%) are unsure, with reticence (13%) the least chosen answer. Younger shoppers show enthusiasm, while older consumers remain cautious, making transparency, restraint, and clear value essential to building trust.

10. **Identity Works When It Feels Like Memory, Not Tracking**
   Consumers love cross-device recognition (25%), especially when it's permissioned (48%), 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 U.S. consumers. Building on prior years' findings, this report examines the latest shifts shaping online purchasing behavior across the United States.

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

Wunderkind

X

MX8 LABS

560

Insights are drawn from a representative sample of 560 U.S. consumers, reflecting diversity across gender, ethnicity, age, and household income. Data collection was completed 12-15 December 2025.

Which Devices Consumers Own and Use Regularly

Device Choice Reflects Intent, Not Preference

Mobile is no longer simply the dominant device for online shopping, it is a baseline expectation across all demographics. Near-universal smartphone usage means any friction in mobile experiences directly constrains reach and conversion. At the same time, desktop remains essential for more deliberate, research-driven moments, particularly among men and older shoppers. Tablets reinforce this multi-device behavior, especially for Gen X and Millennials, bridging casual and considered browsing.

Shoppers increasingly move fluidly between devices based on context, intent, and purchase complexity. As a result, brands must lead with mobile-first execution while preserving desktop depth and enabling identity-driven continuity, ensuring consistent, connected experiences as consumers switch devices throughout the buying journey.

Key Insights

Mobile is Ubiquitous

GEN Z	98%
MILLENNIALS	98%
GEN X	97%

95%

Smartphones are the device of choice for 95% of consumers, with Gen Z, Millennials and Gen X showing near-universal adoption, making mobile performance table stakes, not a differentiator.

Desktop Still Matters

BOOMER	79%
MEN	73%

71%

The older the consumer, the more they lean to desktop. Men (73% vs. 69% of women) and Boomers over-index, favoring larger screens for detailed browsing and research-driven purchases.

Tablets Skew Mid-Generation

GEN X	54%
MILLENNIALS	49%
WOMEN	47%
MEN	43%

45%

Gen X shows the strongest tablet adoption, using tablets as a comfortable middle ground between mobile convenience and desktop depth, often for browsing, comparison, and more considered shopping moments.

Strategic Takeaways

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

2. 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 finalize more deliberate, higher-value purchases.

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

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	87%	97%	98%	98%	95%	95%	95%
A personal desktop computer/laptop	79%	69%	72%	67%	69%	73%	71%
A tablet	34%	54%	49%	42%	47%	43%	45%

How Often Do Consumers Shop Online?

Shopping Frequency Signals Habit, Not Just Demand

Online shopping is no longer an occasional activity for many consumers, it has become a recurring habit, particularly among younger generations. Millennials and Gen Z shop online most frequently, reflecting ingrained digital behaviors shaped by convenience, mobile access, and always-on retail environments. However, frequency does not disappear with age. Older shoppers still participate regularly, but with more deliberate cadence, suggesting planning and purpose over impulse.

Shopping frequency increasingly reflects lifestyle and mindset rather than access alone. High-frequency shoppers expect relevance, speed, and continuity, while lower-frequency shoppers prioritize clarity, value, and confidence. Brands that recognize these differences can better align cadence, messaging, and triggers to meet shoppers where they are.

𝄐 Key Insights

Younger Shoppers Drive Frequency

GEN Z	54%
MILLENNIAL	51%
GEN X	49%

47%

Gen Z and Millennials are the most frequent online shoppers, with over half shopping online two to three times per week, reinforcing digital commerce as a habitual part of daily life.

Older Shoppers Are More Deliberate

BOOMERS	34%
GEN Z	19%
GEN X	19%
MILLENNIAL	13%

21%

Boomers are more likely to shop online every few months, well over the average (34% vs. 21%), and almost double that of any other generation. This indicates planned, needs-based purchasing rather than habitual browsing. Their lower frequency suggests higher emphasis on trust, value, and confidence at the moment of purchase.

Men Slightly Outpace Women

MEN	48%
WOMEN	46%

Men shop online slightly more frequently than women overall, in both weekly shopping (48% vs. 46% of women) and the 5–6 times per month range (33% vs. 30% of women), suggesting both impulsive and intentional, planned purchasing behavior.

Strategic Takeaways

1. Reinforce Habits for High-Frequency Shopper
Lean into automation, triggered messaging, and timely reminders to support frequent shoppers. Personalized offers, replenishment cues, and price-drop alerts help sustain momentum without increasing perceived noise.

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

3. Match Messaging Cadence to Shopping Rhythm
Align communication frequency with shopping behavior. 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 personalized promotions or timely reminders about deals. For less frequent shoppers, use messaging that addresses their specific needs or hesitations, such as abandoned cart notifications or limited-time offers on items they've browsed.

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	32%	49%	51%	54%	46%	48%	47%
5-6 times a month	34%	32%	35%	27%	30%	33%	32%
Every few months	34%	19%	13%	19%	24%	18%	21%

2026 Online Shopping Plans

Shopping Frequency Signals Habit, Not Just Demand

Online shopping is no longer an occasional activity for many consumers, it has become a recurring habit, particularly among younger generations. Millennials and Gen Z shop online most frequently, reflecting ingrained digital behaviors shaped by convenience, mobile access, and always-on retail environments. However, frequency does not disappear with age. Older shoppers still participate regularly, but with more deliberate cadence, suggesting planning and purpose over impulse.

Shopping frequency increasingly reflects lifestyle and mindset rather than access alone. High-frequency shoppers expect relevance, speed, and continuity, while lower-frequency shoppers prioritize clarity, value, and confidence. Brands that recognize these differences can better align cadence, messaging, and triggers to meet shoppers where they are.

Key Insights

Stability Is the Baseline

BOOMER	74%
GEN X	55%
MILLENNIAL	51%
GEN Z	49%
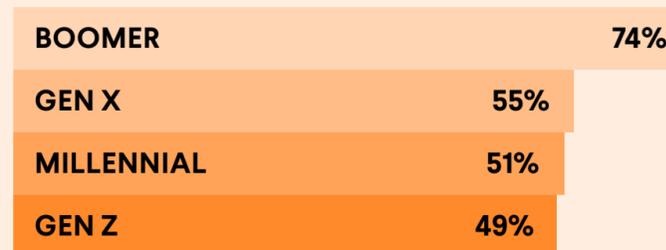
57%

A majority of consumers plan to shop online about the same amount in 2026, with the older the consumer, the more rooted in consistency they are. This strongly indicates that eCommerce is now a normalized behavior rather than a rapidly expanding one.
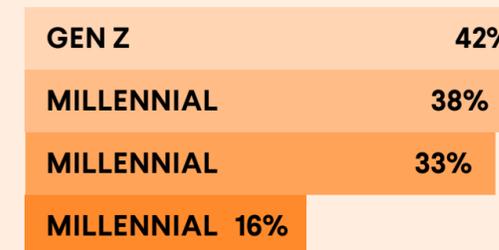
Men Show Higher Upside Potential

MEN	35%
WOMEN	29%

35%

With parity across shopping the same amount (57%), men are more likely than women to plan increased online shopping in 2026, suggesting greater responsiveness to convenience, efficiency, and digitally led value propositions.

Younger Consumers Signal Growth

GEN Z	42%
MILLENNIAL	38%
MILLENNIAL	33%
MILLENNIAL	16%

32%

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

A Small Group Signals Pullback

10%

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

Strategic Takeaways

1. Focus on Converting the "Stable Majority"
Growth will come from nudging existing shoppers to do slightly more. Use personalized reminders, replenishment cues, and timely value messaging to turn steady behavior into incremental frequency.

2. Invest Disproportionately in Younger Audiences Highlight Family-Centric Solutions
Prioritize Gen Z and Millennials with mobile-first experiences, relevant offers, and frictionless journeys that reward repeat behavior and make increased shopping feel effortless.mindset, especially during key gifting seasons or back-to-school periods.

3. Design Campaigns for Male Growth Potential
Lean into efficiency, speed, and utility-driven messaging to convert men's higher stated growth intent into realized increases in shopping frequency and spend.

4. Protect and Monetize Consistency Among Boomers
Treat Boomers as a dependable base. Emphasize trust, clarity, and reliability to retain spend, while selectively introducing convenience-driven enhancements that reduce friction without forcing change.

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

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	74%	55%	51%	49%	57%	57%	57%
Shop more online	16%	33%	38%	42%	29%	35%	32%
Shop less online	9%	12%	11%	8%	12%	8%	10%
I don't plan to shop online in the next 12 months	1%	0%	1%	1%	1%	0%	1%

Where Consumers Plan to Spend Online

Marketplaces Dominate, but Control Is the Opportunity

Online marketplaces, like Amazon and Temu are the preeminent destination for planned online purchases, driven by convenience, familiarity, and breadth of choice. However, this dominance masks important underlying shifts. Younger consumers show growing openness to brand-owned channels, while apps, social commerce, and even AI-assisted purchasing are beginning to emerge as meaningful, if still secondary behaviors.

Large online retail stores continue to serve as a trusted middle ground, appealing to shoppers who want the convenience and breadth of marketplaces with the familiarity and perceived reliability of established retailers.

Rather than a zero-sum channel battle, this landscape reflects differing shopper priorities: efficiency versus connection, speed versus control. Marketplaces will continue to anchor volume, but brands that invest in differentiated value, through loyalty, personalization, and ownership of the customer relationship, can meaningfully rebalance where purchases happen over time.

Key Insights

Marketplaces Win on Volume

BOOMER	58%
GEN X	53%
GEN Z	40%
MILLENNIAL	39%

47% (directly on a brand's website or app)

Online marketplaces remain the most common planned destination for purchases, especially among older shoppers who prioritize convenience, scale, and trust over brand-specific engagement.

Direct-to-Brand Skews Younger

GEN Z	23%
MILLENNIAL	22%
BOOMER	14%
GEN Z	9%

17%

Younger consumers are significantly more likely to plan purchases directly on brand websites or apps, signaling growing appetite for exclusive access, brand affinity, and direct relationships.

Retailers Remain a Middle Ground

25%

With relative parity across age demographics and gender, large online retailers, like Target and Walmart continue to attract shoppers who value convenience and variety without fully defaulting to marketplaces.

Emerging Channels Are Gaining Visibility

AI TOOLS	4%
SOCIAL MEDIA	5%

4—5%

While still small, AI-assisted checkout and social commerce are no longer negligible, especially among younger audiences, pointing to early-stage channel diversification.

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 personalized experiences that clearly differentiate brand-owned destinations, especially for Gen Z and Millennials already signaling openness to buying direct.

3. Optimize 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 behavioral 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. Walmart, Costco, Target, etc.)	24%	29%	26%	23%	25%	26%	25%
At an online marketplace (e.g. Amazon, Temu, Rakuten, etc.)	58%	53%	39%	40%	47%	47%	47%
Directly on a brand's website	8%	5%	11%	18%	11%	10%	10%
Directly in a brand's app	6%	4%	11%	5%	7%	6%	7%
Within AI tool (e.g. ChatGPT Instant Checkout)	1%	6%	5%	4%	4%	4%	4%
Social Media (e.g. Instagram, Facebook)	0%	4%	8%	10%	5%	6%	5%
Other	2%	1%	1%	0%	1%	0%	1%

Reason for Favored Purchase Destinations

Convenience Leads, but Value and Relevance Differentiate

Consumers' purchase destination choices are driven first by ease, but long-term preference is shaped by value and relevance. Convenience remains the dominant motivator across all demographics, reinforcing expectations for speed, simplicity, and low friction at every step of the journey. Irrespective of economic headwinds, great customer service beats price—great news for brands.

Younger shoppers increasingly apply additional criteria, including loyalty recognition, relevant recommendations, and faster, more responsive support. These expectations signal a shift from transactional convenience toward experiences that feel personalized and adaptive. As consumers gain more options and flexibility in where they buy, preference increasingly reflects how well a brand understands, anticipates, and responds to individual needs, not simply undercutting a competitor.

⸝⸝ Key Insights

Convenience Is the Primary Driver

BOOMER	74%
GEN X	68%
MILLENNIAL	58%
GEN Z	46%
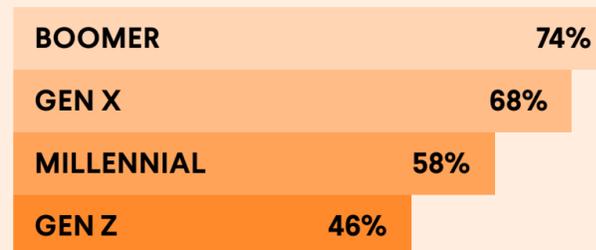
61%

Convenience is the top reason consumers choose where to purchase, with stark generational differences. The older the shopper, the more they prioritize efficiency and familiarity over added features.

Younger Shoppers Expect Recognition

GEN Z	22%
MILLENNIAL	22%
GEN Z	12%
BOOMER	11%

17%

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

Value Reinforces Channel Choice

48%

Better brand offers and discounts play a significant role in channel selection, reinforcing price sensitivity even as digital shopping becomes habitual.

Personalization Skews Gen Z

GEN Z	26%
AVERAGE	19%

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

Strategic Takeaways

1. Remove Friction Everywhere

Optimize speed, navigation, and checkout across every purchase destination. Convenience is table stakes, and even minor friction can redirect shoppers toward competitors offering simpler, faster, and more intuitive buying experiences.

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. Reward Loyalty Explicitly

Make loyalty visible and tangible through recognition, tailored messaging, and acknowledgment of past behavior, reinforcing repeat purchasing and strengthening direct relationships that extend beyond one-time transactions.

4. Elevate Support as a Differentiator

Invest in faster, more proactive support experiences, particularly for younger shoppers, where responsiveness, relevance, and problem resolution increasingly influence trust, satisfaction, and where purchases ultimately occur.

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	43%	52%	51%	45%	49%	47%	48%
Better loyalty recognition	11%	12%	22%	22%	16%	17%	17%
More relevant recommendations	13%	14%	21%	26%	18%	19%	19%
Faster support	17%	18%	18%	33%	19%	24%	22%
Convenience	74%	68%	58%	46%	62%	60%	61%
None of these	5%	4%	1%	1%	4%	1%	3%

Most Trusted Places to Buy Online

Marketplaces Lead the Way

Trust remains a decisive factor in where consumers choose to purchase online, and it continues to concentrate around familiar, established purchase destinations. Marketplaces and large online retail stores still benefit from scale-driven credibility, buyer protections, and ingrained consumer habits. However, this dominance is not absolute. Younger consumers show growing trust in brand-owned websites and apps, signaling a shift toward direct relationships when transparency, recognition, and experience expectations are met.

Emerging destinations, including social platforms and AI-enabled tools remain niche, but their presence reflects evolving definitions of trust tied to relevance and control. As digital commerce matures, trust is no longer singularly earned through scale alone, but increasingly through consistency, clarity, and consumer-centric experiences.

Key Insights

Marketplaces Still Anchor Trust

BOOMER	42%
GEN X	39%
GEN Z	24%
MILLENNIAL	22%
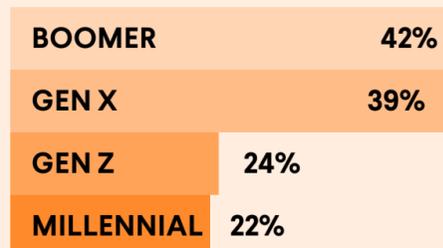
32%

Marketplaces remain the most trusted purchase destination overall, particularly among older consumers who value familiarity, buyer protections, and predictable outcomes when shopping online.

Retail Stores Reinforce Reliability

BOOMER	30%
MILLENNIAL	27%
GEN X	22%
GEN Z	22%
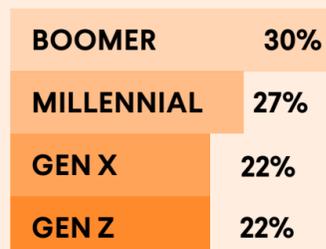
25%

Large online retail stores continue to hold a strong trust position, benefiting from brand recognition and perceived accountability without the perceived complexity of navigating individual brand sites.

Brand-Owned Channels Build Trust With Younger Consumers

GEN Z	20%
AVERAGE	10%

16%

Younger shoppers are more likely to trust brand websites and apps, reflecting comfort with direct relationships when experiences deliver transparency, consistency, and clear value.

Emerging Destinations Face a Trust Gap

SOCIAL MEDIA	7%
AI TOOLS	5%

7%

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

⚗ Strategic Takeaways

1. Reinforce Trust Signals Everywhere
Prioritize 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 younger 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, prioritizing 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. Walmart, Costco, Target, etc.)	30%	22%	27%	22%	25%	25%	25%
An online marketplace (e.g. Amazon, Temu, Rakuten, etc.)	42%	39%	22%	24%	32%	31%	32%
Directly on the brand's website (e.g. gap.com, nike.com, samsung.com, etc)	10%	16%	17%	20%	18%	14%	16%
Directly in the brand's app	11%	11%	14%	16%	11%	15%	13%
Within AI tool (e.g. ChatGPT Instant Checkout)	1%	1%	9%	7%	4%	5%	5%
Social Media (e.g. Instagram, Facebook)	2%	8%	9%	11%	6%	9%	7%
None of these	6%	2%	1%	0%	3%	1%	2%

# Reasons for Trusted Purchase Destinations

Trust Is Earned Through Safety, Recognition, and Relevance

Trust in online purchasing is built less on a single factor and more on a combination of safety, consistency, and perceived understanding. Secure payment remains the foundation of trust across all demographics, but it is no longer sufficient on its own. Increasingly, consumers expect brands and purchase destinations to recognize them, respect their preferences, and limit irrelevant communication.

Younger shoppers, in particular, associate trust with personalization, transparency, and continuity across devices. Reviews also continue to play an important validating role, especially when consumers are navigating unfamiliar products or destinations. Together, these signals suggest that trust is no longer purely institutional, it is experiential, earned through repeated demonstrations that a brand or destination understands, protects, and respects the shopper.
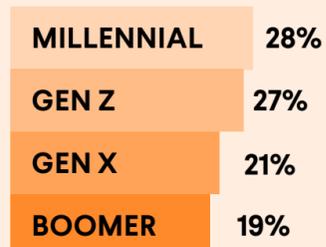
Key Insights

Security Is the Trust Baseline

BOOMER	66%
GEN X	65%
MILLENNIAL	58%
GEN Z	54%
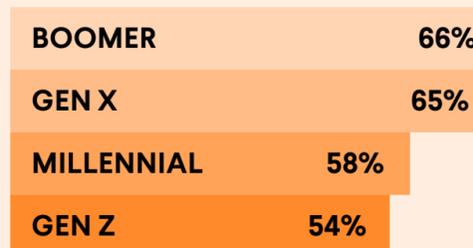
61%

Safe payment and strong security protections are the most important trust drivers overall, particularly for older consumers who prioritize risk reduction and financial confidence.

Recognition Builds Confidence

MILLENNIAL	28%
GEN Z	27%
GEN X	21%
BOOMER	19%

24%

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 recognize them across devices and allow control over preferences, reinforcing expectations for continuity and personalization.

Reviews Validate Decisions

FEMALE	36%
MALE	31%
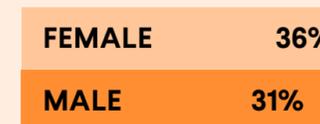
34%

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

Fewer Irrelevant Messages Build Authority

BOOMER	19%
GEN X	6%

12%

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

Strategic Takeaways

1. 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 recognize 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 personalized journey that resonates across generations.

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Transparency on data use	9%	13%	14%	16%	11%	15%	13%
Control over preferences	20%	23%	29%	22%	22%	25%	24%
Consistently recognizes me across devices	19%	21%	28%	27%	23%	25%	24%
Fewer irrelevant messages	19%	6%	10%	13%	12%	12%	12%
Safe payment / good security	66%	65%	58%	54%	59%	62%	61%
Reviews from previous customers	24%	40%	31%	39%	36%	31%	34%
None of these	10%	2%	4%	3%	6%	4%	5%

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.
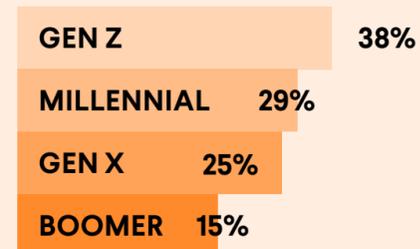
Key Insights

Unfortunately, Price is Paramount

BOOMER	70%
GEN X	69%
MILLENNIAL	59%
GEN Z	50%
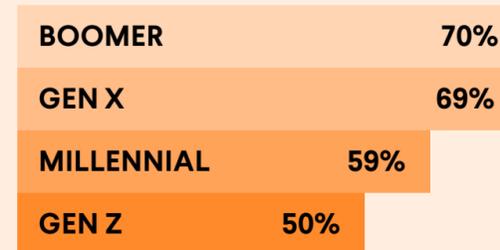
62%

Better pricing or exclusive discounts are the strongest drivers of direct-to-brand purchasing, particularly among older consumers and men (64% vs. 60% of women) who remain highly value-conscious.
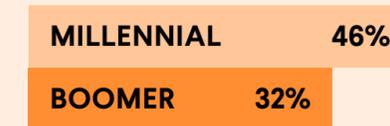
Personalization Tips the Scale

GEN Z	38%
MILLENNIAL	29%
GEN X	25%
BOOMER	15%

27%

Younger consumers (2.5x that of Boomers) are significantly more motivated by personalized shopping experiences and relevant messages, highlighting personalization as a key lever for direct-to-consumer growth.
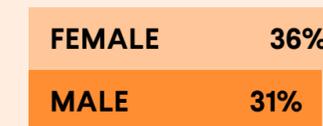
Speed is the Name of the Game

MILLENNIAL	46%
BOOMER	32%

38%

Younger consumers demand instant gratification, which means faster delivery options are a critical differentiator when competing against marketplaces.

Loyalty Drives Younger Engagement

FEMALE	36%
MALE	31%

34%

Loyalty rewards meaningfully increase willingness to shop direct, especially among Gen Z and women, signaling appetite for recognition and long-term value.

Strategic Takeaways

1. Lead With Clear Economic Incentives
Use exclusive pricing, brand-only discounts, or bundles to create an immediate reason to shop direct, particularly when competing with the speed and convenience of marketplaces.

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

3. Make Loyalty Visible and Valuable
Clearly communicate loyalty rewards and benefits at key moments to reinforce repeat engagement, reward direct relationships, and give shoppers a reason to return beyond one-time savings.

4. Use Personalization 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, customizable options, and personalized rewards to strengthen engagement and loyalty.
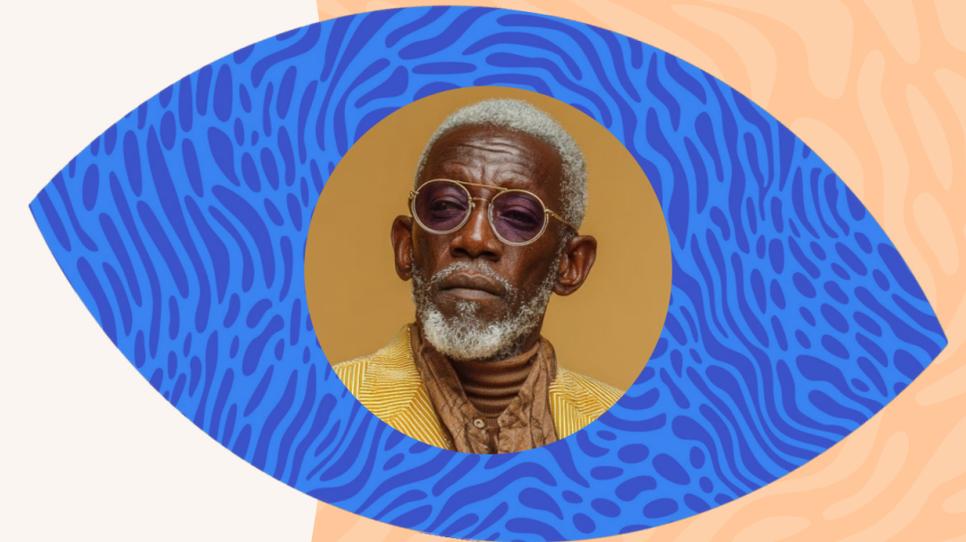
8 WHAT WOULD ENCOURAGE YOU TO SHOP DIRECTLY FROM A BRAND'S WEBSITE INSTEAD OF A MARKETPLACE?

| RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Better pricing or exclusive discounts	70%	69%	59%	50%	60%	64%	62%
Faster delivery options	32%	36%	46%	37%	37%	39%	38%
Better loyalty rewards	30%	37%	31%	35%	36%	31%	34%
A more personalized shopping experience	15%	25%	29%	38%	26%	28%	27%
More relevant, personalized messages based on what I browsed	11%	18%	28%	26%	18%	24%	21%
Let me set message frequency/quiet hours.	3%	5%	13%	19%	11%	9%	10%
None of these	10%	3%	3%	4%	5%	4%	5%

Factors Influencing Brand Purchase Decisions

Familiarity and Value Drive Direct Purchase Decisions

When consumers choose to purchase directly from a brand, their decisions are shaped less by inspiration and more by reassurance. Prior experience with a brand remains the strongest influence, signaling that trust and familiarity lower perceived risk in direct-to-brand transactions. Price and shipping incentives continue to play a critical role, reinforcing the importance of tangible value when bypassing marketplaces.

Younger consumers, however, place greater weight on reviews and advertising, suggesting a need for validation and discovery even within direct environments. Overall, direct purchase decisions reflect a balance between confidence and value—brands win when they reduce uncertainty while clearly rewarding shoppers for buying direct.
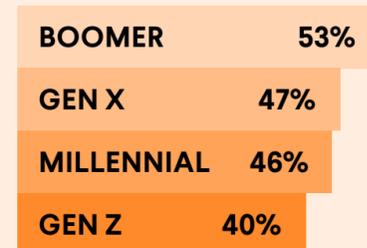
Key Insights

Familiar Brands Win

BOOMER	55%
MILLENNIAL	45%
GEN Z	45%
GEN X	38%
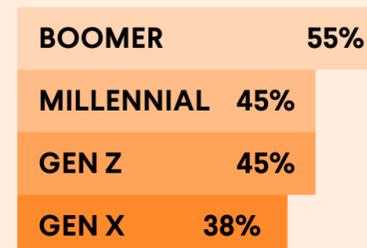
45%

Past purchase experience is a preeminent influential factor in buying directly from a brand, highlighting trust and familiarity as primary drivers of direct conversion.
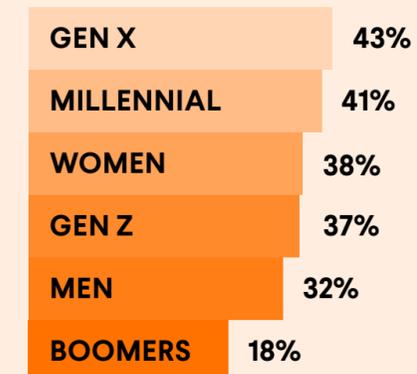
Price Remains a Gatekeeper

BOOMER	53%
GEN X	47%
MILLENNIAL	46%
GEN Z	40%

46%

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

Reviews Matter More to Younger Shoppers and Women

GEN X	43%
MILLENNIAL	41%
WOMEN	38%
GEN Z	37%
MEN	32%
BOOMERS	18%

35%

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

Advertising Influences Discovery

GEN Z	22%
BOOMER	1%

11%

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

Strategic Takeaways

1. 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 behaviors.

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	55%	38%	45%	45%	45%	46%	45%
I prefer to purchase from brands that offer the lowest price	53%	47%	46%	40%	45%	47%	46%
I prefer to purchase from brands that offer the best shipping deals	37%	34%	33%	29%	32%	34%	33%
I prefer to purchase from brands that have the best advertisements	1%	8%	11%	22%	9%	12%	11%
I prefer to purchase from brands that have the best reviews	18%	43%	41%	37%	38%	32%	35%
Other (Please specify)	3%	0%	1%	0%	1%	1%	1%
None of these	6%	4%	1%	5%	4%	3%	4%

What Matters Most When Purchasing Directly from Brands

Value and Convenience Outweigh Brand Image

When purchasing directly from a brand, consumers prioritize practical value over emotional or aspirational drivers. Free shipping and price–related factors clearly outweigh brand recognition or popularity, signaling that direct channels are evaluated through a cost–benefit lens.

Younger shoppers introduce additional considerations, such as delivery speed, reviews, and product popularity, but even these are grounded in utility and confidence rather than brand storytelling alone.

Overall, direct-to-brand purchasing is less about persuasion and more about justification. Consumers expect brands to earn the direct purchase by reducing cost, effort, and uncertainty. This reinforces that success in owned channels depends on removing friction and delivering tangible benefits, not relying on brand equity to carry the decision.

Key Insights

Price Still Sets the Floor

GEN X	38%
BOOMER	29%
MILLENNIAL	22%
GEN Z	22%
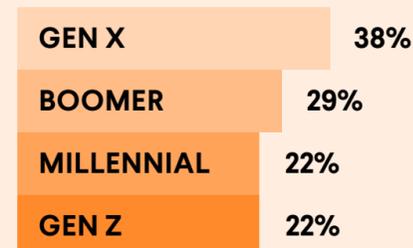
28%

Best price remains a leading consideration, especially for Gen X, reinforcing that economic value remains a gatekeeper even in direct brand relationships.
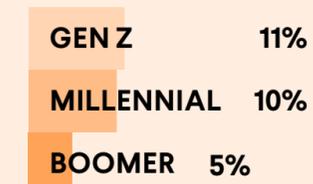
Free Shipping Is the Top Driver

BOOMER	34%

20%

Free shipping is the second most important factor overall, with Boomers indexing 2x more than any other generation, underscoring the outsized role of shipping costs in direct purchase decisions.

Social Proof Gains Importance With Youth

GEN Z	11%
MILLENNIAL	10%
BOOMER	5%

8%

Predictably, reviews and popularity matter more to younger consumers, signaling the role of validation and reassurance when buying directly from brands.

Speed Matters More to Younger Shoppers

GEN Z	15%
BOOMER	5%

10%

Delivery time is significantly more important to Gen Z (3x that of Boomers), reflecting expectations shaped by instant gratification and marketplace-driven speed standards.

Strategic Takeaways

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

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

3. Optimize Delivery Expectations for Younger Audiences
Emphasize delivery speed and communicate fulfillment timelines clearly to meet younger shoppers' expectations shaped by fast, on-demand commerce and marketplace-driven standards.

4. Reinforce Confidence With Proof Points
Prominently surface reviews, ratings, and popularity cues at key decision moments to reduce uncertainty and support confident direct purchases, especially among younger shoppers who rely on validation.

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	29%	38%	22%	22%	29%	27%	28%
Discount	7%	8%	9%	5%	7%	8%	8%
Popularity of item	0%	1%	5%	8%	2%	5%	4%
Reviews	5%	8%	10%	11%	11%	6%	8%
Brand name recognition	7%	8%	11%	7%	6%	10%	8%
Convenience	8%	7%	11%	9%	9%	8%	9%
Delivery time	5%	9%	9%	15%	10%	9%	10%
Free Shipping	34%	15%	16%	17%	20%	21%	20%
Ability to pick up in store	1%	3%	5%	5%	2%	5%	4%
Other	1%	1%	1%	0%	1%	0%	1%
None of these	4%	1%	0%	1%	3%	1%	2%

Factors Influencing Online vs. In-Store Purchase Decisions

Convenience and Cost Tip the Balance Toward Online

The decision to purchase directly from a brand online versus in-store is shaped by a trade-off between immediacy and effort. Convenience-related factors—such as free shipping, delivery speed, and product availability—consistently outweigh experiential or inspirational drivers. While online shopping no longer needs to justify its legitimacy, it must still earn preference by removing friction and delivering clear advantages over physical retail. Younger shoppers increasingly prioritize speed, flexibility, and access, while older consumers remain more sensitive to cost-related incentives. Overall, the choice between online and in-store reflects pragmatic decision-making: shoppers go online when it saves time, reduces effort, or offers clearer economic value than visiting a physical location.
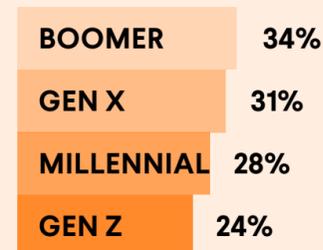
Key Insights

Speed Matters More to Younger Shoppers

GEN Z	34%
MILLENNIAL	29%
GEN X	29%
BOOMER	24%
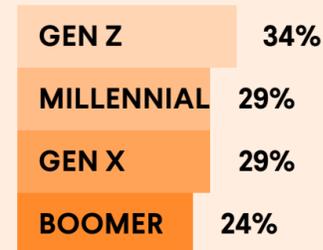
29%

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

Exclusive Online Offers Drive Digital Preference

BOOMER	34%
GEN X	31%
MILLENNIAL	28%
GEN Z	24%

30%

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. Against traditional stereotypes this is more important the older the consumer.

Free Shipping Is the Strongest Online Advantage

BOOMERS	60%
GEN X	48%
FEMALE	44%
MALE	40%
MILLENNIAL	32%
GEN Z	30%
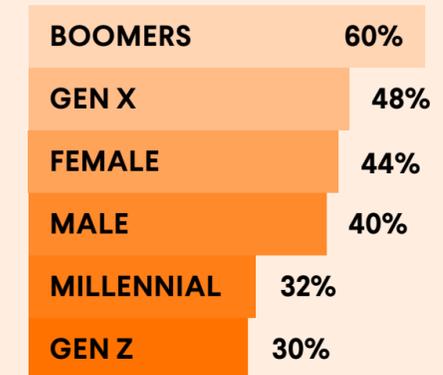
42%

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

Availability Drives Digital Preference

MILLENNIAL	33%
MALE	32%

29%

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

Strategic Takeaways

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

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

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

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

5. Expand Convenience Beyond Checkout
Offer flexible payment options, 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	31%	26%	28%	23%	26%	28%	27%
Price comparisons	21%	20%	26%	20%	19%	25%	22%
Product availability	27%	26%	33%	27%	25%	32%	29%
Delivery speed	24%	29%	29%	34%	28%	30%	29%
Free shipping	60%	48%	32%	30%	44%	40%	42%
Exclusive online discounts or bundles	34%	31%	28%	25%	31%	29%	30%
Easy and free returns	26%	28%	21%	20%	24%	24%	24%
Access to online-only products or early releases	7%	13%	17%	22%	14%	15%	15%
Detailed product information & reviews	15%	12%	15%	23%	17%	16%	16%
Flexible payment options (buy now/pay later)	7%	21%	24%	24%	22%	17%	19%
None of these	5%	1%	0%	1%	2%	1%	2%

# What Helps the Most When Making Online Purchase Decisions

Relevance and Urgency Convert Browsing Into Buying

Onsite experiences increasingly determine whether browsing turns into purchase. While price sensitivity remains high, shoppers respond most strongly to signals that combine relevance with urgency. Price-drop alerts and stock-based notifications tap into value and scarcity, helping consumers make faster decisions with greater confidence. Younger shoppers, in particular, respond to personalized recommendations and contextual guidance that reduce effort and uncertainty. Conversely, generic experiences fail to move shoppers forward, reinforcing the importance of timely, behavior-driven interactions.

As online environments become more crowded, the experiences that convert are those that feel helpful rather than promotional, surfacing the right information at the right moment to support confident decision-making.
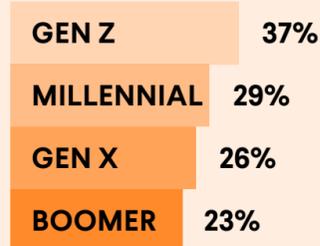
𝄐 Key Insights

Price Drops Drive Action

BOOMER	63%
GEN X	61%
MILLENNIAL	58%
GEN Z	48%
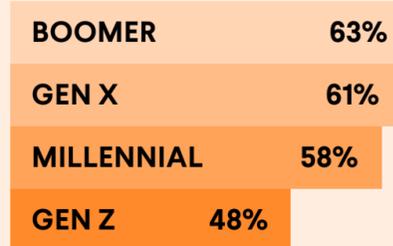
57%

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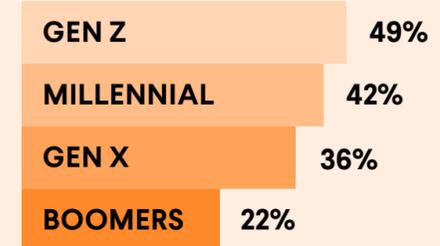
Urgency Signals Matter

GEN Z	37%
MILLENNIAL	29%
GEN X	26%
BOOMER	23%

29%

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

Personalization Resonates With Younger Shoppers

GEN Z	49%
MILLENNIAL	42%
GEN X	36%
BOOMERS	22%

37%

Personalized recommendations and styling guidance are significantly more influential for Gen Z and Millennials (2x that of Boomers), highlighting expectations for relevance and assistance during browsing.

Generic Experiences Fall Flat

10%

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

⚡ Strategic Takeaways

1. Replace Generic Experiences With Smart Signals
Move away from one-size-fits-all onsite messaging in favor of behavior-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 behavior 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. Personalize the Browsing Experience
Deliver personalized recommendations and contextual guidance based on real-time browsing behavior 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
Personalized recommendations based on browsing	22%	36%	42%	49%	39%	36%	37%
Alerts when items are low in stock	23%	26%	29%	37%	29%	29%	29%
Back-in-stock notices	17%	29%	29%	31%	26%	27%	27%
Price-drop alerts	63%	61%	58%	48%	59%	56%	57%
Styling or usage recommendations	7%	18%	26%	26%	20%	18%	19%
None of these	23%	12%	4%	3%	9%	11%	10%

Barriers to Completing Online Purchases

**Friction and Uncertainty Are the Primary Conversion Killers**

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

The factors that stop shoppers from completing a purchase are less about desire and more about friction, trust, and clarity. High shipping costs remain the most common deterrent, reinforcing how quickly perceived value can erode at checkout. However, operational and experiential barriers, such as complicated checkout flows, limited payment options, or confusion around why an offer is being shown, also meaningfully disrupt momentum.

Younger shoppers are more sensitive to trust and transparency gaps, while older shoppers are more likely to abandon when costs feel unjustified. Together, these blockers highlight a critical truth: conversion loss is often preventable when brands remove friction, clearly explain value, and reinforce confidence at the moment of decision.
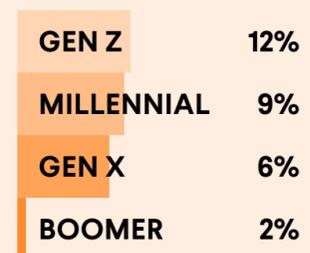
𝄁𝄁 Key Insights

Shipping Costs Are the Biggest Barrier

BOOMER	51%
FEMALE	38%
GEN X	36%
MALE	33%
MILLENNIAL	30%
GEN Z	26%
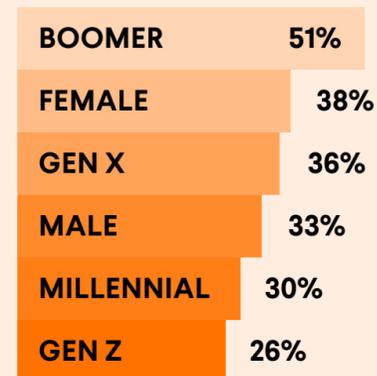
35%

High shipping costs are the most common reason shoppers abandon purchases, especially among Boomers and women, where unexpected fees quickly undermine perceived value.
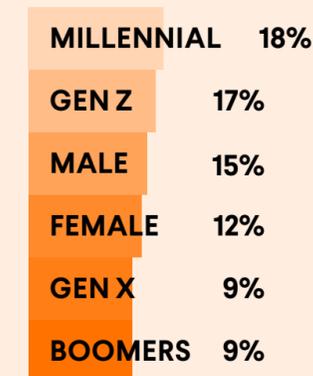
Confusion Undermines Confidence

GEN Z	12%
MILLENNIAL	9%
GEN X	6%
BOOMER	2%

8%

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

Trust Gaps Stop Younger Shoppers

MILLENNIAL	18%
GEN Z	17%
MALE	15%
FEMALE	12%
GEN X	9%
BOOMERS	9%

13%

Younger consumers are twice as likely than older consumers to abandon purchases due to lack of trust in the brand, reinforcing the importance of credibility and reassurance earlier in the journey.

Checkout Friction Still Breaks Momentum

15%

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

Strategic Takeaways

1. Address Shipping Costs Transparently
Minimize 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.

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

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
High shipping costs	51%	36%	30%	26%	38%	33%	35%
Lack of trust in the brand	9%	9%	18%	17%	12%	15%	13%
Complicated checkout process	12%	17%	16%	16%	16%	15%	15%
Items out of stock	19%	21%	12%	19%	18%	18%	18%
Not enough payment options	2%	4%	8%	7%	3%	8%	6%
Confusion about why I'm seeing an offer	2%	6%	9%	12%	7%	8%	8%
None of these	4%	6%	7%	3%	6%	4%	5%

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

Retention Is Driven by Experience, Not Just Satisfaction

Repeat purchasing is shaped less by the initial transaction and more by what happens immediately after. While product satisfaction is assumed, the factors that truly drive return behavior are ease, recognition, and follow-through. Clear communication, relevant post-purchase messaging, and a smooth account or reordering experience reinforce confidence and reduce friction for future purchases.

Younger shoppers, in particular, expect continuity, remembered preferences, helpful reminders, and meaningful incentives, while older consumers prioritize reliability and simplicity. Together, these behaviors suggest that retention is not passive. Brands earn repeat purchases by demonstrating ongoing value, relevance, and respect for the customer's time after the sale is complete. Tailoring content strategies to the unique preferences of gender and age groups allows brands to deepen connections and maximize their reach.

Key Insights

Promotions Drive Repeat Visits

BOOMER	65%
GEN X	49%
MILLENNIAL	47%
GEN Z	35%
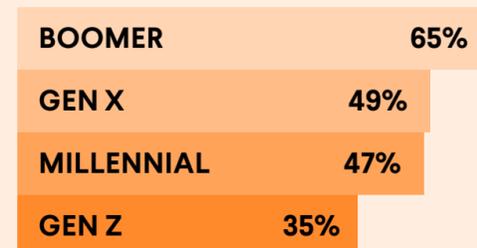
48%

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

Personalization Pulls Younger Shoppers Back

GEN Z	26%
GEN X	22%
MILLENNIAL	21%
BOOMER	8%
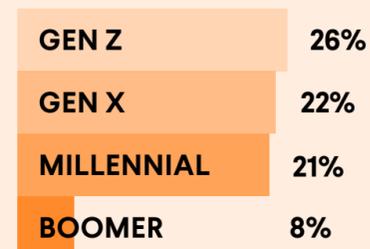
20%

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

Loyalty Rewards Have Broad Appeal

40%

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

Reviews Are a Universal Trust Anchor

27%

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

Strategic Takeaways

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

2. Use Incentives to Prompt the Next Action
Deploy timely, relevant incentives after purchase to encourage repeat behavior, 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 recognize 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 Personalized Promotions to Younger Shoppers and Women
Create targeted campaigns featuring upcoming sales, exclusive rewards, and personalized discounts. Leverage email and text to ensure these offers reach Gen Z, Millennials and women 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	or	12%	8%	12%	9%	11%	10%
Behind-the-scenes brand stories	2%	7%	11%	12%	7%	9%	8%
Customer reviews or testimonials	26%	24%	30%	30%	27%	28%	27%
Upcoming sales or promotions	65%	49%	47%	35%	48%	49%	48%
Actions offering me loyalty points or rewards	44%	41%	35%	42%	42%	39%	40%
Personalized recommendations based on what I browsed	8%	22%	21%	26%	21%	19%	20%
Restock/low-stock alerts for items I care about	10%	12%	19%	18%	13%	17%	15%
None of these	10%	8%	2%	3%	6%	5%	6%

Motivating Consumers to Opt-In for Brand Communications

**Opt-In Is Earned Through Immediate, Tangible Value**

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

Older consumers are most motivated by cost savings, while younger shoppers respond to access-based benefits such as early product launches and personalized content. Control also plays a meaningful role, with opt-in willingness increasing when consumers can manage frequency and relevance.

Overall, opt-in decisions are not driven by brand affinity alone; they are transactional, deliberate, and tied to perceived usefulness. Brands that clearly articulate what consumers will gain, and respect how often they communicate are far more likely to earn permission and sustain engagement.

Key Insights

Free Shipping Is the Strongest Opt-In Driver

BOOMER	51%
GEN X	38%
WOMEN	36%
MEN	33%
MILLENNIAL	30%
GEN Z	26%
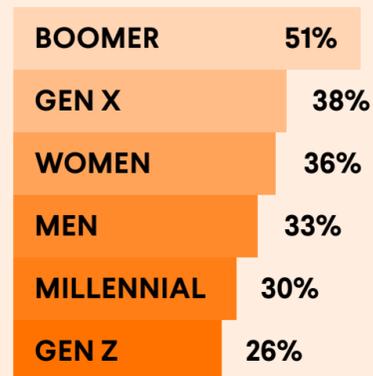
45%

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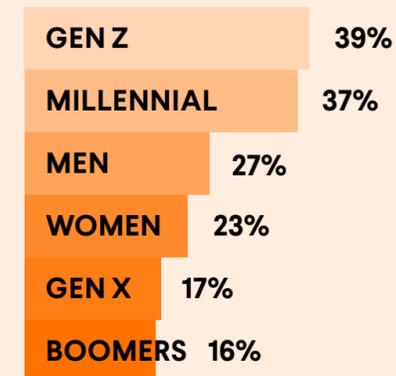
Confusion Undermines Confidence

GEN Z	20%
MILLENNIAL	20%
GEN X	8%
BOOMER	6%
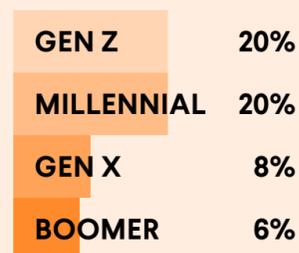
14%

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

Younger Shoppers Want Early Access

GEN Z	39%
MILLENNIAL	37%
MEN	27%
WOMEN	23%
GEN X	17%
BOOMERS	16%

25%

Younger consumers are twice as likely than older consumers to abandon purchases due to lack of trust in the brand, reinforcing the importance of credibility and reassurance earlier in the journey.

Loyalty Rewards Have Broad Appeal

36%

With consumers tightening their belts, loyalty points redeemable for rewards strongly motivate opt-in across age groups, signaling appetite for ongoing, accumulative value rather than one-time incentives alone.when effort outweighs perceived reward.

⚤ Strategic Takeaways

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

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.differentiated brand experiences.

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

| RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
One time discount	22%	24%	17%	19%	23%	18%	21%
Free shipping	58%	56%	39%	30%	48%	43%	45%
Loyalty points later used for rewards	38%	39%	31%	37%	35%	38%	36%
Exclusive access to content	7%	14%	16%	21%	15%	15%	15%
Early access to their new products	16%	17%	37%	29%	23%	27%	25%
VIP warranty service	6%	6%	8%	7%	6%	8%	7%
Control over frequency/quiet hours	8%	8%	9%	14%	10%	10%	10%
Personalized content--not just discounts	6%	8%	20%	20%	13%	15%	14%
None of these	14%	6%	2%	3%	6%	7%	6%

Where Consumers Discover Deals and Promotions Online

Preference Skews Toward Owned and Intent-Driven Touchpoints

Consumers prefer to learn about brand offers through channels they actively choose, rather than passively encounter. Email and brand-owned properties, websites and apps remain the most trusted and preferred sources, particularly among older consumers who value familiarity and control. Younger shoppers, however, diversify their discovery, leaning more into brand apps, social signals, and personalized content informed by browsing behavior.

Offline touchpoints, such as in-store promotions and word-of-mouth, continue to play a meaningful supporting role. Overall, offer discovery is shaped by trust, relevance, and intentionality. These insights present opportunities for brands to fine-tune their marketing efforts to align with demographic trends and behaviors. Brands perform best when they meet consumers where they already expect to engage, rather than forcing discovery through interruptive channels.

Key Insights

Email Remains the Primary Discovery Channel

|	
BOOMER	48%
GEN X	39%
WOMEN	39%
MILLENNIAL	34%
MEN	33%
GEN Z	24%
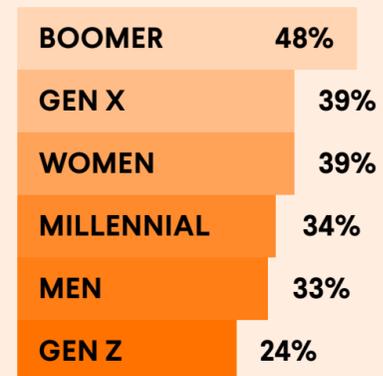
36%

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

Brand-Owned Properties Drive Engagement

BRAND WEBSITE	36%
BRAND APP	18%

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 Personalized Signals

MILLENNIAL	24%
MEN	22%
GEN Z	21%
GEN X	14%
WOMEN	14%
BOOMERS	11%
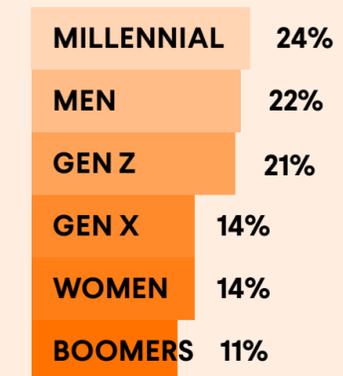
18%

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

Offline Still Influences Awareness

IN-STORE PROMOTIONS	22%
FRIENDS & FAMILY	22%

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

⚲ 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, personalization, and behavior-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	14%	12%	14%	20%	15%	15%	15%
Email	48%	39%	34%	24%	39%	33%	36%
Search	18%	17%	18%	13%	15%	18%	17%
Brand's own website	41%	34%	29%	40%	35%	37%	36%
Brand's own app	10%	25%	18%	18%	18%	17%	18%
Brand's organic posts	2%	5%	16%	12%	6%	11%	9%
Brand's ads on social based on my browsing	11%	14%	24%	21%	14%	22%	18%
My preference center/brand account	8%	14%	20%	16%	13%	16%	15%
Influencer content	1%	9%	8%	14%	9%	7%	8%
In-store promotions	20%	22%	20%	26%	23%	20%	22%
TV ads	19%	11%	15%	11%	11%	16%	14%
Direct mail	14%	5%	6%	7%	6%	9%	8%
Friends or family recommendations	22%	25%	18%	23%	24%	20%	22%
None of these	6%	4%	1%	2%	4%	2%	3%

Preferred Channels to Get Consumers Back to Buy

### Preference Is Permission-Based and Contextual

The channels consumers prefer for communication reveal their comfort with certain platforms and the frequency of their online interactions. When brands follow up after onsite browsing, consumers strongly favor permission-based, familiar communication methods. Email remains the dominant re-engagement channel overall, particularly among older shoppers who value clarity and control. However, younger consumers show greater openness to mobile-first channels, including SMS, rich media messages, and app push notifications.

Importantly, preference reflects context rather than novelty, shoppers want brands to reappear in places that feel expected and useful, not intrusive. Broad paid media retargeting underperforms relative to owned and opted-in channels. This reinforces that re-engagement works best when it feels like a continuation of the shopping journey, not a reminder from the outside.
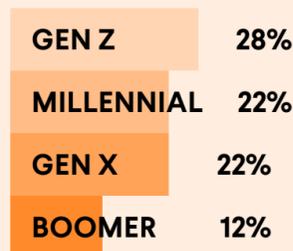
Key Insights

Email Is the Default Re-Engagement Channel

Group	%
BOOMER	62%
MEN	42%
GEN X	41%
WOMEN	34%
MILLENNIAL	31%
GEN Z	21%
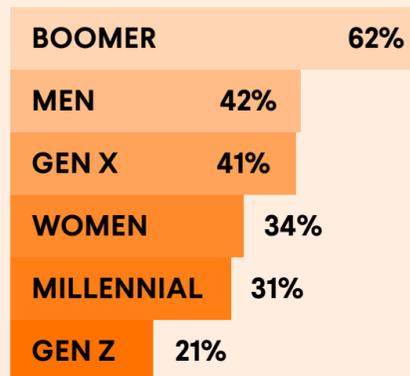
38%

Email is the most preferred follow-up method overall especially among older consumers and men, reinforcing its role as the most trusted and least intrusive re-engagement channel.
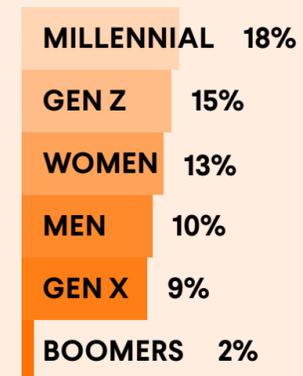
Push Gain Relevance With Youth

Group	%
MILLENNIAL	18%
GEN Z	15%
WOMEN	13%
MEN	10%
GEN X	9%
BOOMERS	2%

25%

Younger cohorts show higher receptivity to app push notifications, signaling openness to more immersive re-engagement within environments they actively use.

Younger Consumers Lean Mobile-First

Group	%
GEN Z	28%
MILLENNIAL	22%
GEN X	22%
BOOMER	12%

21%

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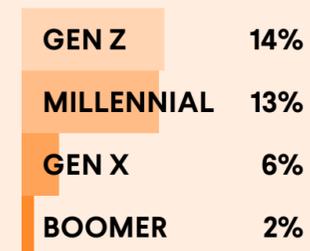
Paid Retargeting Is Least Preferred

Group	%
GEN Z	14%
MILLENNIAL	13%
GEN X	6%
BOOMER	2%

9%

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

Strategic Takeaways

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

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

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.

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	62%	41%	31%	21%	34%	42%	38%
Send a short text-only message to my mobile phone (SMS)	12%	22%	22%	28%	21%	22%	21%
Send a text message with imagery or video to my mobile phone (MMS)	12%	15%	13%	19%	18%	12%	15%
Send a push notification via their app I downloaded	2%	9%	18%	15%	13%	10%	11%
Target me with an ad placed on social media or a website that is not the brand's website	2%	6%	13%	14%	8%	10%	9%
None of these	10%	7%	4%	3%	7%	5%	6%

Messaging Cadence

Tolerance Is Channel-Specific and Skews Lower Than Brands Assume

Consumers are not broadly opposed to brand messaging, but their tolerance is tightly bound to both frequency and channel. Across channels, acceptance peaks at one to two messages per week, with sharp drop-off beyond that.

Email and push notifications carry slightly higher tolerance, while ads and text messages face quicker fatigue, particularly among older consumers. Younger shoppers show more flexibility, especially for app-based notifications, but still favor restraint over volume. This reinforces a critical point: acceptable frequency is not universal. Brands that apply a one-size-fits-all cadence risk overexposure, while those that tailor frequency by channel and audience are better positioned to maintain trust and engagement over time.
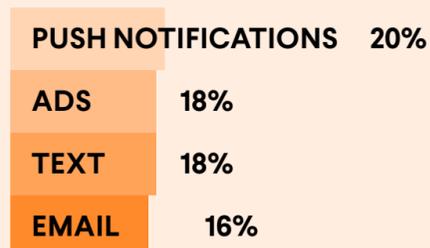
ᕫ Key Insights

One Message Per Week Is the Safe Baseline

PUSH NOTIFICATIONS	28%
ADS	26%
TEXT	25%
EMAIL	20%
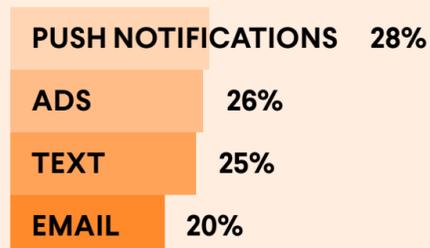
Across channels, one message per week represents the most broadly acceptable frequency, reinforcing restraint as the default expectation.

Tolerance Drops Quickly Beyond Two Messages

PUSH NOTIFICATIONS	20%
ADS	18%
TEXT	18%
EMAIL	16%

Acceptance declines noticeably after two to three messages per week, signaling a narrow margin between effective engagement and over-messaging.

Personalization Resonates With Younger Shoppers

1 PER WEEK	20%
2 PER WEEK	16%
3 PER WEEK	20%
4 PER WEEK	22%
5 PER WEEK	23%

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

High-Frequency Messaging Is Niche

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

Strategic Takeaways

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

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

3. Default to One, 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 behavior, where tolerance is highest and relevance can be clearly demonstrated.

Messages That Would Persuade a Consumer to Purchase Directly

Price and Intent Signals Get Consumers Back to Buy

Cart abandonment messaging is most effective when it directly reflects shopper intent and delivers clear economic value. Messages tied to specific products, such as price drops, discount codes, or reminders outperform broad brand-level promotions. This indicates that consumers respond best when brands acknowledge what they viewed or considered, rather than resetting the conversation.

Loyalty offers also play a meaningful role, particularly among younger shoppers, reinforcing the importance of recognition and long-term value. Conversely, generic recommendations and post-purchase suggestions have lower impact, suggesting timing and relevance matter more than breadth. Overall, persuasive follow-up messaging succeeds when it is precise, timely, and grounded in demonstrated interest.

Key Insights

Discount Codes and Price Drops Lead Conversion

DISCOUNT CODES	34%
PRICE DROP ON VIEWED ITEM	29%

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	34%

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

Reminders and Availability Signals Support Intent

CART REMINDERS	18%
BACK-IN-STOCK NOTICES	19%

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

Loyalty Offers Matter More to Women

GEN X	60%
MILLENNIAL	48%
FEMALE	44%
GEN Z	40%
MEN	32%
BOOMER	30%

40%

Loyalty program offers meaningfully influence purchase decisions, especially among Gen X, Millennials, and women signaling appetite for ongoing value beyond one-time discounts.

⚸ Strategic Takeaways

1. Anchor Messaging to Demonstrated Intent
Prioritize 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 younger shoppers 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	58%	46%	41%	33%	41%	47%	44%
General brand sale across many items	23%	18%	28%	27%	22%	26%	24%
Discount codes	56%	57%	43%	46%	53%	48%	50%
Reminders for items I left in my cart	16%	17%	15%	26%	15%	21%	18%
Loyalty program offers	28%	48%	45%	37%	43%	37%	40%
Notice that an item I viewed online is back in stock	22%	17%	20%	18%	19%	19%	19%
Notice that an item I viewed online is low in stock	13%	9%	17%	12%	13%	12%	13%
Recommendations for alternatives when an item is out of stock	6%	13%	14%	15%	12%	13%	12%
New items that are similar to what I viewed previously	18%	21%	22%	25%	20%	23%	22%
Post-purchase recommendations for what to buy next	0%	6%	14%	17%	9%	10%	9%
None of these	11%	5%	1%	3%	5%	5%	5%

Improving Cart Abandonment Messaging

Relevance Beats Timing

When consumers say brand messages should be "more helpful," they are overwhelmingly asking for relevance over volume. Fewer, more relevant messages outrank better timing, preferred channels, or explanations of why a message was sent.

Triggered messaging based on real interactions also performs strongly, particularly among younger shoppers, reinforcing expectations that brands respond to behavior rather than broadcast broadly. While transparency around "why I got this" improves sentiment, it is not sufficient on its own. Consumers want messages that feel earned, timely, and directly connected to their actions. Helpfulness is defined less by polish and more by restraint, relevance, and responsiveness.
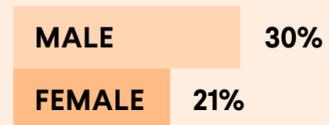
⬭⬭ Key Insights

Triggered Messages Increase Usefulness

GEN Z	40%
MILLENNIAL	38%
MALE	35%
GEN X	34%
FEMALE	32%
BOOMER	22%
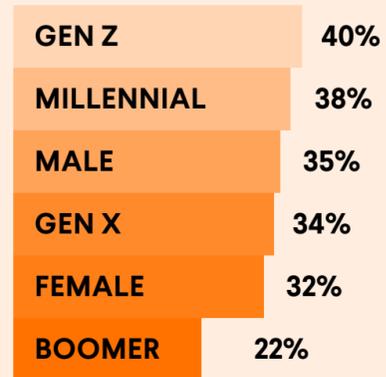
34%

Messages triggered by consumer interactions are significantly more helpful to younger shoppers and men, reinforcing expectations for responsiveness tied directly to behavior.
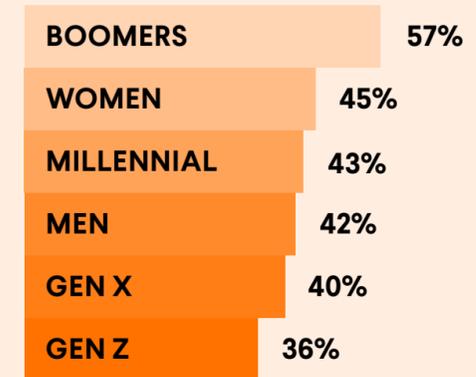
Channel Preference Still Plays a Role

MALE	30%
FEMALE	21%

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

BOOMERS	57%
WOMEN	45%
MILLENNIAL	43%
MEN	42%
GEN X	40%
GEN Z	36%

44%

Reducing message volume while increasing relevance is the top driver of perceived helpfulness, especially among Boomers and women who show the lowest tolerance for excess communication.

Transparency Supports, But Doesn't Lead

29%

Clear explanations for why a message was received are valued, but trail behind relevance and behavior-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
Use engagement signals and preference controls to dynamically adjust frequency, ensuring higher volume is earned through interaction rather than assumed.

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

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

WHICH WOULD MAKE BRAND
MESSAGES MORE HELPFUL?

| RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Sent at better times for me	7%	20%	22%	26%	15%	23%	19%
Sent in my preferred channel	25%	24%	26%	27%	21%	30%	25%
Fewer but more relevant	57%	40%	43%	36%	45%	42%	44%
Clearer "why I got this" explanations	24%	26%	32%	33%	29%	29%	29%
Messages triggered by my interactions with the brand	22%	34%	38%	40%	32%	35%	34%
None of these	14%	14%	5%	5%	12%	7%	9%

Preferred Alerts for Abandoned Carts

Price and Practicality Drive Alert Value

When it comes to cart abandonment alerts, consumers overwhelmingly favor signals that deliver clear, immediate value. Price-drop notifications stand out as the most desired alert by a wide margin, reinforcing strong price sensitivity across demographics. Availability-related alerts, such as back-in-stock notifications play a meaningful supporting role, particularly for younger shoppers who are more willing to wait for desired items. Complementary product alerts also resonate, especially post-purchase, signaling openness to helpful guidance when it feels additive rather than promotional.

By contrast, low-stock alerts and alternative recommendations are less compelling, suggesting that urgency alone is less persuasive than value or utility. Effective alerts succeed when they reduce effort, save money, or help shoppers act at the right moment.

Key Insights

Price Drops Are the Clear Standout

|	
BOOMER	82%
GEN X	68%
WOMEN	66%
MEN	59%
MILLENNIAL	57%
GEN Z	46%
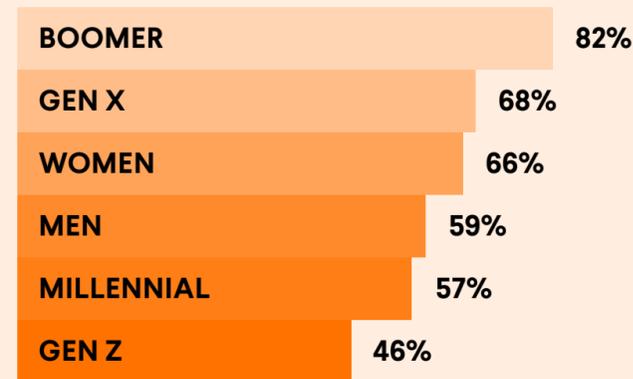
63%

Price-drop alerts are the most desired alert overall, with especially strong appeal among Boomers and women reinforcing the power of savings-driven signals.

Availability Alerts Support Intent

30%

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

MILLENNIAL	47%
GEN X	41%
GEN Z	39%
BOOMER	24%
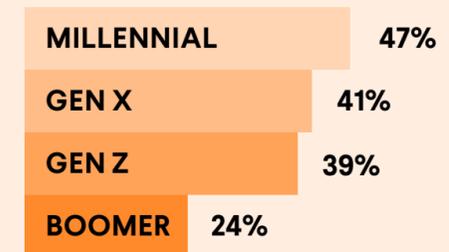
38%

Alerts recommending complementary items after purchase resonate strongly, suggesting openness to guidance when it feels useful rather than disruptive.

Urgency Alone Has Limited Pull

13%

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.

⌇ Strategic Takeaways

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

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

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

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

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	82%	68%	57%	46%	66%	59%	63%
Low stock	5%	14%	16%	17%	13%	13%	13%
Back in stock	26%	28%	30%	35%	29%	31%	30%
Similar alternatives if out of stock	17%	20%	24%	30%	21%	25%	23%
Complementary items after purchase	24%	41%	47%	39%	38%	39%	38%
None of these	9%	6%	2%	3%	5%	5%	5%

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

Acceptance Is Conditional on Relevance and Restraint

When consumers opt into a brand's communications, they implicitly expect a more connected experience, but not a louder one. Seeing ads on social platforms after browsing a brand site is broadly acceptable, yet sentiment hinges on how well those ads align with recent intent and how often they appear.

Most consumers evaluate these experiences pragmatically: ads are fine when they feel relevant, restrained, and clearly connected to their behavior. Overexposure or poor coordination quickly shifts perception from helpful to intrusive, particularly among older audiences. This underscores an important shift in expectations: cross-channel advertising is no longer judged in isolation, but as part of a unified brand conversation that should feel intentional, respectful, and consumer-controlled.

Key Insights

Younger Consumers Are More Receptive

|	
MILLENNIAL	30%
GEN Z	27%
GEN X	16%
BOOMER	5%
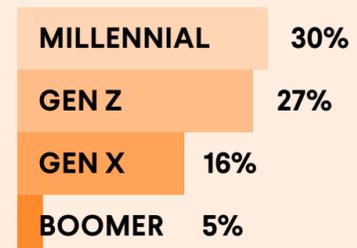
20%

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

Relevance and Frequency Decide Sentiment

32%

The most common response is conditional acceptance, with consumers across the board stating their feelings depend on ad relevance and frequency, highlighting tolerance rather than enthusiasm for retargeted social ads.

Annoyance Increases With Age

BOOMER	28%
GEN X	14%
MILLENNIAL	14%
GEN Z	12%
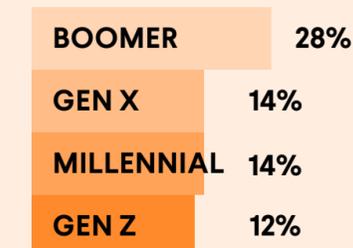
17%

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

Neutral Reactions Outnumber Positives

25%

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

Strategic Takeaways

1. Orchestrate Ads as a Continuation of Owned Experiences

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

2. Let Identity Drive Relevance, Not Volume

Use consented, identity-based signals to ensure ads are personalized 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.

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	5%	16%	30%	27%	19%	20%	20%
Neutral	26%	27%	20%	25%	24%	25%	25%
Annoyed	28%	14%	14%	12%	17%	17%	17%
Depends on frequency/relevance	26%	35%	31%	33%	33%	30%	32%
None of these	15%	8%	5%	3%	7%	8%	7%

Improving the Ad Experience for Consumers

Control and Relevance Matter More Than Explanation Alone

Consumers are clear about what improves ad experiences: relevance, restraint, and control matter more than simply explaining why an ad appears. While transparency helps establish baseline trust, it does not compensate for poor coordination or excessive frequency.

Shoppers increasingly expect ads to reflect their expressed interests, recent behavior, and stated preferences, especially when they have already opted into a brand's communications. Younger consumers, in particular, want the ability to shape what they see, while older shoppers prioritize fewer, more relevant impressions. This reflects a broader shift in expectations: effective advertising is no longer about exposure, but about orchestration, where ads feel like a helpful extension of an existing relationship rather than an intrusive interruption.
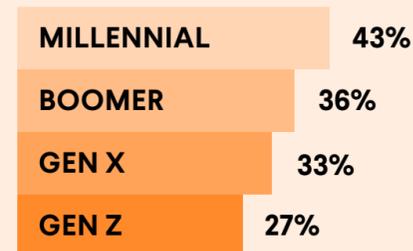
Key Insights

Transparency Helps, but Isn't Enough

GEN Z	29%
MEN	25%
MILLENNIAL	23%
GEN X	21%
WOMEN	18%
BOOMER	12%
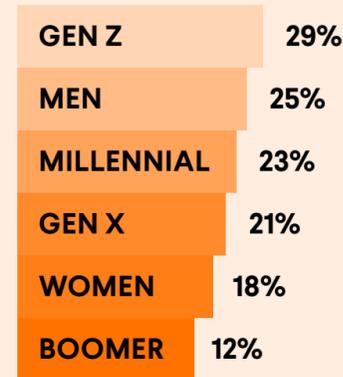
21%

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

Fewer, More Relevant Ads Improve Sentiment

MILLENNIAL	43%
BOOMER	36%
GEN X	33%
GEN Z	27%

35%

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

Preference-Based Targeting Resonates With Youth

GEN Z	42%
MEN	35%
MILLENNIAL	32%
WOMEN	27%
GEN X	24%
BOOMER	24%
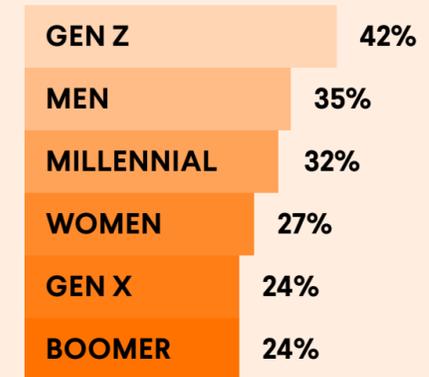
31%

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

Opt-Out Flexibility Builds Trust

41%

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

⚘ Strategic Takeaways

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

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

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

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

WHAT WOULD MAKE THOSE
ADS FEEL BETTER?

RESPONSE	AGE GROUP				GENDER		EVERYONE
	BOOMER	GEN X	MILLENNIAL	GEN Z	FEMALE	MALE	TOTAL
Clear "why am I seeing this"	12%	21%	23%	29%	18%	25%	21%
Fewer, more relevant ads	36%	33%	43%	27%	33%	36%	35%
Ability to opt-out of ads but keep emails/texts	33%	40%	47%	43%	40%	42%	41%
Only see ads for categories I choose	24%	24%	32%	42%	27%	35%	31%
None of these	16%	10%	2%	6%	11%	6%	8%

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

Consumer Sentiment on AI Personalization in Shopping

AI Is Welcome When Control and Value Are Clear

AI-driven personalization is transforming eCommerce, offering tailored experiences that enhance convenience and relevance. While many consumers appreciate these advancements, some concerns persist, particularly among older demographics.

Consumers are not broadly opposed to AI-driven personalization, but their comfort is highly conditional. Most shoppers fall into a pragmatic middle: they are either cautiously positive or undecided, signaling openness rather than enthusiasm. Acceptance rises sharply when consumers feel they can control frequency, timing, and topics, turning AI into a helpful assistant rather than a surveillance tool.

Younger consumers show the strongest enthusiasm, while resistance is concentrated among older shoppers who remain sensitive to data use and intent. This highlights a critical reality: AI earns trust when it is transparent, restrained, and clearly beneficial. Without control and clarity, even well-intentioned personalization risks creating discomfort rather than value.
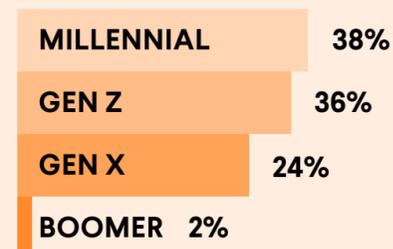
Key Insights

Discomfort Concentrates Among Older Consumers

BOOMER	30%
WOMEN	15%
GEN X	14%
MEN	11%
MILLENNIAL	6%
GEN Z	5%
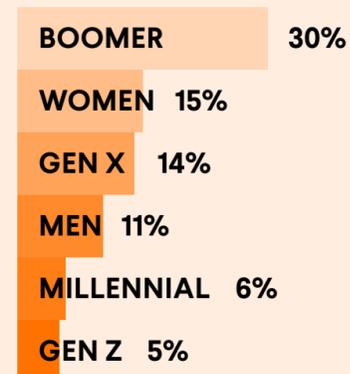
13%

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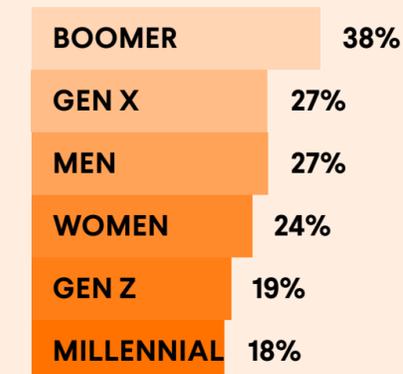
Enthusiasm Skews Younger

MILLENNIAL	38%
GEN Z	36%
GEN X	24%
BOOMER	2%

25%

Younger shoppers are significantly more likely to say they "love" AI-driven personalization, reflecting comfort with algorithmic experiences when value is clear.

Uncertainty Remains

BOOMER	38%
GEN X	27%
MEN	27%
WOMEN	24%
GEN Z	19%
MILLENNIAL	18%

25%

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

Control Turns AI Into a Positive

36%

The most common positive response, with relatively equal feedback is conditional acceptance, with consumers comfortable using AI when they can control frequency, timing, and topics, reinforcing control as the gateway to trust.

Strategic Takeaways

1. Make Control the Entry Point for AI
Introduce AI-powered personalization 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 behavior. 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 personalization more broadly across the experience.

4. Segment AI Experiences by Age and Comfort
Lean into richer AI-driven personalization 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	2%	24%	38%	36%	26%	25%	25%
I'm positive, as long as I can control frequency, timing, and topics, and see why I'm getting a message	29%	36%	38%	39%	34%	37%	36%
I'm not sure yet	38%	27%	18%	19%	24%	27%	25%
I don't feel comfortable with this	30%	14%	6%	5%	15%	11%	13%

Consumer Comfortableness with Being Recognized Across Devices and Sessions

**Consumers Love Cross-Device Recognition, Especially When It's Permissioned**

Consumers are increasingly comfortable with brands recognizing them across devices and sessions, but generally when that recognition is clearly permissioned and purpose-driven.

Identity is not viewed as invasive when it is used to maintain continuity, reduce friction, and respect preferences consumers have already shared. The strongest acceptance comes when identity helps brands remember shoppers, what they like, what they've seen, and how they prefer to engage, rather than uncover new or unexpected information.

Younger consumers are more enthusiastic about this continuity, while older shoppers remain cautious, signaling the importance of clarity and control. Ultimately, identity earns trust when it feels like a service that improves experience, not a mechanism for monitoring behavior.

Key Insights

Younger Shoppers Embrace Continuity

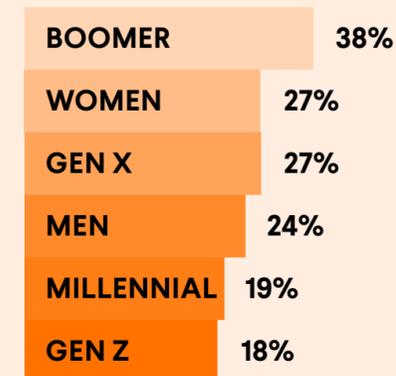|	
GEN Z	35%
MILLENNIAL	35%
MALE	27%
GEN X	24%
FEMALE	22%
BOOMER	3%

25%
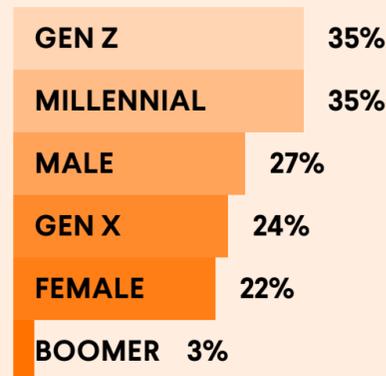
Younger consumers are significantly more likely to say they "love" being recognized across sessions, signaling comfort with seamless, identity-driven experiences.

Discomfort Is Concentrated, Not Universal

BOOMER	38%
WOMEN	27%
GEN X	27%
MEN	24%
MILLENNIAL	19%
GEN Z	18%

12%

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

Uncertainty Persists Among Older Consumers

16%

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

Control Unlocks Comfort With Recognition

48%

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

Strategic Takeaways

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

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

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

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

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	3%	24%	35%	35%	22%	27%	25%
Fine with it if I control preferences	47%	47%	48%	48%	45%	51%	48%
Unsure	21%	14%	13%	14%	19%	12%	16%
Not comfortable	29%	14%	4%	3%	14%	10%	12%

Conclusion

Intelligent Orchestration, Not More Marketing, Will Win 2026

The 2026 Consumer Insights Report reinforces a defining shift in modern commerce: growth is no longer unlocked by more messages, more channels, or more campaigns, it is earned through intelligent orchestration. Consumers expect brands to recognize them, respect their preferences, and engage only when there is clear value. In this environment, relevance is not a tactic; it is the foundation of trust.

Across devices, shoppers move fluidly based on context and intent. Mobile is the baseline, desktop supports higher-consideration moments, and tablets quietly bridge the two. This multi-device reality demands continuity, experiences that remember shoppers, preserve momentum, and adapt in real time. Brands that fail to connect these moments risk fragmentation, friction, and lost intent.

As shopping behavior stabilizes and volume-driven growth plateaus, the opportunity shifts to precision. Younger consumers signal upside, but only for brands that deliver speed, personalization, and responsiveness without crossing into intrusion. Throughout the data, one message is consistent: fewer, better interactions outperform scale. Consumers reward brands that reduce noise, suppress redundancy, and communicate with purpose.

AI and identity are central to this next chapter, but only when deployed responsibly. Consumers are open to AI-powered personalization and cross-device recognition when these capabilities are transparent, permissioned, and clearly beneficial. When identity helps brands remember rather than track, and when AI is used to decide what not to send as much as what to send, trust strengthens instead of erodes.

Direct-to-brand growth reflects the same dynamic. Marketplaces remain critical for trust and discovery, but long-term value is built in owned environments where brands can recognize customers, honor preferences, and deliver continuity across touchpoints. The brands that succeed will use marketplaces for acquisition, then transition relationships into identity-driven, value-led experiences.

Ultimately, 2026 will favor brands that operate with intelligence and restraint, brands that replace campaign-led execution with always-on decisioning, powered by consented identity and real-time intent. The future belongs to those who orchestrate experiences holistically, proving at every interaction that they understand who the consumer is, what they want, and when it actually matters.

The tools to thrive in this evolving digital commerce landscape are at your fingertips. Now is the time to harness them, and Wunderkind is here to help you do just that. Let's make 2026 your strongest year yet.

Wunderkind

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

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

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