2025 OMNICHANNEL REPORT:

REACHING SHOPPERS EVERYWHERE THEY BROWSE AND BUY

INTRODUCTION

Shopper behaviour in 2025 reflects a growing focus on practicality, flexibility, and value. While most shoppers express no strong preference between pureplay and multichannel retailers, many still favour retailers that offer store-based conveniences. Services such as in-store returns, Click and Collect, and transparency of stock availability continue to influence purchasing decisions, particularly in categories like Fashion and Electronics.

Shoppers are also rethinking the technology they want in their online experience. Novelty features, such as virtual try-ons and chatbots, are seeing declines in interest, while functions that support ease of discovery and decision-making remain in high demand.

Social media continues to play a significant role in product discovery and brand engagement, but the influence of traditional platforms is shifting. Facebook and Instagram maintain leading positions, though their impact is declining. Meanwhile, TikTok and other emerging platforms are gaining traction with younger shoppers. Across all channels, shoppers favour content that feels useful, entertaining, and authentic.

Retailers who respond to these preferences with practical, well-executed strategies will be in a stronger position to drive growth. The insights in this report highlight where behaviours are shifting and where retailers should consider placing their time, effort, and investment in 2025.

"The line between channels is blurring, but shoppers remain sharply focused on what matters: convenience, confidence, and control. In 2025, success comes from meeting customers with the right experience at the right time. Retailers who recognize this shift and prioritize practical innovation over flashy trends will be the ones who convert intent into lasting loyalty."

Shannon Ingrey

VP and GM, APAC, Commerce.

Data for this report was collected in April 2025. All data in this report is sourced from the responses of 1052 randomly selected Australian and New Zealand online shoppers.

01

HOW PURCHASING PREFERENCES ARE EVOLVING

In 2025, shoppers are shifting between pureplay and multichannel retailers depending on the experience offered. While more than half say they have no preference for multichannel or pureplay, almost as many still favour multichannel stores. Pureplay retailers appeal to shoppers through lower prices, wider ranges, and better stock availability. However, the benefits of a store network remain hard to overlook, particularly in the Fashion category, where multichannel preference has grown.

Preferences within categories are also shifting. This year, more shoppers are choosing to buy Fashion, Electronics, and Beauty products through pureplay channels compared to 2023. These movements suggest shoppers are more comfortable relying on online-only experiences where the offer is strong enough.

The technology features used by online shoppers are also evolving. Their desire for fad-driven tools, such as chatbots and virtual try-ons, is subsiding, while practical functions are holding steady or improving. Personalised recommendations, filters, and curated product lists are now experiencing high adoption and perceived value among online shoppers. Price alerts are still valued, but usage has declined. Retailers would be wise to prioritise tools that help shoppers make confident purchase decisions quickly.

Delivery expectations are also tightening. Fewer shoppers are now willing to wait longer for shipping, though most still allow for a few business days. Their tolerance for slow or vague delivery timeframes is wearing thin. Shoppers’ expectations around clarity also apply to Click and Collect, where definite availability, confirmed pickup timing, and local convenience are key drivers of use. Retailers who remove uncertainty and focus on proven features will be well-positioned to transform shoppers’ intent into action.

Multichannel Matters to Nearly Half of Shoppers

In 2025, 52% of shoppers say they have no preference between buying from a pureplay (online only) or multichannel (online and in-store) retailer. This figure is a slight 3% higher than in 2023.

Even so, nearly half (44%) do prefer a multichannel store, while just 5% say they would actively choose a pureplay retailer.

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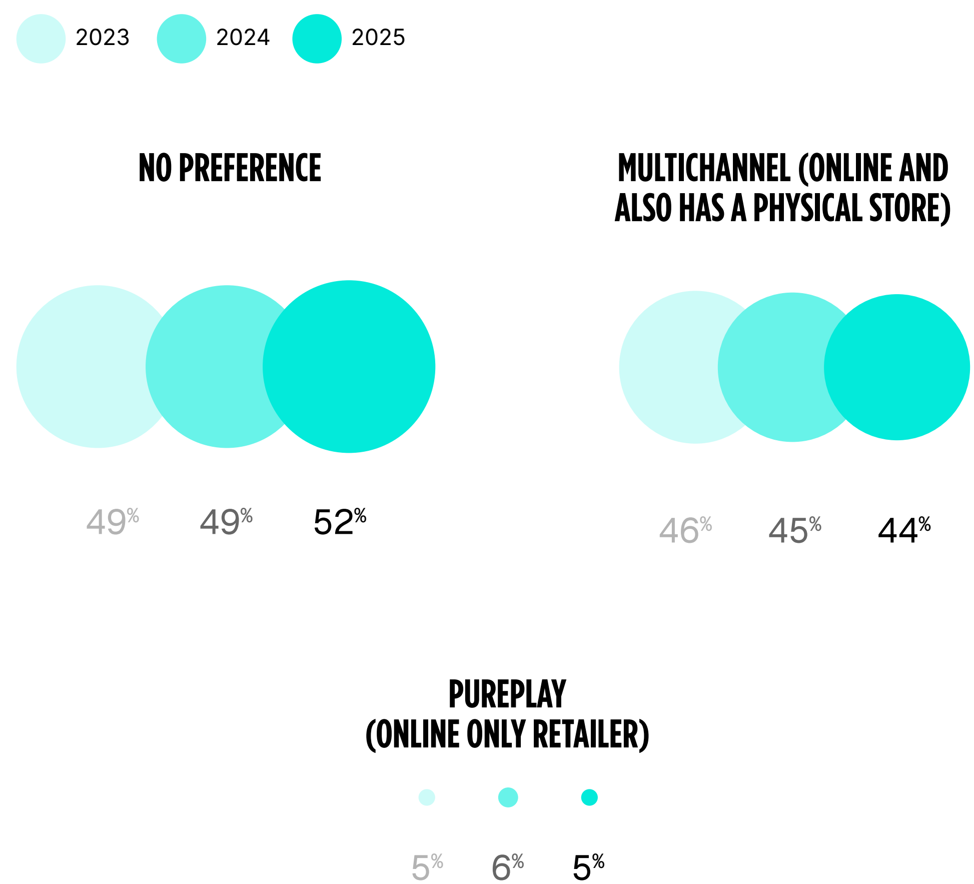
Generally, do you prefer making online purchases from a pureplay (online-only retailer) or multichannel retailer (online and also has a physical store)?



Pureplay Retailers Win on **Value and Availability**

Among shoppers who choose pureplay retailers over multichannel options, 65% say it's because of lower prices. Stock availability influences 51%, and 46% are motivated by access to a wider product range.

Factors such as better customer service and stronger loyalty programs sway the decisions of fewer shoppers, at 12% and 11%, respectively.

Reasons why shoppers prefer purchasing online from a pureplay retailer.

2025

65%

Cheaper price

51%

The items I want are in stock

46%

Wider range of products available

31%

Cheaper delivery

21%

Better sales events and offers

21%

Easier returns process

20%

More payment options

18%

Better website

12%

Better customer service

11%

Better loyalty program

Fashion and Tech Drive Pureplay Preferences

Shoppers are also more likely to choose pureplay retailers for certain product categories. Electronics or Electrical Products top the list, with 38% of shoppers preferring to buy from a pureplay store. Beauty Products follow at 36%, and Fashion at 34%.

Fashion shows the biggest shift in behaviour: in 2025, 8% more shoppers say they prefer to buy these items from a pureplay retailer compared to 2023. Electronics or Electrical Products also see a 7% increase.

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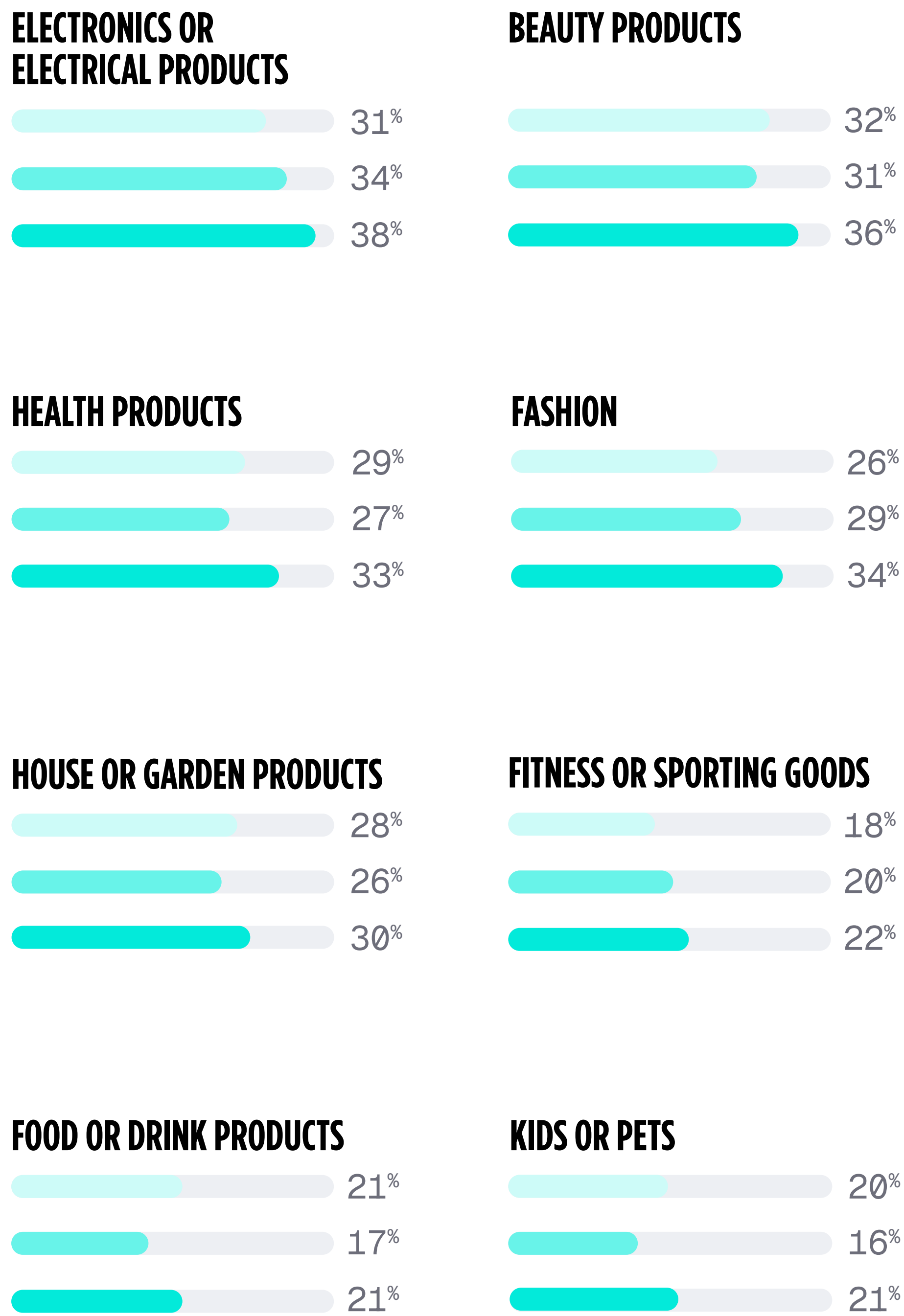
What types of products would you prefer to buy online from a pureplay retailer rather than a multichannel retailer? Tick all that apply.

2023 2024 2025



Multichannel Preference Gains and Losses

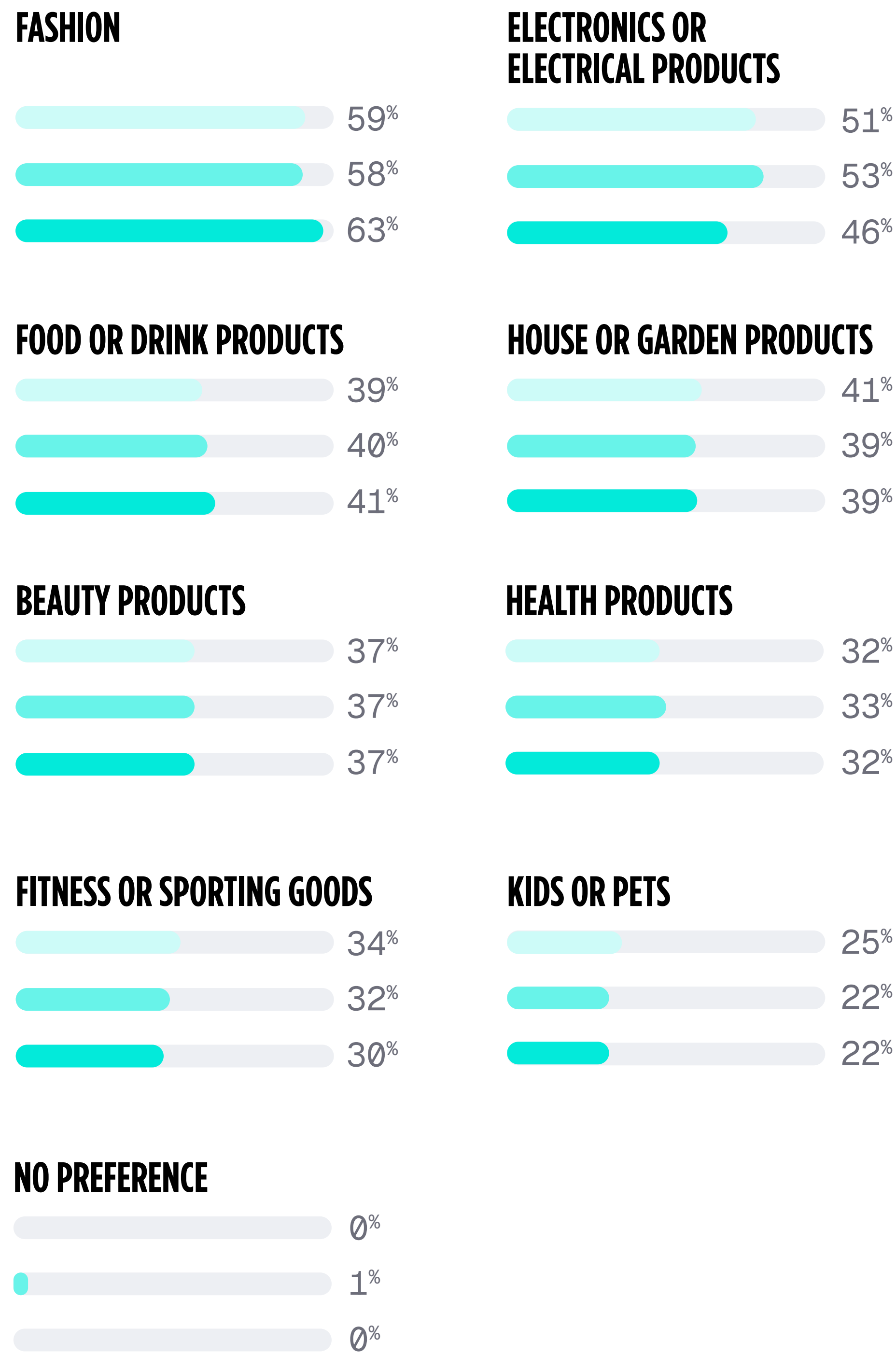
In 2025, 63% of shoppers say they prefer to buy Fashion items from a multichannel retailer over a pureplay retailer. Electronics or Electrical Products come next at 46%, followed by Food and Drink at 41%.

Fashion's multichannel preference has grown by 4% since 2023. In contrast, preference for Electronics or Electrical Products from a multichannel retailer has dropped by 5% over the same period.

?

What types of products would you prefer to buy online from a multichannel retailer rather than a pureplay retailer? Tick all that apply.

2023 2024 2025



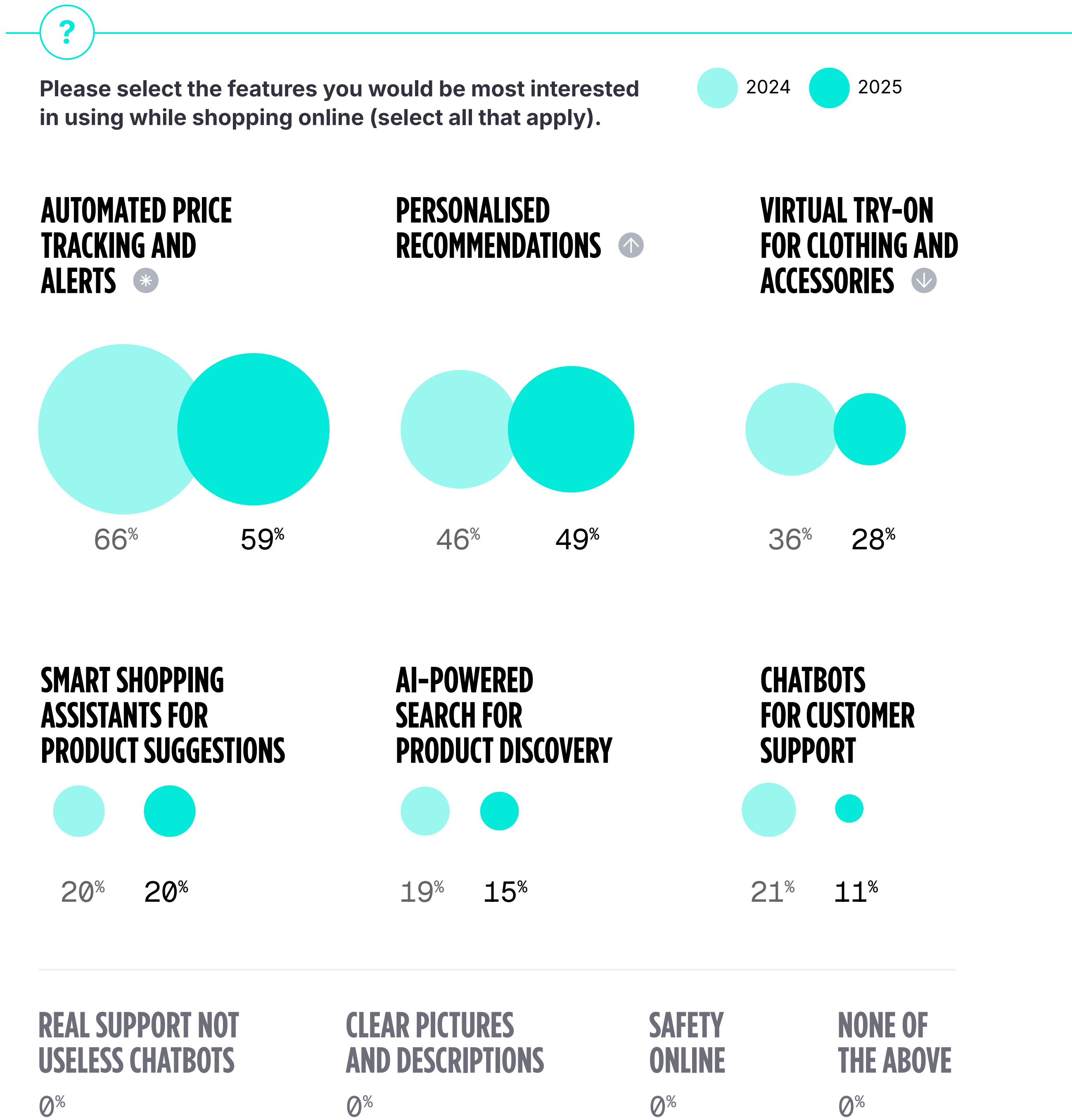
Practical Value Over Novelty Features

Automated price tracking and alerts remain the top feature for shoppers, though interest has slipped 7% from last year, down to 59% in 2025.

Virtual try-ons are losing ground, with interest falling 8% to 28% this year, signalling that the augmented reality (AR) trend may be subsiding.

Meanwhile, personalised recommendations climb 3% to reach 49%, with smart shopping assistants edging forward to reach 20% of shoppers' interest.

Customer support chatbots see the sharpest decline, down 10% to 11%, suggesting shoppers want authentic, humanistic shopping experiences over novelty tech.



Practicality Prevails in Website Feature Usage

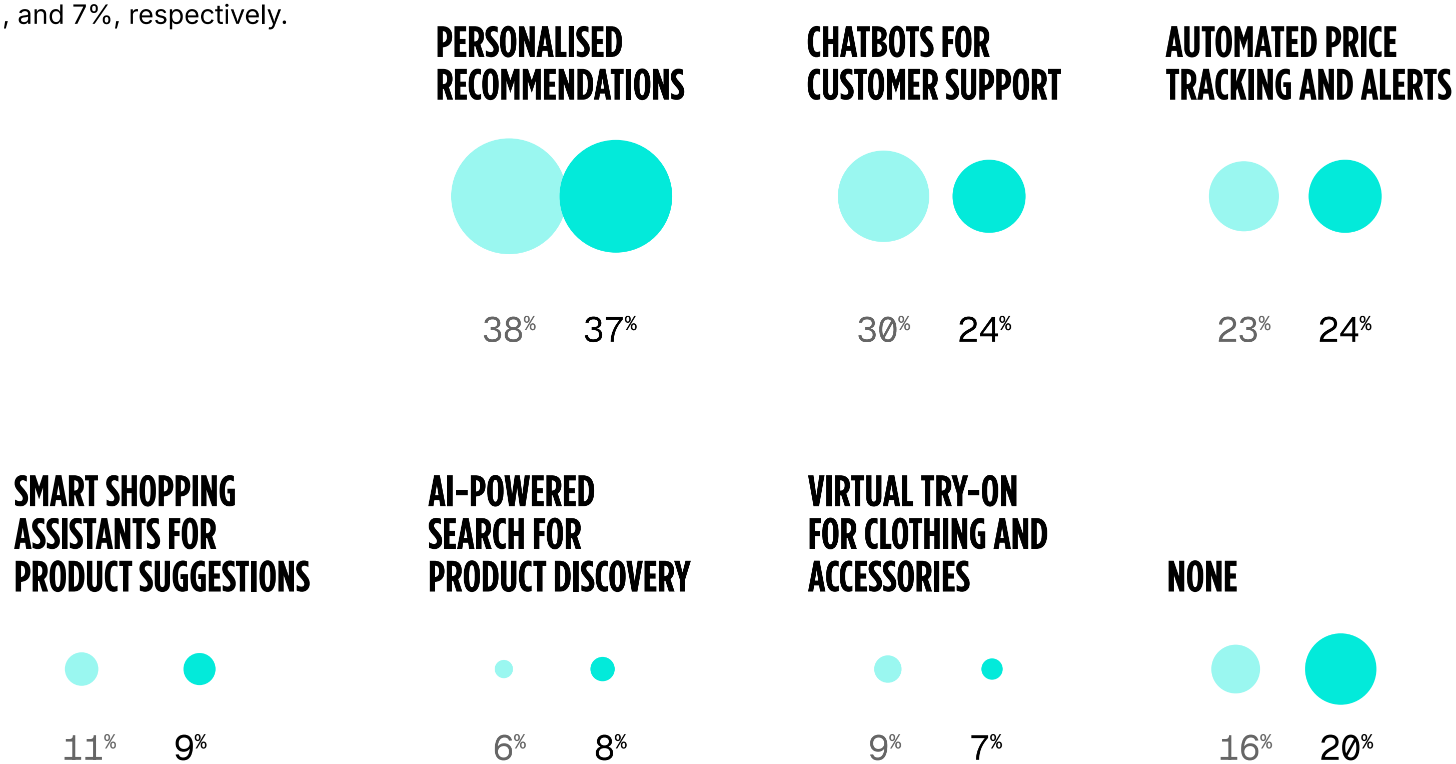
Personalised recommendations top the list for actual usage, with 37% of shoppers saying they use this feature.

Chatbots for customer support and automated price tracking and alerts share second place at 24%, though usage of price tracking has dropped 6% since last year.

Smart shopping assistants, AI-powered search, and virtual try-ons remain relatively niche, with usage sitting at 9%, 8%, and 7%, respectively.

In the last 6 months, have you used any of these features while shopping online? Select all that apply.

2024 2025



Filters Come First for Online Shoppers

When looking for products, most shoppers say product filtering functionality is the most helpful.

Recommended product lists take second place, followed by complementary product lists in third.

"Customers also viewed" lists are seen as the least helpful, with far fewer shoppers showing a preference for this feature.

?

In order of priority (from highest to lowest, 1 being most important, 6 being least), which website features help you when looking for a product?

#1

PRODUCT FILTERS, SUCH AS PRODUCT CATEGORY, COLOUR, LENGTH, ETC.

#2

A LIST OF PRODUCTS THAT ARE RECOMMENDED FOR YOU

#3

A LIST OF OTHER PRODUCTS OFTEN BOUGHT TOGETHER WITH THE PRODUCT YOU ARE VIEWING

#4

A LIST OF PRODUCTS THAT OTHER CUSTOMERS ALSO VIEWED BASED ON THE PRODUCT

#5

PREDICTIVE SEARCH

#6

A LIST OF MOST POPULAR OR TRENDING PRODUCTS ON THE WEBSITE

In-Store Perks That Influence Online Sales

According to shoppers, 77% say they would purchase more from a multichannel retailer if in-store product availability were visible online.

Additionally, 74% say the ability to return items in-store would influence their decision, while 69% would be swayed by free shipping directly to the store.

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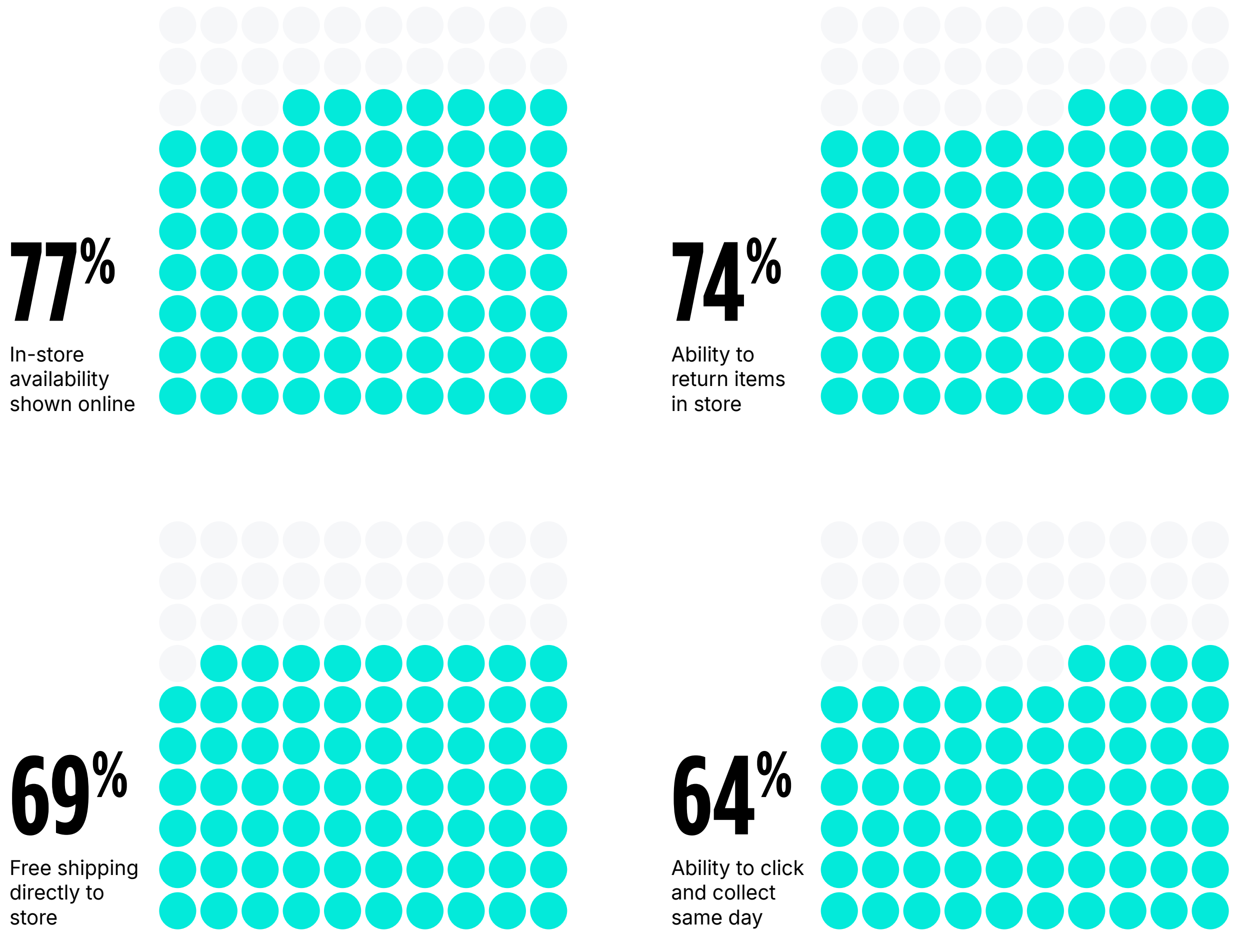
What factors would lead you to increase your purchases from a multichannel retailer? Tick all that apply.

2025



Delivery Speed is Still a Deal-Breaker

In 2025, shoppers are becoming less forgiving of long delivery times. Last year, 42% were undeterred by longer shipping times. This year, that figure drops by 9%, down to 33%.

The remaining 67% of customers have a range of delivery speed expectations.

While tolerance for longer delivery windows is declining, perceptions of what qualifies as “long” vary. The largest group (28%) is only willing to shop elsewhere if delivery exceeds 5–7 business days, followed by 19% who say 3–5 business days is their limit.

Only 10% of shoppers expect same-day or next-day delivery.

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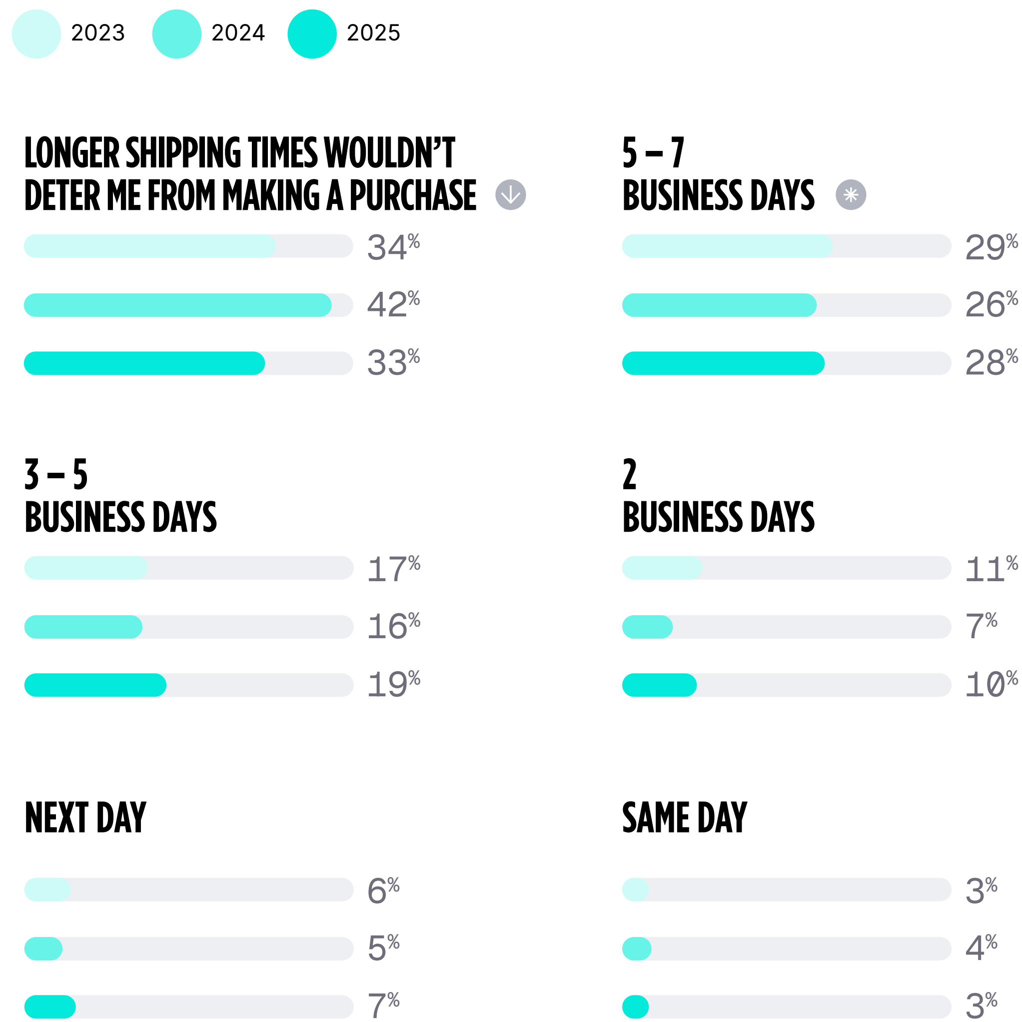
If products are available at similar prices, would you consider a different seller or website if the delivery time exceeded a certain threshold?



02

CLICK AND COLLECT IS SHAPING CHECKOUT DECISIONS

Click and Collect is now a strategic component of the retail fulfilment experience. Nearly three-quarters of shoppers now use it, and more than a third abandon online orders when it’s not offered. Retailers that don’t provide this service risk losing business at the moment shoppers are ready to buy.

Shoppers choose Click and Collect for practical reasons: over half say it’s cheaper than delivery, more convenient, or faster. Most are also willing to wait at least a day, but over a quarter want their order ready within three hours. By offering both flexibility and speed, retailers can attract more shoppers interested in collecting their orders.

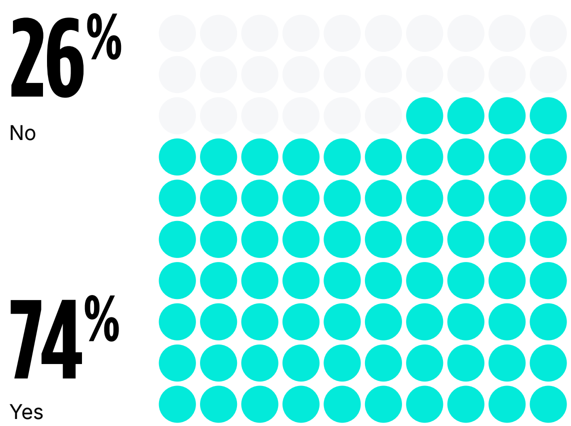
Clarity is also essential. Most shoppers want to see product availability and accurate pickup timeframes at checkout. Consolidated pickups and easy parking further influence purchase decisions. When shoppers receive a clear and convenient Click and Collect experience, they’re more likely to complete their checkout and show up in-store to collect.

No Click and Collect Can Mean **No Sale**

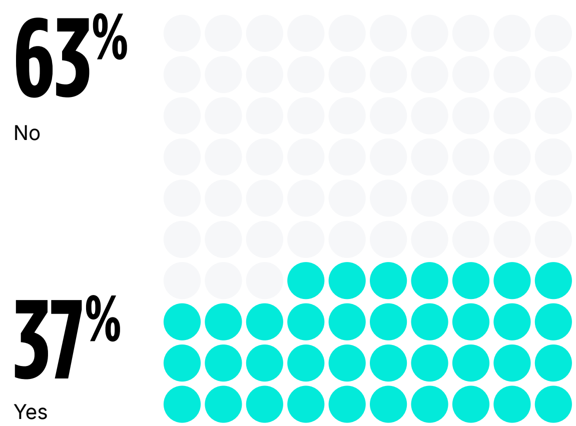
Click and Collect is now widely used, with 74% of shoppers choosing this collection method in the past 12 months.

Even more notably, 37% say they abandoned an online order entirely when Click and Collect wasn't available.

Have you placed an order via Click and Collect in the last 12 months?



In the past 12 months, have you abandoned an online purchase because Click and Collect wasn't available?



2025

Cost, Convenience, and Speed Drive Click and Collect Use

Shoppers primarily choose Click and Collect because it's cheaper than delivery, with 58% citing this reason.

Convenience is another key factor, as 53% say having a location near where they live or work influences their choice. In addition, 52% prefer it because it's faster than home delivery.

Fewer shoppers are motivated by retailer discounts, with only 12% selecting Click and Collect for this reason. Just 9% choose it due to concerns about transit damage.

?

Why did you choose Click and Collect? Tick all that apply.

2025

58%

It was cheaper than delivery

53%

I live/work near the store and it was convenient

52%

It was faster than delivery

19%

I was worried about the item being delivered to my home when I wasn't there

19%

I wanted to see the item in person and possibly return it if it wasn't suitable

12%

The store offered me a discount for choosing Click & Collect

9%

I was worried about the item being damaged in transit

8%

I just prefer it

5%

It was the only option (e.g. during lockdown)

2%

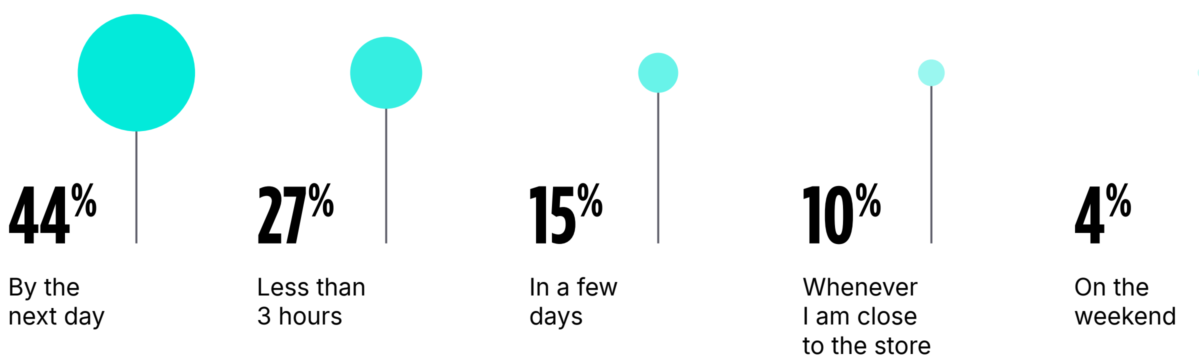
I didn't want to browse in-store for long because I am worried about COVID

Next Day Collection Suits Most, **But Speed Still Sells**

Most shoppers are willing to wait for Click and Collect. Nearly half prefer to pick up their order the next day, with 44% choosing this option, while 29% are happy to collect it after several days.

However, a significant portion of shoppers (27%) want to collect their items within three hours.

If you were to place a Click and Collect order, how soon would you typically prefer to collect it?



Clarity and Convenience Appeal to Click and Collect Customers

A sense of certainty is the strongest driver encouraging shoppers to use Click and Collect, followed closely by convenience.

Seeing confirmed item availability at checkout influences 70% of shoppers, and 64% want to know the exact pickup time in advance.

Nearly half (47%) prefer the option to collect items from multiple stores in one location. Another 46% are drawn to stores that are easy to find and offer accessible parking when picking up orders.

?

Which of the following would encourage you to use Click and Collect more? Tick all that apply.

2025

70%

Confirmation stock is available at checkout

64%

Knowing exactly when the order will be ready

47%

Stock from multiple stores can be collected at my local store or collection point

46%

Parking / location of the store is easy to find

36%

Order is ready within 3 hours

35%

No queue when collecting order

20%

Having an option of a collection point (other than the store)

6%

Nothing would encourage me to use Click and Collect more

4%

Gift wrapping option

2%

None of the above

03

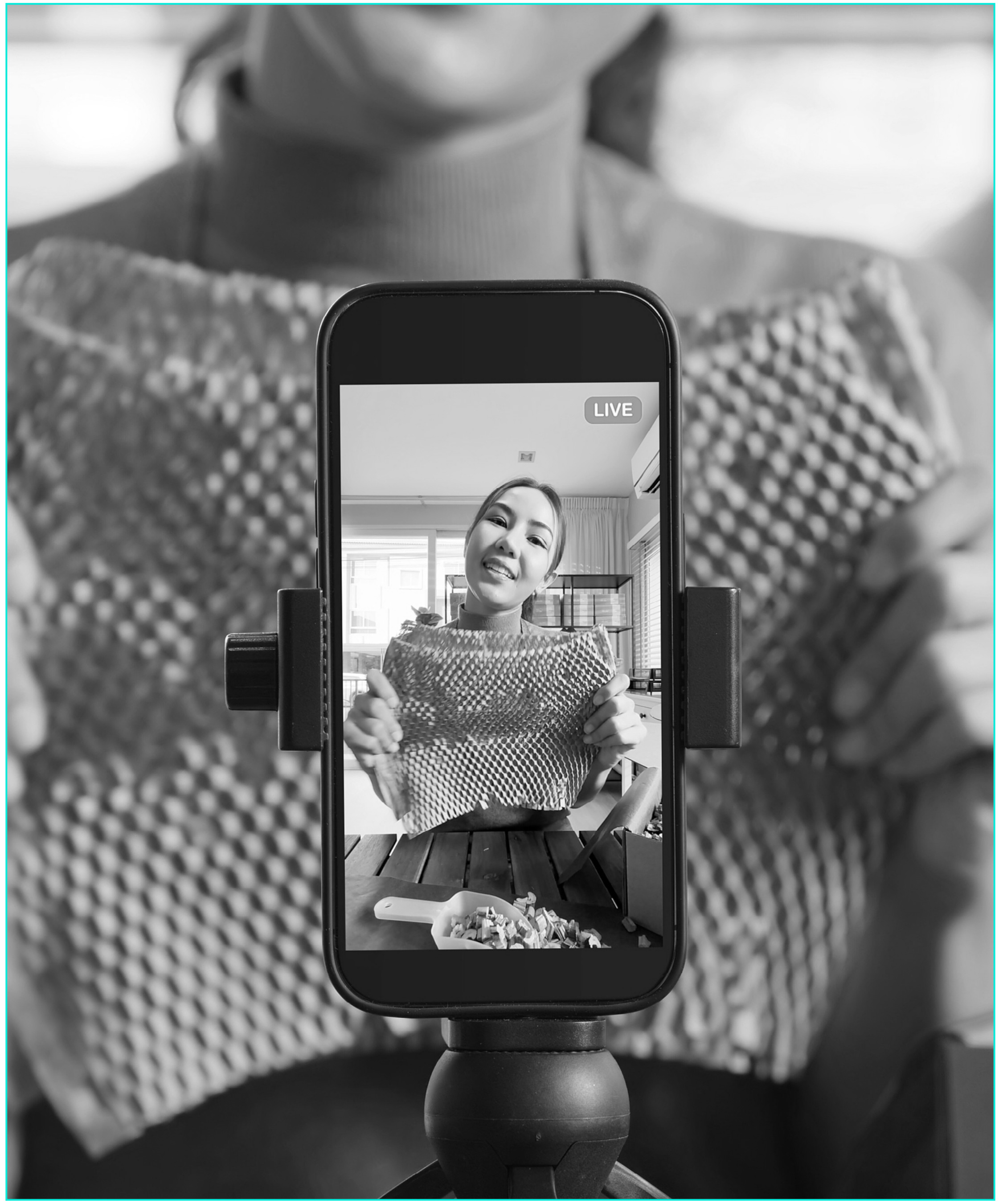
RETHINKING AND RESPONDING TO SHOPPER ENGAGEMENT

Social media continues to play a role in the purchase journey, though the landscape is shifting. Meta platforms still lead in engagement, but both Facebook and Instagram have seen a decline in overall influence. Meanwhile, smaller and emerging platforms are gaining traction.

Younger shoppers are more active on platforms like Instagram and TikTok, while Facebook remains most popular with those aged 35 to 44. Pinterest shows a more balanced appeal across age groups, though older shoppers tend to be less engaged with social commerce overall.

Shoppers gravitate toward light, entertaining content. Contests and giveaways are the most appealing, while podcasts and interviews generate the least interest. Sponsored posts remain the most effective format, but their impact is declining as creator-led content becomes more influential.

While these insights can spark fresh thinking around a retailer's platform mix and content approach, it's still important to test and confirm engagement with their target audience. By doubling down on relevance and authenticity, they may also capture more attention from a wider audience.



Same Leaders, New Movement in Social Engagement

In 2025, Meta leads shopper engagement on social platforms, with Facebook and Instagram taking the top spots.

Facebook remains the number one platform at 78%, despite a 4% decline since 2023. Instagram follows at 60%, marking a 7% increase over the same period.

Other platforms lag further behind. Data shows that 26% of shoppers use LinkedIn, 24% use TikTok, and 21% use Pinterest.

TikTok has seen a 5% increase in usage since 2023, while Pinterest has declined by 7% over the same timeframe.

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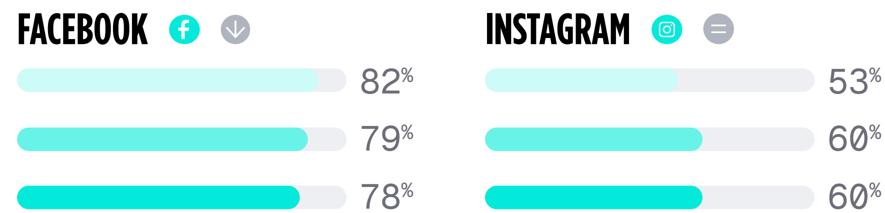
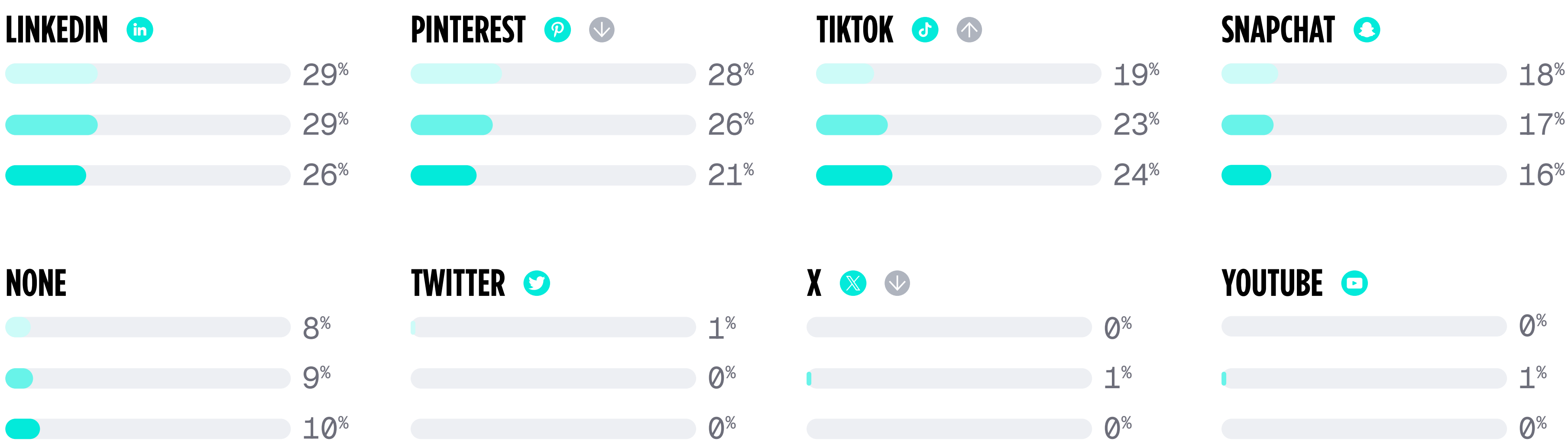
Which of the following platforms do you engage with? Tick all that apply.

2023 2024 2025





Major Social Platforms Decline, While Others Rise

Meta's influence over shoppers' purchase decisions may be starting to loosen. While it still leads among social platforms that shoppers say encourage them to buy, Facebook sits at 39%, a 16% drop compared to two years ago.

Instagram holds second place at 29%, reflecting a 6% decline from previous years. Meanwhile, the "Other" category, which includes smaller and emerging platforms, has risen by 9% this year. Together, these shifts may signal a broader move toward platforms seen as more authentic and less driven by algorithms.

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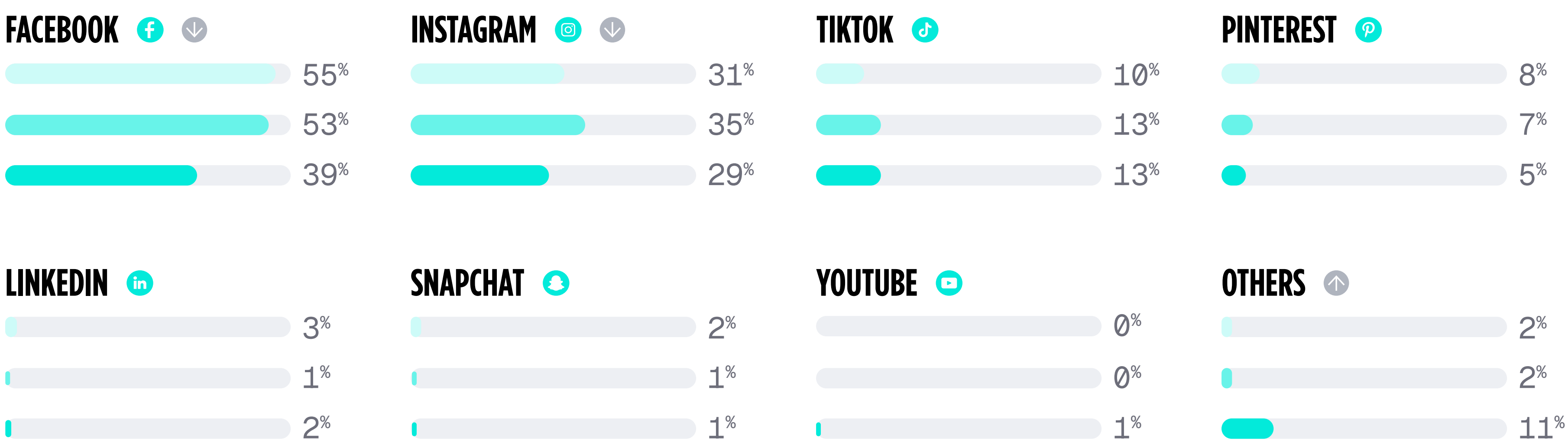
Which of the following have encouraged you to make an online purchase? (Tick all that apply)

2023 2024 2025



Platform influence also varies by age group. Facebook continues to resonate most with shoppers aged 35 to 44. Instagram stands out among those aged 25 to 34, while TikTok is most influential with the 18 to 24 crowd.

Pinterest may have lower overall influence on online purchases, but it maintains a more even pull across all age groups compared to other platforms.

Older shoppers are increasingly less influenced by social media, with 58% of those aged 65 and over saying they aren't encouraged to purchase via social channels.

18-24 YEARS

45%
INSTAGRAM

- TikTok (41%)
- Facebook (21%)
- None (21%)
- YouTube (7%)
- Pinterest (3%)
- Snapchat (3%)
- LinkedIn (3%)

25–34 YEARS

53%
INSTAGRAM

- TikTok (33%)
- Facebook (29%)
- None (28%)
- Pinterest (7%)
- Snapchat (2%)
- YouTube (1%)
- LinkedIn (1%)

35–44 YEARS

45%
FACEBOOK

- Instagram (42%)
- None (32%)
- TikTok (13%)
- Pinterest (5%)
- LinkedIn (2%)
- YouTube (1%)
- Snapchat (0%)

45–54 YEARS

43%
FACEBOOK

- None (36%)
- Instagram (27%)
- TikTok (13%)
- Pinterest (4%)
- LinkedIn (1%)

55–64 YEARS

43%
NONE

- Facebook (41%)
- Instagram (15%)
- Pinterest (5%)
- TikTok (5%)
- LinkedIn (2%)
- Snapchat (1%)

65+ YEARS

58%
NONE

- Facebook (33%)
- Instagram (5%)
- Pinterest (5%)
- LinkedIn (1%)
- TikTok (1%)
- YouTube (1%)
- Snapchat (1%)

Not All Shoppers Are Swayed by the Social Scroll

Sponsored posts from brands or retailers are the most likely to influence purchases while shoppers scroll through social media, with 42% saying they've been encouraged to buy this way. Organic posts come next, influencing 29% of shoppers, followed by influencer or celebrity content at 20%.

Despite this, a sizable portion of shoppers (40%) say social media doesn't influence their purchase decisions at all.

It's also worth noting that the impact of sponsored posts has declined by 5% since 2023, while creator and celebrity content has grown in influence by the same margin.

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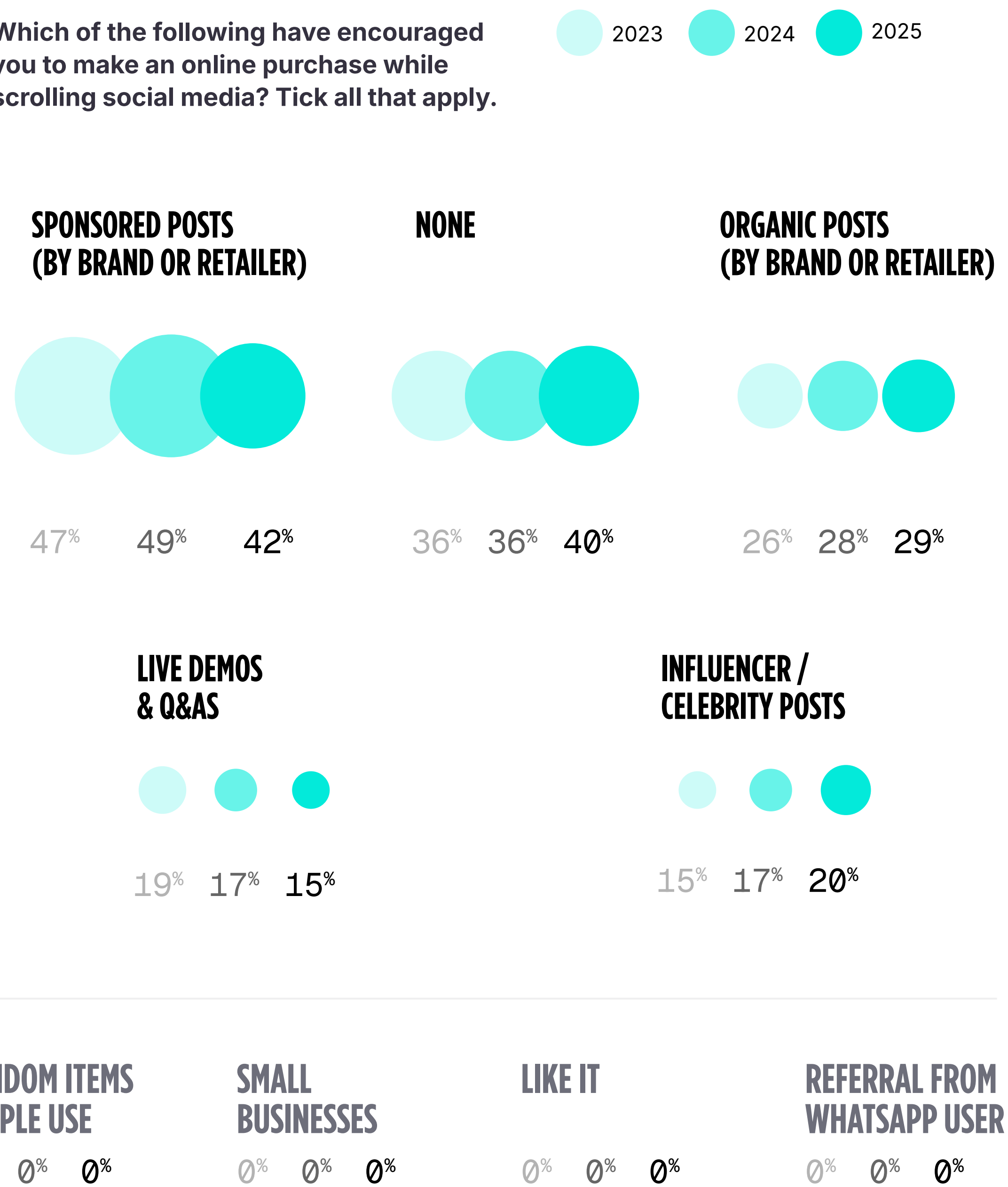
Which of the following have encouraged you to make an online purchase while scrolling social media? Tick all that apply.



Entertain First, Educate Later

When not actively making a purchase, most shoppers consider contests or product giveaways the most enjoyable type of interaction with a brand or retailer.

Social and lifestyle posts share second place. At the other end of the scale, case studies, interviews, and podcasts are rated as the least enjoyable by shoppers.

?

When you're not actively making a purchase, how much do you enjoy the following from a brand or retailer? Rank in order of priority from most to least enjoyable (1 being most important, 8 being least).

#1 CONTESTS OR PRODUCT GIVEAWAYS

#2 SOCIAL POSTS

#3 LIFESTYLE POSTS OR IMAGES

#4 Q&AS

#5 STAFF INSIGHTS

#6 CASE STUDIES

#7 INTERVIEWS

#8 PODCASTS

CONCLUSION

Shopper expectations in 2025 are shaped by clarity, convenience, and control. Price, delivery, and the path to purchase carry more weight than trend-driven features. While shoppers are open to buying across different channels, they expect a consistent experience that meets their standards. Services like Click and Collect, in-stock visibility, and accurate delivery timelines continue to influence where and how they choose to shop.

Shoppers are also becoming more selective in how they engage with brands. Sponsored content and influencer posts still play a role, but many are tuning out content that feels overly polished or curated. Giveaways, helpful recommendations, and content that adds real value are more likely to capture attention and drive purchase decisions.

The trends and behavioural shifts outlined in this report should serve as a strong foundation for retailers to further test and understand the needs of their specific shopper cohorts. By acting on this data and exploring it more deeply, retailers will be better positioned to turn shopper intent into effective conversion strategies.

“Shoppers are making decisions with greater intention and less patience for anything that feels unclear or inauthentic. As buying journeys stretch across channels, the brands that lead will be the ones who meet that complexity with simplicity, transparency, and trust.”

Shannon Ingrey

VP and GM, APAC, Commerce.

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EXPLORE MAKESWIFT

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