

## Amazon: A Shoppers Perspective - UK - January 2020

Report Price: £2195.00 | \$2963.91 | €2470.25

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Amazon is the largest non-food retailer in the UK, but in truth it is far more than a retailer; it is also a leading video and streaming provider, a significant consumer electronics producer and much more.”

– **Nick Carroll, Associate Director of Retail Research**

This report looks at the following areas:

- Nike ditches Amazon, a one-off or a significant trend?
- Amazon: setting the foundations for 'frictionless retail'

**BUY THIS  
REPORT NOW**

**VISIT:**  
store.mintel.com

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
reports@mintel.com

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Amazon: A Shoppers Perspective - UK - January 2020

Report Price: £2195.00 | \$2963.91 | €2470.25

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

What you need to know  
Products covered in this Report

### Executive Summary

Amazon: The business

The 'trillion' dollar business

Figure 1: Amazon, total net sales, 2014-19

The largest non-food retailer in the UK

Figure 2: Top 10 leading UK retailers as a % of all retail sales (ex-VAT, ex-fuel), 2018

Amazon's adspend reaches record highs in 2019

Figure 3: Total above-the-line, online display and direct mail advertising expenditure by Amazon, 2015-19

Amazon's brand image in a strong position

Figure 4: Key metrics for selected brands, November 2019

Amazon continues to innovate, from smart rings to Premier League football

Figure 5: Amazon Echo Loop, September 2019

Amazon: The consumer

Nearly nine in 10 shop with Amazon

Figure 6: Frequency of Amazon shopping, October 2019

Nearly half have access to Amazon Prime

Figure 7: Amazon Prime membership, October 2019

Younger shoppers far more likely to shop via mobile

Figure 8: Devices used to shop with Amazon in the past year, by age, October 2019

Hard-copy media still the most popular purchase

Figure 9: Products purchased via Amazon in the past year, October 2018 and 2019

Delivery perks are key but Prime Video is increasingly important

Figure 10: Amazon Prime services regularly used, by access to Amazon Prime, October 2019

Half of UK households have an Amazon device

Figure 11: Ownership of Amazon devices, October 2019

Reviews crucial to purchasing on Amazon

Figure 12: Behaviours of Amazon shoppers, October 2019

Marketplace is a differentiator but some question the quality

Figure 13: Attitudes towards Amazon Marketplace, October 2019

What we think

### Issues and Insights

Amazon: the ecosystem

The facts

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Amazon: A Shoppers Perspective - UK - January 2020

Report Price: £2195.00 | \$2963.91 | €2470.25

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The implications

Nike ditches Amazon, a one-off or a significant trend?

The facts

The implications

Amazon: setting the foundations for 'frictionless retail'

The facts

The implications

## Amazon: Structure and Innovations – What You Need to Know

The 'trillion' dollar business

The largest non-food retailer in the UK

Amazon's adspend reaches record highs in 2019

Amazon's brand image in a strong position

Amazon continues to innovate, from smart rings to Premier League football

## Amazon: An Overview

The 'trillion' dollar business

Figure 14: Amazon, total net sales, 2014-19

Consumer-facing operations still the majority of Amazon's business

Figure 15: Amazon net sales breakdown, 2018

AWS is becoming the driver of investment

Figure 16: Breakdown of Amazon net sales, as a percentage, by business segment, 2016-18

Amazon turns the profit screw

Figure 17: Amazon profits, 2014-18

Figure 18: Amazon, net cash provided by (used in) operating activities, 2014-18

## Amazon: In the UK Market

The UK accounts for just 6% of Amazon's revenue

Figure 19: Geographic breakdown of Amazon revenues, 2016-18

The dominant online market leader

Figure 20: Online retailing market shares, 2018

Figure 21: Amazon reported sales and gross transactional revenues as a % of all online retail sales, 2016-19

Electricals still the key category for the business

Figure 22: Estimated Amazon UK sales, by product, 2018

How big is Amazon in the context of the wider sector?

Figure 23: Top 10 leading UK retailers as a % of all retail sales (ex-VAT, ex-fuel), 2018

## Amazon: Brand Research

Amazon: brand overview

Brand map

Figure 24: Attitudes towards and usage of selected brands, November 2019

Key brand metrics

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Amazon: A Shoppers Perspective - UK - January 2020

Report Price: £2195.00 | \$2963.91 | €2470.25

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 25: Key metrics for selected brands, November 2019

Brand attitudes: Amazon, logically, stands out as providing a great online service

Figure 26: Attitudes, by brand, November 2019

Brand personality: Amazon has cultivated a 'fun' brand image

Figure 27: Brand personality – macro image, November 2019

Reliability key to the appeal of the Amazon brand

Figure 28: Brand personality – micro image, November 2019

Brand analysis

Figure 29: User profile of Amazon, November 2019

### Amazon: Launch Activity and Innovation

Refreshing the Amazon device line-up

Figure 30: Amazon Smart Oven, September 2019

Figure 31: Amazon Echo Loop, September 2019

Figure 32: Amazon Echo Auto, September 2019

Figure 33: Amazon Kids edition, October 2019

It's not all about consumer electronics...

Figure 34: Amazon Belei, November 2019

Expanding the streaming line up

Refining delivery, collection and payment

Prove it (sustainable)

Celebrating its two biggest days

Figure 35: Amazon Home of Black Friday 2019 pop-up, November 2019

### Amazon: Advertising and Marketing Activity

Amazon's adspend hits record highs in 2019

Figure 36: Total above-the-line, online display and direct mail advertising expenditure by Amazon, 2015-19

Growth in spending on Prime and services

Figure 37: Total above-the-line, online display and direct mail advertising expenditure by Amazon, by advertising category, 2015-19

The majority is spent on TV

Figure 38: Total above-the-line, online display and direct mail advertising expenditure by Amazon, by media type, 2015-19

Nielsen Ad Intel coverage

### The Consumer – What You Need to Know

Nearly nine in 10 shop with Amazon

Nearly half have access to Amazon Prime

Younger shoppers far more likely to shop via mobile

Hard-copy media still the most popular purchase

Delivery perks are key but Prime Video is increasingly important

Half of UK households have an Amazon device

Reviews crucial to purchasing on Amazon

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Amazon: A Shoppers Perspective - UK - January 2020

Report Price: £2195.00 | \$2963.91 | €2470.25

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Marketplace is a differentiator but some question the quality

## Who Shops and How Frequently with Amazon?

Almost nine in 10 shop with Amazon

Half of Amazon shoppers use the retailer once a month or less

Figure 39: Frequency of Amazon shopping, October 2019

25-34s most frequent Amazon shoppers

Figure 40: Frequency of Amazon shopping, by age, October 2019

More have increased their level of Amazon use than decreased it

Figure 41: Changes in Amazon use in the past year, October 2019

## Amazon Prime Membership

Nearly half have access to Amazon Prime

Figure 42: Amazon Prime membership, October 2019

Younger consumers more likely to have access to Prime

Figure 43: Amazon Prime membership, by age, October 2019

A quarter have joined Prime in the past year

Figure 44: Length of Amazon prime membership, October 2019

## Devices Used to Shop with Amazon

Most shop via laptop/desktop

Figure 45: Devices used to shop with Amazon in the past year, October 2019

Younger shoppers far more likely to shop via mobile

Figure 46: Devices used to shop with Amazon in the past year, by age, October 2019

Younger shoppers more likely to shop via multiple devices

Figure 47: Repertoire of devices used to shop with Amazon in the past year, by age, October 2019

## What They Buy via Amazon

Hard-copy media still the most popular purchase via Amazon

Figure 48: Products purchased via Amazon in the past year, October 2018 and 2019

Prime members more likely to buy across all categories...

Figure 49: Purchases made via Amazon in the past year, by Prime membership status, October 2019

...and have a wider repertoire of purchasing

Figure 50: Repertoire of categories shopped via Amazon in the past year, by Prime membership status, October 2019

## Amazon Services Used

Delivery still key but Prime Video is growing in importance

Figure 51: Amazon Prime services regularly used, by access to Amazon Prime, October 2019

So big it has its own day

Figure 52: Purchasing during Amazon Prime Day 2019, October 2019

Figure 53: Attitudes towards Amazon sales events, October 2019

Will more live sport encourage more Prime Video sign-ups?

Figure 54: Attitudes towards sport on Prime Video, by gender and age, October 2019

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Amazon: A Shoppers Perspective - UK - January 2020

Report Price: £2195.00 | \$2963.91 | €2470.25

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Most use multiple services

Figure 55: Repertoire of Prime services used, by Prime services regularly used, October 2019

## Ownership of Amazon Devices

### Half of UK households have an Amazon device

Figure 56: Ownership of Amazon devices, October 2019

### Prime members significantly more likely to own Amazon devices

Figure 57: Ownership of Amazon devices, by membership of Amazon Prime, October 2019

### The majority purchased their products via Amazon

Figure 58: Where Amazon products were purchased, October 2019

## Behaviours of Amazon Shoppers

### For most Amazon is the first port of call online

Figure 59: Behaviours of Amazon shoppers, October 2019

### Amazon's influence is not limited to online

Figure 60: Behaviours of Amazon shoppers, by age, October 2019

## Attitudes towards Marketplace

### Over a third think Marketplace is what makes Amazon unique

Figure 61: Attitudes towards Amazon Marketplace, October 2019

### One in five Amazon shoppers believe they have received counterfeit products

Figure 62: Attitudes towards shopping with Amazon, by age, October 2019

### Half of 16-34s say it is hard to trust the quality of Marketplace products

Figure 63: Agreement with attitudes towards Amazon Marketplace, by age, October 2019

## Appendix – Data Sources, Abbreviations and Supporting Information

Data sources

VAT

Financial definitions

Abbreviations

Consumer research methodology

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)