

MARIST POLL™

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NPR/Marist Poll

The Digital Economy:
Summary of Findings

This NPR/Marist Poll Reports:

Americans' Shopping Habits

Americans are online shoppers. But, that doesn't mean they are turned off by the in-store experience. In fact, a majority of Americans who shop online (56%) *prefer* to shop in a brick and mortar store. 37% of online shoppers are true to the digital experience and prefer to buy online. Nearly seven in ten Americans (69%) say they have purchased an item online. This includes 43% of U.S. residents who say they are regular online shoppers doing so daily (2%), at least once a week (16%), or at least once a month (25%).

And, it is Amazon that has permeated the shopping psyche of online buyers. 63% of Americans say they have bought an item through Amazon which is 92% of online shoppers. More than four in ten Americans, 44%, are Amazon Prime users which includes 30% who are personally a Prime member and an additional 14% who share someone else's membership. This means that nearly two in three *online shoppers* (64%) are either an Amazon Prime member (44%) or share someone else's Prime membership (20%).

Online shoppers also trust Amazon with their personal information. 67% of online consumers report having either a great deal (32%) or quite a lot of confidence (35%) in Amazon to protect their privacy and personal information. This contrasts with the overall perception of online retailers. A majority of online shoppers (52%) say they either *don't have very much* (38%) or *have no confidence at all* (14%) in most online retailers to keep consumers' personal data secure.

Given the degree of trust online shoppers place in Amazon, it follows that the plurality of online shoppers (44%) say Amazon is their first stop when making an online purchase. Fewer turn to a search engine such as Google (33%), the apps or websites of a specific store (10%), a specific brand online (6%), or an online marketplace such as eBay or Etsy (5%).

So, how do online shoppers access the digital marketplace? A majority (54%) say they do so most often with a desktop or laptop computer. But, that could change. 45% buy online from a mobile device such as a smart phone or tablet including a majority (53%) of those under 45. Only 1% of online shoppers say they use a voice home assistant such as Google's Home,

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Amazon's Alexa, or Apple's Homepod most often to buy online. However, 18% of the overall American population own such a device, and 10% of online shoppers have used a voice home assistant to make a purchase at some point.

Motivating Factors

Despite an appreciation of the in-store experience for the majority of online shoppers (56%) over digital retailers (37%), there are significant factors that motivate them to point and click for their purchases. When deciding whether to shop online instead of making an in store purchase, 39% of online shoppers cite the speed in which they need an item as the *most* important determining factor. The difficulty in getting to the store (23%) and the price of an item (23%) follow. Fewer online shoppers mention shipping rates (9%) or the availability of items (5%).

The convenience of online shopping weighs heavily in the decision to buy online. Most online consumers say the ability to shop day or night (88%, including 64% who cite this reason as a major factor), the ease in which one can find the product for which they are looking (88%, including 62% who cite this reason as a major factor), saving time (84%, including 61% who cite this reason as a major factor), and the breadth of product choices (84%, including 58% who cite this as a major factor) are either major or minor factors in their online shopping habits.

Online shoppers also value the lack of lines and people (78%), availability of product reviews by other shoppers (78%), and the cheaper prices (76%) afforded by online shopping. However, fewer online consumers consider these to be major factors (48%, 38%, and 44%, respectively) when deciding to take their business online.

56% of those who shop virtually say the availability of recommendations by the online retailer is influential in their purchasing decision. This includes 18% who consider it to be a major component in their decision.

Preferences of Online Shoppers

Most online shoppers (90%) prefer free shipping even if an item takes longer to arrive.

Brands aren't dead, but it likely requires greater effort to rise above the noise of so many product choices. 73% of online shoppers say they set out looking for a particular brand while nearly one in five (18%) are more likely to just be guided by a recommendation from the online retailer. Nearly half of online shoppers (48%) are more concerned with getting the best deal compared with 47% who are online to purchase a specific brand. Of note, online shoppers who regularly make purchases via Amazon are more likely to be concerned with getting a bargain (52%) than being brand loyal (43%).

Nearly four in ten online shoppers (39%) say an online retailer's free return policy largely influences their decision to buy online. 37% report it influences their choice a little, and 24% say it does not impact their decision at all.

Purchased Items

Clothes or shoes are the leading online purchase made by Americans (58%), including 84% of online shoppers. Electronics such as TV's, computers, speakers, or headphones (48%) is the second most mentioned category of items bought online by American adults including 69% of online shoppers who have made such a purchase. Vitamins or supplements (26%), pet food or supplies (19%), household basics such as batteries, toothpaste, or garbage bags (18%), pharmacy basics such as over-the-counter medicines or lotion (14%), non-perishable groceries (12%), and prescription drugs or health products such as contact lenses (12%) round out the list among Americans.

The top purchase among Amazon shoppers is clothes or shoes (84%). However, among these shoppers, only 20% say they usually purchase garments or shoes from Amazon. 76% say they buy them from another retailer.

Aside from cars, airline tickets, and tickets for concerts or sporting events, a plurality of online shoppers (37%), say the single most expensive item they have purchased online was an electronic device. Clothes and shoes follow (19%) among national online shoppers.

22% of online shoppers say that the most expensive item they have purchased was between \$100 and just under \$250. 21% report the merchandise was between \$250 and just under \$500. 18% recall the price range as between \$500 to just under \$1,000, and another 18% say the product's price was between \$1,000 to just under \$2,500. Nine percent of online shoppers have clicked their way through a purchase of an item that cost \$2,500 or more. Interestingly, men (36%) are twice as likely as women (18%) to have purchased an item with a price tag of \$1,000 or more.

Buyer's Remorse?

Most online shoppers are satisfied with their purchases. 91% of online shoppers nationally never (26%) or rarely (65%) return the purchases they make online. A similar proportion (89%) report they hardly ever (70%) or have never (19%) regretted an online purchase. And, most online shoppers do not make purchases with the expectation that they will return at least part of the order. 66% say they never have made such a purchase, and an additional 28% say the thought of ordering an item with the intent of returning it only rarely crosses their mind.

Among online shoppers who have returned an online purchase, a majority (55%) have, at some point, brought the item back to a brick and mortar store. 56% of national online shoppers also report they have kept an online purchase they wanted to return. What's the main reason digital consumers have kept an item they wanted to send back? Nearly six in ten (58%) say the return process was too much of a hassle. 20% say they missed the return window, and 14% cite the high cost of returning the item. Eight percent mention another reason.

60% of online shoppers who ended up with an item they have wanted to return have just held onto it. 26% have given the merchandise away, and 7% have simply thrown the item out. The same proportion (7%) have resold it.

Online consumers though are not big on returning a product they have used or worn. 74% say they have never done so, and 24% report they have rarely done so.

A Virtual Trip to the Grocery Store?

Most online shoppers (88%) have never bought fresh groceries online. And, the most cited reason given by online shoppers who do not choose this purchasing option is they prefer the in-store experience (49%). 21% are not interested in buying their fresh groceries online, and 14% say it never occurred to them. Six percent report the option is not available in their area, 5% report someone else buys their groceries for them, and 4% say it is too expensive.

In general, 10% of Americans have used a fresh grocery delivery service. When it comes to their preferred delivery service, Americans who use such a service stay local. A majority of these residents (53%) turn to a local market or service. More than one in ten delivery service customers say they use Amazon Fresh (15%), Instacart (15%), FreshDirect (14%), Walmart Grocery (13%), or Peapod (12%).

Meal kit subscription services such as Blue Apron or HelloFresh are not commonplace among Americans. 97% of Americans say they are *not* subscribed to this type of service compared with 2% who are. Americans also are not clamoring for box services such as Birch Box or Stitch Fix. 97% of U.S. residents report they have yet to subscribe to these services, and 3% have.