



THE 2019 AMAZON CONSUMER SHOPPING STUDY

How Shoppers Browse and Buy on Amazon

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Introduction

2019 will be a pivotal year for brands, and here's a few reasons why:

- ✓ According to eMarketer, "**Amazon's U.S. ad business will grow** more than 50 percent this year (to more than \$11 billion). Its share of the U.S. digital ad market will swell to 8.8 percent in 2019, reaching nearly 10 percent by next year."
- ✓ **Content is king**, and brands who are not taking advantage of [Amazon Stores](#), [A+ Content](#), or [Enhanced Brand Content](#) are already falling behind.
- ✓ The [growth of the Amazon Fresh and Amazon Pantry](#) categories have compelled grocery giants Walmart and Target to speed up their own initiatives to open up their grocery aisles to online shoppers. With the [introduction of Sponsored Products advertising to AmazonFresh and Pantry](#), grocery and CPG brands now have the tools they need to capitalize on consumer dollars.





In this year's Amazon Shopper Study, we asked 2000 U.S. Amazon shoppers big questions including:

- ✓ How often do you use Amazon to discover new products or brands?
- ✓ Are you concerned about counterfeit products on Amazon?
- ✓ What's the biggest factor in your decision to buy a product on Amazon?
- ✓ ...and plenty more.

Some of the results drastically differ from our [2018 Amazon Shopper Survey](#) but some things never change (like the need for free shipping and competitive pricing).

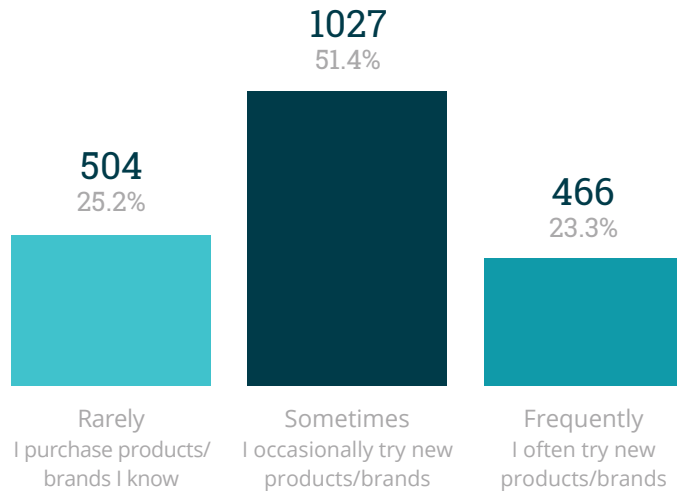
The Brands



The Brands

75% of Shoppers Use Amazon to Discover New Products or Brands

How often do you use Amazon to discover new products or brands?



[In 2017](#), nearly 50% of Amazon shoppers reported they were open to “occasionally” or “frequently” trying new products or brands on Amazon.

This year, that number jumped to nearly 75%.





Amazon has made it a point to get established brands to buy in as vendors and/or third-party sellers. Brands can't ignore the fact that their customers are most likely shopping on Amazon, and **75% of them might not be as loyal as you thought.**

“Amazon is often known as a Demand Capture platform - a place where businesses are fulfilling branded searches by shoppers who already had the intention of buying a product from that brand. Businesses are beginning to realize that Amazon can also be leveraged as a Demand Generation platform, where shoppers are using the Search bar on Amazon.com as a discovery tool to find new products or new brands. The intention may not have initially been to buy from a specific brand, but the intent was to buy a product.”



Jen Acosta

Sr. Marketplace Channel Analyst
CPC Strategy (now part of Elite SEM)



More Than Half of Amazon Shoppers Feel Comfortable Buying an Unfamiliar Brand on Amazon vs. Any Other Store

We also found that 52.2% of shoppers are more willing to buy a brand they're not familiar with on Amazon than they would be at any other store.

Even more shocking for brands, is **72% of Gen Z (female-only) shoppers look to Amazon for new product discovery** — meaning they are starting their searches on the platform. [According to our recent studies*](#), 18 to 24-year-old women are increasingly turning to the megalith online retailer specifically for new products within the categories of health and beauty and computer, electronics, and office.

True/False: I am more willing to buy a brand I am not familiar with on Amazon than any other store.



“It’s impossible to think about the future without thinking about one of the largest and most influential generations that are starting to shake up the workforce and the economy: Gen Z. Gen Z women are unlike any generation before them, and brands who don’t understand how to create relationships with them are setting themselves up for a rough ride.”



Dalton Dorne
CMO
Elite SEM

This also gives us reason to believe small and midsize brands on the platform will gain unprecedented market share via Amazon in 2019.

“If you know your audience prefers to shop on Amazon, then make sure you have a presence on the platform they are shopping on. If you do not, they will find another product that is similar to yours to purchase and you will lose out on sales.”



Tanya Zadoorian
Sr. Marketplace Channel Analyst
CPC Strategy (now part of Elite SEM)



Credit: CPC Strategy / Elite SEM “The Future of Female Commerce” 2019 Amazon infographic



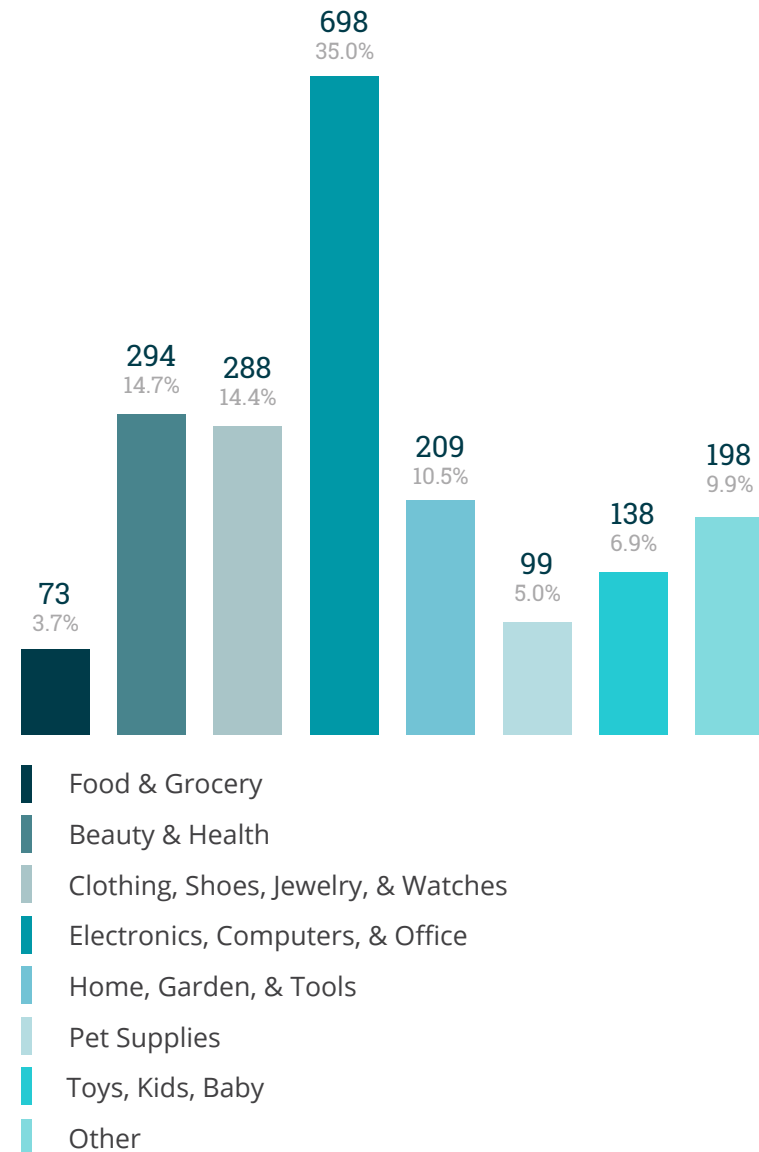
Top Categories expected for 2019 include “Electronics, Computer, Office,” “Beauty & Health,” and “Casual Clothing”

Among all respondents, top categories included “Electronics, Computers & Office” (35%), followed by “Beauty & Health” (14.7%), and “Clothing, Shoes, Jewelry, & Watches (14.4%).

The lowest ranking categories included Food & Grocery (3.7%), as well as Pet Supplies (5%).

Although we did see similar trends across all age groups, Millennials seem to be taking a real interest in Amazon’s Prime Pantry (including their baby care section, offering serious deals on diapers especially if you use [Subscribe & Save](#)).

Which product category do you buy from Amazon most frequently?





There are also toys, baby proofing products, sippy cups and just about anything a child might need on a moment's notice (which seem to be top of mind as many of these individuals start their growing families).

We're also seeing a growing trend in luxe beauty brands joining the Marketplace (and reaping the benefits) such as [Guthy|Renker](#), [Laura Geller](#), and [Stacked Skincare](#).

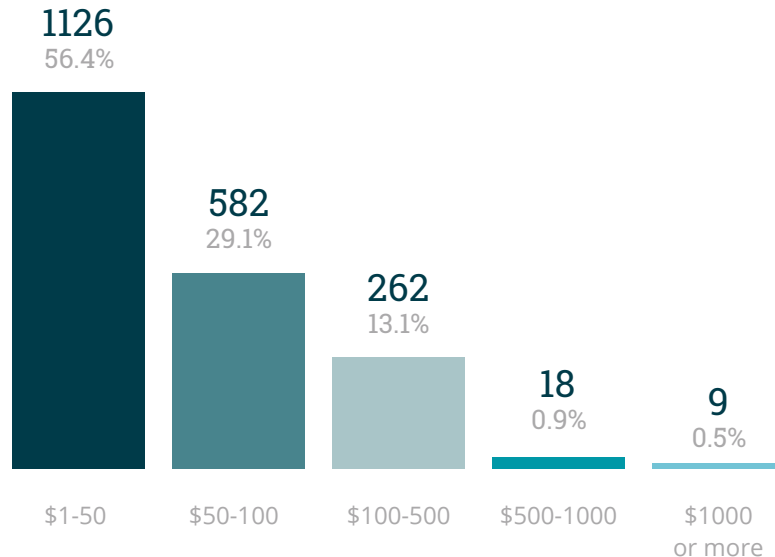
Category-wise, we discovered (in our [2019 Amazon Apparel Survey](#)) that most consumers (across all demographics) are willing to test new brands (or generic brands) in the **casual apparel category**, followed by **activewear** and **outerwear** as well.





53% of Consumers spend at least \$50 (or more) on Amazon monthly

How much do you spend on Amazon per month?



Although the majority of shoppers will only spend up to 50\$ a month on their Amazon purchases, we do see that **43% of consumers are spending much more** — many of them [Prime Members](#).

Amazon Prime is an exclusive, members-only program that offers online shoppers access to select content, cash-back opportunities and fast, free shipping.

It's also a one-way ticket to more purchases.





According to [research](#), Amazon Prime members spend almost **twice** as much as non-members do, clocking in at nearly **\$1,300 in purchases every year**.

[Consumer Intelligence Research Partners](#) reports that Prime members shop about **25 times annually on the site**, versus non-Prime members' mere 14 purchases.

That membership is growing, too.

Though the program's recent growth will certainly line Amazon's pockets, it also presents a "prime" opportunity for retailers in today's competitive ecommerce space. It's simple, really: **Put your products in front of Prime members, and open the door for more customers, more sales and more profits.**

"Many online shoppers already have a deep loyalty to shopping on Amazon and are Amazon Prime members, which makes them much more likely to click on a products being advertised by Amazon."

"If a shopper knows they can get free two day shipping and the unmatched customer service experience they get with Amazon, they will often choose them over lesser known retailers."



Pat Petriello

Head of Marketplace Strategy
CPC Strategy (now part of Elite SEM)

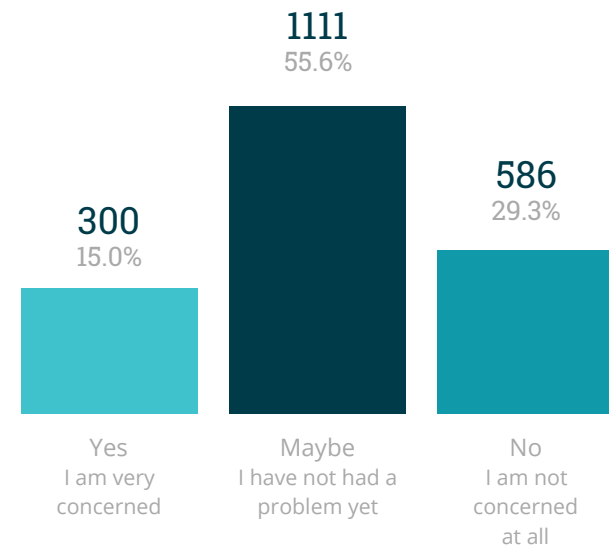
Nearly 70% of Amazon Shoppers are Either 'Moderately' or 'Very' Concerned About Counterfeit Products on Amazon

Once the press picked up what they called a “counterfeit problem” in 2016, the stories picked up steam, particularly with the [public departure of Birkenstock](#).

While Amazon has cracked down on counterfeiters since then and put measures in place to protect brands, this is still somewhat of a concern for consumers (but more so for brands).

Features such as the “[Amazon Brand Registry](#)” and the recent addition of “[Amazon Project Zero](#)” aim to help brands manage (and hopefully resolve) counterfeit issues.

Are you concerned about counterfeit products on Amazon?





In addition to Amazon’s standard proactive measures to protect customers, the Brand Registry uses information about your brand to implement additional predictive protections that attempt to identify and remove potentially bad listings. The more you tell Amazon’s Brand Registry team about your brand and its intellectual property, the more Amazon can help you protect your brand.

Some brands are also seeking support from [legal brand protection professionals](#):

“The key to effective brand protection is to pair your monitoring efforts with an effective enforcement program. Many small sellers and brands try to “DIY” their brand protection efforts, which can have legal ramifications if they do not consult with attorneys first.”



Jeffrey H. Schick
Partner
Francissen Rafelson Schick LLP





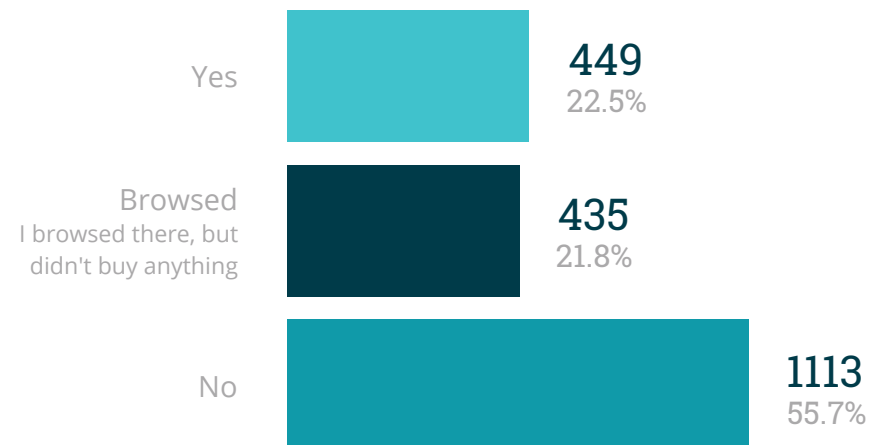
77% of Amazon Shoppers Did Not Make a Purchase on Black Friday Weekend 2018

Black Friday weekend in 2018 wasn't a big deal for survey respondents — **77.5%** claimed they didn't make any purchases on Amazon during that time.

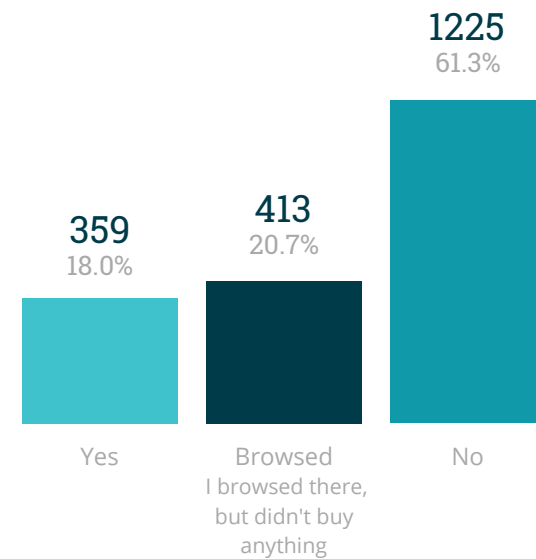
We saw similar results when we asked Amazon shoppers about Prime Day—about **81%** also said they didn't make a purchase.

This speaks to Amazon's push to make major shopping holidays more of a week-long or month-long event vs. just one day.

Did you buy anything on Amazon over Black Friday weekend in 2018?



Did you buy anything from Amazon on Prime Day in 2018?



However, when we look at general marketplace data we see that Prime Day was even bigger than our data indicates—**probably just because only a portion of our respondents were Prime members.**

Even with a [website glitch](#) on Monday, [reports](#) indicate that 2018 Amazon Prime Day sales surpassed Black Friday and Cyber Monday.

(Read more about Prime Day 2018 in our [blog recap](#)).



The good news is by Tuesday, many of the technical issues on Amazon.com were resolved.

“While the Amazon site outage could cost the company an estimated 72 million, Prime Day is still forecast to shatter last years numbers by about 50% as the outage provided customers with plenty of time to shop during the 36-hour holiday.”



Jordan Gisch

Sr. Marketplace Channel Analyst
CPC Strategy (now part of Elite SEM)

Regardless of the technical difficulties facing Prime Day last year, we saw significant wins for many of our own clients due to the extended promotional dates for Prime Day (more like Prime week or Prime month), new [Amazon Prime Day badges](#), and advanced advertising tactics.



The Device



The Device

About 52% of Amazon Shoppers Prefer to Purchase Using Their Desktop Computer or Laptop

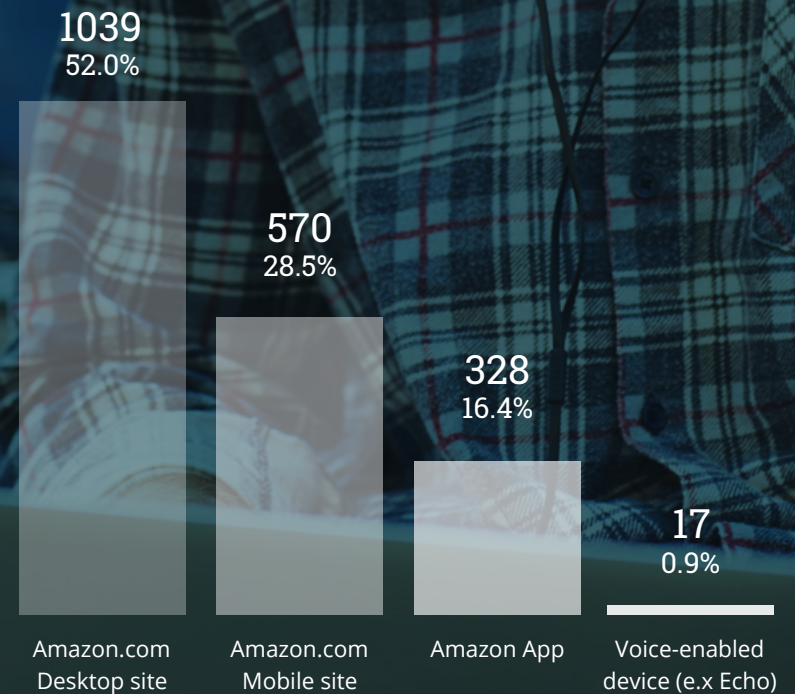
Though Millennials and Gen Z shoppers are largely thought of as “attached to their phones”, it seems these digital natives don’t always lean on their mobile devices when shopping online.

According to our data, **52% have actually used a desktop or laptop to buy online** in the last six months. That’s more than mobile and voiced-enabled shoppers combined.

One thing to note, in this survey question, we specifically used the word “purchase” instead of “browse” or “shop.” This may not seem like a significant difference, but other studies have shown that [shoppers are more likely to browse on mobile and buy on desktop](#).

That being said, we still believe mobile will continue to become a significant part of Amazon’s buyer journey as we continue to see a growing number of **Amazon App purchases (16.4%)**.

Which device do you use most often to purchase products on Amazon?





68% of Amazon Shoppers “Window Shop” on Amazon

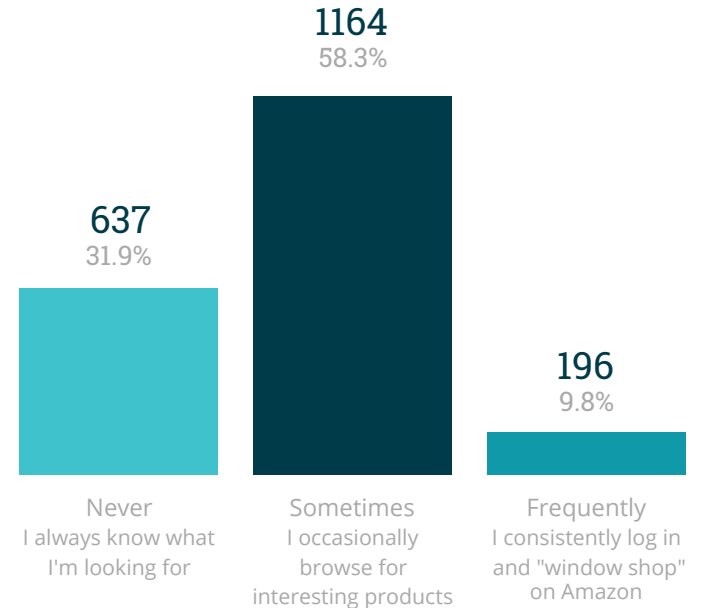
As we mentioned, the number of consumers using Amazon as a way to discover new brands is on the rise. Luckily, in late 2018, Amazon introduced advanced tools to help advertisers engage with new customers using [Sponsored Product Ads product targeting](#). Advertisers are already pretty excited to implement this new feature and for good reason.

With product targeting, it is now easier than ever before to reach shoppers as they browse detail pages and filter search results for specific products similar to yours.

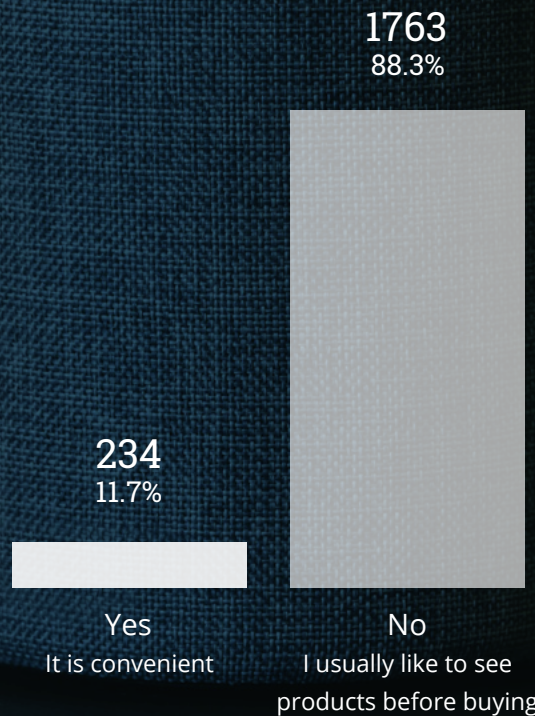
Additional [Headline Search Ad placements \(now called Sponsored Brands\)](#) also allow advertisers to get their brand name in front of new customers and expand their brand awareness, serving ads at the top, middle and bottom of the search results page.

With the right messaging and targeting capabilities, advertiser now have the opportunity to turn many of these “window shoppers” into loyal buyers.

How many hours per week do you spend browsing Amazon without a specific product in mind?



Have you purchased anything with a voice-enabled device in the last 6 months?



11.7% of Amazon Shoppers Made a Purchase Via a Voice-Enabled Device in the Last Six Months

Amazon Echo owners don't just use their device to look up dinner recipes or to listen to music.

You can ask Alexa to place orders for Prime-eligible physical products. On supported devices, you can also ask Alexa to place orders for music. In select cities, Alexa can help you shop for groceries from Whole Foods Market through Prime Now.

Data shows that Echo owners actually increase their Amazon spending by about **10% after buying the device**.



Many brands, [particularly those in the Consumer Packaged Goods sector](#), are taking note of the fact consumers are turning to Alexa for shopping suggestions, a trend we saw continue from 2018 to 2019.

Although, we're not entirely sure what direction voice-enabled shopping will take, we should take it from Bezos himself: Amazon is going to "double down" on the Alexa consumer experience.

Voice shopping isn't going anywhere, and it's up to retailers to stay on the cutting edge.



The Search Experience



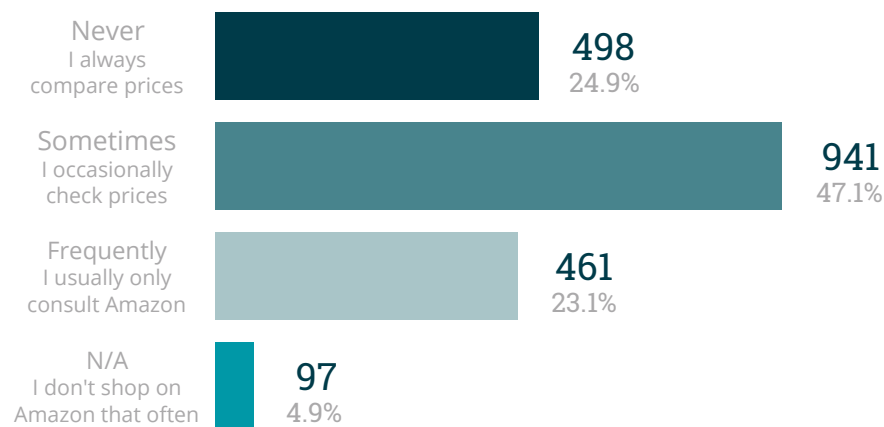
The Search Experience

About 72% of Amazon Shoppers Still Price Check on Other Sites

The percentage of shoppers who price-check against sites (other than Amazon) dropped slightly this year (**72%**) compared to our 2018 survey results (**75%**).

We know by now that Amazon shoppers are price-conscious, but this slight dip in customers leaving the site to price compare could be due to a variety of benefits within Amazon's shopper experience including the introduction of 1 hour shipping, same-day pick up, and other accelerated shipping options.

How often do you make purchases on Amazon without comparing prices on other sites?



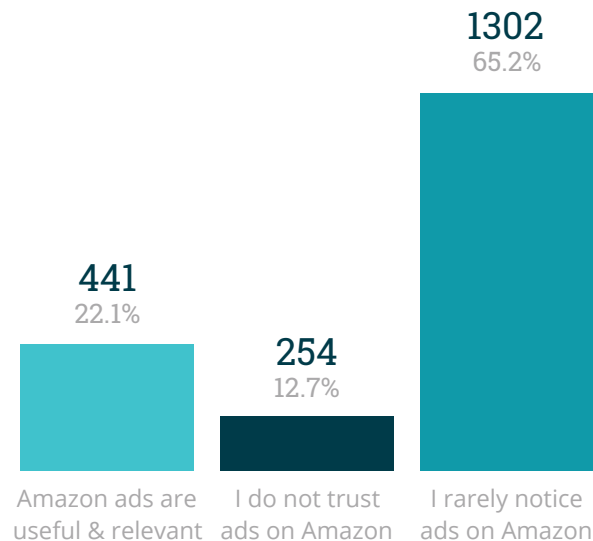
87% of Amazon Shoppers Either ‘Don’t Notice Ads’ on Amazon or Find Them ‘Useful and Relevant’

If 65% of your customers don’t notice you’re serving them an ad and another 22% of your customers actually *like* the ads you’re serving up—that’s a winning scenario. We saw similar results last year.

The future of ads on Amazon is bright, and could potentially extend beyond mobile and desktop into other formats.

To learn more about how to advance your Amazon Advertising strategy, check out our recent guide: [“The 2019 Amazon Ads Guide”](#)

Which of the following best describes how you feel about ads on Amazon?



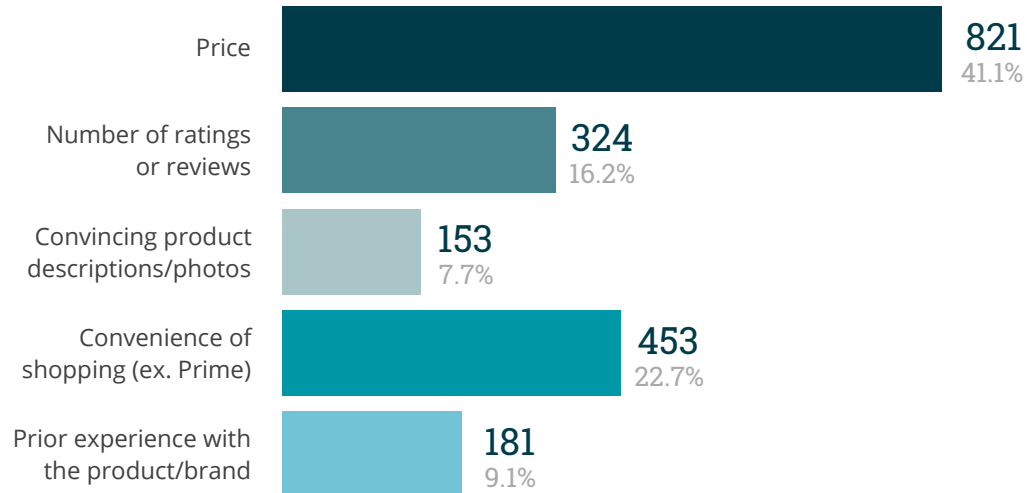
The Decision



The Decision

For 41.1% of Amazon Shoppers, Price is Still #1

The last time you made a purchase on Amazon,
what was the biggest factor in your decisions?



Price, shipping, and reviews still hold the key to Amazon shoppers' hearts. We saw very similar results last year and we definitely weren't surprised to see that Amazon shoppers still value these factors today.

One thing to note is a slight increase in the **value of product descriptions/photos (from 6.3% in 2018 to 7.7% in 2019)**.





As we mentioned earlier, content optimization is king, and brands who aren't taking advantage of Amazon Stores, A+ Content, or Enhanced Brand Content are already falling behind.

At CPC Strategy, we know improvements in content increase conversions and can potentially help customers make better purchasing decisions and reduce returns.

“The ability to showcase your product in a 360-view and explain specific features may help decrease the risk of returns and empower the consumer to make the purchase decision with the additional information provided.



Ashley Vanderveen

Project Manager, Creative Services
CPC Strategy (now part of Elite SEM)



“Amazon is a conversion engine optimizing towards turning traffic into orders, and Premium A+ Content allows brands more options to highlight the unique value proposition of their products and recreate the in-store shopping experience on a two-dimensional screen.”

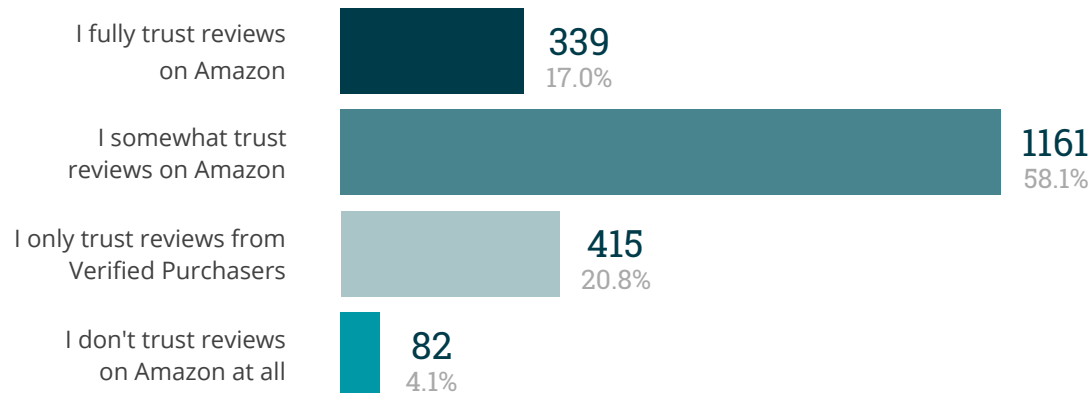


Pat Petriello

Head of Marketplace Strategy
CPC Strategy (now part of Elite SEM)

75% of Amazon Shoppers Fully (or Somewhat) Trust Reviews on Amazon

Which of the following best describes how you feel about reviews on Amazon products?



About 17% of our respondents said reviews were *the most important* factor in their decision to make a purchase (compared to last year, 15%).



Amazon customers also showed they are more savvy when it comes to parsing reviews, with nearly 20% claiming they only trust reviews from Verified Purchasers (reduced from 30% of respondents last year). And coming in at the very bottom, still significant—4.1% of our respondents don't trust Amazon reviews at all.

Although reviews are still important, they might not hold the weight they use to pre-2017.

Customers are also looking at content including product descriptions, A+ Content, Amazon Stores, and more.

If you're selling on Amazon, now is the time to invest in what you can control—price adjustments, premium content and brand building your off-Amazon presence.





The Bottom Line

Trends to look out for in 2019:

1 Big opportunities for brand discovery

More upcoming brands will have the opportunity to steal market share from big brands. This change will be driven by the average Amazon shopper's openness to new brands and price-conscious nature. Across all categories, we are seeing the biggest opportunities for brands selling in "Health & Beauty" as well as "Consumer Packaged Goods".

2 CPGs take a stand in the digital world

Consumer packaged goods have come a long way and with the introduction of Sponsored Products advertising to programs like AmazonFresh and Amazon Pantry, competition (as well as opportunity) to get in front of consumers is destined to reach an all-time high in 2019. Unfortunately, CPGs not willing to expand their products from the store shelf and invest in the online marketplace will be left behind.





3 Amazon's ad placements & targeting features expand

Amazon will continue to improve their native advertising experience for shoppers, ensuring they're helping consumers to find the right product, for the right price, at the right time. Sellers will reap the benefits, but only if they have the right strategy.

From changes in advertising (new placements, new targeting capabilities) to the emergence of an entirely new shopping channel (voice), Amazon sellers will need to be ready for anything this year. **We can help.**



Methodology Details

This survey was commissioned by CPC Strategy (now a part of Elite SEM) and conducted by Survata, an independent research firm in San Francisco. Survata interviewed 2001 online respondents between February 19, 2019 and February 25, 2019. Respondents were screened with the following question: “Did you buy a product on Amazon in the past six months?” and were reached across the Survata publisher network, where they take a survey to unlock premium content, like articles and ebooks. Respondents received no cash compensation for their participation. More information on Survata’s methodology can be found at survata.com/methodology.



About CPC Strategy & Elite SEM

Founded in 2007, CPC Strategy is a retail-focused performance marketing agency that drives paid media strategy and management for brands like Reef, The Honest Company, Unilever's Seventh Generation, and Nestle. CPC's Amazon Sales Acceleration Program (ASAP) is the industry-leading growth solution for brands on Amazon.

In 2018, CPC was acquired by Elite SEM, an award-winning digital marketing agency founded on Search and focused on holistic performance-driven digital marketing. Elite's services span all stages of an integrated marketing strategy, allowing leading industry brands to strategically evaluate digital marketing spend and increase cross-channel performance.

Together, CPC and Elite form the most capable Paid Search, Paid Social, and Amazon performance marketing practice in the industry, with established complementary solutions in CRM/Email Marketing, Analytics, SEO/CRO, and Integrated Marketing planning.



Take the Next Step

Schedule Your Amazon Strategy Evaluations

CPC Strategy's Amazon Audit is a complimentary 60-minute analysis and assessment of brand's existing Vendor Central account, advertising programs, product order (PO) volume, and profitability metrics.

[SCHEDULE MY EVALUATION](#)