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eCommerce consumer research

Contents

In the current tough economic situation the behaviour of customers is unpredictable.

The core of your business is your customers. It's vital to know your target audience in order to thrive rather than just survive.

That's why we have conducted this research. Our intention is for you to use these insights when making decisions and developing growth plans.

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Key findings

Attitude towards finances

SAVING MONEY IS TOP OF MIND

83%
of consumers hunt around to find **bargains**

70%
of consumers shop around to make a **saving**, however small

Behaviour of online shoppers

Only 3%
of consumers **are loyal** to particular online retailers

Even with a different attitude to finances, consumers show comparable attitude to online behaviour (hunting for bargains, even small savings, not being loyal to online retailers)

Online expenditure

↓3%
decrease in online expenditures is expected by respondents in 2023 vs 2022

Groups that are expecting increase in expenditures are: male (2% average increase), having household income over £70k (8% increase), people with kids (2%), those who shop online weekly or more often

Importance of delivery options

COST IS THE KING

54%
ranked delivery cost to be **#1** important delivery factor

If delivery costs are higher than **£5.95** you can **lose more than 50%** of your customers

Appealing online offers

£20
annual fee for free returns is somewhat appealing for 48% frequent e-shoppers

57%
of those who do not have a subscription are **open to this idea**

Most attractive non-delivery features: free samples of other products and exclusive offers for existing customers

Sustainability

40%
of respondents ranked green/sustainable delivery to be the **least important** delivery feature

Methodology

1,000
respondents

2-7 March 2023

Online Survey

Non-Grocery products

36%
Have kids

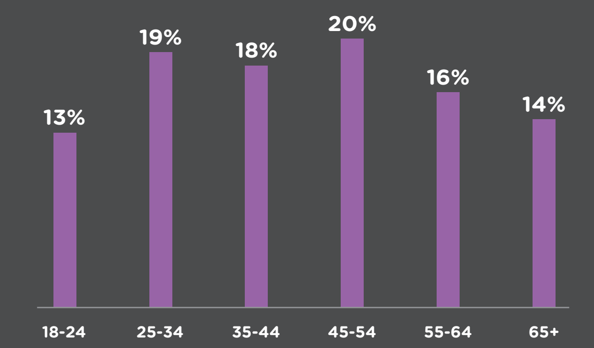
61%
Have pets

49%
Male

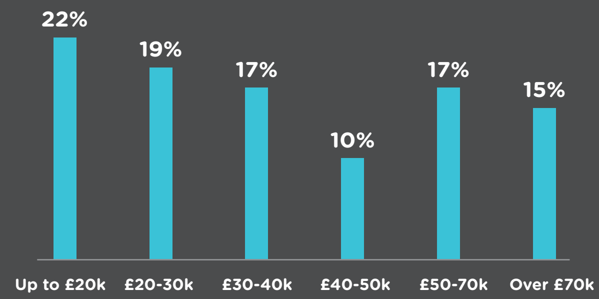
51%
Female

Region	% of respondents
London	13%
South East	14%
South West	9%
West Midlands	9%
East Midlands	7%
East of England	9%
Yorks & the Humber	8%
North West	11%
North East	4%
Scotland	8%
Wales	5%
Northern Ireland	3%

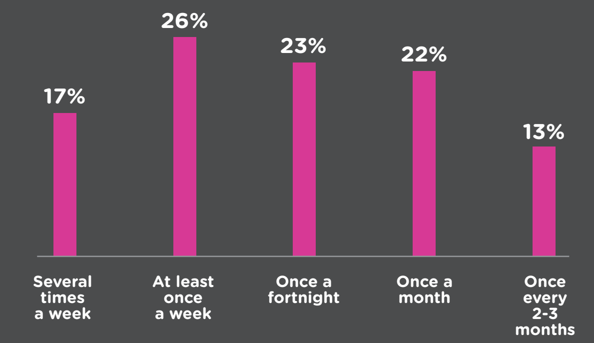
Age range, % of respondents



Household income range, % of the respondents



Online shopping frequency



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UK eCommerce market at a glance

USERS

55,820,000

Number of online shoppers

82.7%

Penetration rate
(2nd in the world)

2022 REVENUE

£111.5 bn

Down 11.2% on 2021 revenue

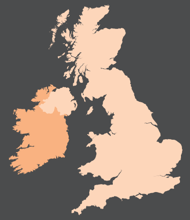
2027 PROJECTED REVENUE

£168.8 bn

Based on Compound Annual Growth Rate 2023-2027 of 8.43%

Source: Statista, March 2023

UK eCommerce market at a glance continued



2022 BIGGEST CATEGORIES

32% Fashion | **19%** Electronics | **17%** Toys, Hobby & DIY

2022 GROWING CATEGORY

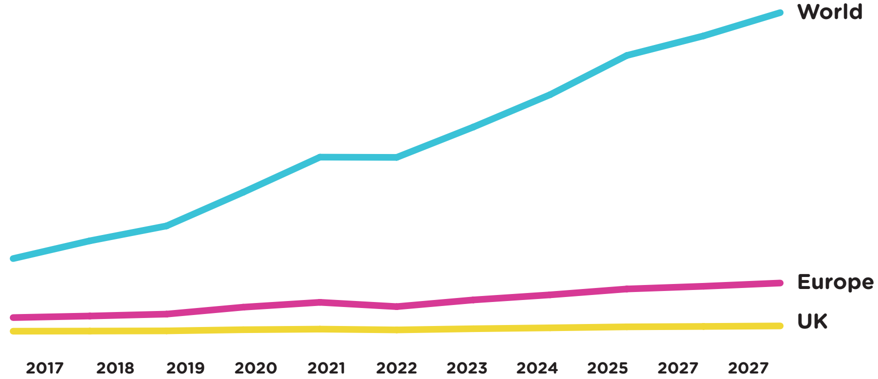
2.1% vs 2021
Food

2023-2027 HIGHEST FORECASTED GROWTH

126% Furniture | **102%** Food | **75%** Beverages

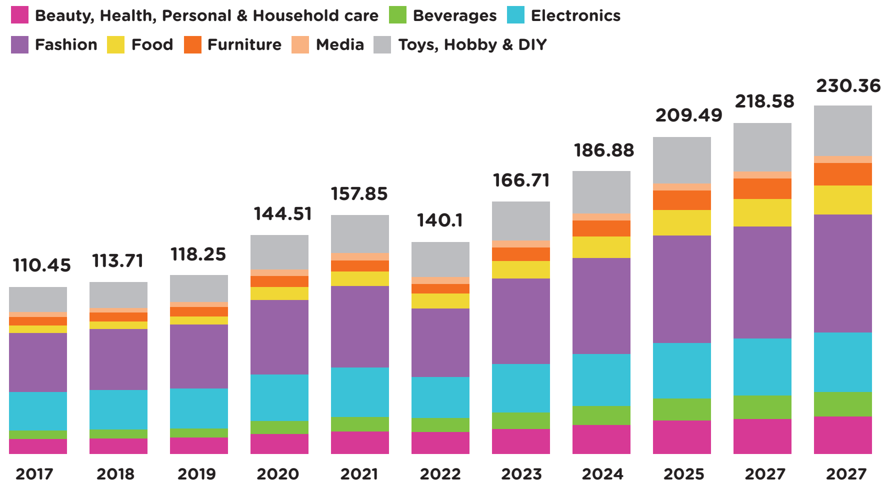
Source: Statista, March 2023

Revenue US$ bn, (World vs Europe vs UK)



Source: Statista, March 2023

Revenue by categories, US$ bn



Source: Statista, March 2023

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Attitude to finances and online shopping

Saving money is top of mind

83%
of consumers hunt around to find bargains

70%
shop around to make a saving, however small

3%
only are loyal to any particular retailer

With the cost of living crisis, it is no surprise that consumers' confidence is falling.

People are becoming more and more concerned about their finances feeling the need to keep a tight rein on their spending.

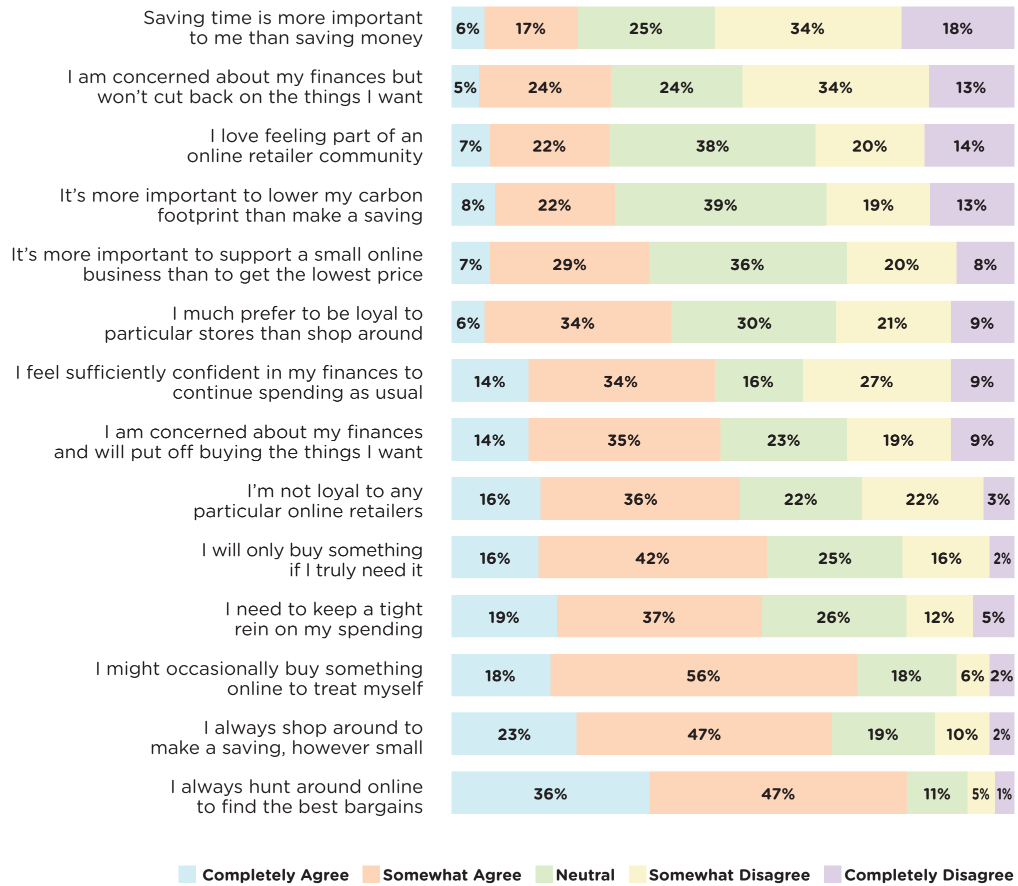
That results in "making a saving" and therefore becomes the main motivator of shopping online. Consumers spend time shopping around in search of best discounts in order to make savings – however small.

The concepts of loyalty, being part of a retailer community, sustainability issues, and supporting small businesses all take a back seat to the main financial concern of saving money.

GOOD NEWS

74%
of consumers still might occasionally buy something to treat themselves

Attitude towards finances and online shopping



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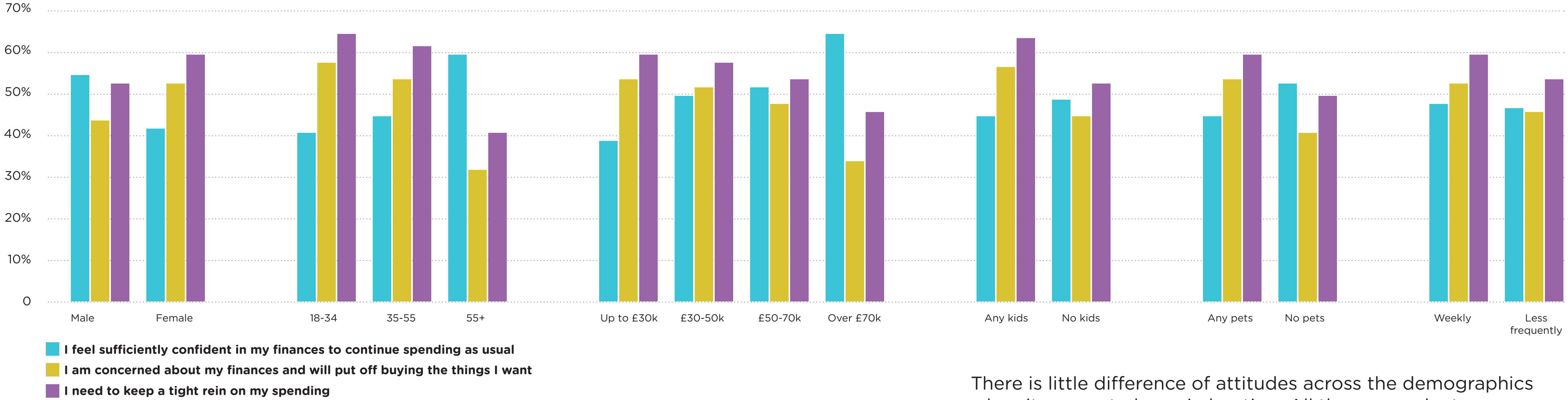
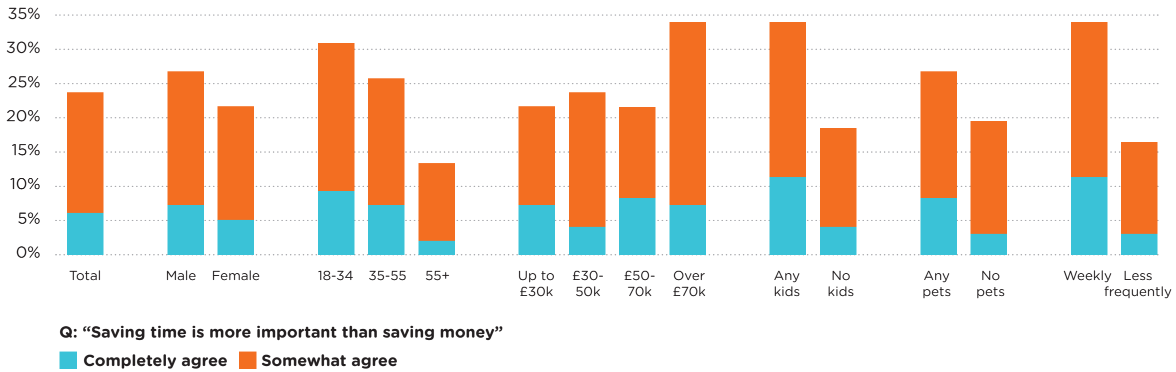
More worried about their finances: female, younger, with lower income, and having kids or pets to care for

Attitudes to finances: demographic breakdown



Importance of saving time: demographic breakdown



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There is little difference of attitudes across the demographics when it comes to bargain hunting. All the respondent groups are comparable in terms of not being loyal to any retailers or looking to make a saving, however small.

It is evident that the least confident and most worried about finances are female, people of younger ages, with lower household income, consumers having someone to care about: kids or pets. Interestingly, frequent buyers who shop online weekly or more often are more concerned about finances too.

It is important to highlight that younger people, who are more concerned about finances, are more inclined to occasionally buy something online to treat themselves, and 30% of respondents aged 18-34 agree that "saving time is more important to me than saving money", a higher percentage in comparison to other age groups.

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Attitudes to finance can differ but people are all equally determined to hunt for bargains

There were three clusters identified from attitudinal and spend preferences:

Cluster 1

Confident about finances and can buy on impulse; happy to make non-necessary purchases; least likely to shop around (35% of the respondents).

Cluster 2

Concerned about finances but won't cut back on everything – will occasionally treat-buy; money less important than convenience/environment; most likely to be loyal to/support small online businesses (29% of the respondents).

Cluster 3

Very concerned about finances; will cut back/put off buying and will hunt online for savings; making a saving more important than convenience or loyalty (36% of the respondents).

Clusters demographics

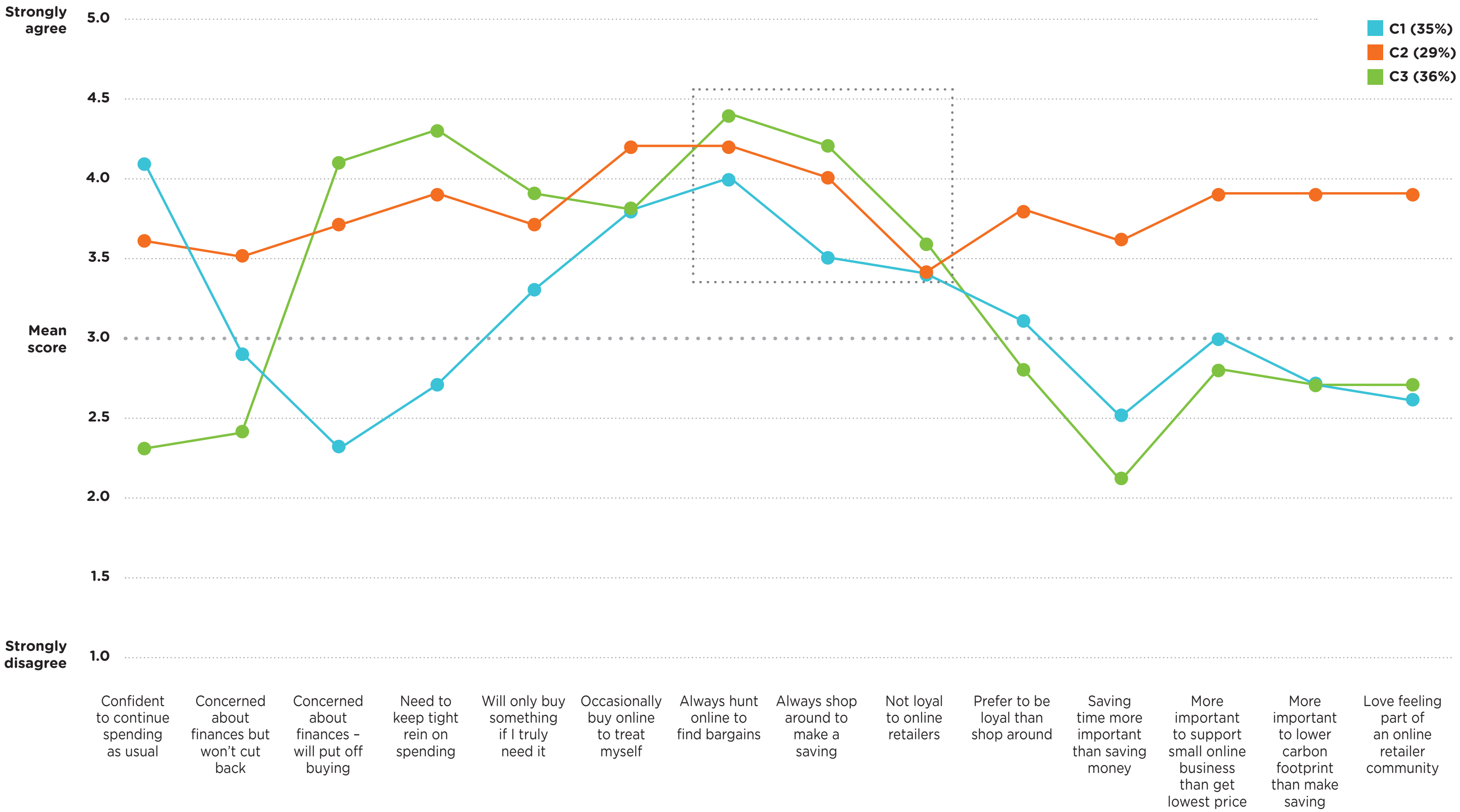
	Male % of respondents	Female % of respondents	Age mean	Household income thousands (mean)	Have children % of respondents	Have pets % of respondents
Cluster 1	57	43	50.3	43.5	24	51
Cluster 2	46	54	39	38.9	51	71
Cluster 3	42	58	43.6	35.6	35	63

eCommerce Consumer Research, Whistl, 2023

Attitudes to finance can differ but people are all equally determined to hunt for bargains
continued

Attitudes to finance differ, but consumers show the same attitude to online shopping: looking for bargains, savings and not being loyal to retailers.

Three clusters from attitudinal and spend preferences



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Respondents are expecting a decrease in their online expenditure by 3%, however there are exceptions...

Q

How will your spend on online (non-grocery) purchases in 2023 compare versus 2022?

3%
decrease in online expenditure is expected by respondents in 2023 vs 2022

8%
increase in online expenditure is expected by respondents with household income over £70k

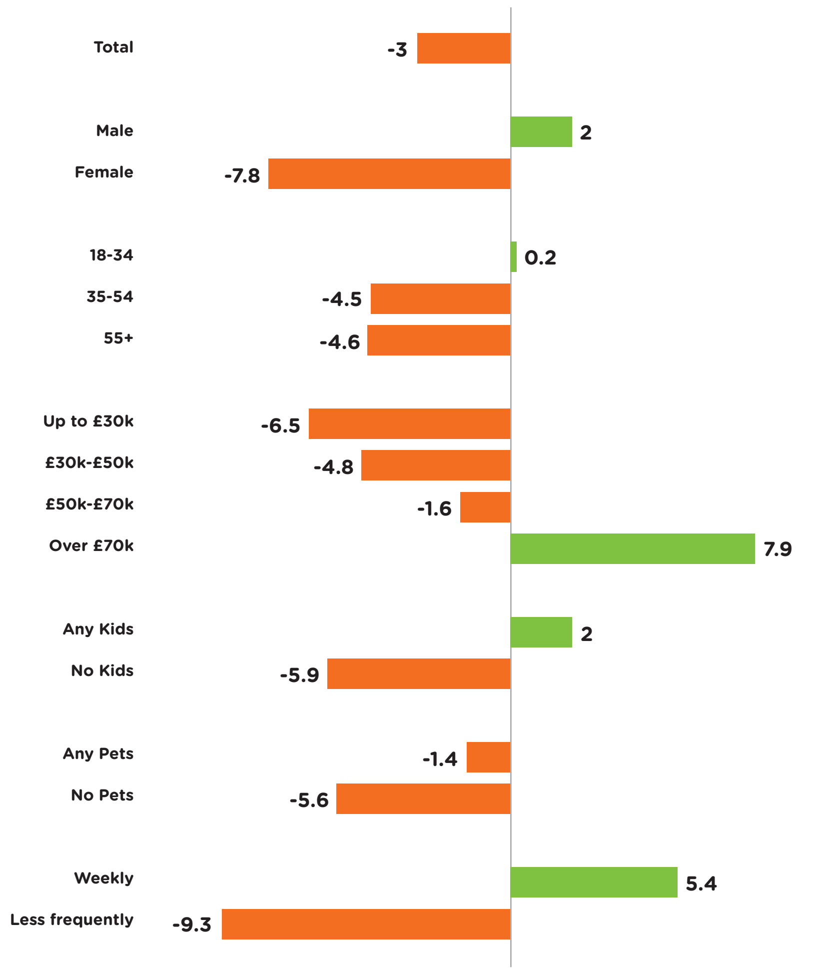
2.3
is the average number of online non-grocery purchases expected to be made by respondents in a typical month in 2023

When predicting their online non-grocery purchases in 2023 compared to 2022, on average respondents are expecting a decrease of 3%. Largest drop in online expenditure is expected by females and those who shop less frequently than once a week.

Increase in online expenditure is expected by male respondents (2% average expenditure increase among male respondents), consumers with household income over £70k (8% increase), people with kids (2% increase), frequent e-shoppers buy online at least weekly (5% increase).

Frequent e-shoppers are also expecting to get the highest number of non-grocery purchases arriving as a parcel in a typical month – 3.9, while the average accounts for 2.6.

Expected difference in online expenditures in 2023 vs 2022



eCommerce Consumer Research, Whistl, 2023

Attitude to various features of online options

Delivery cost is #1 priority for e-shoppers in 2023

Q

When making decisions in 2023 on which non-grocery items to buy online and from where, how important will each of these be? Rank in order of importance.

54%
ranked delivery cost to be #1

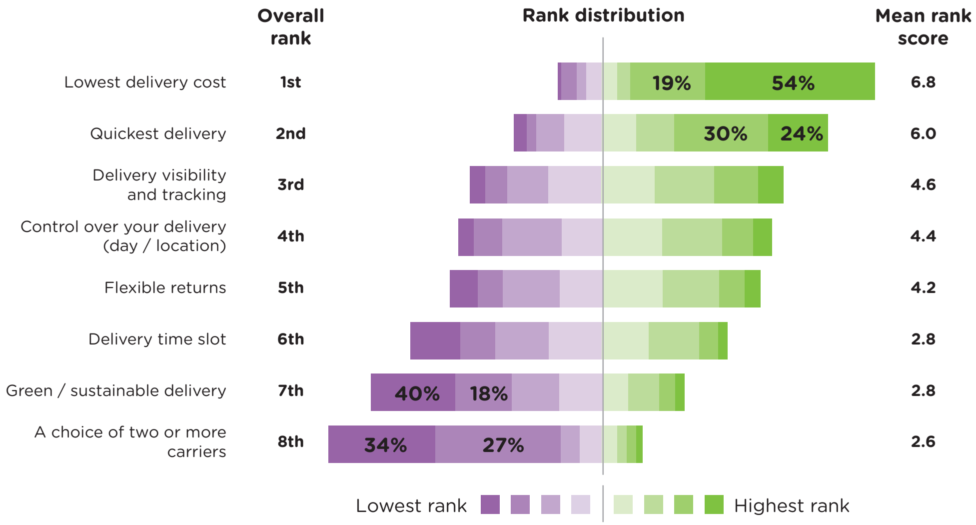
The noticeable change in 2023 is the delivery cost being a priority over the speed of the delivery. In 2022 these two features were comparable[1].

In 2023 delivery cost was ranked the most important option by 54% of respondents, and quick delivery ranked 1st by 24% of respondents.

Delivery visibility and tracking, control over your delivery, flexible returns and delivery time slot tend to have same importance for customers.

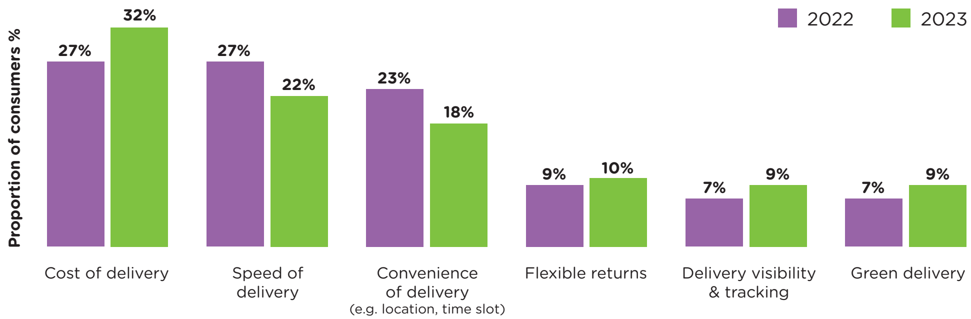
Surprisingly, a green/sustainable delivery was ranked least important by 40% of respondents.

Importance of delivery options



eCommerce Consumer Research, Whistl, 2023

The importance of cost of delivery surpasses the importance of speed of delivery in 2023 compared to 2022.



[1] eCommerce Delivery Benchmark report, Auctane, Retail Economics, 2023

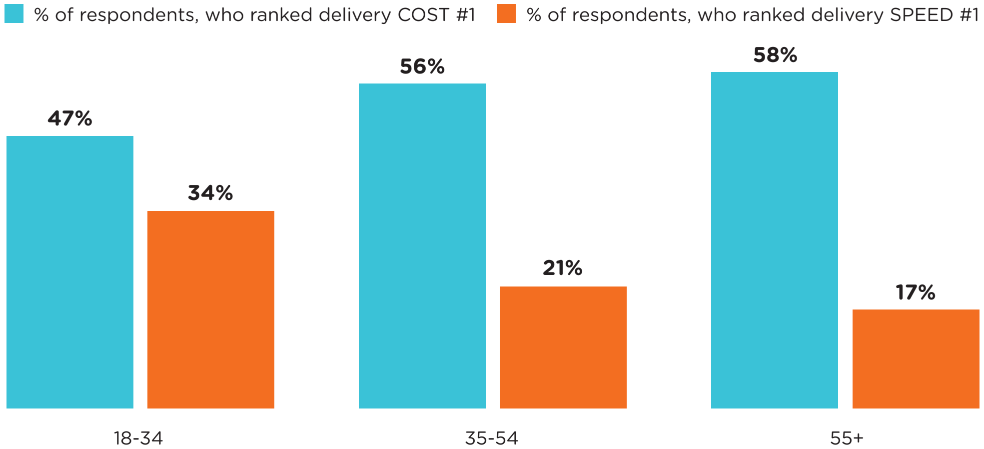
eCommerce Delivery Benchmark report, Auctane, Retail Economics, 2023

Not all delivery features are equally important for various demographic groups

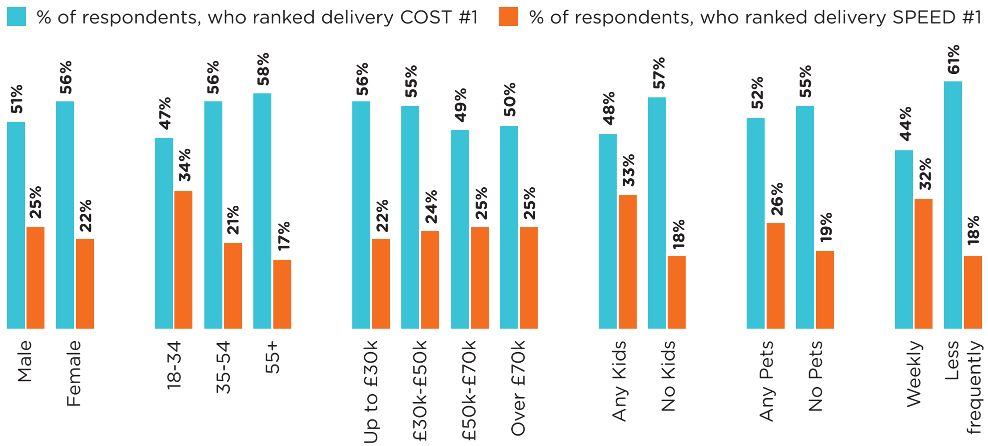
The importance of a quick delivery speed is decreasing with age, while the importance of delivery cost is increasing.

Male respondents tend to value speed a little more than female, and to value lower cost a little less than female. The same pattern is applicable for consumers having kids (vs those who have not) and frequent e-shoppers (versus those who shop less often than once a week).

Change of delivery preferences with age



Differences in importance of delivery features by demographics



eCommerce Consumer Research, Whistl, 2023

If delivery costs are higher than £5.95 you risk losing more than 50% of your customers

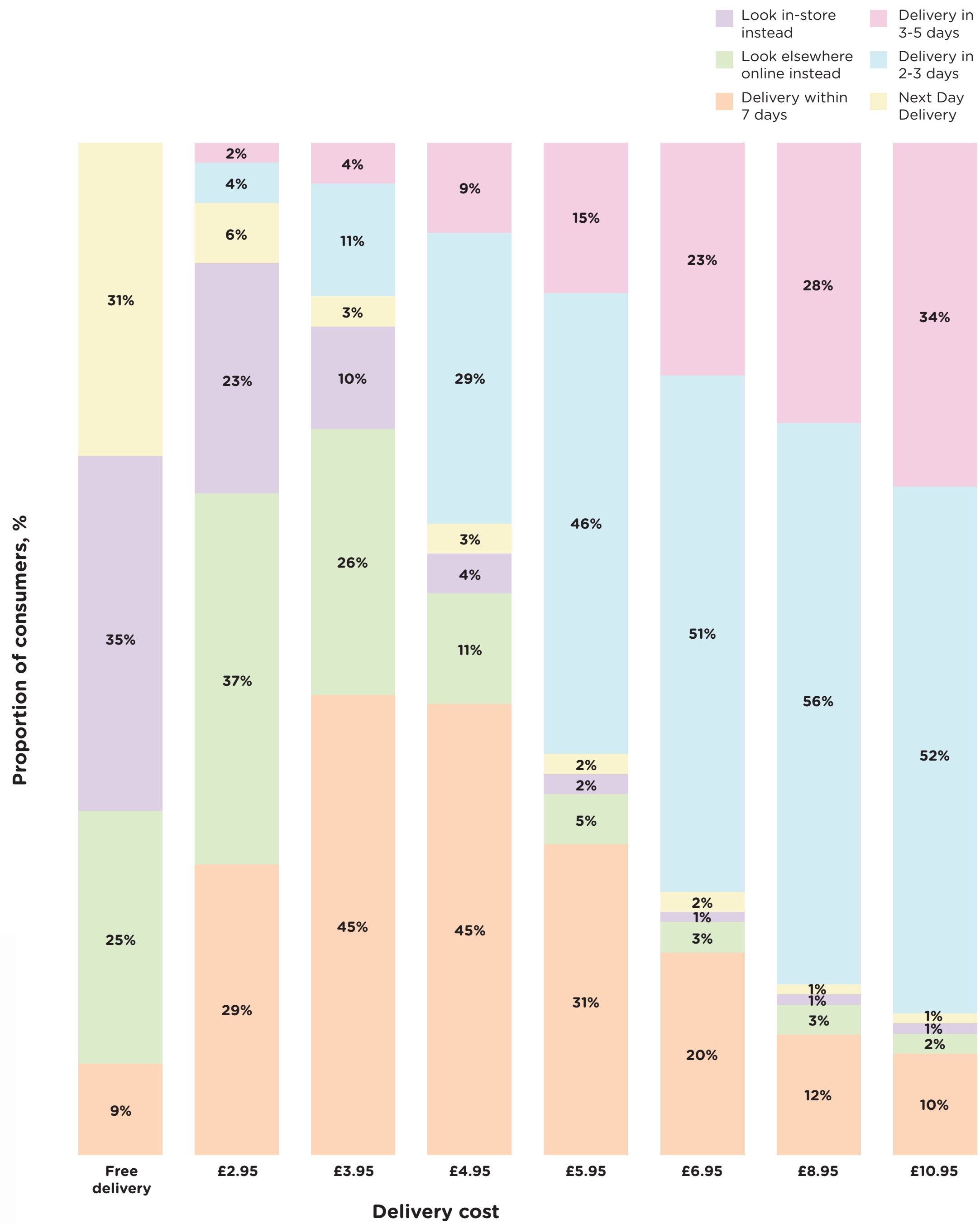
50%
of consumers could be lost if the delivery cost is above £5.95

26%
of respondents find the idea of £30 annual fee for free delivery somewhat appealing

Thinking about delivery of non-grocery standard size parcels, consumers are becoming very price-sensitive to delivery. A price higher than £3.95: third of customers are going to look elsewhere (online or even in-store) at £4.95, more than half at £5.95, and more than 70% at £6.95.

Delivery within 7 days is bearable by consumers only with free delivery, while 2-3 day delivery is ok for delivery cost under £4.95.

Only 7% of respondents would be definitely be interested in £30 annual fee for free deliveries. 19% of respondents might be interested. It appeals most to males, people with kids and frequent e-shoppers.



eCommerce Consumer Research, Whistl, 2023

Almost two thirds of respondents expect returns to be free

65% of respondents think that returns should be free in any circumstances

48% of frequent e-shoppers definitely/might be interested in £20 annual fee for free returns

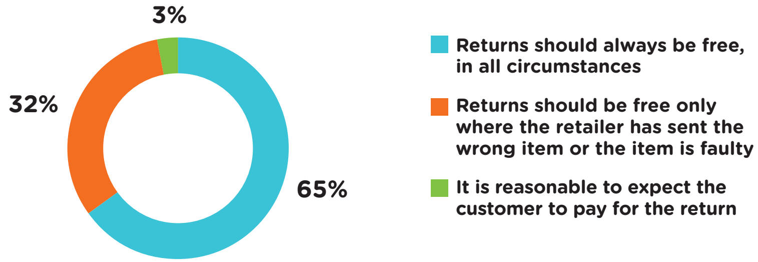
53% are definitely not interested in £40 annual fee for free deliveries and free returns

Most respondents believe returns should be free, especially if the reason for return relates to retailer's fault.

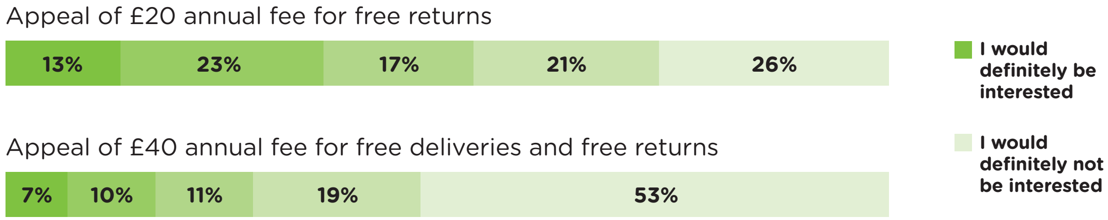
However, barring a free returns option, an annual £20 fee could be quite interesting, especially for those who shop weekly or more often (48%).

Free returns appeal most to females and younger respondents.

Most of respondents think that returns should be free

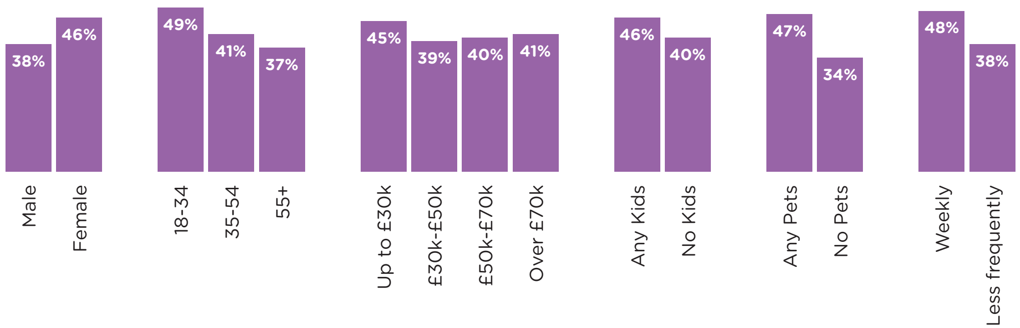


Attractiveness of annual fees for free deliveries/returns



More and less attracted by free returns

% of respondents for whom free returns are very appealing (would definitely tempt to buy)



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Subscriptions are very popular and continue to have great potential

A quarter of respondents already has one or more subscriptions. **43%** of respondents are open to the idea.

Most interested in subscriptions are respondents within 18-34 age group.

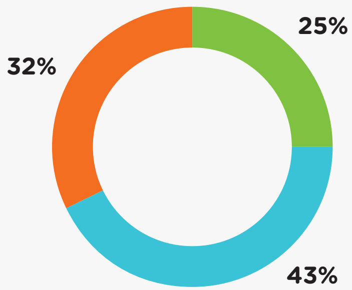
Least interested are people 55+ years old, of whom **46%** do not have any subscriptions and would not be interested in any in future.

% discount on future purchases and free delivery on all recurring orders are the most appealing features of subscriptions – ranked 1st and 2nd by more than **40%** of respondents.

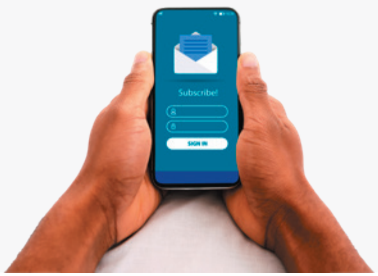
57%

of those who do not have a subscription are open to the idea

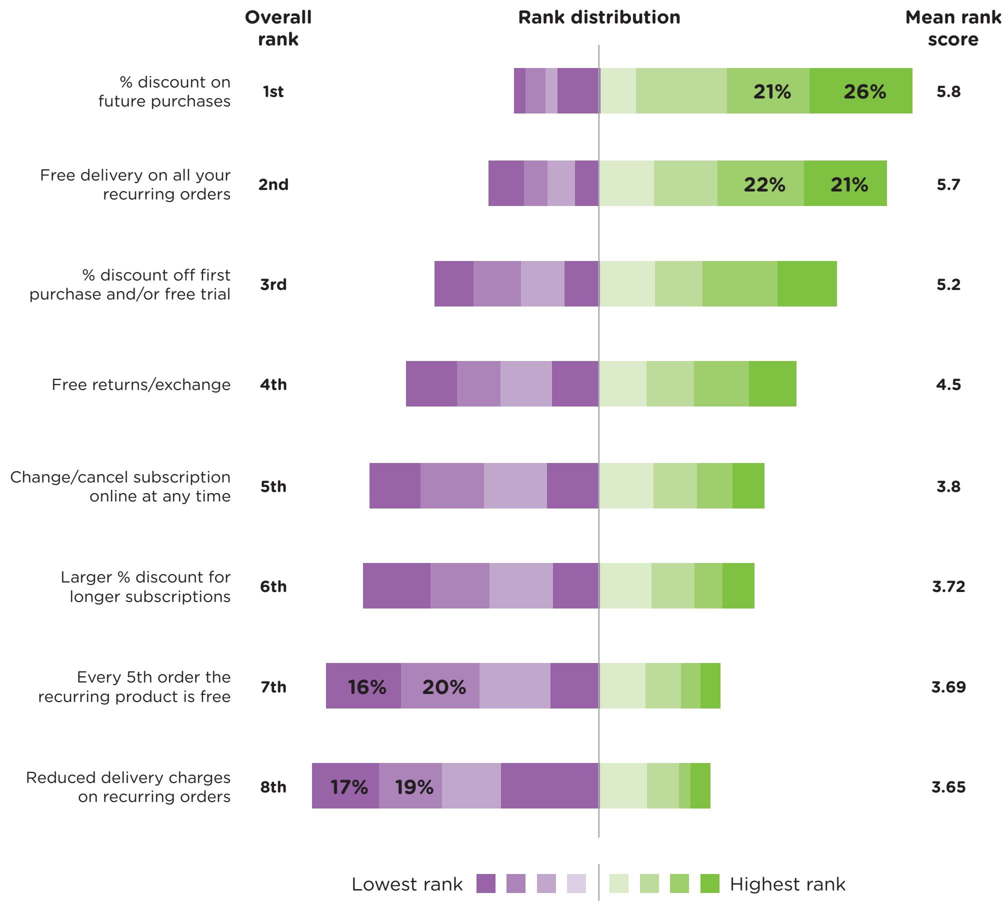
Appeal of subscriptions, % of respondents



- **I currently have one or more subscriptions**
- **I don't currently have any such subscriptions but would be open to the idea**
- **I don't currently have any such subscriptions and would be not interested in the future either**



What are most attractive features of subscriptions



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Customers say discounts and special offers are the best way to attract new consumers

Answering the open question *"If you were an online business owner, how would you entice new customers to buy from you for the first time,"* **47%** of respondents mentioned discounts and special offers, and **40%** named free delivery.

Thinking about how they would make customers loyal, **49%** of respondents suggested loyalty rewards, **39%** named discounts and offers.

Respondents ideas
How to entice people to buy

Max details on web site
Reliable delivery
Good website
Easy returns
Gifts
Free returns
Adverts
Value for money
Discounts/Offers
Free delivery
Next day delivery
Good customer service
Loyalty rewards
Buy 1 get 1 free
Good quality products
Flexible delivery time slots

Respondents ideas
How to make people loyal

Discounted delivery
Buy 1 get 1 free
Free returns
Free delivery
Easy returns
Email updates
Gift cards
Quality products
Loyalty rewards
Free gifts
Discounts / Offers
Good customer service
Low prices
Reliable delivery
Max details on web site
Fast delivery
Unique products
Reliable delivery
Tracking

eCommerce Consumer Research, Whistl, 2023

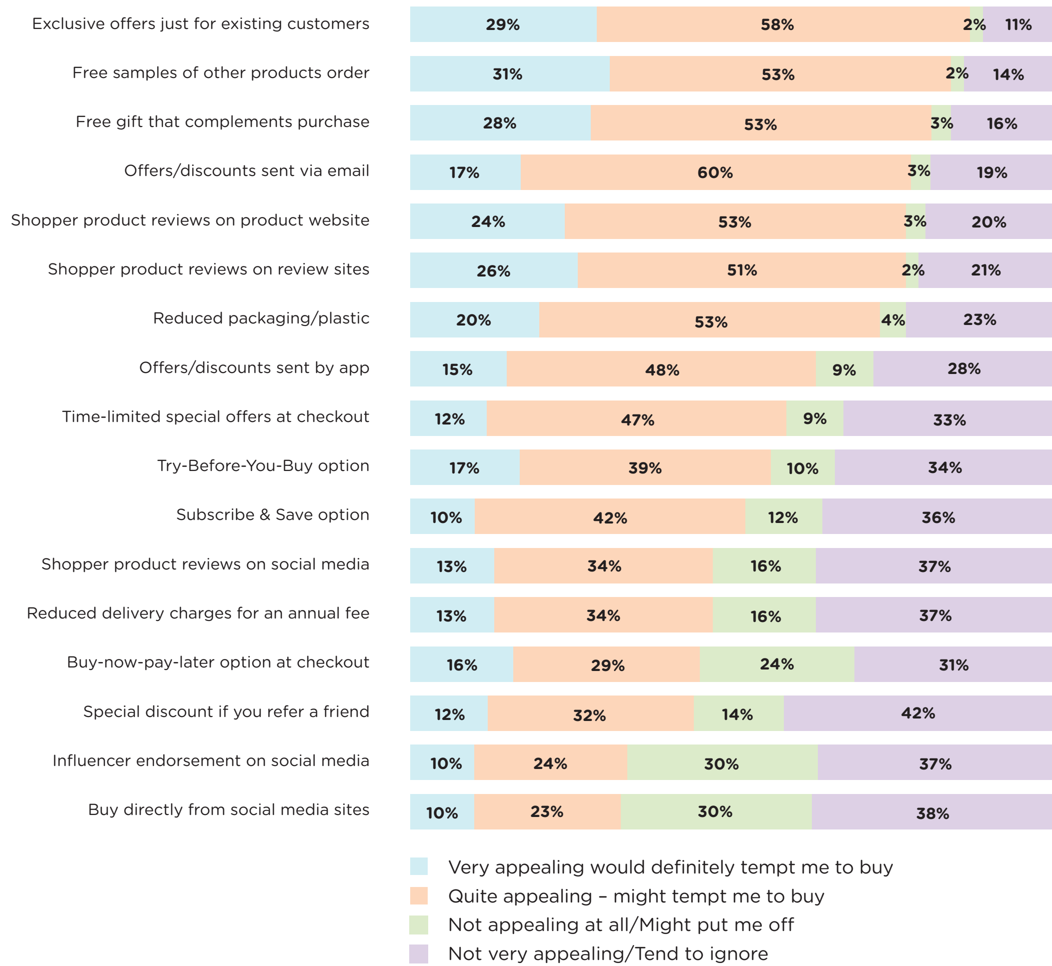
Most appealing non-delivery online features are free product samples and exclusive offers

The most appealing non-delivery options are free product samples of other products (31%), exclusive offers for existing customers (29%), free gifts that complement purchase (28%).

Free samples are more appealing for respondents under 55 years old, frequent e-shoppers, female, respondents with kids or pets.

Buy-now-pay-later option is more appealing for younger respondents, those who have kids and are frequent online shoppers.

Attractiveness of different non-delivery features of online offers



eCommerce Consumer Research, Whistl, 2023

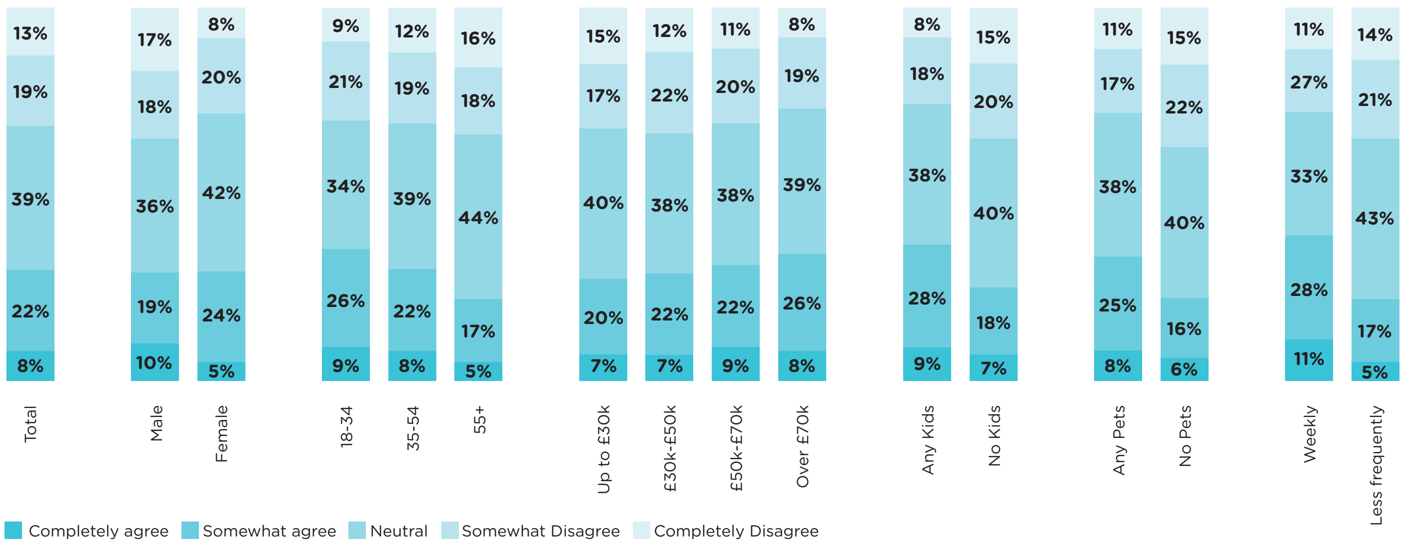
Consumers are concerned by sustainability issues, but it is far from the top priority

40%
of respondents ranked green/sustainable delivery as the least important delivery feature

35%
of young consumers think lowering carbon footprint is more important than making a saving

Younger people, even when concerned about finances, still consider sustainability issues more important than other age groups. 35% of 18-34 respondents completely or somewhat agree that "It's more important to lower my carbon footprint than make a saving".

How do you feel about:
"It's more important to lower my carbon footprint than make a saving"

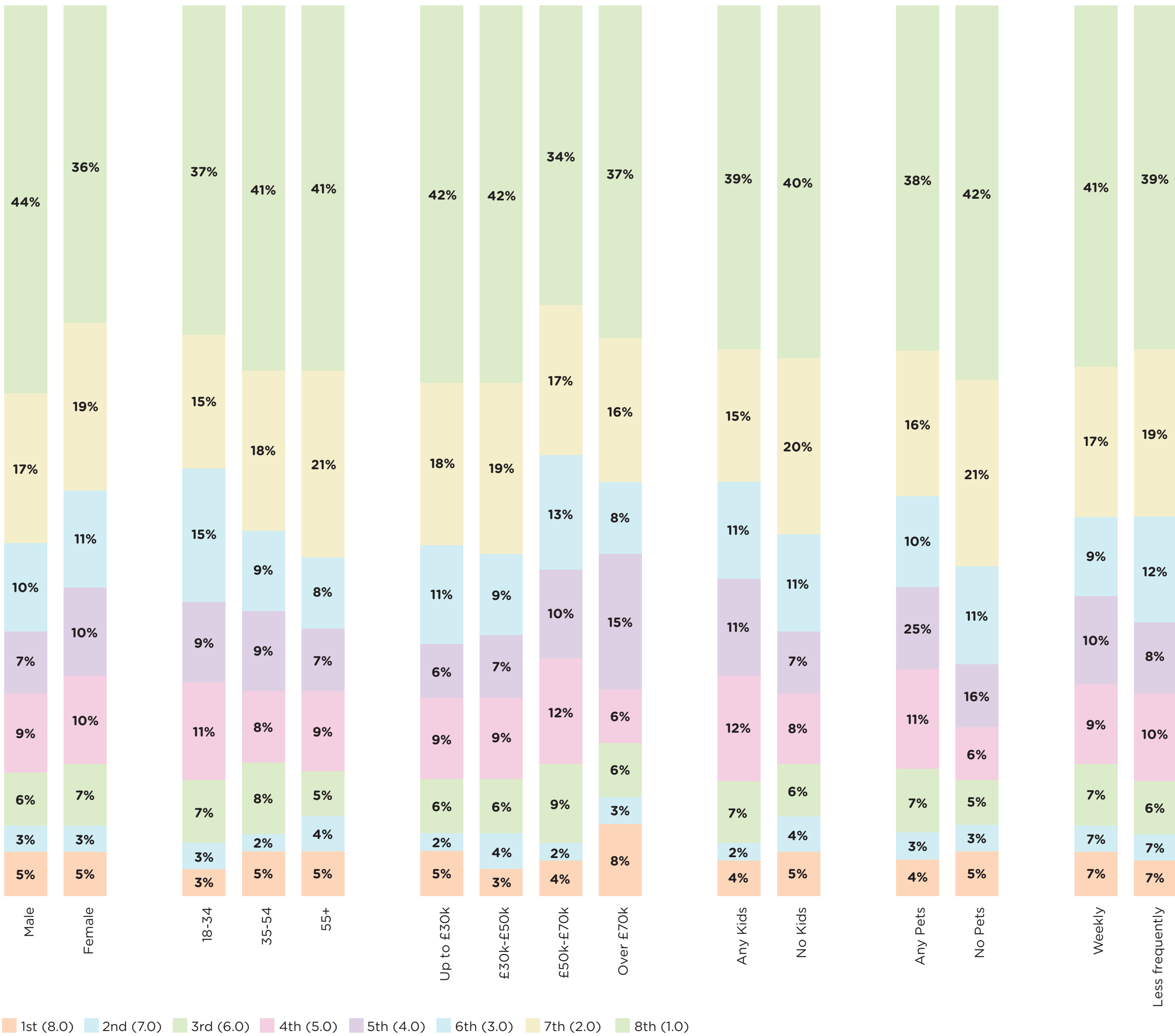


eCommerce Consumer Research, Whistl, 2023

Consumers are concerned by sustainability issues, but it is far from the top priority
continued

Fewer respondents from the youngest age group ranked “Green/Sustainable delivery” as last, however, it is noteworthy that higher percentages of those who ranked it #1 and #2 are among 55+ age group.

Sustainability/Green delivery got the last rank among the other delivery options



eCommerce Consumer Research, Whistl, 2023

Facebook is the most frequently used social media channel

61%
of respondents use Facebook on a daily basis

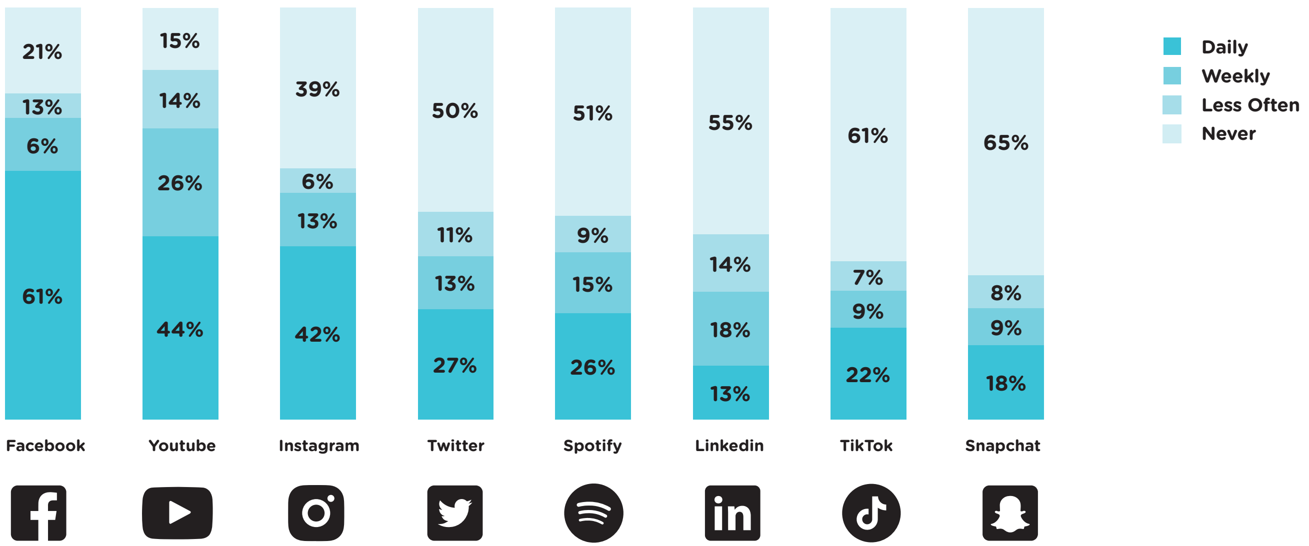
Most used by males:

- YouTube
- Twitter
- Spotify
- LinkedIn

Most used by females:

- Facebook
- Instagram
- Tiktok

Frequency of social media use



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Consumer Online Profiles

Men
18-34

Household income

£39.3k

41%
Have kids

58%
Have pets

Key facts	Expect online spend to increase by 5% in 2023	Speed of delivery is more important and cost less important	Are less likely to be attracted by free delivery and more likely to be attracted by advertising

DELIVERY	39% place speed of delivery in #1 position (significantly higher compared to other online shoppers) and are less sensitive to delivery charges. Significantly **more** positive towards the concept of annual fees for deliveries compared to the average. 41% place lowest delivery cost in #1 position, significantly lower importance compared to other online shoppers.	
ONLINE EXPENDITURE AND ATTITUDE TO FINANCES	Expect online spend to increase by 5% in 2023. Concerned about finances and will put off buying rather than shopping around. Saving time is more important. Significantly more likely than most to support small online businesses over getting the lowest price and more likely than most to love feeling part of an online retailer community. Think it is important to lower one's carbon footprint.	
SUBSCRIPTIONS	Use subscriptions slightly more than average and find the % discount on future purchases aspect particularly appealing.	
RETURNS	Expect to return 15% of online purchases in 2023, higher than the average across all online shoppers. More positive towards the concept of annual fees for returns compared to the average.	
"VERY" APPEALING FEATURES, WOULD TEMPT TO BUY (SHOWN >30%)	Free delivery (68%) Free returns (46%) **Same/next day delivery (44%)** **Free gift that complements your purchase (42%)** **Free Click & Collect option (42%)**	**Free samples of other products with your order (39%)** Exclusive offers just for existing customers (35%) **Shopper product reviews on product website (33%)** Shopper product reviews on review sites (33%) **Buy-now-pay-later option at checkout (30%)**
DON'T FEEL APPEALING/WILL IGNORE (SHOWN >30%)	**Buy directly from social media sites (45%)** **Influencer product endorsement on social media (39%)** **Free returns for an annual fee (38%)** **Special discount if you refer a friend (36%)**	**Offers/discounts sent via email (36%)** **Subscribe & Save option (34%)** **Reduced delivery charges for an annual fee (33%)** **Offers/discounts sent by app (31%)**
OWN SUGGESTIONS	**For enticing customers** Discounts/offers (49%) **Free delivery (23%)** **Adverts/social media (17%)**	**For retaining customers** Loyalty rewards (48%) Discounts/offers (39%) Good customer service (13%) Gift cards/vouchers (11%)
REGULAR USE OF SOCIAL MEDIA (DAILY/WEEKLY)	92% use Instagram 82% use Youtube 71% use Spotify 69% use Facebook	67% use Twitter 63% use Snapchart 58% use TikTok 44% use LinkedIn

Percentages significantly higher / lower (at 99% confidence) than rest of the sample shown in blue / orange respectively

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Women
18-34

Household income

£38.2k

37%

Have kids

67%

Have pets

Key facts

- Expect online spend to decrease by 3.5% in 2023
- Use subscriptions more than others
- Love feeling part of an online community

DELIVERY	31% place speed of delivery in #1 position, higher than average. 51% place lowest delivery cost in #1 position (slightly lower than average). Slightly more positive towards the concept of annual fees for deliveries compared to the average.	
ONLINE EXPENDITURE AND ATTITUDE TO FINANCES	Expect online spend to decrease by 3.5% in 2023. Feel less confident than others to keep spending as usual – concerned about finances and will put off buying rather than shopping around. Need to keep a tight rein on spending but will occasionally buy online as a treat. Significantly **more** likely than others to love feeling part of an online retailer community.	
SUBSCRIPTIONS	Use subscriptions significantly **more** than average and find the % discount on future purchases aspect particularly appealing.	
RETURNS	Expects to return **18%** of online purchases in 2023 – **77%** think returns should always be free. More positive towards the concept of annual fees for returns compared to the average	
"VERY" APPEALING FEATURES, WOULD TEMPT TO BUY (SHOWN >30%)	Free delivery (68%) Free returns (50%) **Exclusive offers just for existing customers (41%)** **Free gift that complements your purchase (38%)**	Shopper product reviews on review sites (36%) Free samples of other products with your order (36%) **Same/next day delivery (36%)** **Shopper product reviews on product website (36%)**
DON'T FEEL APPEALING/WILL IGNORE (SHOWN >30%)	**Free returns for an annual fee (50%)** **Influencer product endorsement on social media (50%)** **Special discount if you refer a friend (47%)** **Buy directly from social media sites (47%)**	**Reduced delivery charges for an annual fee (43%)** **Buy-now-pay-later option at checkout (42%)** Try-Before-You-Buy option (36%)
OWN SUGGESTIONS	**For enticing customers** Discounts/offers (47%) Free delivery (34%) **Adverts/social media (18%)**	**For retaining customers** **Loyalty rewards (58%)** **Discounts/offers (49%)** Free delivery (13%)
REGULAR USE OF SOCIAL MEDIA (DAILY/WEEKLY)	**90%** use Instagram **87%** use Youtube 78% use Facebook **66%** use Spotify	**65%** use TikTok **51%** use Twitter **51%** use Snapchart **41%** use LinkedIn

Percentages significantly higher / lower (at 99% confidence) than rest of the sample shown in blue / orange respectively

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Men
35-54

Household income

£42.9k

49%
Have kids

62%
Have pets

Key facts

- Expect online spend to increase by 4% in 2023
- Use LinkedIn more than others
- Find getting offers sent by app more attractive

DELIVERY	53% place lowest delivery cost in #1 position (similar to average), while 22% place speed of delivery in #1 position (similar to average). Average sensitivity to delivery charges. More negative than positive towards the concept of annual fees for deliveries.	
ONLINE EXPENDITURE AND ATTITUDE TO FINANCES	Expect online spend to **increase by 4%** in 2023. Feel somewhat confident to continue spending as usual but are also on the hunt to find bargains online (still need to watch spending and only buy something if needed). To some extent will support small online businesses over getting the lowest price and has mixed feelings about wanting to be part of an online retailer community. Mixed feelings about how important it is to lower carbon footprint.	
SUBSCRIPTIONS	Use subscriptions slightly more than average.	
RETURNS	Expect to return 10% of online purchases in 2023, slightly lower than the average across all online shoppers. Split feelings towards the concept of annual fees for returns.	
"VERY" APPEALING FEATURES, WOULD TEMPT TO BUY (SHOWN >30%)	Free delivery (58%) Free returns (38%) Free samples of other products with your order (29%) Exclusive offers just for existing customers (27%)	Free Click & Collect option (24%) Shopper product reviews on review sites (24%) Offers/discounts sent via email (23%) Free gift that complements your purchase (23%) **Offers/discounts sent by app (22%)**
DON'T FEEL APPEALING/WILL IGNORE (SHOWN >30%)	Influencer product endorsement on social media (66%) Buy directly from social media sites (65%) Free returns for an annual fee (56%) Shopper product reviews on social media (55%) Buy-now-pay-later option at checkout (51%)	Special discount if you refer a friend (49%) Reduced delivery charges for an annual fee (49%) Subscribe & Save option (44%) Try-Before-You-Buy option (44%) Time-limited special offers during checkout (41%)
OWN SUGGESTIONS	**For enticing customers** Discounts/offers (49%) Free delivery (36%) Value for money/best price (10%)	**For retaining customers** Value for money / best price (10%) Discounts / offers (34%) Free delivery (12%) Good customer service (11%)
REGULAR USE OF SOCIAL MEDIA (DAILY/WEEKLY)	79% use Youtube 78% use Facebook 49% use Instagram 48% use Twitter	**42%** use LinkedIn 42% use Spotify 28% use TikTok 20% use Snapchart

Percentages significantly higher / lower (at 99% confidence) than rest of the sample shown in blue / orange respectively

Women
35-54

Household income

£40.2k

57%
Have kids

71%
Have pets

Key facts

- Expect online spend to decrease by 12% in 2023
- Free gifts is the most lucrative feature
- More ecologically minded

DELIVERY	58% place lowest delivery cost in #1 position (higher than average), while 20% place speed of delivery in #1 position (lower than average). Average sensitivity to delivery charges. Negative towards the concept of annual fees for deliveries.	
ONLINE EXPENDITURE AND ATTITUDE TO FINANCES	Expect online spend to decrease by 12% in 2023. Feel significantly less confident to continue spending as usual and will put off buying. Need to keep a tight rein on spending and will always shop around to make a saving. Mixed feeling about supporting small online businesses over getting lowest price and about wanting to be part of an online retailer community. Not sure if it's more important to lower carbon footprint over making a saving.	
SUBSCRIPTIONS	Use subscriptions similar to the average.	
RETURNS	Expect to **return** 11% of online purchases in 2023, similar to the average across all online shoppers. Split feelings towards the concept of annual fees for returns, similar to the average	
"VERY" APPEALING FEATURES, WOULD TEMPT TO BUY (SHOWN >30%)	Free delivery (69%) Free returns (43%) **Free samples of other products with your order (42%)** **Free gift that complements your purchase (37%)** Shopper product reviews on review sites (30%)	Exclusive offers just for existing customers (29%) **Reduced packaging/plastic (28%)** Shopper product reviews on product website (28%) **Green/Sustainable delivery (27%)** Free Click & Collect option (26%)
DON'T FEEL APPEALING/WILL IGNORE (SHOWN >30%)	Buy directly from social media sites (73%) Influencer product endorsement on social media (65%) Free returns for an annual fee (59%) Special discount if you refer a friend (58%) Buy-now-pay-later option at checkout (57%)	Shopper product reviews on social media (56%) Reduced delivery charges for an annual fee (54%) Subscribe & Save option (48%) Try-Before-You-Buy option (44%) Time-limited special offers during checkout (41%)
OWN SUGGESTIONS	**For enticing customers** Discounts/offers (54%) Free delivery (54%) **Free gifts (11%)**	**For retaining customers** Loyalty rewards (56%) Discounts / offers (46%) Free delivery (17%) **Free gifts (11%)**
REGULAR USE OF SOCIAL MEDIA (DAILY/WEEKLY)	80% use Facebook 66% use Youtube 58% use Instagram 35% use Spotify	32% use Twitter 22% use TikTok 21% use Snapchart **20%** use LinkedIn

Percentages significantly higher / lower (at 99% confidence) than rest of the sample shown in blue / orange respectively

Men
55-74

Household income

£38.9k

11%
Have kids

50%
Have pets

Key facts

- Expect online spend to decrease by 3% In 2023
- Plan to return only 6% of online purchases
- Almost no attractive features except for free delivery

DELIVERY	57% place lowest delivery cost in #1 position (higher than average), while 19% place speed of delivery in #1 position (lower than average). Significantly **higher** than average sensitivity to delivery charges. Significantly **more** negative towards the concept of annual fees for deliveries.	
ONLINE EXPENDITURE AND ATTITUDE TO FINANCES	Expect online spend to decrease by 3% in 2023, similar to the average. Feels very confident to continue spending as usual and won't put off buying. Doesn't need to keep a tight rein on spending and feels saving time is much more important than saving money. Not particularly interested in supporting small online businesses and does not really want to be part of an online retailer community. Does not think it's more important to lower one's carbon footprint than make a saving.	
SUBSCRIPTIONS	Use subscriptions a lot less than average: **11%** currently have a subscription and **48%** do not want one.	
RETURNS	Expect to return **6%** of online purchases in 2023, significantly lower than average across all online shoppers and significantly **less** (51%) think returns should always be free. Significantly **negative** towards the concept of annual fees for returns.	
"VERY" APPEALING FEATURES, WOULD TEMPT TO BUY (SHOWN >30%)	Free delivery (57%) **Free returns (31%)** **Exclusive offers just for existing customers (20%)** **Free samples of other products with your order (16%)** **Free Click & Collect option (16%)**	**Same/next day delivery (12%)** **Shopper product reviews on review sites (12%)** Reduced packaging/plastic (11%) **Free gift that complements your purchase (11%)** Green/Sustainable delivery (11%)
DON'T FEEL APPEALING/WILL IGNORE (SHOWN >30%)	**Influencer product endorsement on social media (90%)** **Buy directly from social media sites (85%)** **Free returns for an annual fee (80%)** **Shopper product reviews on social media (76%)** **Buy-now-pay-later option at checkout (74%)** **Reduced delivery charges for an annual fee (74%)**	**Special discount if you refer a friend (71%)** **Subscribe & Save option (66%)** **Time-limited special offers during checkout (61%)** **Try-Before-You-Buy option (59%)** **Offers/discounts sent by app (51%)**
OWN SUGGESTIONS	**For enticing customers** Free delivery (44%) Discounts/offers (42%) Value for money/best price (13%) Next day/fast delivery (12%)	**For retaining customers** Loyalty rewards (41%) Discounts/offers (32%) Free delivery (21%) Good customer service (16%)
REGULAR USE OF SOCIAL MEDIA (DAILY/WEEKLY)	**60%** use Facebook **53%** use Youtube **21%** use Twitter **20%** use Instagram	**18%** use Spotify **17%** use LinkedIn **9%** use TikTok **6%** use Snapchat

Percentages significantly higher / lower (at 99% confidence) than rest of the sample shown in blue / orange respectively

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Women
55-74

Household income

£35.0k

12%

Have kids

55%

Have pets

Key facts

- Expect online spend to decrease by 7% in 2023
- Not interested in speed of delivery, but customer service is important
- Active Facebook users

DELIVERY	59% place lowest delivery cost in #1 position (higher than average), while **14%** place speed of delivery in #1 position (lower than average). Higher than average sensitivity to delivery charges. **75%** are negative towards the concept of annual fees for deliveries.	
ONLINE EXPENDITURE AND ATTITUDE TO FINANCES	Expect online spend to decrease by 7% in 2023, a larger decrease than the average. Feel somewhat confident to continue spending as usual and won't put off buying but always hunt for bargains. Need to keep a tight rein on spending less than most and feel saving time is more important than saving money. Mixed feelings about supporting small online businesses but do not really want to be part of an online retailer community. Unsure if it's more important to lower one's carbon footprint than make a saving.	
SUBSCRIPTIONS	Use subscriptions a lot less than average: **15%** currently have a subscription and **42%** do not want one.	
RETURNS	Expect to return **7%** of online purchases in 2023, significantly lower than average across all online shoppers. Significantly **negative** towards the concept of annual fees for returns.	
"VERY" APPEALING FEATURES, WOULD TEMPT TO BUY (SHOWN >30%)	Free delivery (71%) Free returns (45%) Free Click & Collect option (27%) Exclusive offers just for existing customers (21%) **Free samples of other products with your order (18%)**	Shopper product reviews on product website (18%) Shopper product reviews on review sites (18%) Same/next day delivery (17%) Green/Sustainable delivery (17%) Reduced packaging/plastic (16%)
DON'T FEEL APPEALING/WILL IGNORE (SHOWN >30%)	**Influencer product endorsement on social media (92%)** **Buy directly from social media sites (92%)** **Free returns for an annual fee (82%)** **Shopper product reviews on social media (78%)** **Buy-now-pay-later option at checkout (74%)**	**Special discount if you refer a friend (73%)** **Reduced delivery charges for an annual fee (68%)** Subscribe & Save option (58%) **Try-Before-You-Buy option (56%)** **Offers / discounts sent by app (54%)**
OWN SUGGESTIONS	**For enticing customers** Free delivery (46%) Discounts/offers (39%) Value for money/best price (14%) **Free returns (14%)** **Good customer service (12%)**	**For retaining customers** Loyalty rewards (40%) Discounts/offers (33%) Free delivery (20%) Good customer service (16%)
REGULAR USE OF SOCIAL MEDIA (DAILY/WEEKLY)	74% use Facebook **43%** use Youtube **30%** use Instagram **18%** use LinkedIn	**15%** use Twitter **10%** use Spotify **6%** use TikTok **2%** use Snapchat

Percentages significantly higher / lower (at 99% confidence) than rest of the sample shown in blue / orange respectively

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Online consumer profile:
Delivery cost is not a priority

11.8%
of online shoppers think free delivery is not a priority

15%
increase in online expenditures is expected

Customers for whom delivery cost is not a priority significantly differ from others in the following:

- **More male than female**
- **More of them have kids**
- **Buy online more often**
- **Use social media more than others**

This profile was identified in the sample by the criteria:

'Very appealing, would definitely tempt me to buy' must not have been selected for the 'Free Delivery' feature

'Lowest delivery cost' must not have been selected as 1st choice in the delivery importance ranking question

Free delivery must not have been mentioned in the open-ended question on how to entice new customers and keep them loyal.

DELIVERY	52% place delivery speed in #1 position (twice the average). Less than average sensitivity to delivery charges. Less negative than others towards the concept of annual fees for deliveries.	
ONLINE EXPENDITURE AND ATTITUDE TO FINANCES	Expect **online spend** to increase by **15%** in 2023. Feel somewhat confident to continue spending as usual and are less inclined to cut back than others. More likely to consider saving time more important than saving money compared to others and less likely to hunt online to find bargains. Love to be part of an online retailer community and think it's more important to support small online businesses than get the lowest price. Tend to think it's more important to lower one's carbon footprint than make a saving.	
SUBSCRIPTIONS	Use **subscriptions** about the same as the average (27% currently have a subscription, with 29% opposed to having one).	
RETURNS	Expect to **return 14%** of online purchases in 2023, higher than the average across all online shoppers. 60% think returns should always be free (slightly lower than the average). Split feelings towards the concept of annual fees for returns	
"VERY" APPEALING FEATURES, WOULD TEMPT TO BUY (SHOWN >30%)	**Free delivery is not a priority and neither are other features 'Very appealing'** **Exclusive offers just for existing customers (21%)** **Free returns (14%)** **Free samples of other products with your order (14%)** **Mostly they tend to find features 'Quite appealing', rather than very appealing or unappealing** **Free delivery (86%)**[1] **Free returns (69%)**	**Reduced packaging/plastic (65%)** **Shopper product reviews on product website (61%)** **Free samples of other products with your order (60%)** **Features they find Very/Quite Appealing sig. more than others:** **Buy directly from social media sites (48%)** **Influencer product endorsement on social media (45%)**
DON'T FEEL APPEALING/WILL IGNORE (SHOWN >30%)	**Neither do they find any features particularly unappealing:** **Influencer product endorsement on social media (55%)** **Buy directly from social media sites (52%)** Special discount if you refer a friend (51%)	
OWN SUGGESTIONS	**For enticing customers** Discounts/offers (36%) Adverts/social media (22%)	**For retaining customers** Loyalty rewards (42%) Discounts/offers (30%) Good customer service (17%)
REGULAR USE OF SOCIAL MEDIA (DAILY/WEEKLY)	77% use Facebook 72% use Youtube 58% use Instagram 50% use Spotify	48% use Twitter 44% use TikTok 42% use LinkedIn 42% use Snapchat

Percentages significantly higher / lower (at 99% confidence) than rest of the sample shown in blue / orange respectively

[1] Significantly higher on 'Quite Appealing' because most other online shoppers find free delivery 'Very Appealing'

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Pet Owners

Household income

£70k+

56%
Have kids

73%
Have dogs

53%
Have cats

46%
Male

54%
Female

32% **18-24**

49% **35-43**

19% **55+**

Key facts

- Expect online spend to increase by 12%
- Active subscription users with potential to grow
- Active social media users with higher-than-average usage of: Instagram, LinkedIn and Twitter

DELIVERY	50% place lowest delivery cost in #1 position (slightly lower than average), while 32% place speed of delivery in #1 position (higher than average). Less than average sensitivity to delivery charges. More negative than positive towards the concept of annual fees for deliveries.	
ONLINE EXPENDITURE AND ATTITUDE TO FINANCES	Expect **online spend** to increase by 12% in 2023. Feel very confident to continue spending as usual and will not put off buying. Need to keep a tight rein on spending less than most and think saving time is more important than saving money. Love to be part of an online retailer community and tend to think it's more important to support small online businesses than get the lowest price. Tends to think it's more important to lower one's carbon footprint than make a saving.	
SUBSCRIPTIONS	Use subscriptions significantly more than average (40% currently have a subscription) and only 21% opposed to one	
RETURNS	Expect to return 15% of online purchases in 2023, significantly higher than the average across all online shoppers. 68% think returns should always be free (higher than the average). Split feelings towards the concept of annual fees for returns	
"VERY" APPEALING FEATURES, WOULD TEMPT TO BUY (SHOWN >30%)	Free delivery (63%) Free returns (44%) Free samples of other products with your order (34%) Exclusive offers just for existing customers (33%)	Same/next day delivery (32%) Free gift that complements your purchase (31%) Shopper product reviews on product website (31%) Green/Sustainable delivery (30%)
DON'T FEEL APPEALING/WILL IGNORE (SHOWN >30%)	Free returns for an annual fee (61%) Influencer product endorsement on social media (61%) Buy directly from social media sites (56%) Special discount if you refer a friend (53%) Buy-now-pay-later option at checkout (5%)	Reduced delivery charges for an annual fee (47%) Try-Before-You-Buy option (40%) Subscribe & Save option (39%) **Shopper product reviews on social media (38%)** Time-limited special offers during checkout (37%)
OWN SUGGESTIONS	**For enticing customers** Discounts/offers (49%) Free delivery (37%) Adverts/social media (13%)	**For retaining customers** Loyalty rewards (64%) Discounts/offers (41%)
REGULAR USE OF SOCIAL MEDIA (DAILY/WEEKLY)	82% use Facebook 77% use Instagram 69% use Youtube 54% use LinkedIn	52% use Twitter 51% use Spotify 40% use TikTok 34% use Snapchat

Percentages significantly higher / lower (at 99% confidence) than rest of the sample shown in blue / orange respectively

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