Ryder
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RYDER E-COMMERCE CONSUMER STUDY

How U.S. Consumers Are Shopping in 2025



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EXECUTIVE SUMMARY

Given recent economic uncertainty, retail brands across all categories and channels face additional challenges in trying to predict this year's consumer behavior and accurately forecast demand. Nevertheless, one of the best ways to plan for upcoming seasons is to reflect on the valuable consumer behavior insights gained from the previous ones. By blending historical data and trends with current economic indicators, brands can build more robust and realistic demand forecasts. As we examine the findings of our 11th annual e-commerce consumer benchmark survey, "How U.S. Consumers Are Shopping in 2025," one thing is clear – **consumers want the flexibility to shop when, where, and how they want, and they expect an exceptional customer experience throughout the entire fulfillment journey.**

The certainty of uncertainty

While recent events may feel unprecedented, at Ryder, we have seen our customers through many periods of ambiguity, strain, and turmoil. The COVID-19 pandemic disrupted forecasting models, making it immensely challenging to make accurate predictions. Leaning on our more than 90 years of experience in navigating all kinds of disruption across industries helped to guide our customers in the right direction then, just as we are doing now.

No matter the disruption, consumer expectations of reliability and convenience prevail, underscoring the importance of maintaining a consistent, responsive experience across all sales channels and an agile, resilient supply chain. This approach enables sellers to navigate disruptions successfully while capturing new customers' attention, optimizing sales opportunities, deepening customers' trust and loyalty, and earning their continued business.

Improving omnichannel integration with in-store pickup availability, flexible return policies, personalized marketing, and cross-channel loyalty programs can help create a more cohesive, enjoyable shopping journey customers will want to replicate. These optimizations can also create more cost savings for consumers, further improving their overall experience.



Steve Sensing
President,
Supply Chain & Dedicated Transportation Solutions,
Ryder System, Inc.

Preparing for the 2025 holiday shopping season

To get a complete picture of the shopper mindset, we must examine the holiday shopping season independently. The holiday season brings unique needs, preferences, behaviors, and circumstances that can differ greatly compared to the rest of the year. To supplement these distinctions, we supplemented this year's annual consumer study with a special report.

To contribute actionable data for 2025 holiday season planning, Ryder hired a third-party research company to survey their behaviors, preferences, experiences, and expectations during the 2024 holiday shopping season. The survey covered purchasing behavior, shipping, returns, omnichannel experience, sustainability, and supply chain factors.

Additionally, given the economic uncertainty in the first half of 2025, we followed up our initial research with a pulse survey in May 2025 to gauge consumer outlook for the upcoming holiday season.

With this combined survey data, our 2025 e-commerce consumer study is our most comprehensive yet, helping brands understand and adapt to the evolving retail landscape and latest consumer expectations. This study provides brands and retailers with consumer insights to help guide their omnichannel sales and supply chain strategies, ultimately enhancing the customer experience.



E-COMMERCE TRENDS



E-COMMERCE TRENDS: KEY TAKEAWAYS

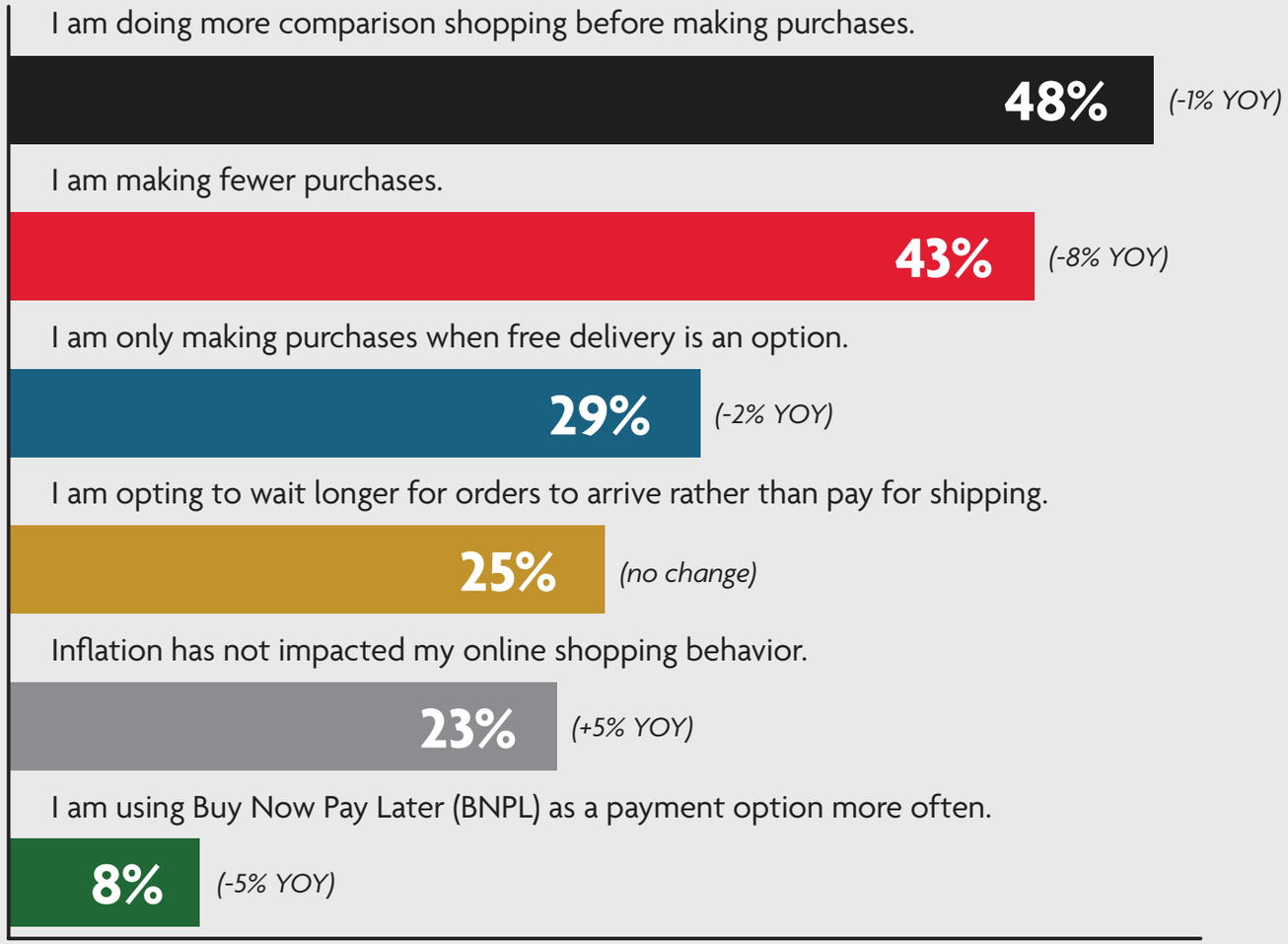
- Fewer consumers are attributing shifts in non-essential shopping behavior to inflation.
- Younger shoppers' non-essential purchase habits are more affected by inflation.
- Inflation cuts deepest into spending on clothing, home goods, electronics, and accessories.
- U.S. shoppers value American-made products.
- Older shoppers are more likely to buy American-made, but not at a higher cost.



Fewer consumers are attributing shifts in non-essential shopping behavior to inflation.



"How is inflation impacting your non-essential online shopping behavior?"

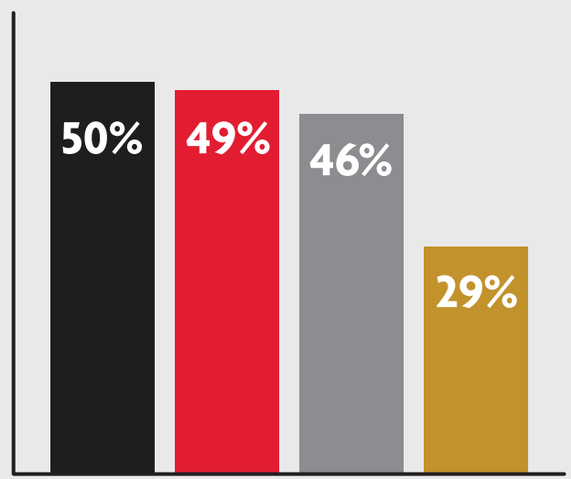


Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

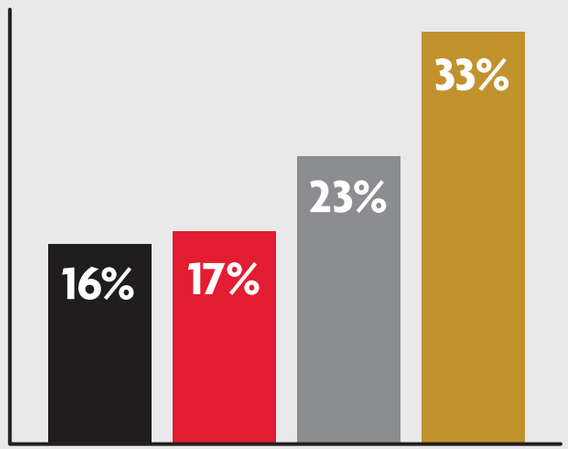
Younger shoppers' non-essential purchase habits are more affected by inflation.

How inflation is impacting non-essential online shopping behavior:

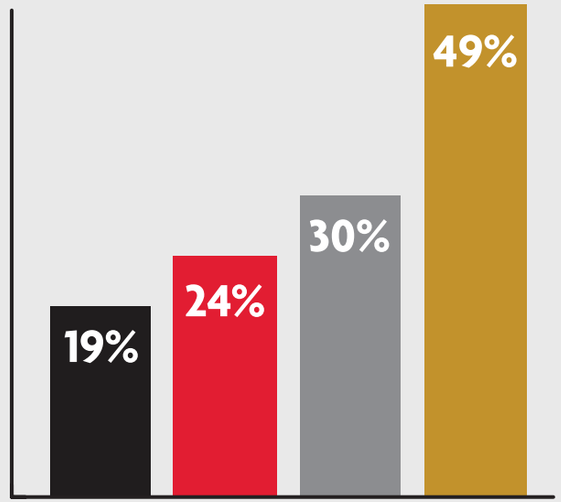
"I am making fewer purchases."



"Inflation has not impacted my online shopping behavior."



"I have not scaled back on purchasing anything due to inflation."



AGE GROUPS:

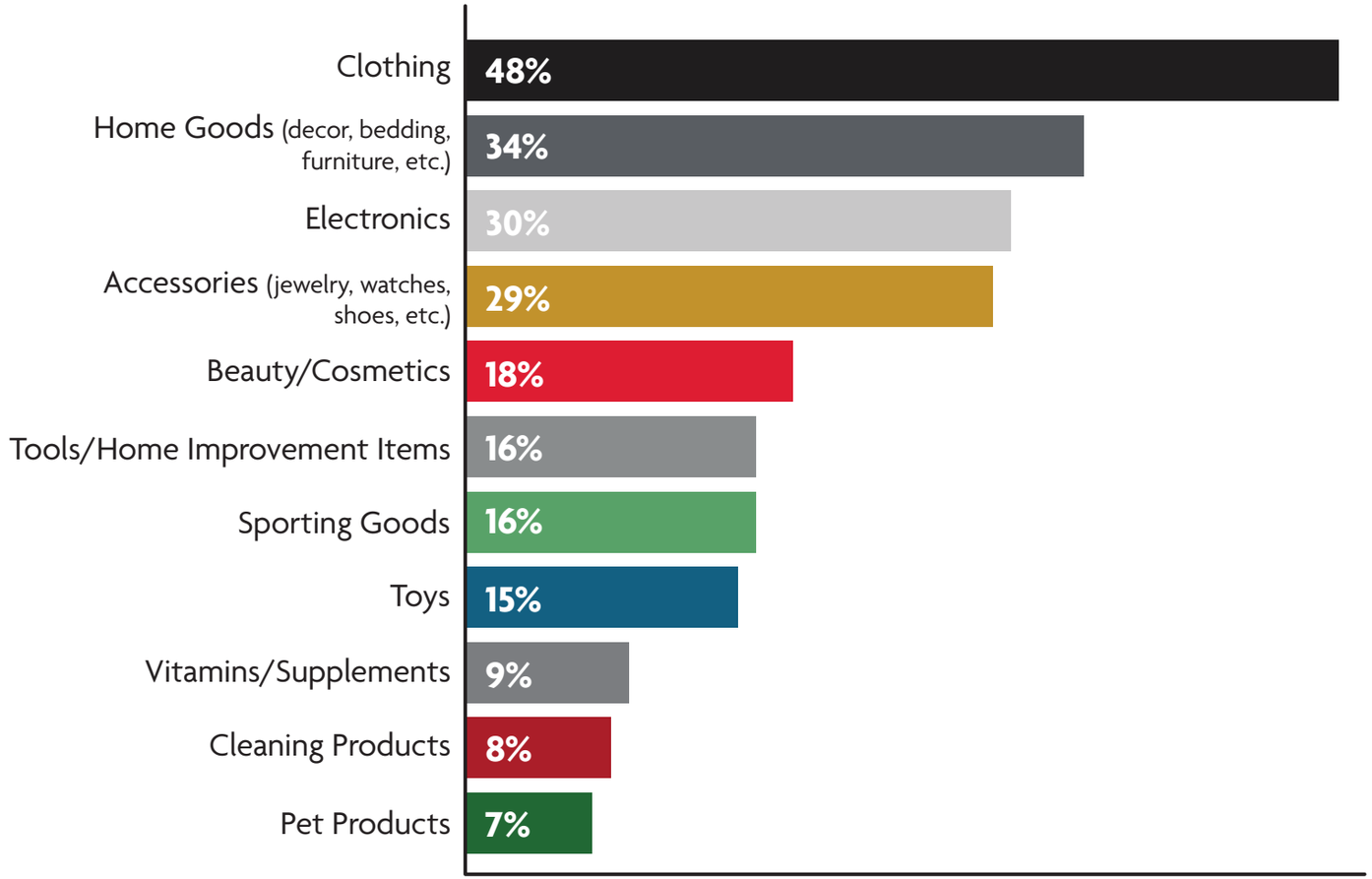
18-29 30-44 45-60 >60

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Inflation cuts deepest into spending on clothing, home goods, electronics, and accessories.

"Which of the following items have you scaled back on purchasing in the past year specifically due to inflation?"

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.



U.S. shoppers value American-made products.

74% of shoppers would be **more likely** to purchase a product that is **made in the U.S.**

Of these shoppers, **nearly half (48%) would be willing to pay a higher price** for an American-made product.

"Which of the following items would you be more likely to purchase if they were made in the U.S.?"

Top 5 Product Categories

65%	Clothing
57%	Vitamins/Supplements
47%	Home Goods
47%	Electronics
45%	Cleaning Products

18%

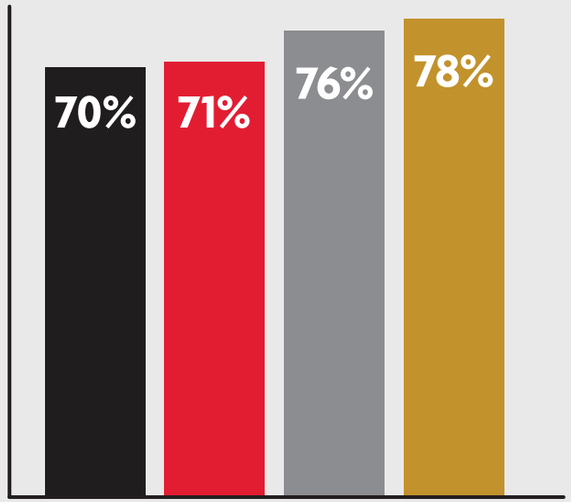
of shoppers find out where a product is manufactured before purchasing it.



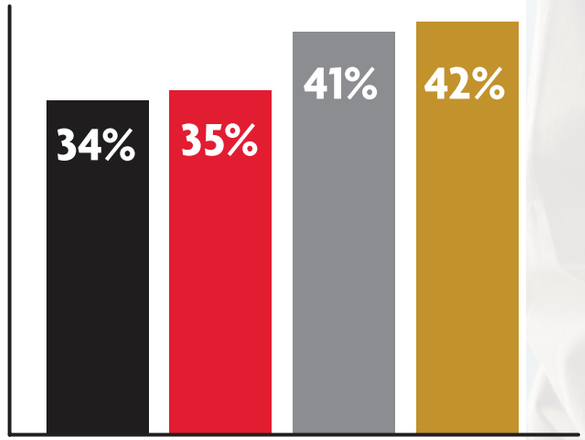
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Older shoppers are more likely to buy American-made, but not at a higher cost.

Shoppers who would be more likely to buy products made in the U.S.



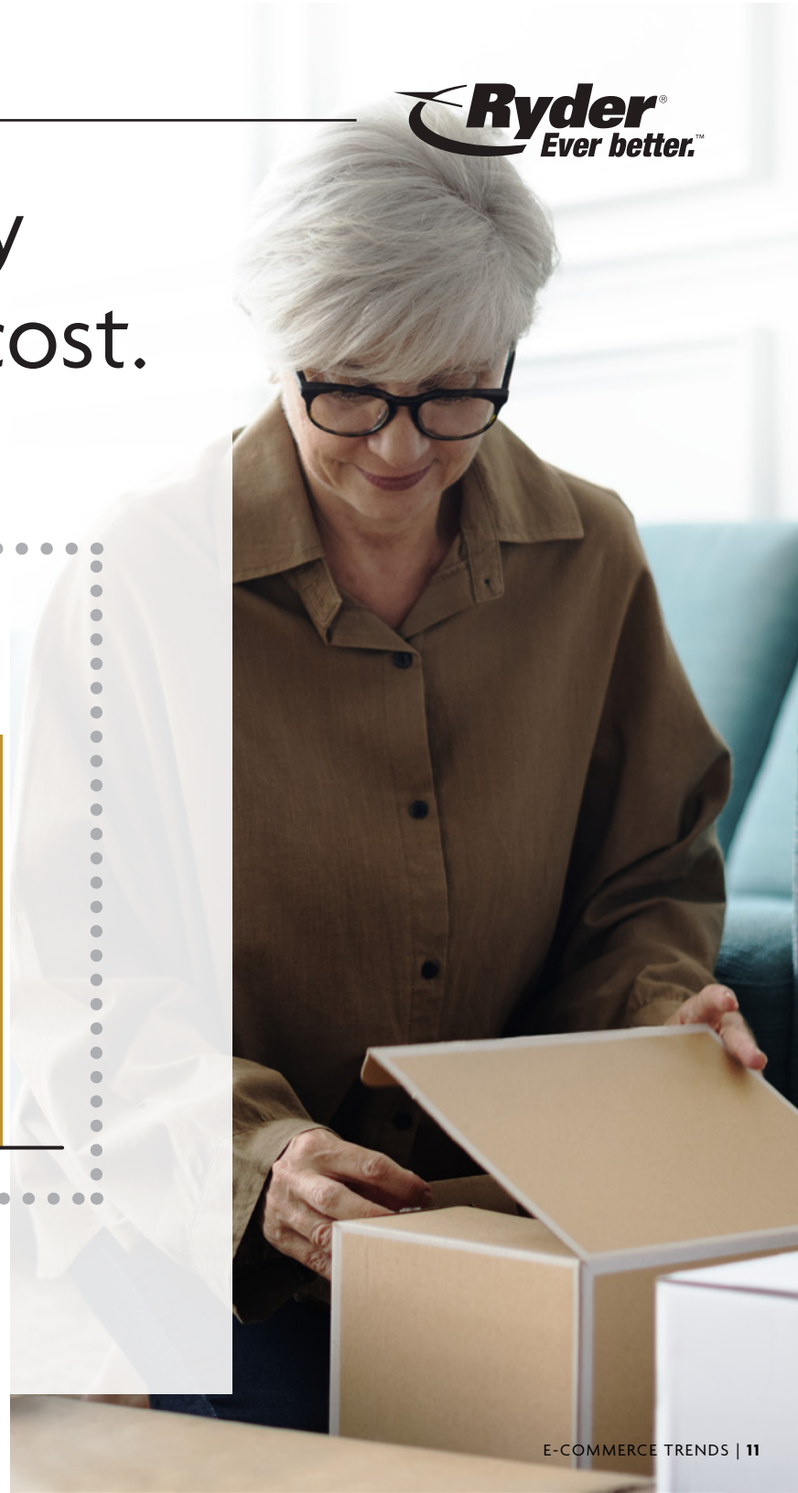
"...but not if I have to pay more for American-made."



AGE GROUPS:

18-29 30-44 45-60 >60

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.



PURCHASE BEHAVIOR



PURCHASE BEHAVIOR: KEY TAKEAWAYS

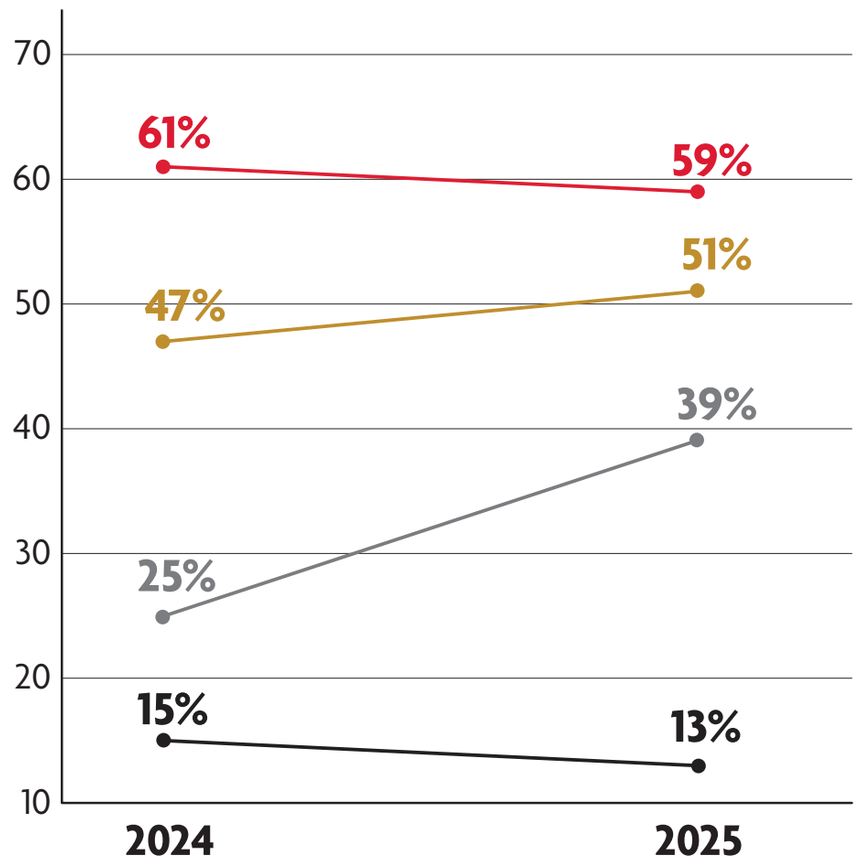
- Experience is the leading driver of physical shopping.
- Price comparison is the most commonly used research method among online shoppers.
- Cleaning products, toys, and vitamins/ supplements exhibited the most annual growth.
- Holiday purchasing patterns signal key omnichannel and consumer loyalty opportunities.



Experience is the leading driver of physical shopping.

"Which of the following statements describes your in-store shopping preferences?"

- I shop in-store because I enjoy the experience (trying on products, comparing products in person, etc.).
- I shop in-store only when I need something immediately.
- I shop in-store because I don't want to wait for online orders in the mail.
- I shop in-store to avoid package theft.



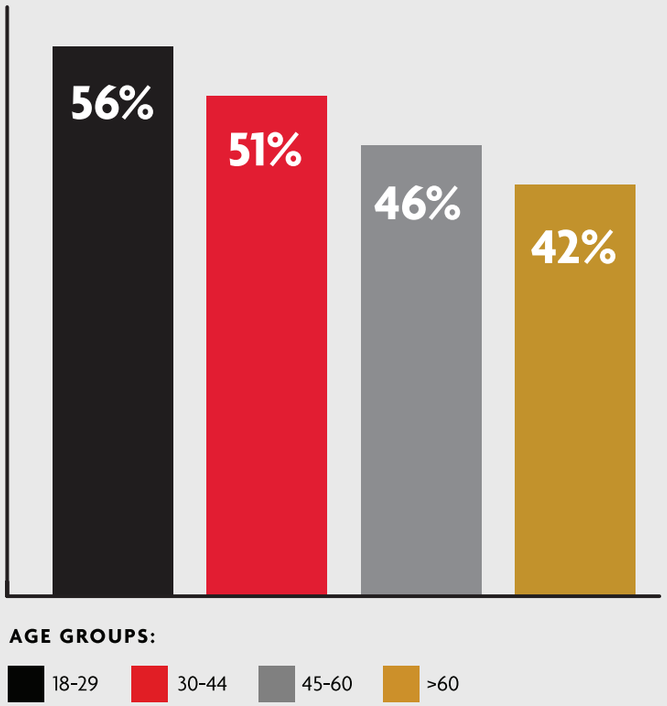
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Price comparison is the most commonly used research method among online shoppers.

"Which of the following do you typically do before purchasing a product online?"



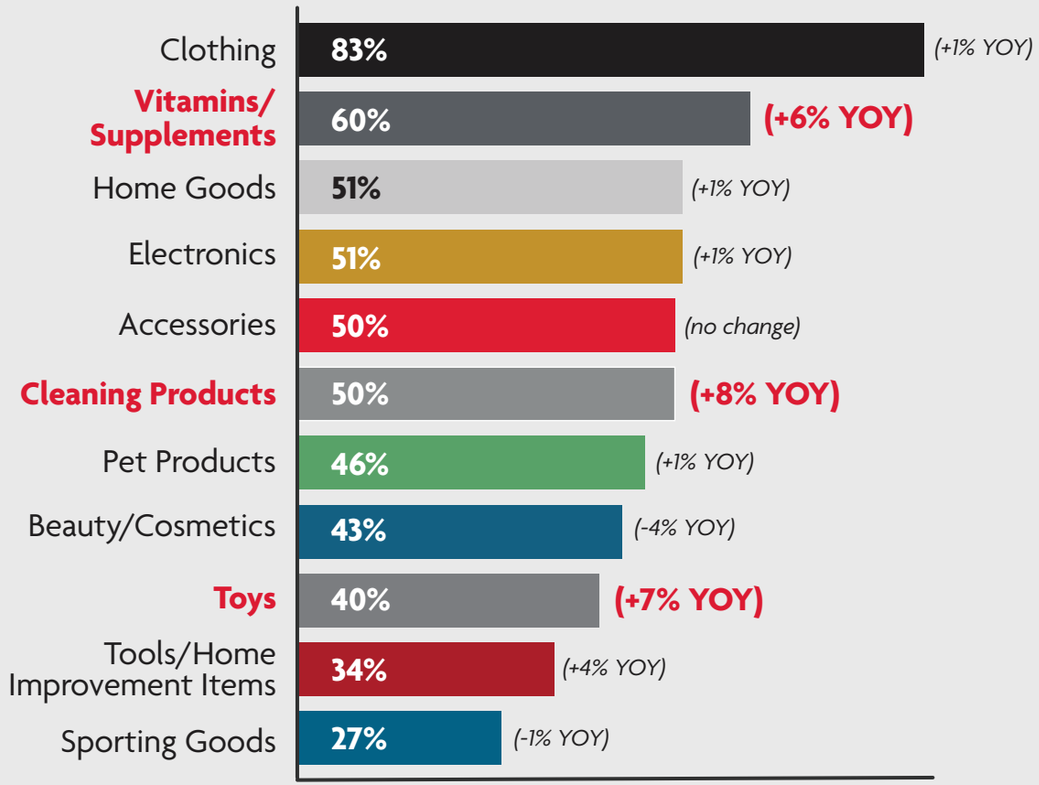
Consumers who report inflation is driving them to do more comparison shopping:



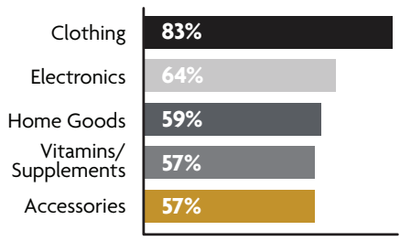
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Cleaning products, toys, and vitamins/ supplements exhibited the most annual growth.

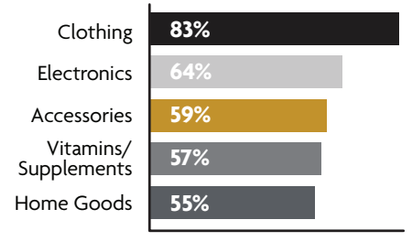
"Which of the following have you purchased online in the past year?"



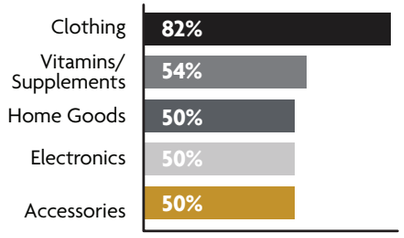
2022 TOP 5



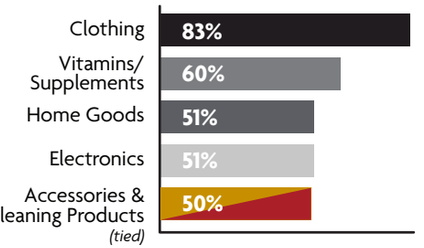
2023 TOP 5



2024 TOP 5



2025 TOP 5



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

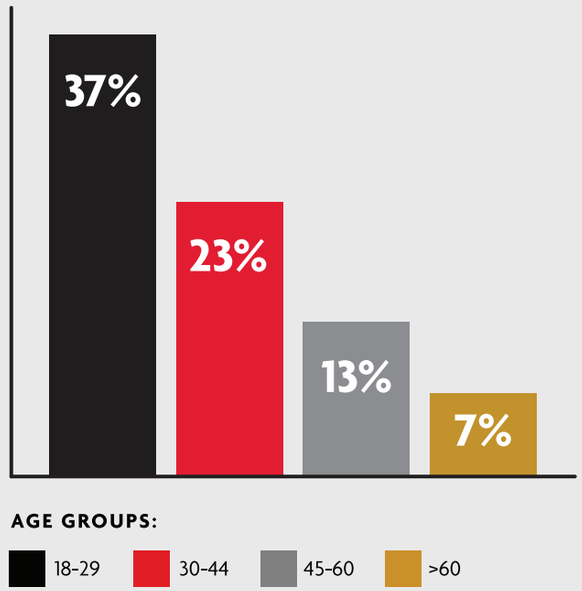
Holiday purchasing patterns signal key omnichannel and consumer loyalty opportunities.

62%

of shoppers use retailer loyalty/ rewards points more during the holiday season than the rest of the year.

(+12% YOY)

Younger shoppers use BNPL methods more during the holiday season than the rest of the year.



I use Buy Online Pickup In Store (BOPIS) more during the holiday season than the rest of the year.

45% *(+1% YOY)*

I use Buy Online Return in Store (BORIS) more during the holiday season than the rest of the year.

39% *(-1% YOY)*

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

OMNICHANNEL

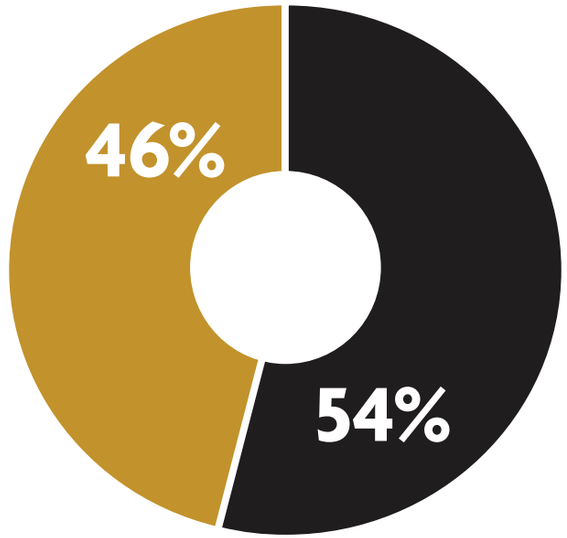


OMNICHANNEL: KEY TAKEAWAYS

- Recently emerged consumer preference for in-store returns holds steady.
- Shoppers seek alternative delivery options to prevent package theft.
- Shipping fees and convenience drive Buy Online Pickup In Store (BOPIS) activity.
- Consumers appear slightly less reliant on mobile devices to aid in-store shopping.



Recently emerged consumer preference for in-store returns holds steady.

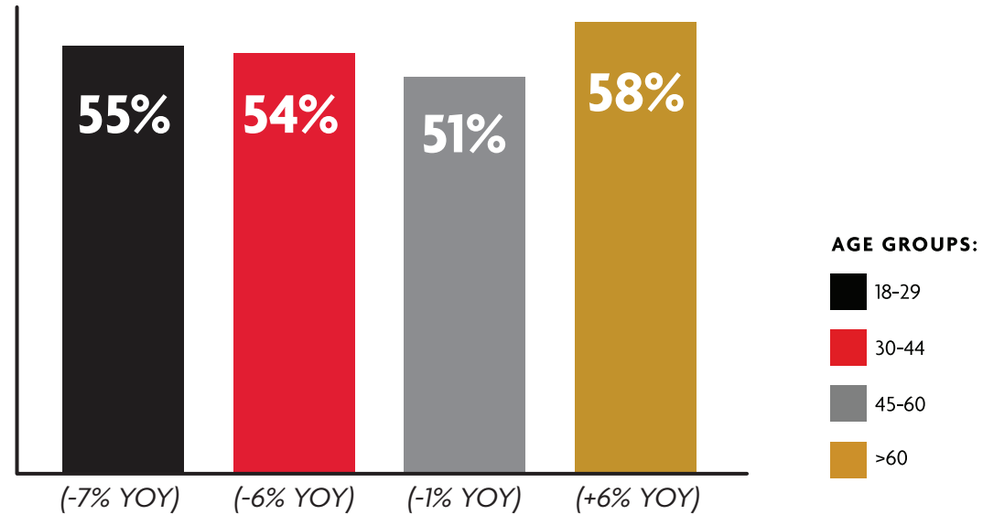


Prefer to return online purchases in-store. *(-1% YOY)*

Prefer to return online purchases via mail/drop box. *(+1% YOY)*

Evolving return preferences across age groups underscore the need for flexible omnichannel offerings.

Preference for in-store returns by age group:

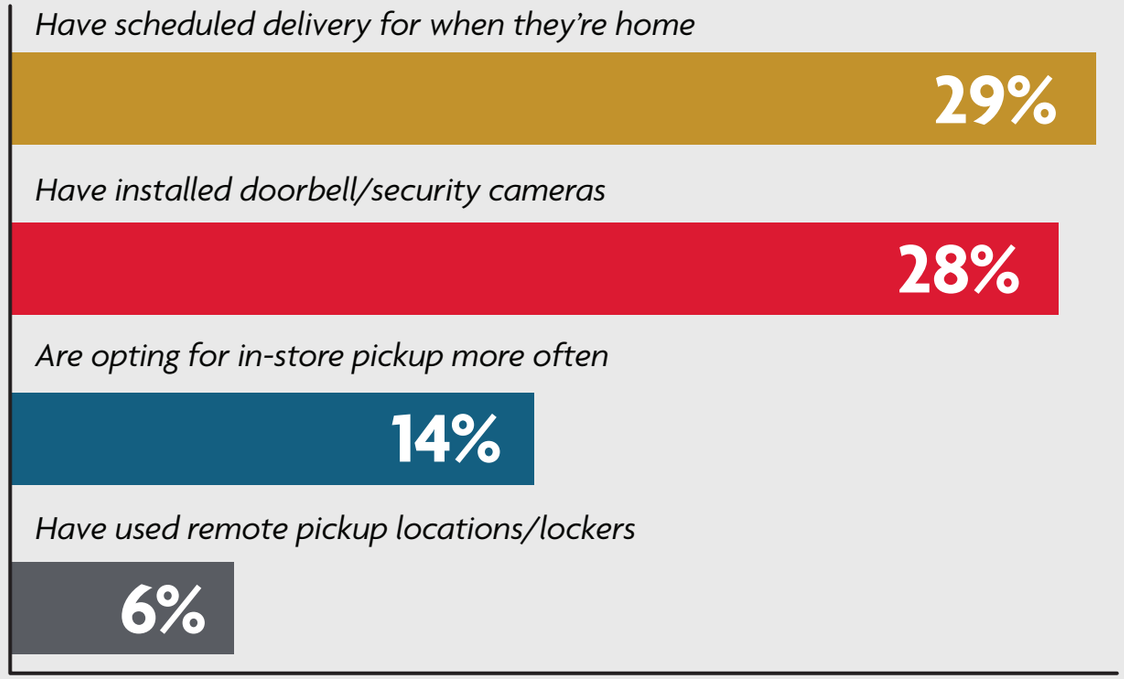


Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Shoppers seek alternative delivery options to prevent package theft.

Despite **nearly half (48%) of shoppers reporting never having experienced package theft,** they are still taking measures to prevent packages from being stolen from their residences.





Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

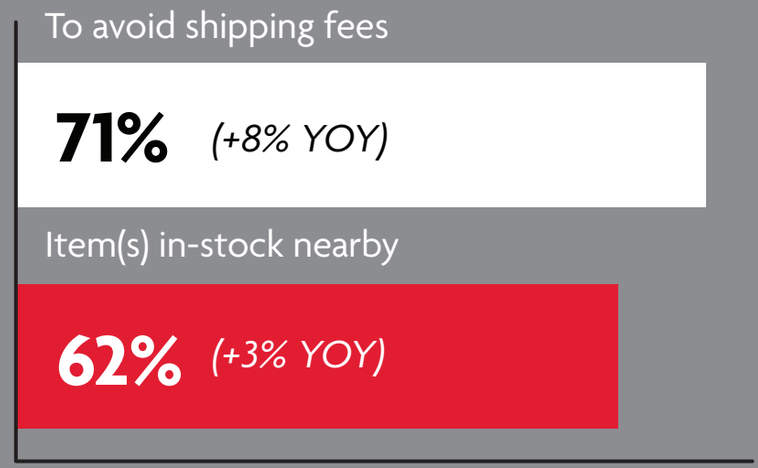
Shipping fees and convenience drive BOPIS activity.

31% of shoppers reported utilizing BOPIS *(+6% YOY)*...

...but fewer customers are making additional purchases when picking up or returning items in-store:

29% *(-11% YOY)*

Most common reasons consumers elect to utilize BOPIS:



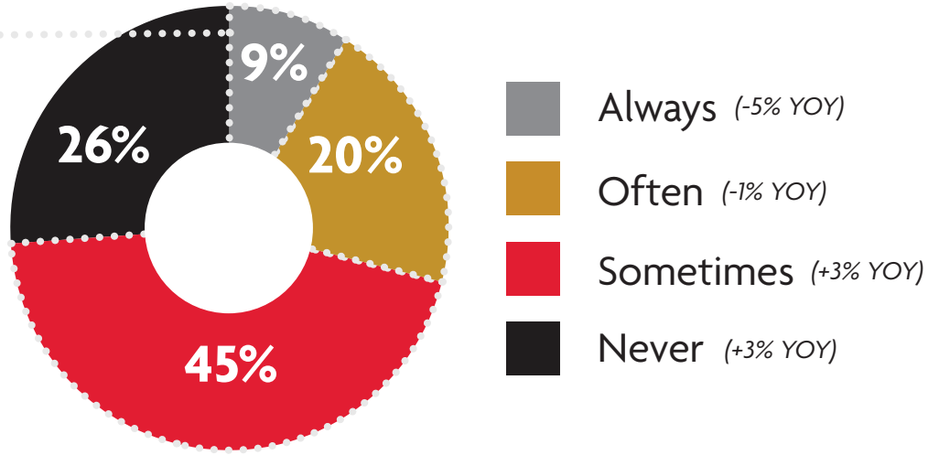
34% of shoppers check for in-store availability before purchasing an item online.

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

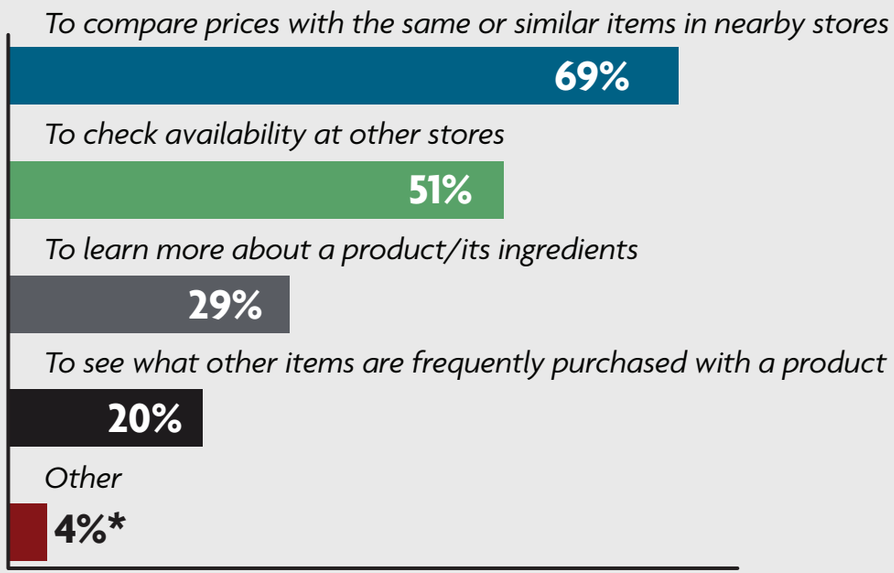
Consumers appear slightly less reliant on mobile devices to aid in-store shopping.



74% of shoppers search for items on their mobile devices while in a store. *(-3% YOY)*



Why do shoppers use their mobile devices while in a store?



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

**Of those who selected "Other," 65% submitted open-ended responses indicating that they use their mobile devices in-store specifically to find the location of an item they are looking for.*

SHIPPING



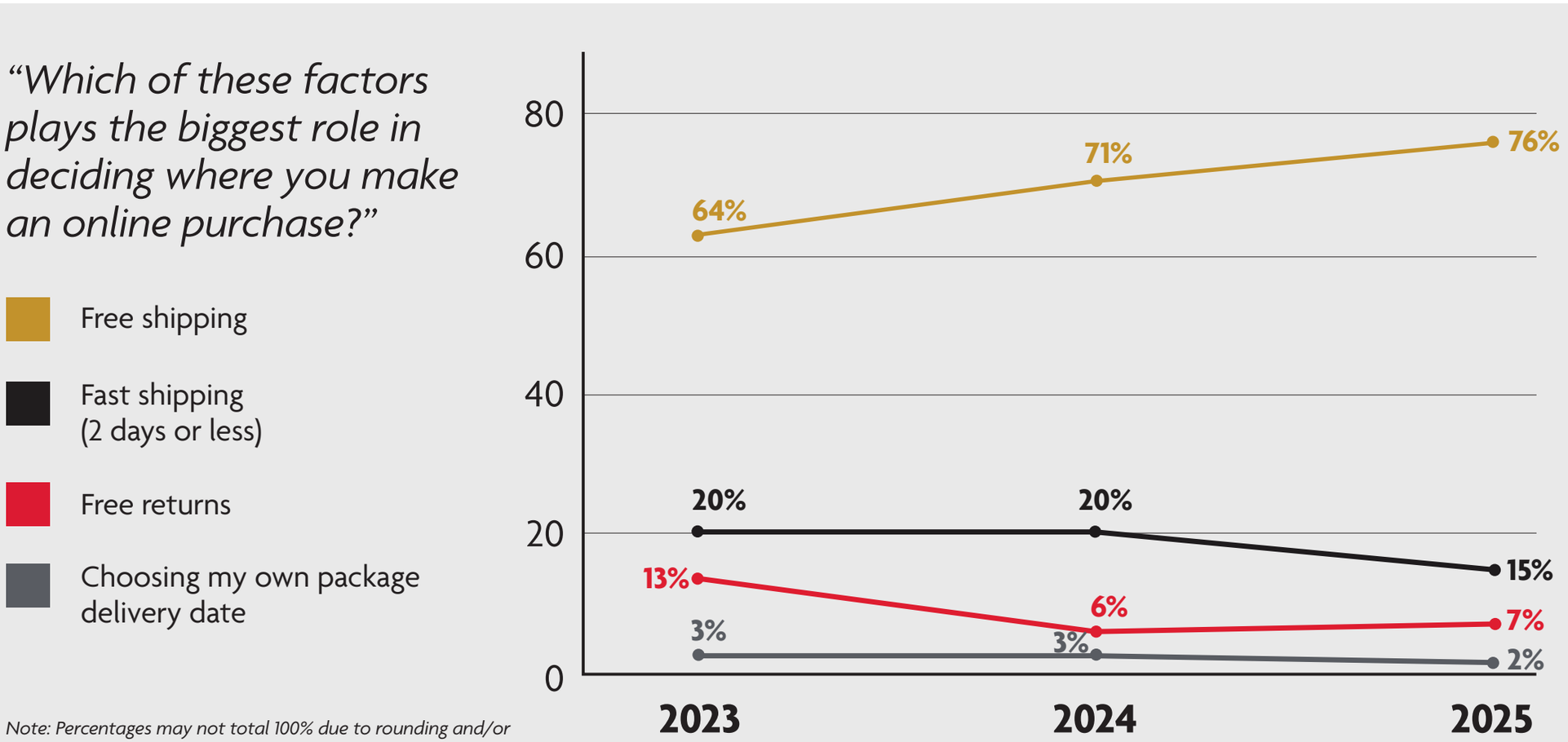
SHIPPING:
KEY TAKEAWAYS

- The influence of free shipping on purchasing decisions is on a steady incline.
- Shoppers' expectations for faster shipping have relaxed.
- Free shipping thresholds continue to contribute to increased average order value.
- Shipping costs are top of mind throughout the buying journey.
- Consumers are decreasingly opposed to paying for shipping that takes longer than 2 days.
- Scheduled delivery is gaining favor when compared to fast shipping.



The influence of free shipping on purchasing decisions is on a steady incline.

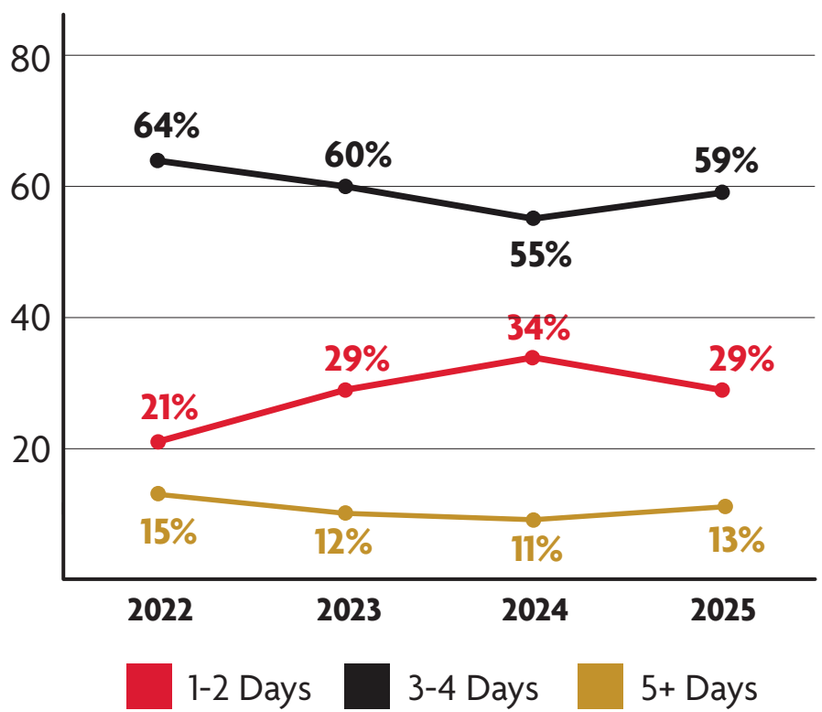
"Which of these factors plays the biggest role in deciding where you make an online purchase?"



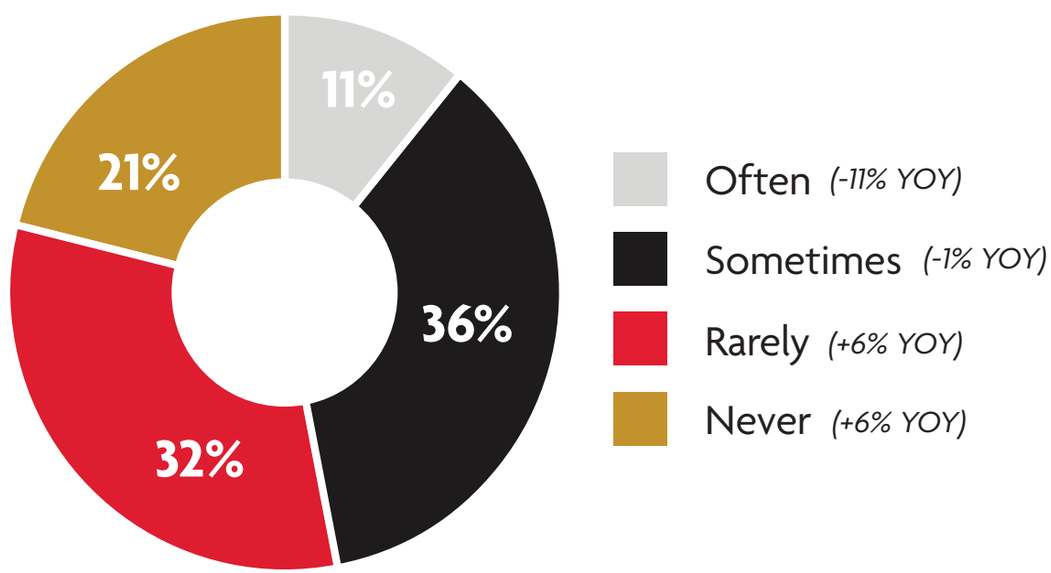
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Shoppers' expectations for faster shipping have relaxed.

Shipping speed expectations:



"How often do you make an online purchase specifically because it's available with same-day delivery?"

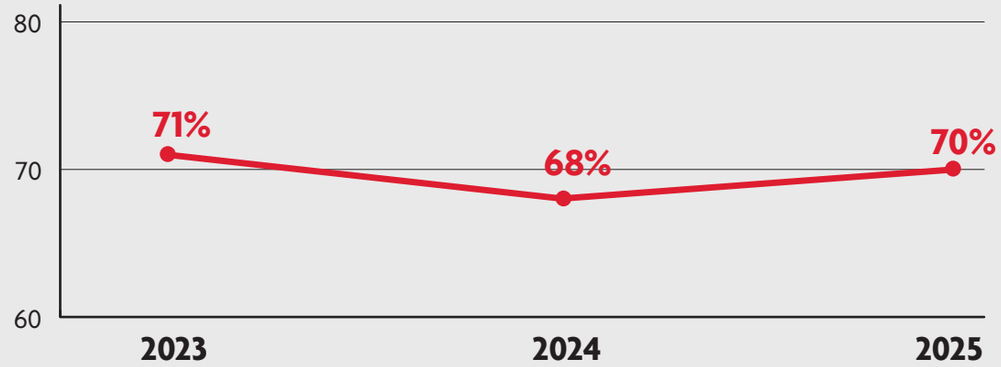


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Free shipping thresholds continue to contribute to increased average order value.

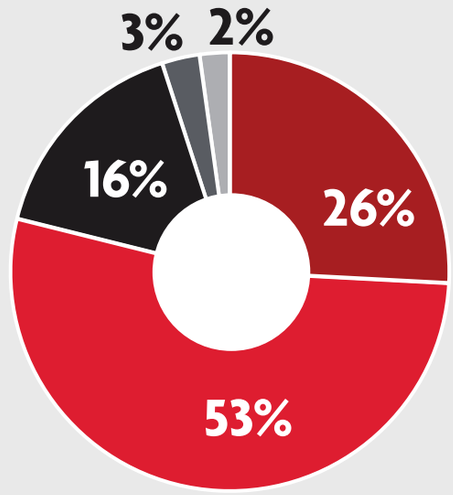


Most consumers have added items to their online shopping carts to qualify for free shipping:



Most shoppers will not spend more than $50 to qualify for free shipping:

- Willing to spend up to $25
- Willing to spend up to $50
- Willing to spend up to $100
- Willing to spend up to $150
- Willing to spend up to $200+



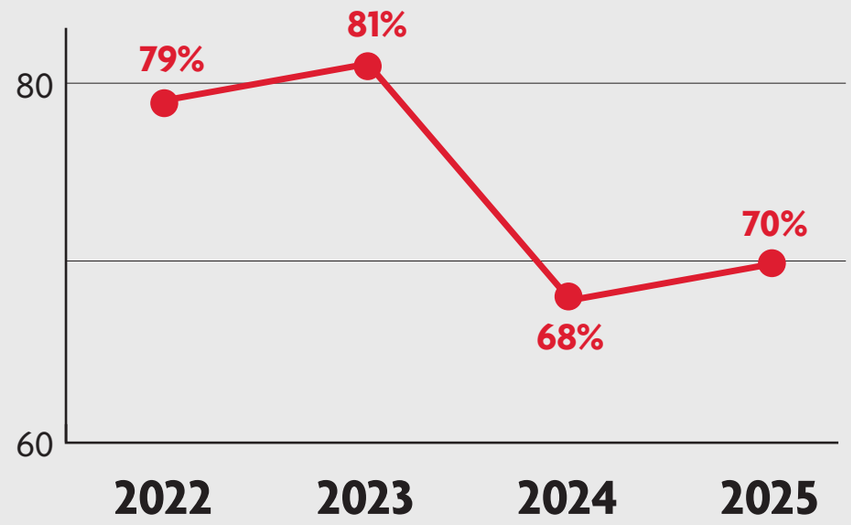
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Shipping costs are top of mind throughout the buying journey.

47%

of shoppers research which sellers offer free or cheaper shipping before buying a product online.

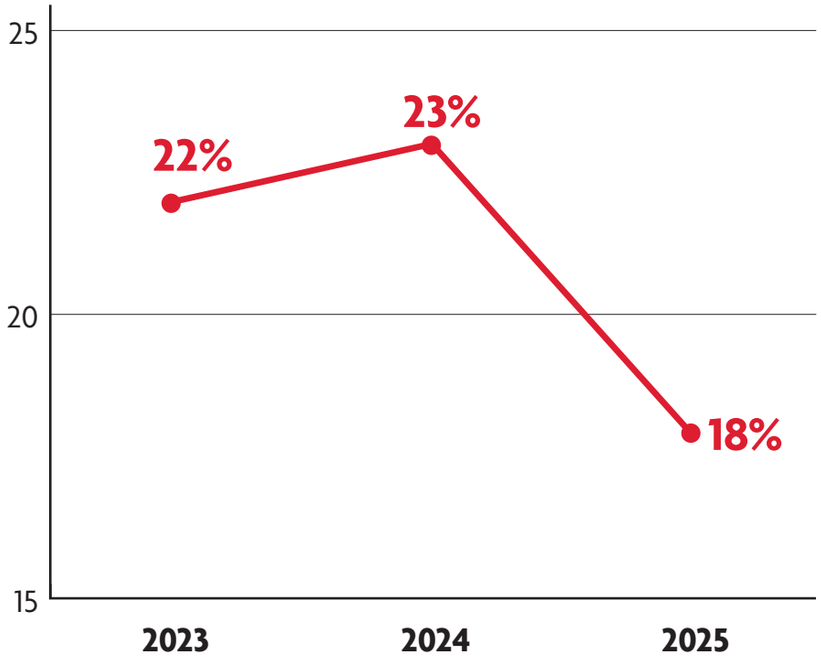
Shoppers who have abandoned items in their online carts upon seeing unanticipated shipping costs:



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Consumers are decreasingly opposed to paying for shipping that takes longer than 2 days.

The number of consumers unwilling to pay for shipping that takes longer than 2 days **fell by 5% since 2024.**



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

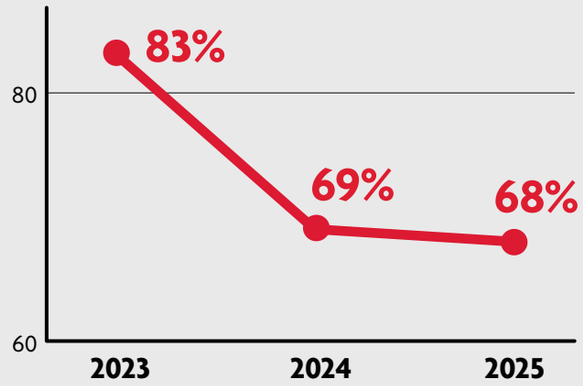


Scheduled delivery is gaining favor when compared to fast shipping.

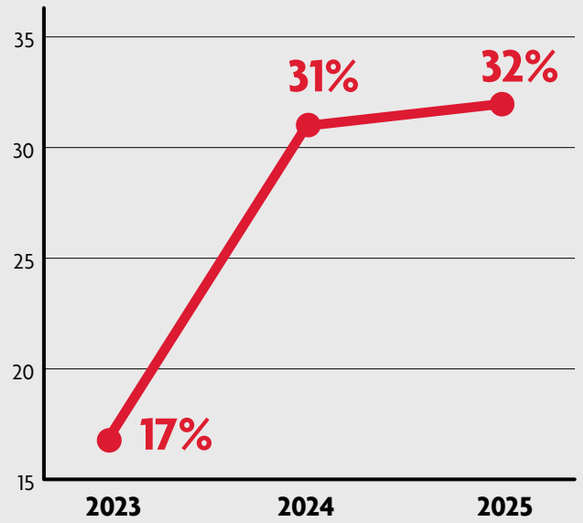
Nearly 1/3
of respondents say scheduled delivery is more important than fast shipping.

"What is more important to you?"

Fast Shipping
(two days or less)



Scheduled Delivery
(receiving your purchase on a specific date)



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

RETURNS



RETURNS:
KEY TAKEAWAYS

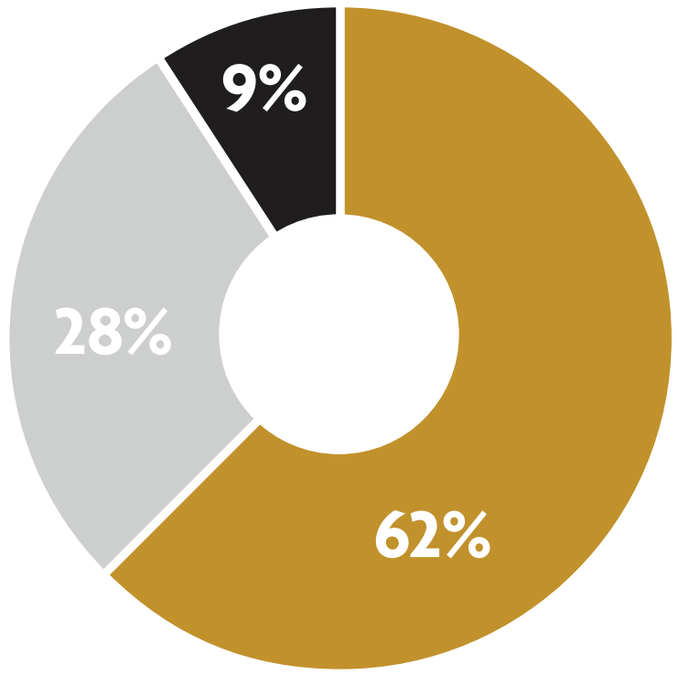
- Regardless of how often they return items, shoppers look for free-return policies.
- Poor fit tops the list of reasons for online returns.
- Returnless refunds increasingly promote brand support and charitable giving.
- Failure to provide hassle-free returns puts customer retention at risk.
- Younger shoppers are more likely to let returns-related hurdles affect future shopping decisions.



Regardless of returns frequency, shoppers look for free-return policies.

In the last year:

- Shoppers that reported returning about the same number of online purchases as usual *(+13% YOY)*
- Shoppers that reported returning fewer online purchases than usual *(-9% YOY)*
- Shoppers that reported returning more online purchases than usual *(-5% YOY)*



57%
of shoppers won't make an online purchase **without a free-return policy.** *(no change)*

40%
of shoppers check if a brand has a **free-return policy before** making an online purchase.

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Poor fit tops the list of reasons for online returns.

Top 3 most returned online purchase categories:

1. Clothing	48%
2. Home Goods	15%
3. Accessories	10%



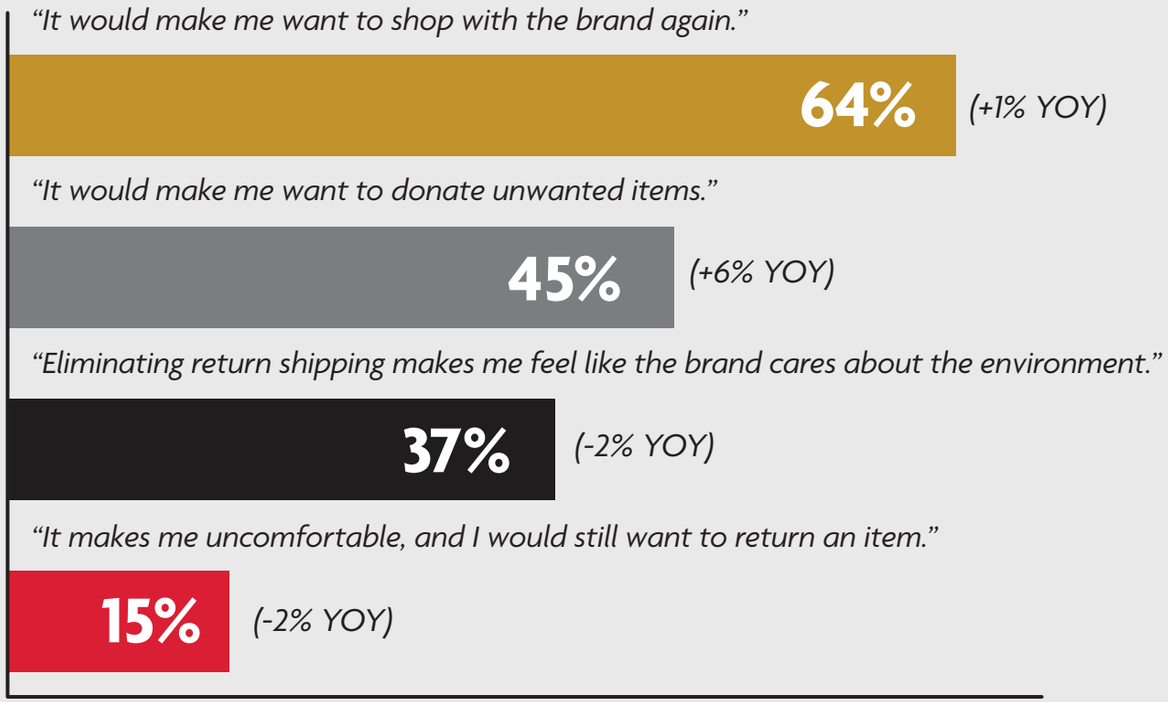
Top 3 reasons for returns:

1. Item(s) did not fit as expected	66%
2. Item(s) were lower quality than expected	28%
3. Items were damaged or defective	25%

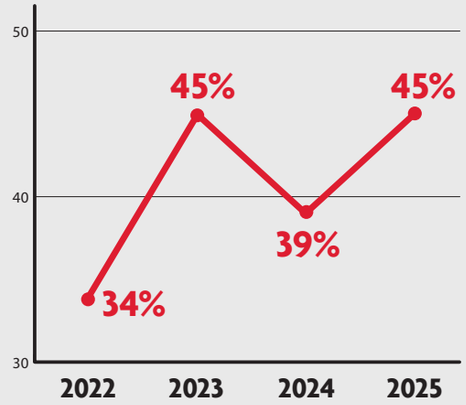
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Returnless refunds increasingly promote brand support and charitable giving.

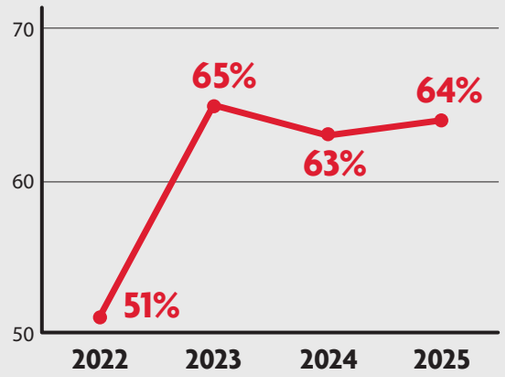
Leading consumer perceptions of returnless refund policies:



Shoppers who are encouraged to **donate unwanted items:**



Shoppers who are encouraged to **shop with the brand again:**

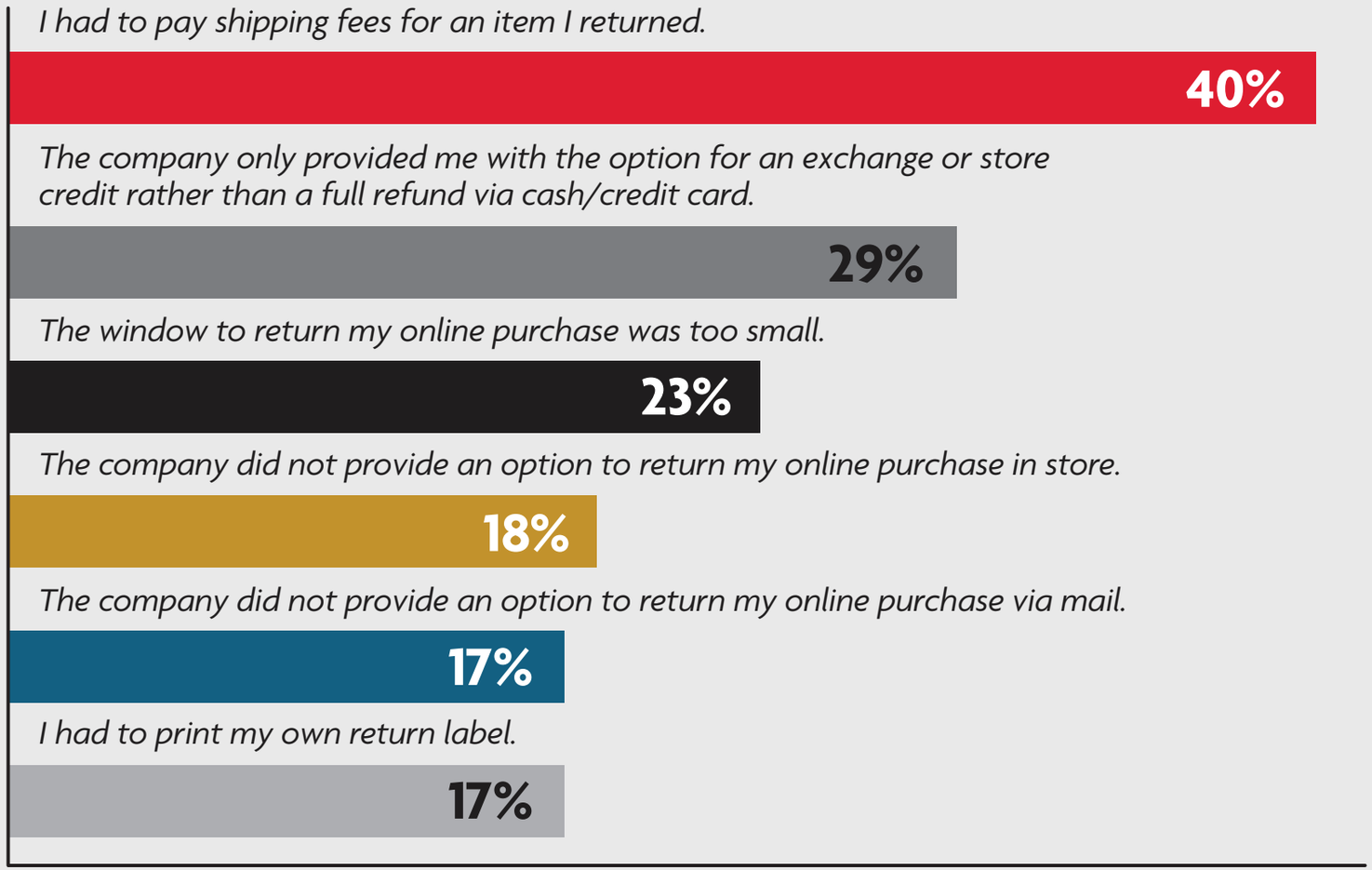


Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Failure to provide hassle-free returns puts customer retention at risk.

"Which of the following experiences have prevented you from continuing to shop with a company?"





Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

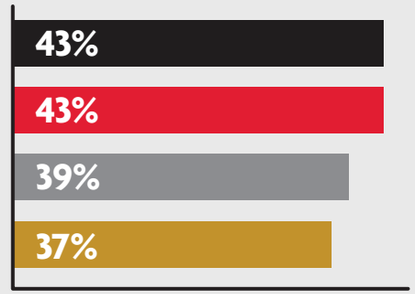
Younger shoppers are more likely to let returns-related hurdles affect future shopping decisions.

"Specifically related to returning online orders, which of the following experiences have prevented you from continuing to shop with a company?"

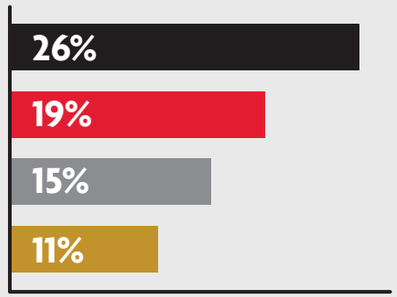
AGE GROUPS:

18-29 30-44 45-60 >60

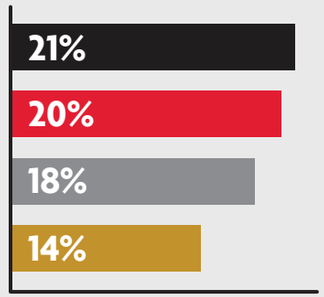
I **had to pay shipping fees** for an item I returned.



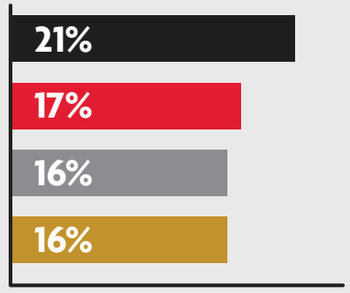
I had to **print my own return label.**



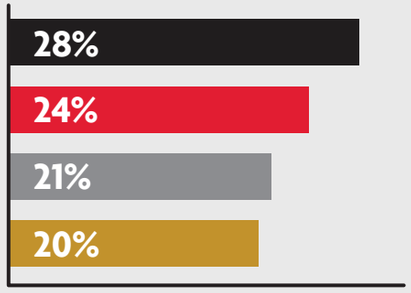
The company **did not** provide an option to **return my online purchase in-store.**



The company **did not** provide an option to **return my online purchase via mail.**



The **window to return** my purchase was **too small.**



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

PACKAGING



PACKAGING:
KEY TAKEAWAYS

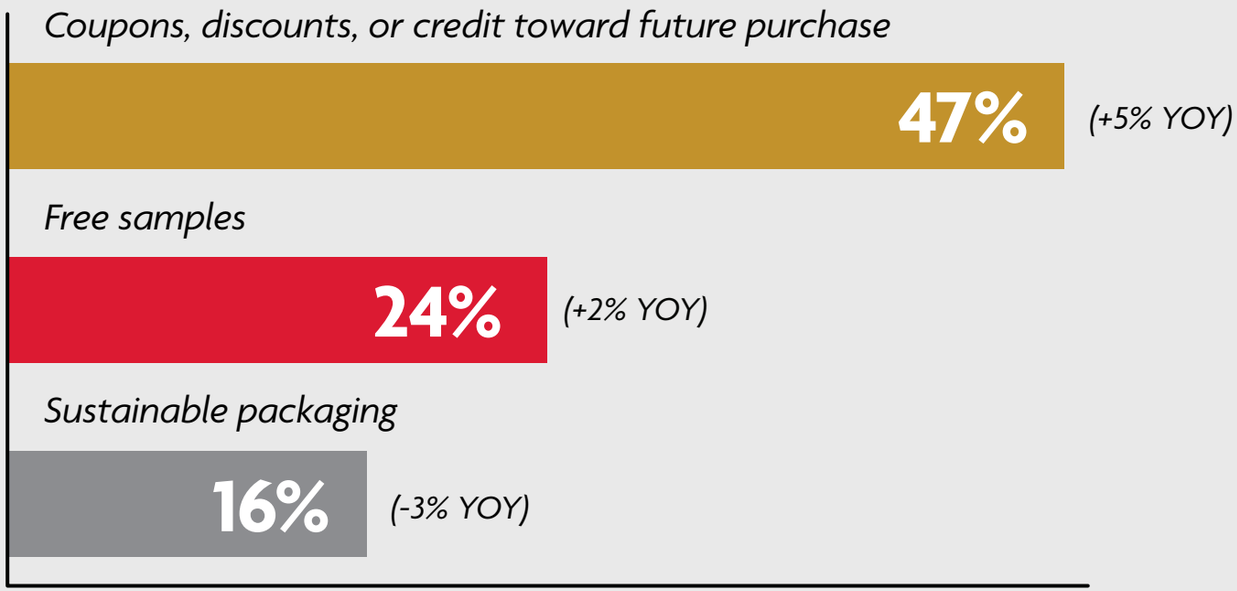
- Perceived value and savings bring customers back to brands.
- A premium unboxing experience drives positive brand sentiment.
- Online shoppers place value on the protection boxes provide.



Perceived value and savings bring customers back to brands.

"When thinking about the experience of unboxing an online order, what factor is MOST likely to make you want to shop with the same brand again in the future?"

Top 3 Factors

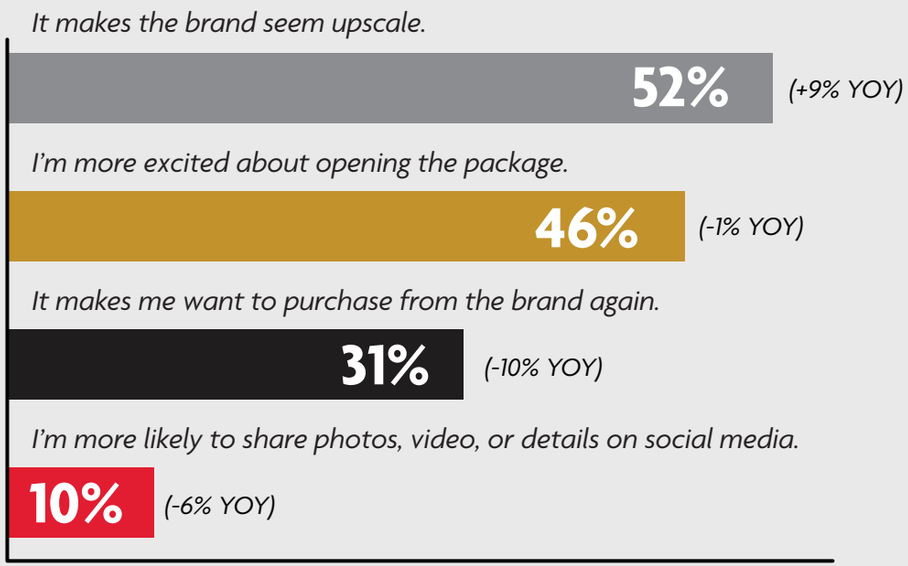


Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

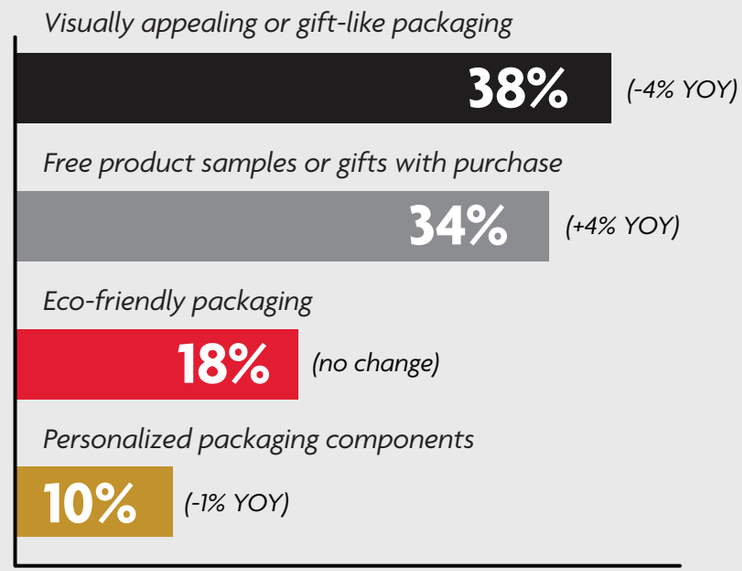


A premium unboxing experience drives positive brand sentiment.

"How are your feelings about a brand affected by a premium unboxing experience (e.g., a custom designed box, colorful tissue paper, ribbons, twine, etc.)?"



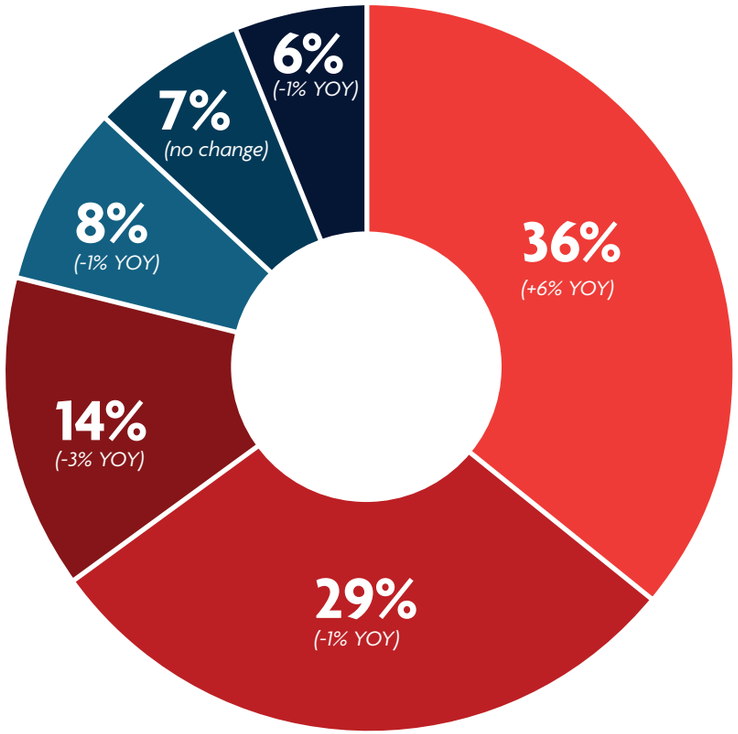
"Which of the following is most likely to encourage you to post photos or video showcasing a package you received from a company?"



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Online shoppers place value on the protection boxes provide.

Shoppers' justifications for online order shipping packaging preference:



Box

- I feel it provides better protection in transit
- I reuse them
- It's more eco-friendly

Bag

- It's easier to dispose of
- I reuse them
- It takes up less space

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

25%

of shoppers returned online purchases because their items arrived damaged or defective.



SUSTAINABILITY



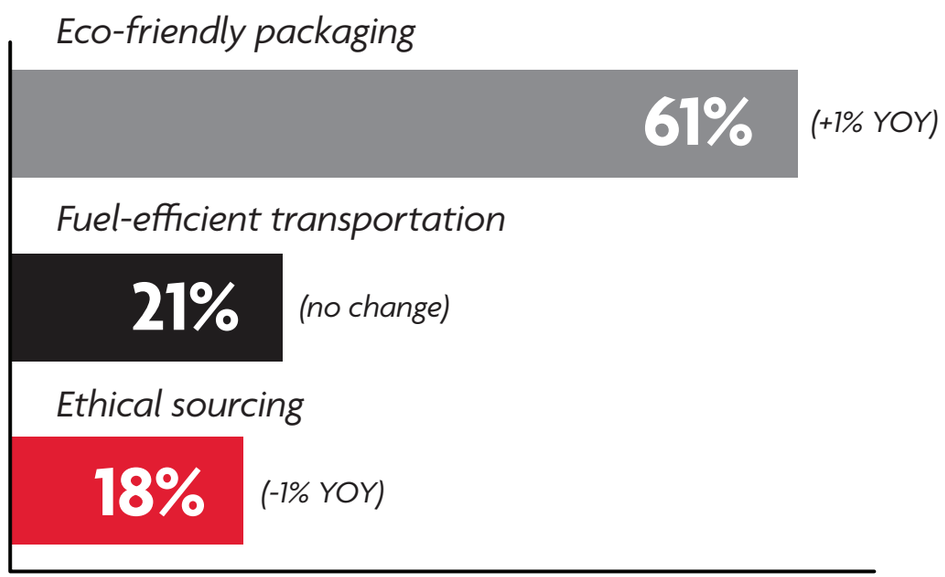
SUSTAINABILITY: KEY TAKEAWAYS

- Shoppers maintain that eco-friendly packaging most influences purchase preference.
- Circular economy participation faces a decline.
- Shoppers demonstrate patience when it comes to environmental impact.

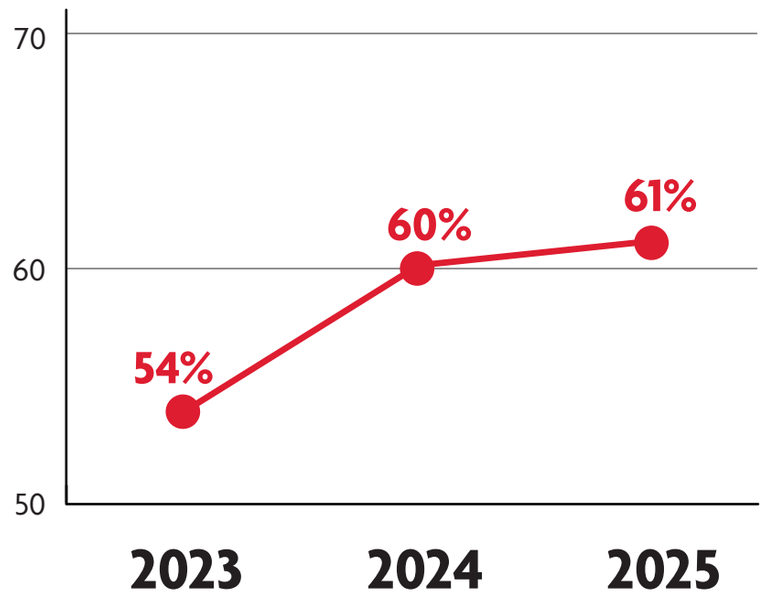


Shoppers maintain that eco-friendly packaging most influences purchase preference.

"Thinking about the environmental impact of e-commerce, which factor would make you ***MOST likely to shop with a brand?"***



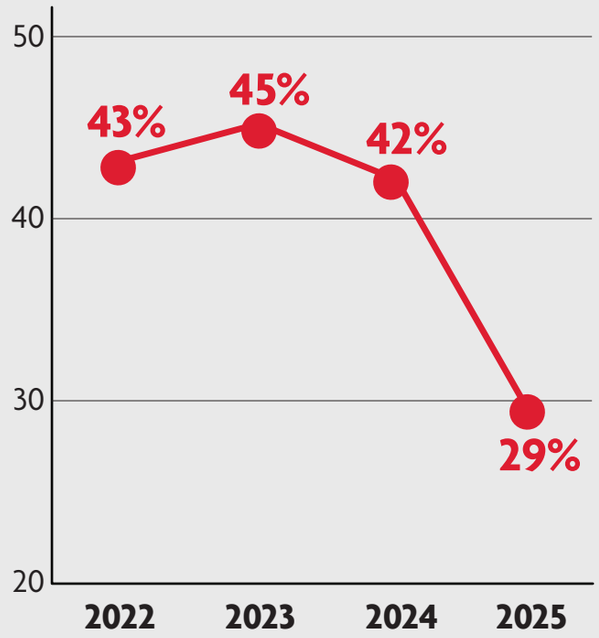
Eco-friendly packaging:



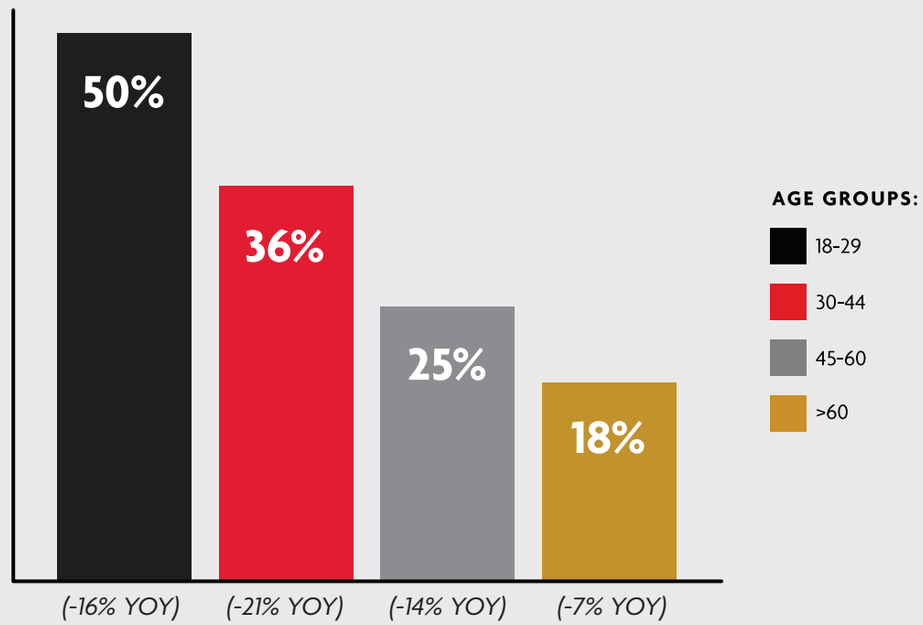
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Circular economy participation faces a decline.

Fewer shoppers are purchasing products or subscribing to services that support a circular economy.*



While participation in circular economy* is down across the board, younger shoppers remain the most active.



*Circular economy: upcycled apparel, zero waste delivery systems, refillable home/personal care containers, etc.

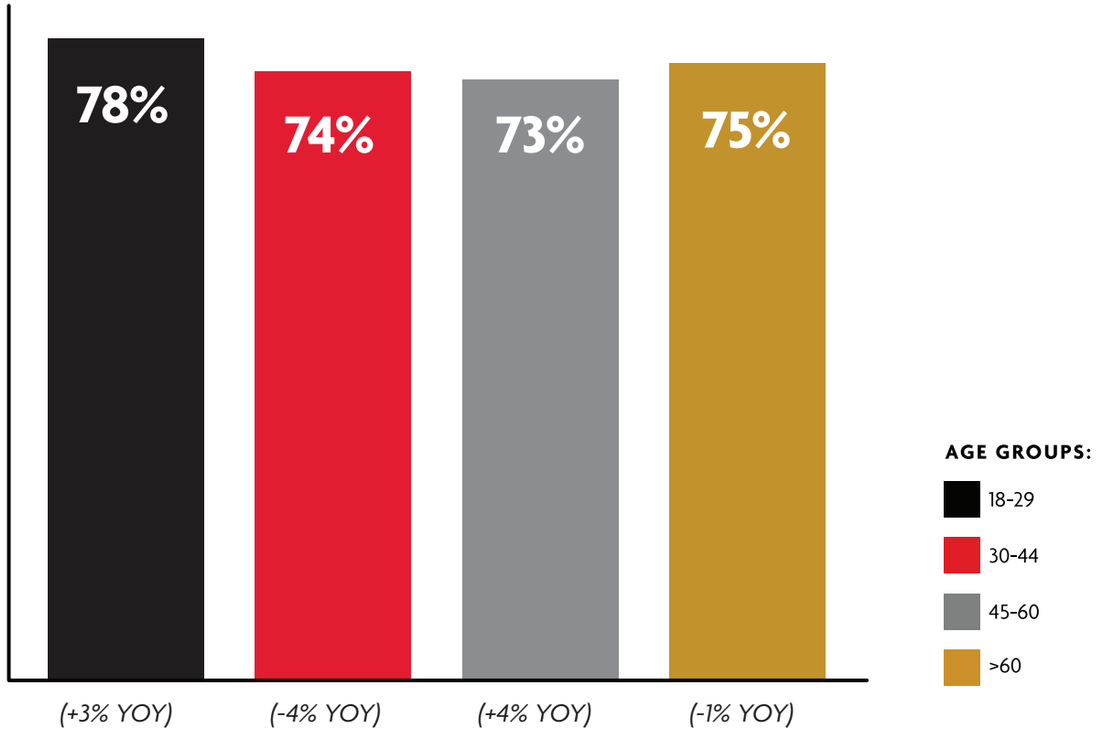
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Shoppers demonstrate patience when it comes to environmental impact.



Approximately three-quarters of consumers (74%) would **wait longer** for an online order to arrive if it meant **reducing the environmental impact.** *(no change)*

This is consistent among all age groups:



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

BEAUTY SHOPPERS



BEAUTY SHOPPERS: KEY TAKEAWAYS

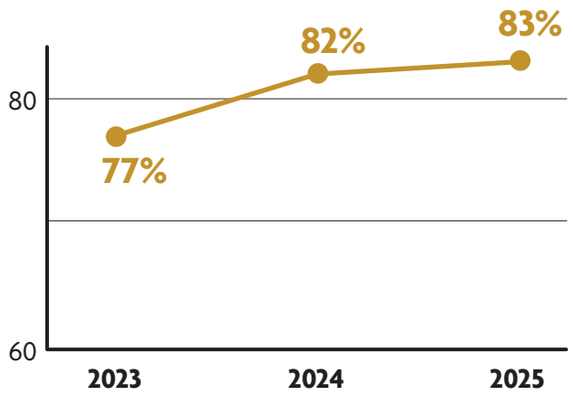
- Skincare continues momentum as leading beauty category.
- Beauty shoppers prefer buying products online but want the option to purchase in-store.
- Shoppers resume focus on price as the leading driver of beauty purchasing decisions.
- Savings and samples continue to drive future business from online beauty customers.



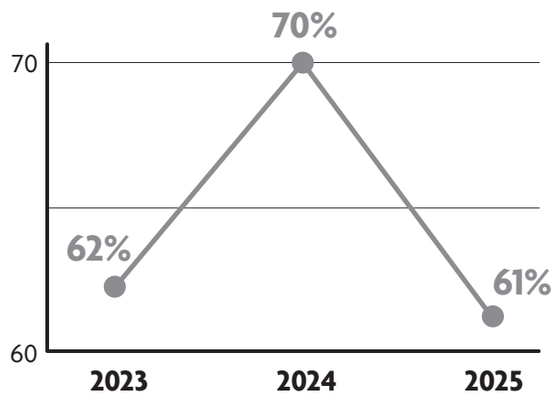
Skincare continues momentum as leading beauty category.

Products beauty shoppers purchase regularly:

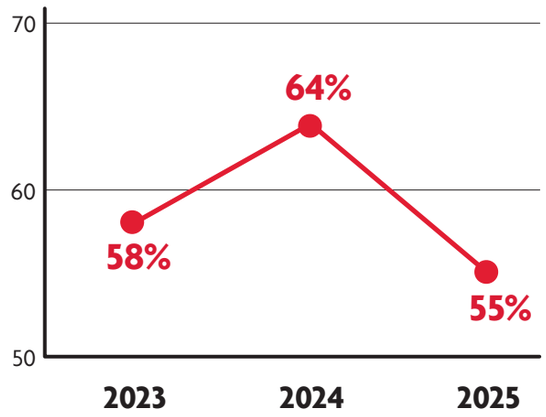
Skincare (sunscreen, moisturizer, lotion, etc.)



Makeup



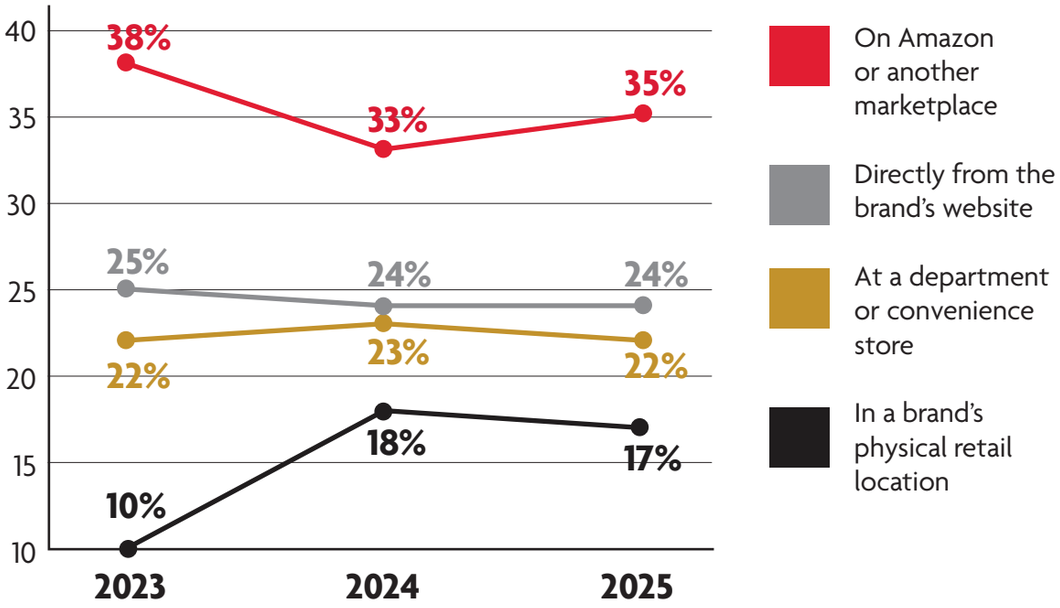
Specialty haircare and styling products



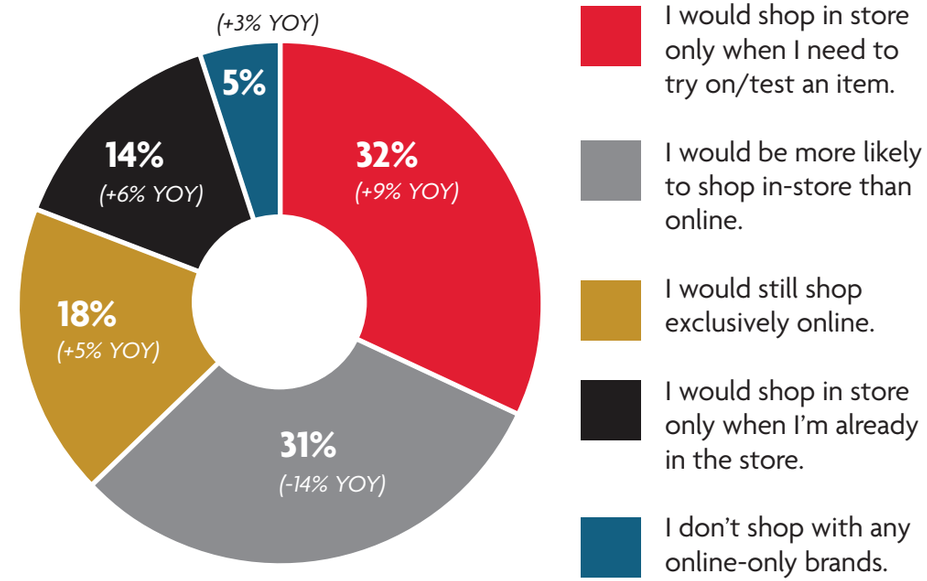
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Beauty shoppers prefer buying products online but want the option to purchase in-store.

"Where do you prefer to buy your cosmetic/beauty products?"



"If an online-only beauty brand you shop with began carrying products in a physical store near you, how would it affect how you shop with the brand?"

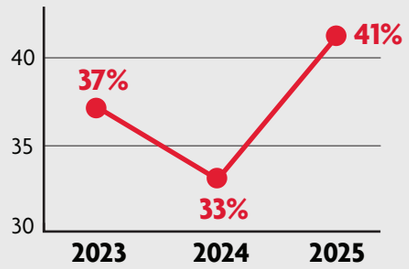


Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

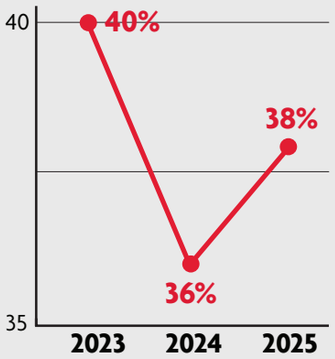
Shoppers resume focus on price as the leading driver of beauty purchasing decisions.

Factors that play the biggest role in cosmetic/beauty product purchases:

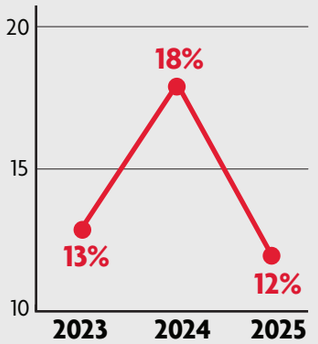
Price:



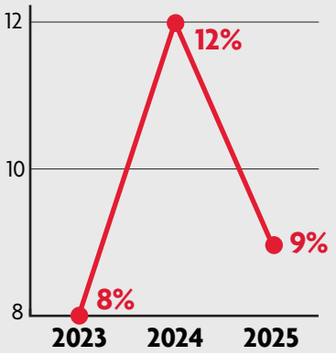
Ingredients used in the products:



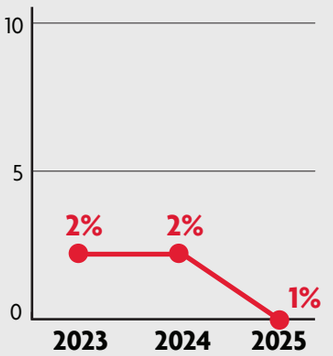
Company's ethical standards and policies:



Company's and product's environmental impact:



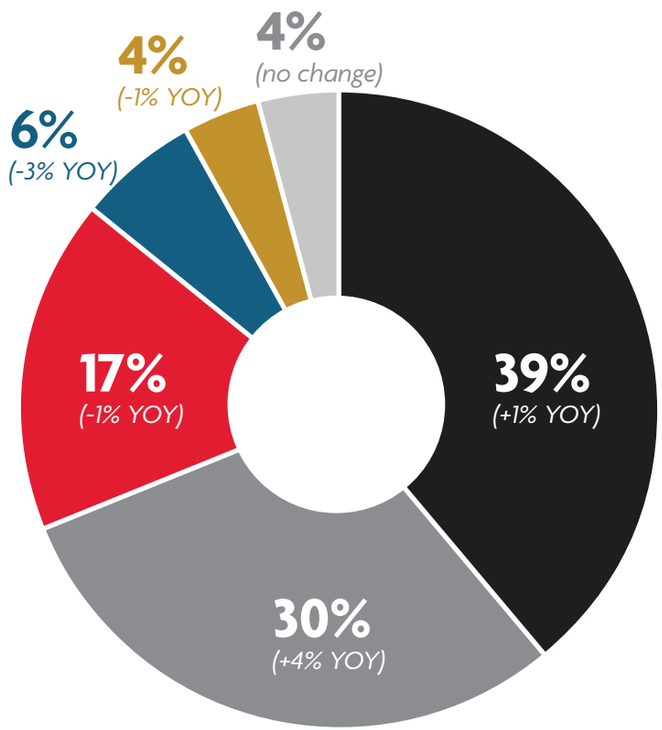
Purchases support a worthy cause:



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Savings and samples continue to drive future business from online beauty customers.

"When thinking about the experience of opening up a package you ordered online, what factor is MOST likely to make you want to shop with the same brand again in the future?"



- Coupons, discounts or credit toward a future purchase
- Free product samples
- Sustainable packaging
- A premium experience (unique packaging, tissue paper, twine, ribbon, etc.)
- A personal note
- Swag (stickers, keychains, etc.)

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.



APPAREL SHOPPERS



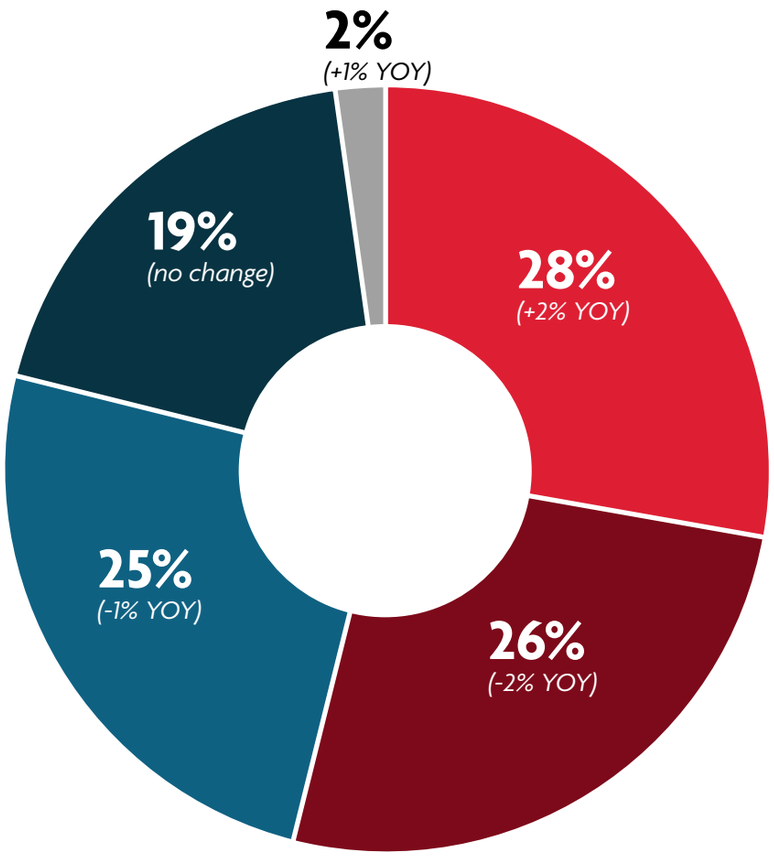
APPAREL SHOPPERS: KEY TAKEAWAYS

- The majority of shoppers prefer buying apparel in-store.
- Apparel shoppers choose brick and mortar for experience and urgency.
- Free shipping factors significantly into apparel shoppers' purchasing decisions.
- Flexible and free returns drive loyalty among apparel shoppers.
- While price leads apparel purchase decisions, product materials are steadily gaining influence.



The majority of shoppers prefer buying apparel in-store.

Where apparel shoppers prefer to buy clothing:



In-store:

- At a department store
- In a brand's physical retail location

Online:

- On Amazon or another marketplace
- Directly from the brand's website

Other:

- Other

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Apparel shoppers choose brick and mortar for experience and urgency.

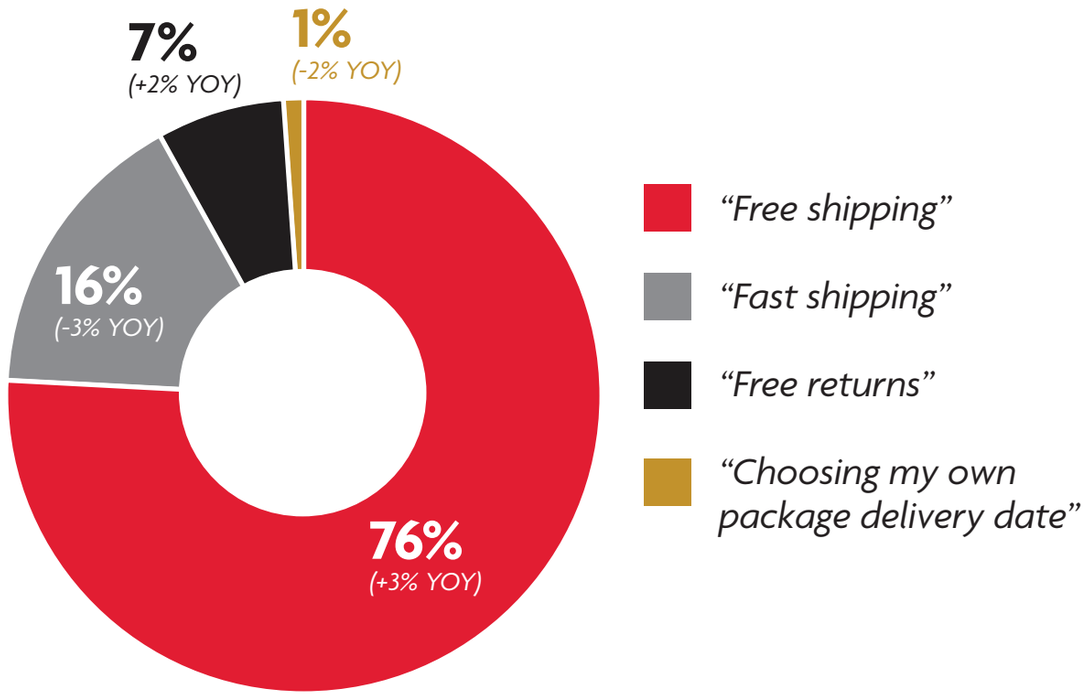
Why apparel shoppers prefer in-store shopping:



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Free shipping factors significantly into apparel shoppers' purchasing decisions.

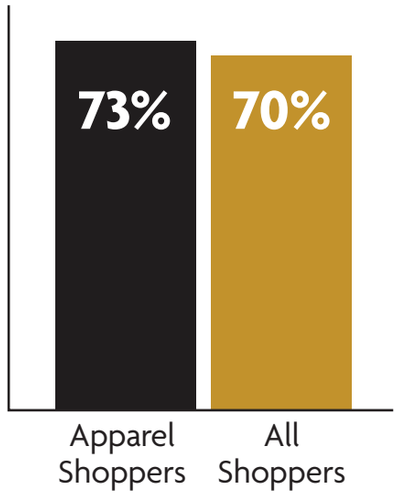
Factors that play the biggest role in deciding where to make an online purchase:



73%

of apparel shoppers have abandoned carts upon seeing unanticipated shipping costs. *(+2% YOY)*

Most shoppers have added more items to their online carts to qualify for free shipping in the last year:



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

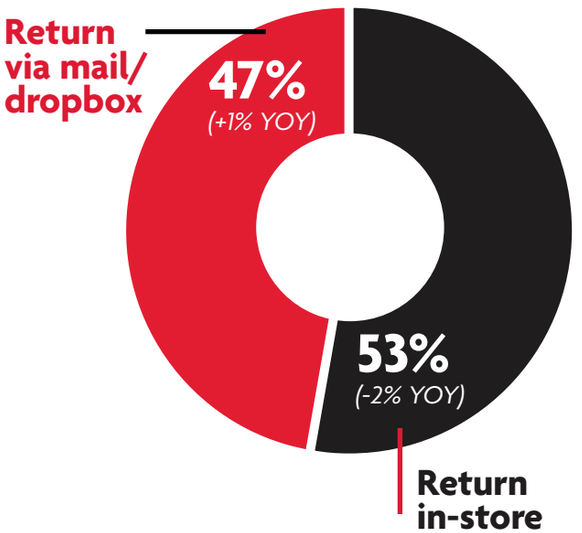
Flexible and free returns drive loyalty among apparel shoppers.



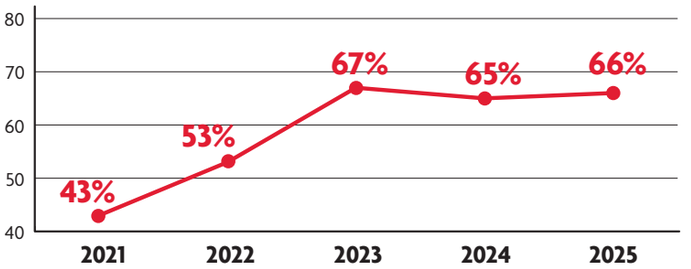
In the past year,

54% of apparel shoppers reported returning clothing they purchased online.

Return method preference for online purchases:



Being offered a returnless refund makes apparel shoppers want to shop with a brand again:



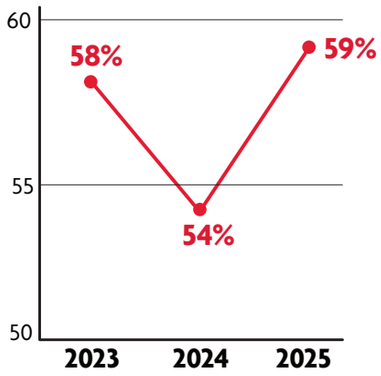
57% of apparel shoppers will not purchase from a brand that doesn't offer free returns. *(+1% YOY)*

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

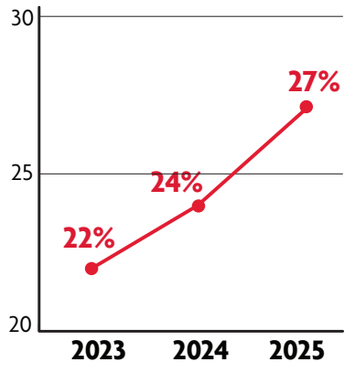
While price leads apparel purchase decisions, product materials are steadily gaining influence.

Factors that play the biggest role in apparel purchases:

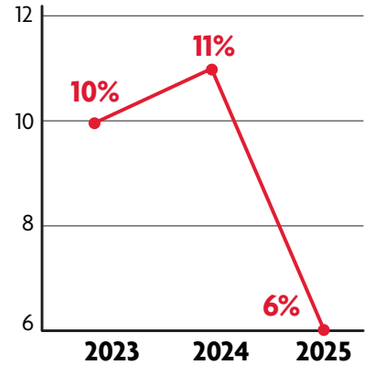
Price:



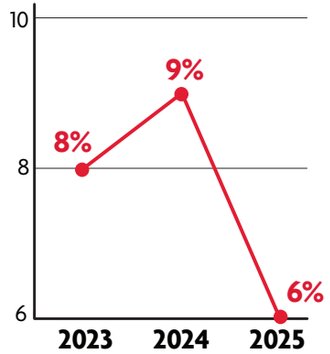
Materials used in the products:



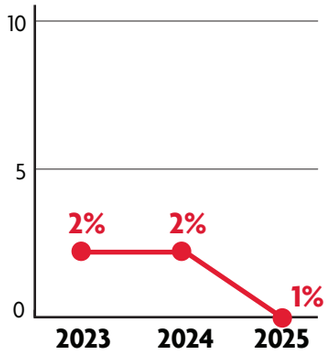
Company's ethical standards and policies:



Company's and product's environmental impact:



Purchases support a worthy cause:



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

METHODOLOGY
Annual E-commerce Consumer Study

In March 2025, Ryder hired a third-party research company to survey 1,376 online shoppers* about behavior, preferences, experiences, and expectations pertaining to their e-commerce activity from 2024 to 2025. Subject matter comprised purchasing behavior, packaging, shipping, returns, omnichannel experience, sustainability, and supply chain factors.

**All respondents reported shopping online either "often," "sometimes," or "all the time."*

Gender breakdown:	Male: **48%**	Other: **1%**
	Female: **51%**	
Age breakdown:	18-29: **10%**	46-60: **29%**
	30-44: **34%**	>60: **27%**
Regional breakdown:	South: **35%**	Midwest: **22%**
	West: **23%**	Northeast: **21%**

Note: Percentages may not total 100% due to rounding.



SPECIAL REPORT:

2025 HOLIDAY PREP



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93 About Ryder System, Inc.

SPECIAL REPORT:
INTRODUCTION

Each year, the peak holiday season comprises a unique set of circumstances. To explore consumers' needs, preferences, and behaviors during this time, in January 2025, Ryder contracted a third-party research company to survey 503 U.S. shoppers to gain actionable insights about the 2024 holiday shopping experience.

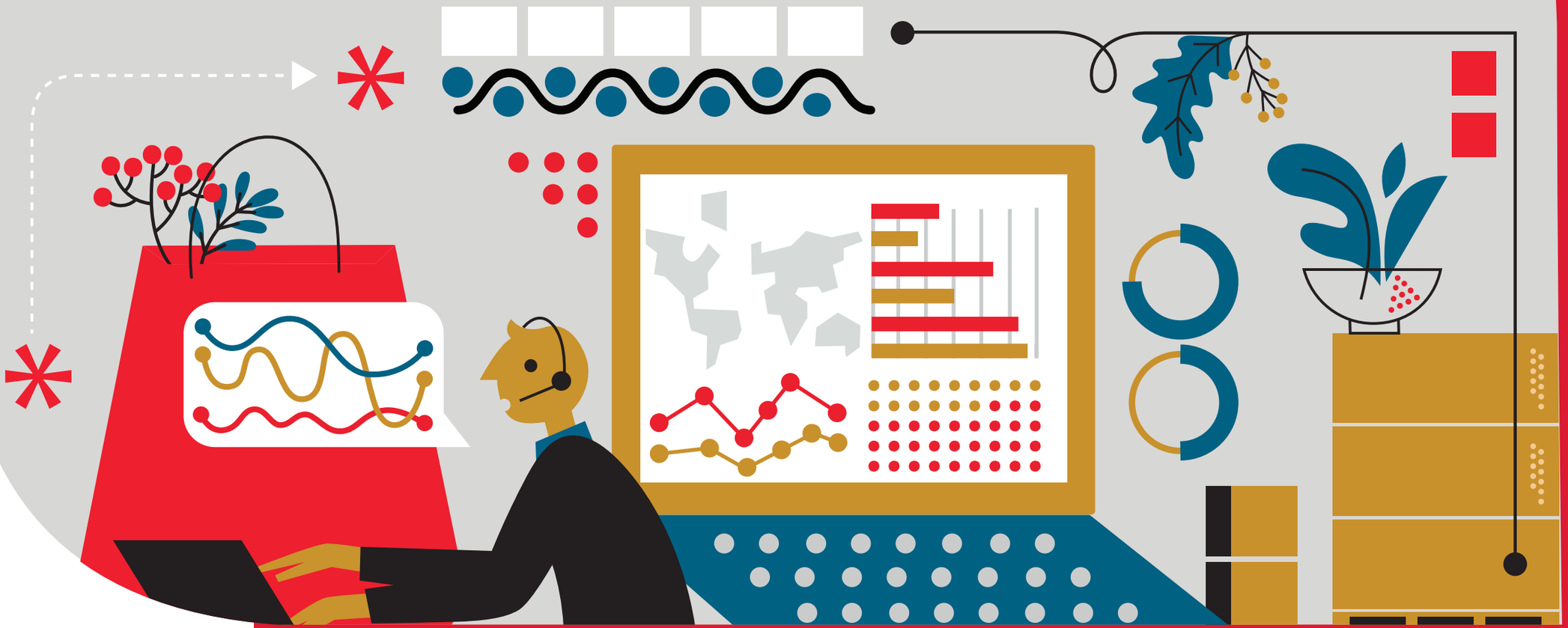
Observing the economic uncertainty that began to emerge just after that initial survey was conducted, Ryder followed up with a pulse survey of 525 U.S. shoppers in May 2025 to gather real-time insights on how these developments may have impacted consumer outlook for the 2025 holiday season.

This cumulative data from both surveys offers comprehensive insights that brands and retailers can apply to peak planning strategies.



HOLIDAY PREP REPORT:

E-COMMERCE TRENDS



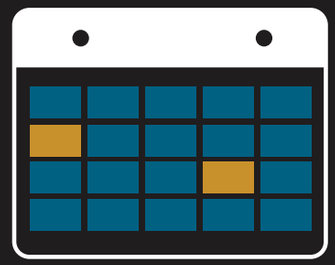
E-COMMERCE TRENDS: KEY TAKEAWAYS

- More than half of consumers plan to start 2025 holiday shopping before November.
- Sales and deals have the most impact on when shoppers will make 2025 holiday purchases.
- Comparison shopping was a favored 2024 holiday shopping tactic.
- Experiential gifts gained popularity in 2024.
- Social media was the leading driver of brand discovery in 2024 and may prove to be a popular shopping channel in 2025.
- More consumers plan to utilize Buy Now Pay Later (BNPL) services during the 2025 holiday shopping season.

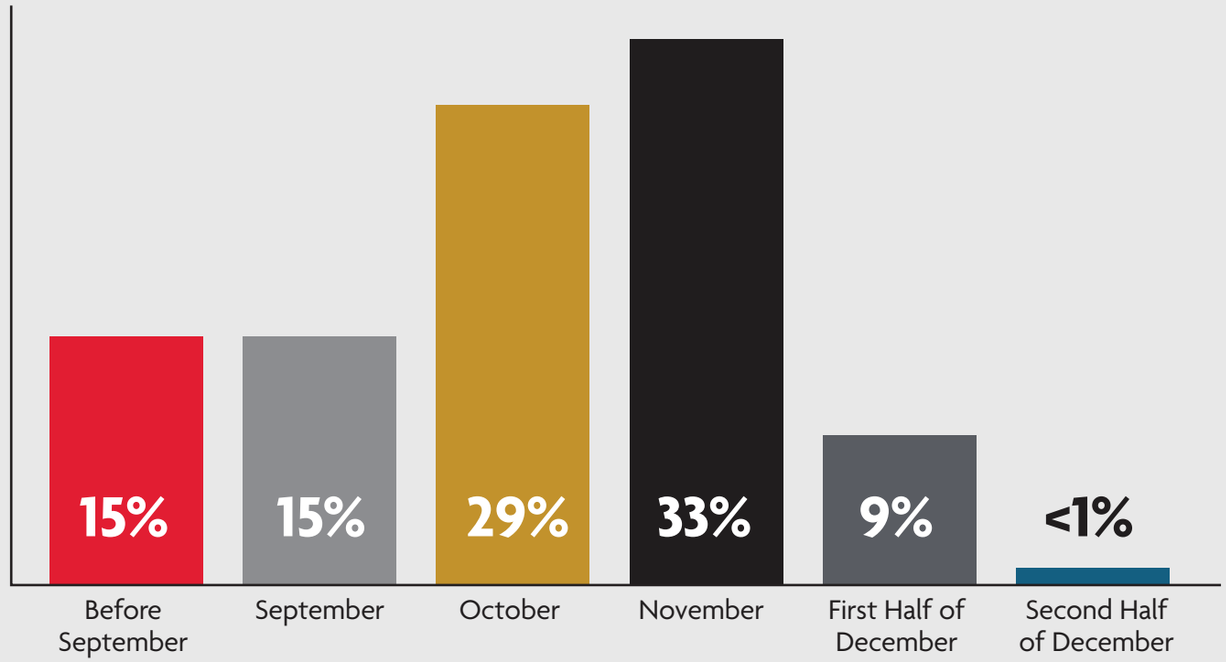


More than half of consumers plan to start 2025 holiday shopping before November.

59%
of consumers plan to start 2025 holiday shopping by the end of October.



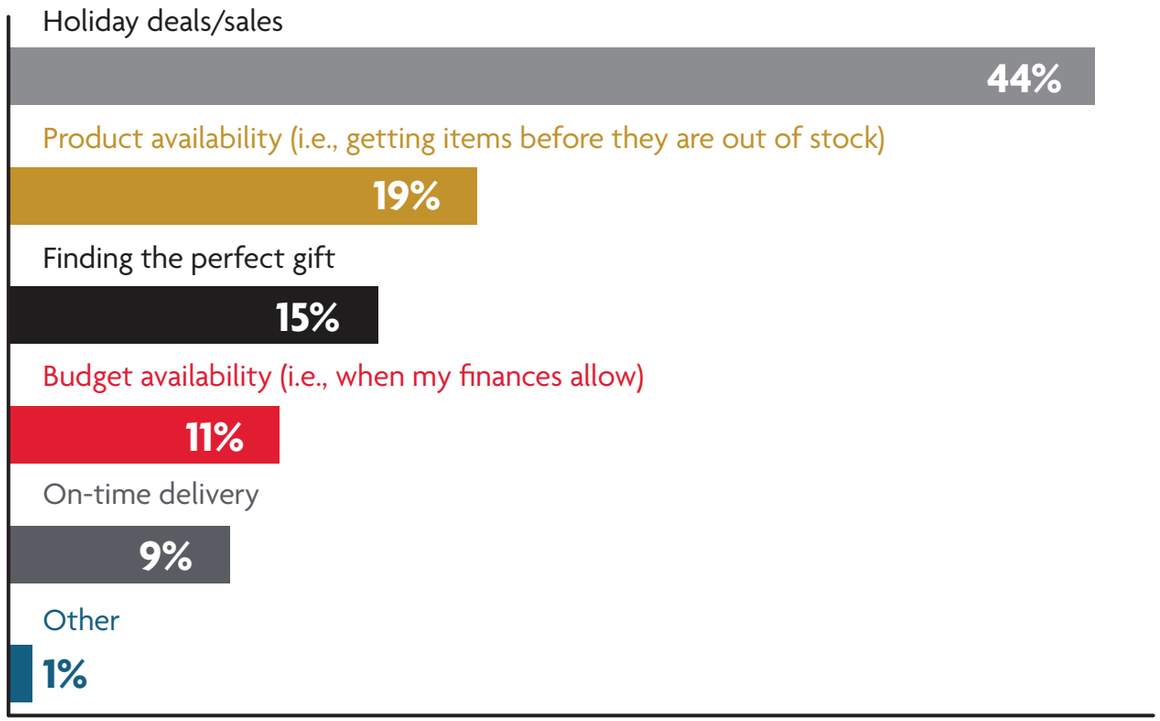
"When do you expect to begin your 2025 holiday shopping?"



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Sales and deals have the most impact on when shoppers will make 2025 holiday purchases.

"Which of the following factors has the biggest influence over the timing of your holiday shopping?"



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

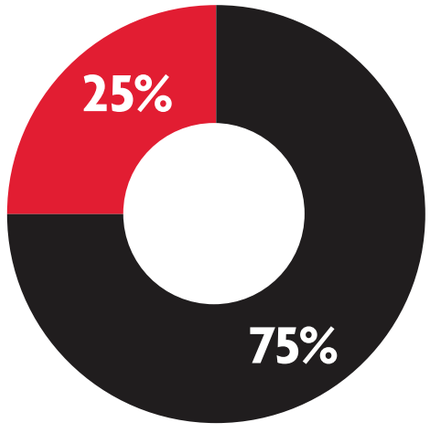
Of the shoppers who selected "product availability" or "on-time delivery,"

64%

expect to begin their holiday shopping before November.

Comparison shopping was a favored 2024 holiday shopping tactic.

Three-quarters of shoppers engaged in "comparison shopping" (i.e., comparing the price of a product from different vendors before buying) during the 2024 holiday season.



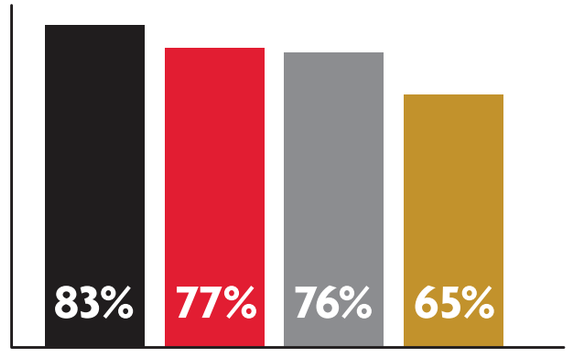
Comparison shopped

Did not comparison shop

Younger shoppers did more comparison shopping during the 2024 holiday season.

AGE GROUPS:

18-29 30-44 45-60 >60



Regardless of when consumers started their holiday shopping, comparison shopping played a role.



Shoppers who started their holiday shopping **earlier** than usual AND engaged in comparison shopping in 2024

Shoppers who started their holiday shopping **later** than usual AND engaged in comparison shopping in 2024

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

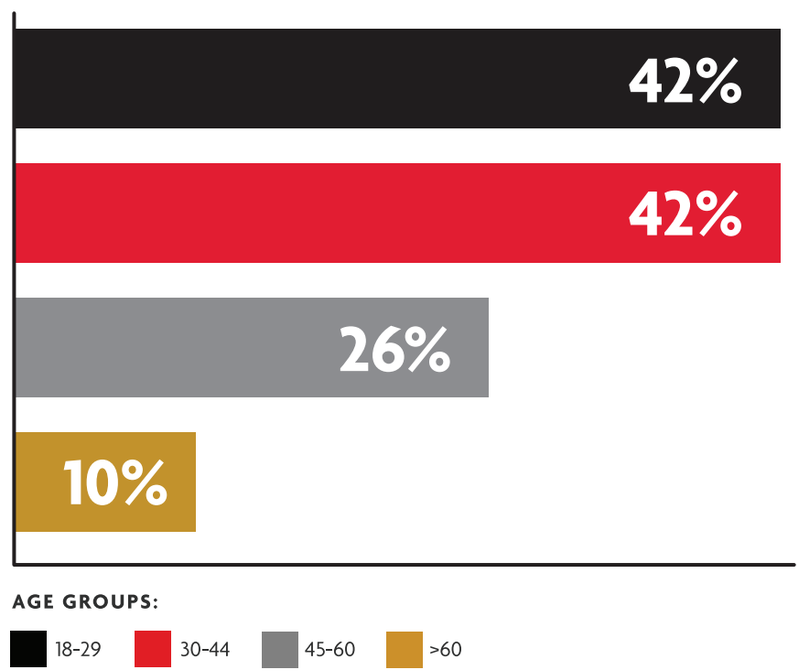
Experiential gifts gained popularity in 2024.

18% spent more money on experience-based holiday gifts in 2024 than in 2023.

52% spent more money on physical items than experience-based gifts during the 2024 holiday season.

30% spent more money on experience-based gifts than physical items during the 2024 holiday season.

Younger consumers were more likely to spend more on experiences than physical items.



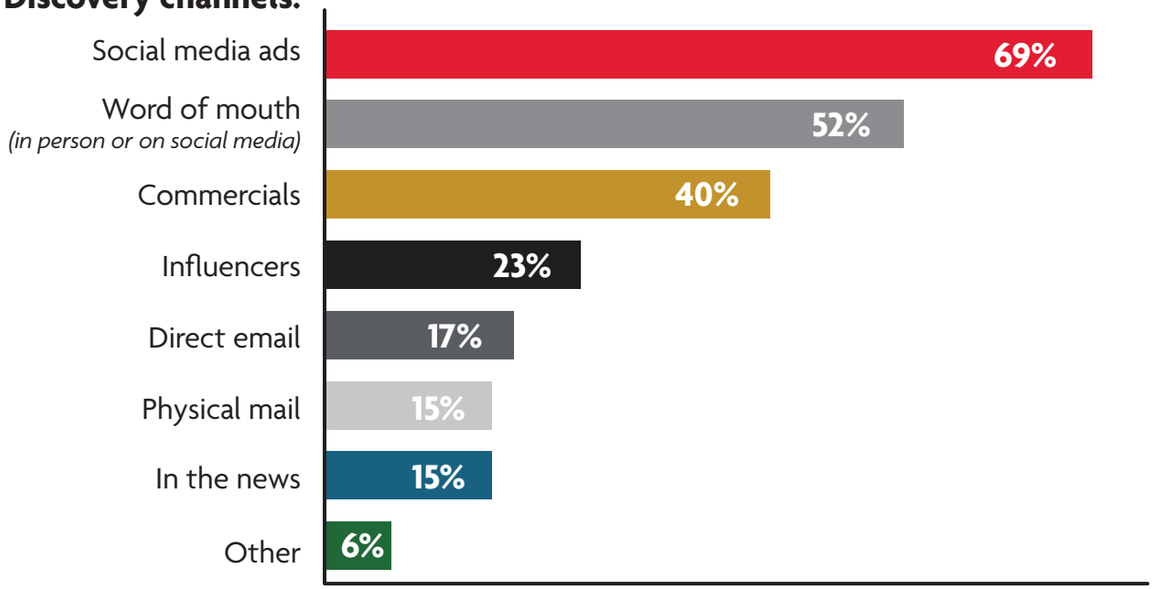
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Social media was the leading driver of brand discovery in 2024 and may prove to be a popular shopping channel in 2025.

2024

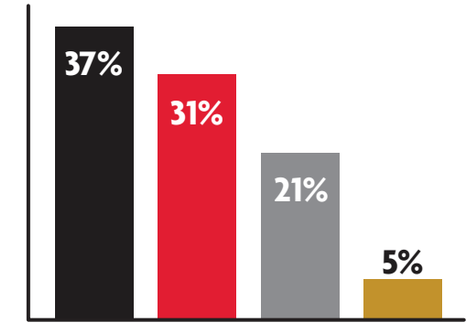
While holiday shopping in 2024, 10% of shoppers discovered new companies they plan to purchase from again. Of that group:

Discovery channels:



2025

Younger consumers, in particular, plan to shop using social media marketplaces during the 2025 holiday season:



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

More consumers plan to utilize Buy Now Pay Later (BNPL) services during the 2025 holiday shopping season.

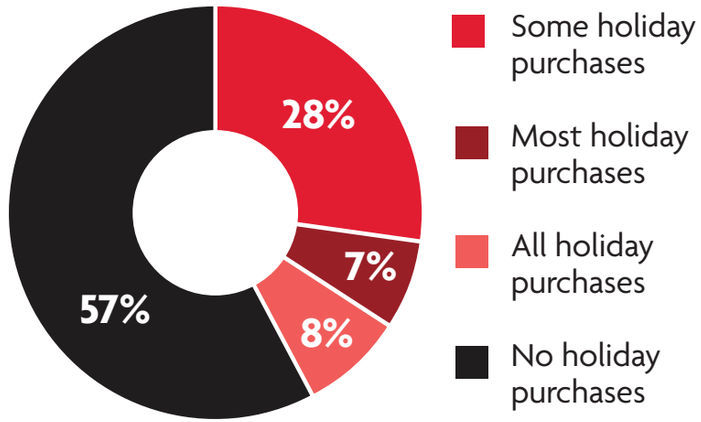
In March 2025:

24%
of consumers reported using BNPL services to purchase items online throughout the year.*

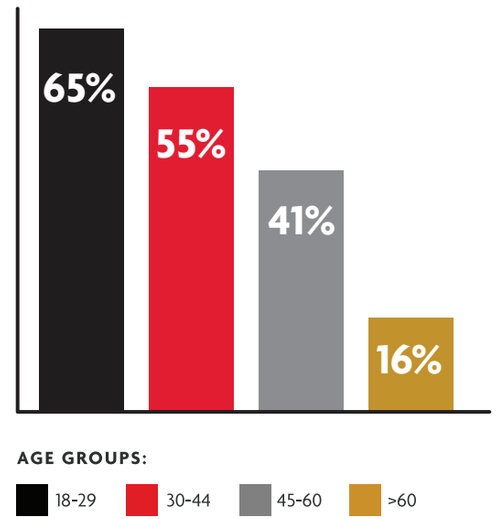
17%
reported using BNPL services more during the holiday shopping season than the rest of the year.*

In May 2025:

43%
of shoppers said they plan to use BNPL services during the 2025 holiday season.



The younger the respondent, the more likely they are to use BNPL for 2025 holiday purchases.



Data from 2025 E-commerce Consumer Study (March 2025)

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

HOLIDAY PREP REPORT:

PURCHASE BEHAVIOR



PURCHASE BEHAVIOR:
KEY TAKEAWAYS

- Cost-saving factors are the primary motivators of 2025 holiday purchasing decisions.
- Shoppers plan to spend less on less in 2025.
- Younger shoppers are showing the greatest effort to rein in spending in 2025.
- Apparel, electronics, and accessories led holiday shopping purchases.
- Shoppers rely on loyalty benefits to supplement holiday shopping.
- The younger the shopper, the more influenced they were by sustainable business practices.



Cost-saving factors are the primary motivators of 2025 holiday purchasing decisions.



"Which of the following factors are most likely to influence your 2025 holiday purchasing decisions? (Select up to 3 options)."

- **#1** Free shipping **76%**
- **#2** Sales/Discounts **64%**
- **#3** Free returns **31%**
- **#4** Fast shipping (2 days or less) **27%**
- **#5** Price matching **20%**
- **#6** Loyalty rewards **18%**
- **#7** Extended return window **11%**
- **#8** Scheduled delivery **9%**
- **#9** Products are made in the U.S.A. **9%**
- **#10** Buy Now Pay Later options **6%**
- **#11** Eco-friendly or sustainable product options **4%**

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

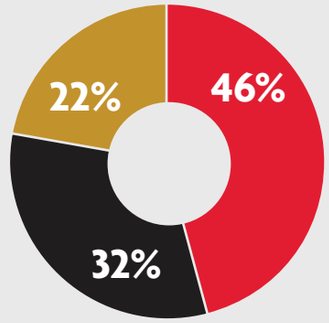
94% of respondents selected at least one of the top 3 factors.

Shoppers say they plan to spend less on less in 2025.

2024

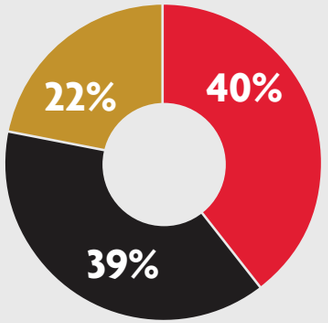
While almost half of shoppers reported spending more *money* on 2024 holiday shopping, a smaller percentage reported making more *purchases*.

Holiday Spending



- Spent more money in 2024 than in 2023.
- Spent less money in 2024 than in 2023.
- Spent about the same in 2024 as in 2023.

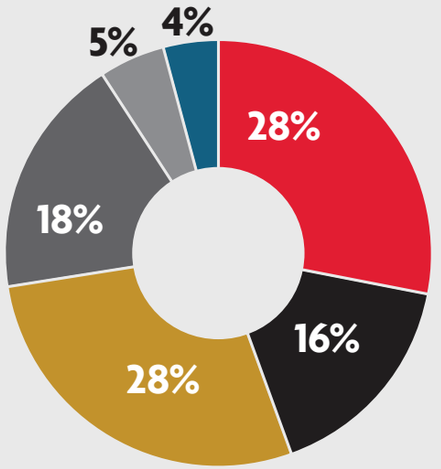
Holiday Purchases



- Made more purchases in 2024 than in 2023.
- Made fewer purchases in 2024 than in 2023.
- Made about the same in 2024 as in 2023.

2025

44% report planning to make fewer purchases during the 2025 holiday season in an attempt to spend less.



- *"I plan to make slightly fewer purchases in an attempt to spend less."*
- *"I plan to make significantly fewer purchases in an attempt to spend less."*
- *"I don't plan to make any changes in spending, even if that means I end up purchasing fewer items."*
- *"I plan to make the same number of purchases, even if I have to spend more due to product and/or shipping costs being higher."*
- *"I plan to make slightly more purchases, even if that means I end up spending more due to product and/or shipping costs being higher."*
- *"I plan to make significantly more purchases, even if that means I end up spending more due to product and/or shipping costs being higher."*

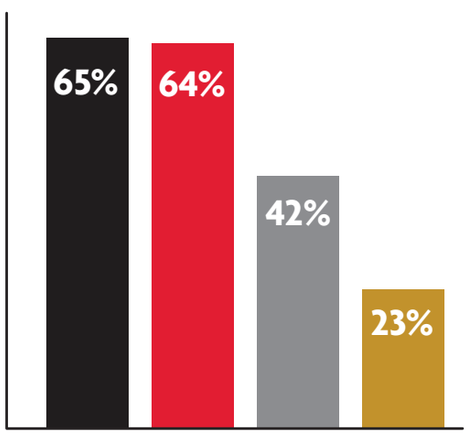
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Younger shoppers are showing the greatest effort to rein in spending in 2025.

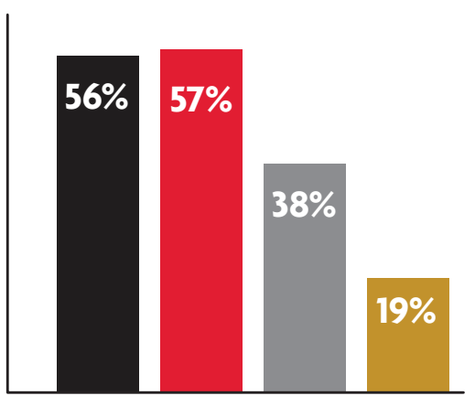
2024

Younger age groups reported both spending more *and* making more purchases during the 2024 holiday season.

Shoppers who spent more money in 2024 than they did in 2023:



Shoppers who made more purchases in 2024 than they did in 2023:

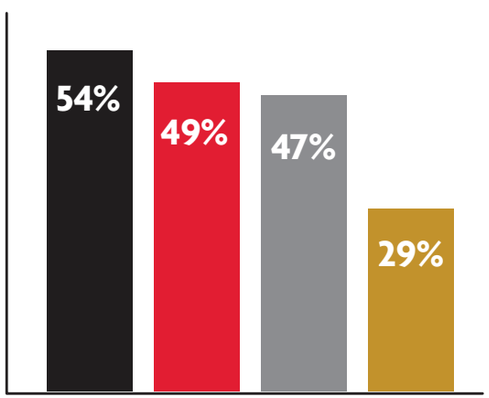


AGE GROUPS:

18-29 30-44 45-60 >60

2025

Shoppers who plan to make fewer purchases in 2025 in an attempt to spend less:



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Apparel, electronics, and accessories led holiday shopping purchases.

"Which of the following items did you spend the most money on during the 2024 holiday season?"

TOP 3

Apparel: 70%

Electronics: 37%

Accessories: 28%

BOTTOM 3

Sporting Goods: 8%

Tools/Home Improvement Items: 8%

Cleaning Products: 9%

23% of shoppers gave gift cards more than usual in 2024.

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

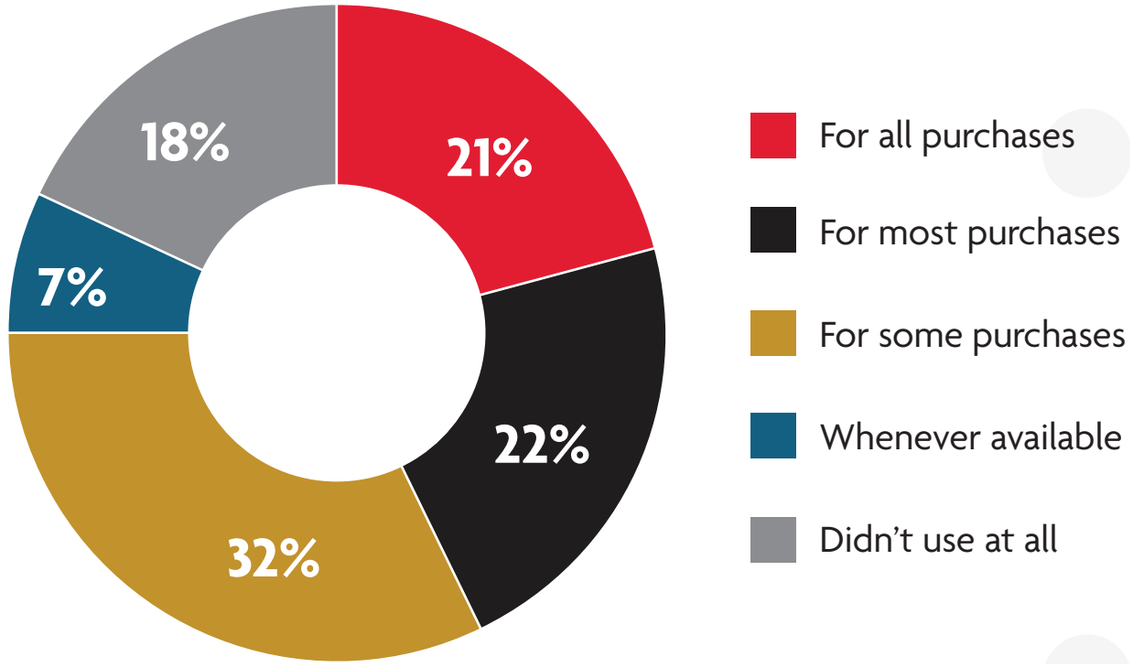
Shoppers rely on loyalty benefits to supplement holiday shopping.



82%

of shoppers reported using loyalty discounts or rewards to make 2024 holiday purchases.

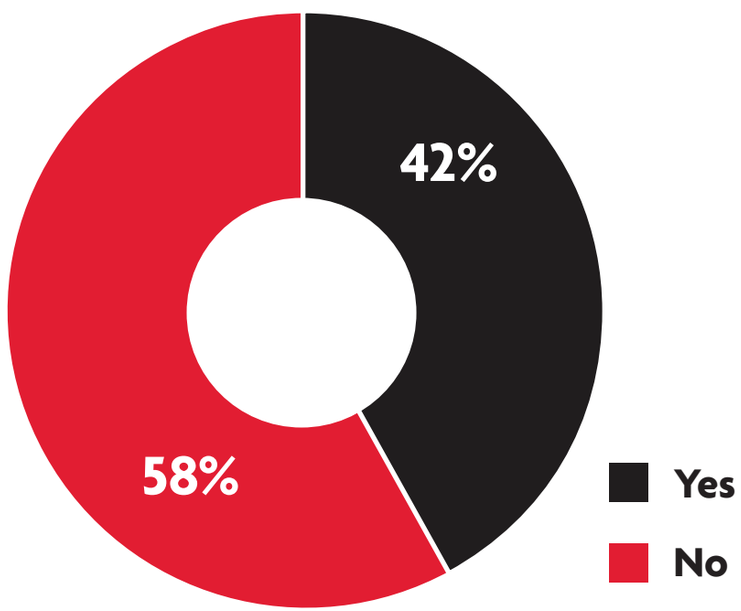
How shoppers used loyalty discounts or rewards for 2024 holiday purchases:

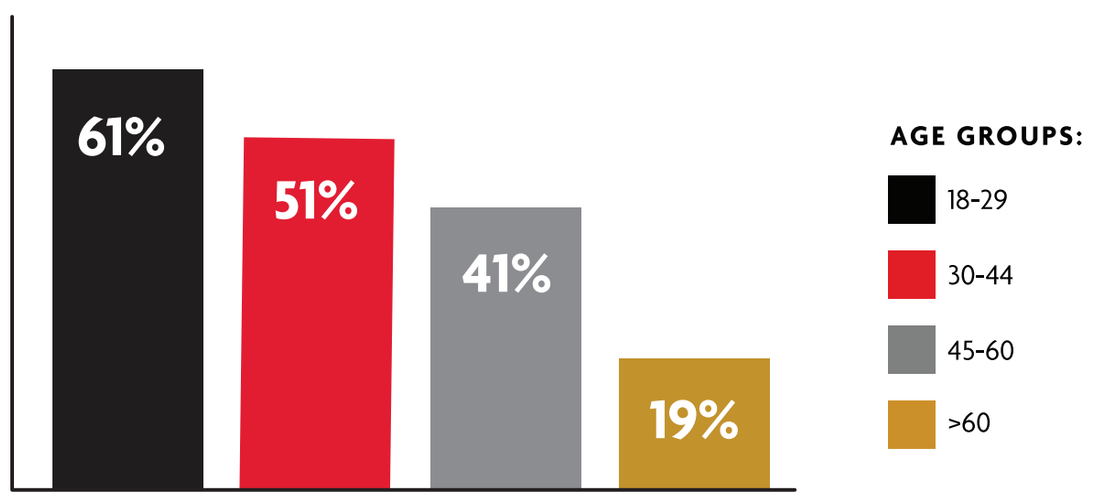


Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

The younger the shopper, the more influenced they were by sustainable business practices.

"While shopping during the 2024 holiday season, did any stores'/brands' sustainable business practices influence your purchase decisions (e.g., products made from eco-friendly materials, use of recycled packaging, fuel-efficient transportation methods, etc.)?"





Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

HOLIDAY PREP REPORT:
OMNICHANNEL



OMNICHANNEL:
KEY TAKEAWAYS

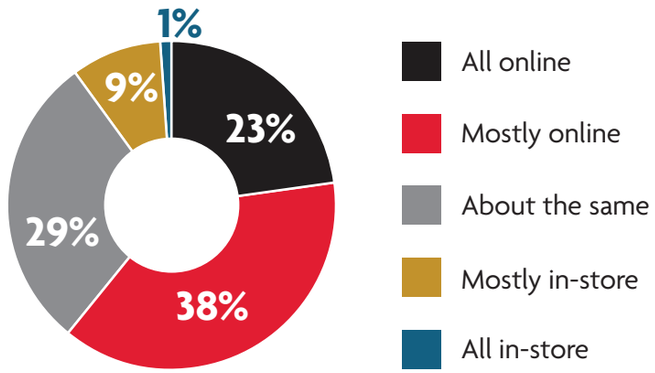
- 2024 holiday shopping increasingly occurred online, but consumers have no plans to abandon physical stores in 2025.
- In-store experience was the main driver of brick-and-mortar shopping.
- In-store pickup availability satisfied time-sensitive purchase needs during the 2024 holiday season.



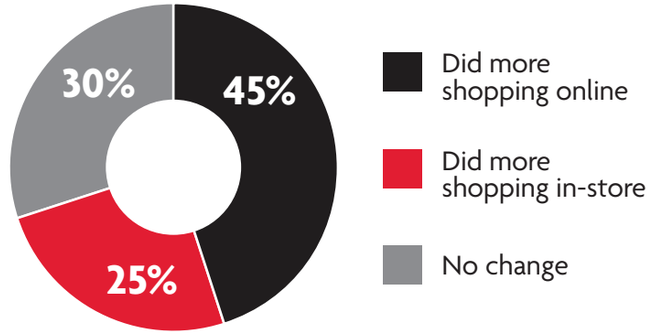
2024 holiday shopping increasingly occurred online, but consumers have no plans to abandon physical stores in 2025.

2024

Where consumers did their 2024 holiday shopping:

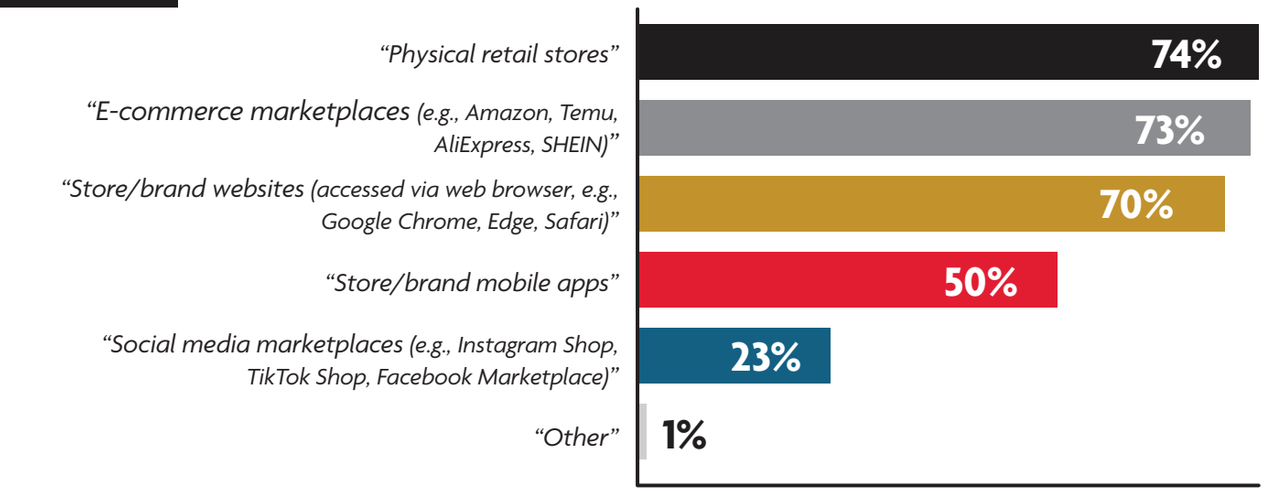


How 2024 holiday shopping behavior compared to 2023:



2025

Where consumers plan to shop during the 2025 holiday season:



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

In-store experience was the main driver of brick-and-mortar shopping.

Most popular reasons for shopping in-store during the 2024 holiday season:



22%
shopped in-store **only** when they needed something immediately.



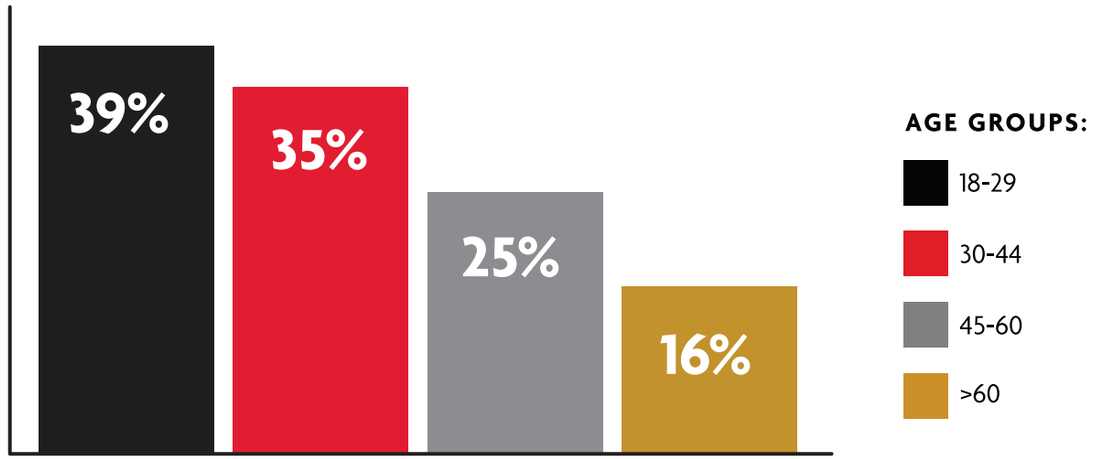
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

In-store pickup availability satisfied time-sensitive purchase needs during the 2024 holiday season.



29% of shoppers purchased something during the 2024 holiday season that was available via in-store pickup specifically because it was faster than standard delivery.

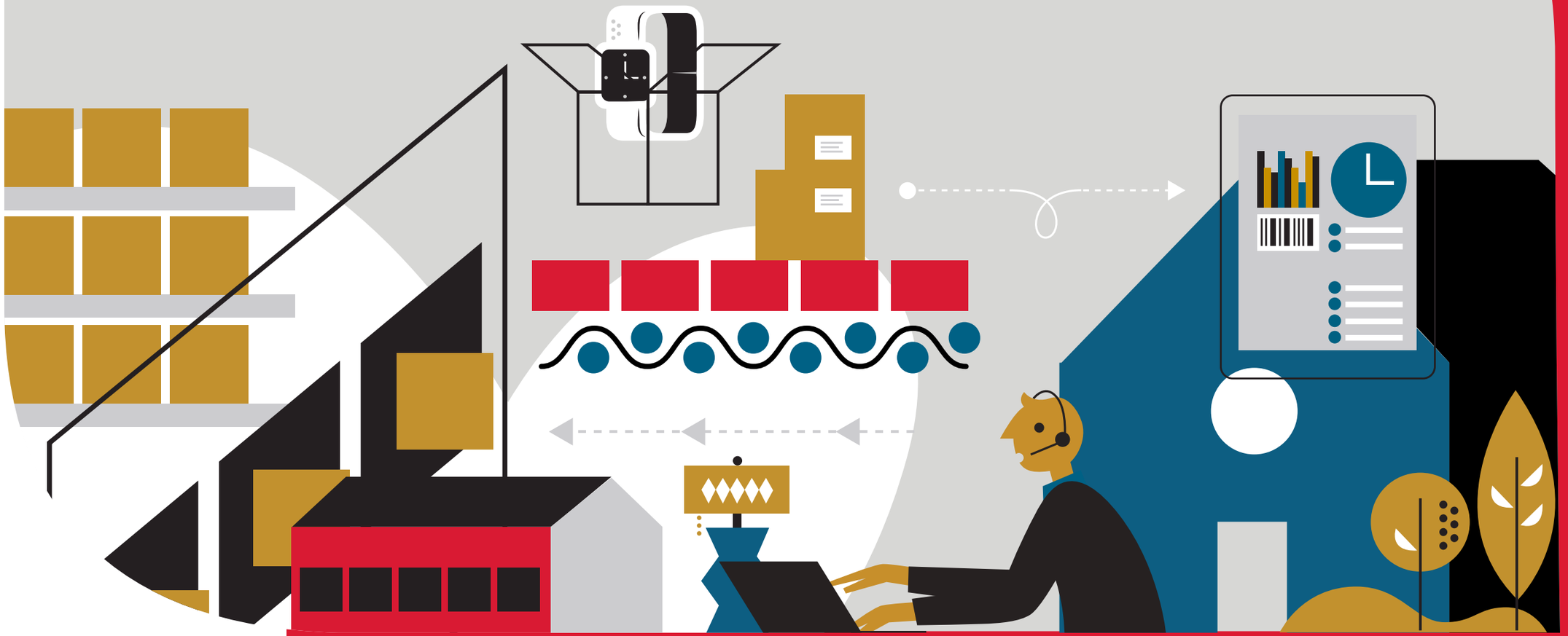
This was prevalent among younger shoppers:



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

HOLIDAY PREP REPORT:

SHIPPING & RETURNS



SHIPPING & RETURNS:
KEY TAKEAWAYS

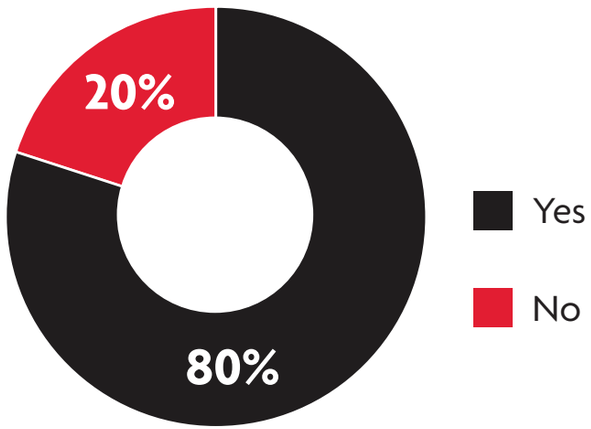
- Free shipping heavily motivated 2024 holiday purchases and is likely to continue doing so in 2025.
- Poor delivery management during the 2024 holiday season resulted in lost business.
- Return fees discourage holiday purchases.



Free shipping heavily motivated 2024 holiday purchases and is likely to continue doing so in 2025.

2024

"While shopping during the 2024 holiday season, did the availability of free shipping encourage you to make any of your purchases?"



2025

76%

of respondents report that free shipping is more likely than any other factor to influence their 2025 holiday purchasing decisions.



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Poor delivery management during the 2024 holiday season resulted in lost business.

17%

of shoppers returned at least one order because it arrived too late.

10%

will no longer shop with a specific company following a negative delivery experience.

13%

canceled at least one order due to slow shipping.

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Return fees discourage holiday purchases.

2024

37%

of respondents reported that the absence of a free-return policy prevented them from making a 2024 holiday shopping purchase.



2025

"Which of the following factors are most likely to influence your 2025 holiday purchasing decisions?"

#1	Free shipping	#7	Extended return window
#2	Sales/Discounts	#8	Scheduled delivery
#3	**Free returns**	#9	Products are made in the U.S.A.
#4	Fast shipping (2 days or less)	#10	Buy Now Pay Later options
#5	Price matching	#11	Eco-friendly or sustainable product options
#6	Loyalty rewards		

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

METHODOLOGY
Special Report: 2025 Holiday Prep

In January 2025, Ryder contracted a third-party research company to survey 503 online shoppers* about their behavior, preferences, experiences, and expectations during the 2024 holiday shopping season. Subject matter comprised purchasing behavior, shipping, returns, omnichannel experience, and sustainability.

Gender breakdown:	Male: **49%**	Female: **52%**
Age breakdown:	18-29: **13%**	46-60: **33%**
	30-44: **34%**	>60: **20%**
Regional breakdown:	South: **37%**	Midwest: **22%**
	West: **23%**	Northeast: **18%**

In May 2025, Ryder followed up with a pulse survey of 525 online shoppers* about their plans and expectations leading up to the 2025 holiday shopping season. Subject matter comprised plans surrounding purchasing, shipping, returns, and omnichannel preferences and behavior.

Gender breakdown:	Male: **49%**	Female: **51%**
Age breakdown:	18-29: **14%**	46-60: **33%**
	30-44: **31%**	>60: **23%**
Regional breakdown:	South: **36%**	Midwest: **22%**
	West: **22%**	Northeast: **20%**

Note: Percentages may not total 100% due to rounding.

**All respondents reported shopping online either "often," "sometimes," or "all the time."*

ABOUT RYDER SYSTEM, INC.

Ryder System, Inc. (NYSE: R) is a fully integrated port-to-door logistics and transportation company. It provides supply chain, dedicated transportation, and fleet management solutions, including warehousing and distribution, contract packaging and manufacturing, e-commerce fulfillment, last-mile delivery, managed transportation, professional drivers, freight brokerage, cross-border solutions, full-service fleet leasing, maintenance, commercial truck rental, and used vehicle sales to some of the world's most-recognized brands. Ryder provides services to businesses across more than 20 industries throughout the United States, Mexico, and Canada. In addition, Ryder manages nearly 250,000 commercial vehicles, services fleets at approximately 760 maintenance locations, and operates nearly 300 warehouses encompassing more than 100 million square feet. Ryder is regularly recognized for its industry-leading practices; technology-driven innovations; environmental management; safety, health and security programs; and recruitment and hiring initiatives.

www.ryder.com

