



Jungle Scout

Consumer Trends Report

Q1 2022

Introduction & Key Takeaways

Jungle Scout's Consumer Trends Report is a quarterly study of 1,000 U.S. consumers which explores how spending behaviors and preferences change over time and due to current events. It tracks the types of products consumers are buying, how retail stores and sites are performing, and whether spending is increasing or decreasing online, in-store, and on Amazon and Walmart.com in particular.

This report focuses on consumer attitudes and behaviors over the first quarter (January through March) of 2022 with some comparison to previous quarters. It explores how inflation is affecting consumer spending online and in-store, the persistence of the homebody economy during the COVID-19 pandemic, and the state of brand loyalty amid tight finances and supply chain issues.

1 Consumers are reducing their spending, with an eye on inflation and savings goals.

- 72% of consumers say rising inflation has affected their spending on consumer goods, and 70% are making fewer “fun” or impulse purchases.
- 38% of consumers say their overall spending will decrease in Q1, and 34% say their online spending will decrease — the highest reported figures on decreased consumer spending in at least one year.
- 52% of consumers are currently saving up for a big purchase or expense, including vehicles, vacations, business ventures, and real estate.

2 Pricing and coupons drive brand loyalty and online purchasing.

- 53% of consumers feel compelled to make a purchase when they get a deal, coupon, or discount code, and 47% say they only purchase products that are on sale or discounted.
- 47% of consumers say they buy from their favorite brands due to affordability — the leading driver of brand loyalty over quality, familiarity, and sustainability.
- 20% of consumers always look for specific brands when shopping online, and 34% say whether they shop for a specific brand depends on the product.

3 Home improvement and the homebody economy will continue in 2022, as consumers plan to stay in and spend on the home and self-care.

- 60% of consumers say they'll spend more time at home in 2022 than they did before the pandemic began.
- 50% are more willing to spend money on their homes now than before the pandemic.
- 62% have a greater interest in self-care now than before the pandemic started, and 61% of consumers have a greater interest in cooking at home.

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Chapter 1

Q1 Insights: Consumers Cut Spending in 2022

From inflation to ambitious savings goals, consumers have important reasons for reducing their spending in 2022. This quarter, we looked into how and why consumers are cutting back, narrowing in on two of the U.S.'s key consumer groups: parents and millennials.

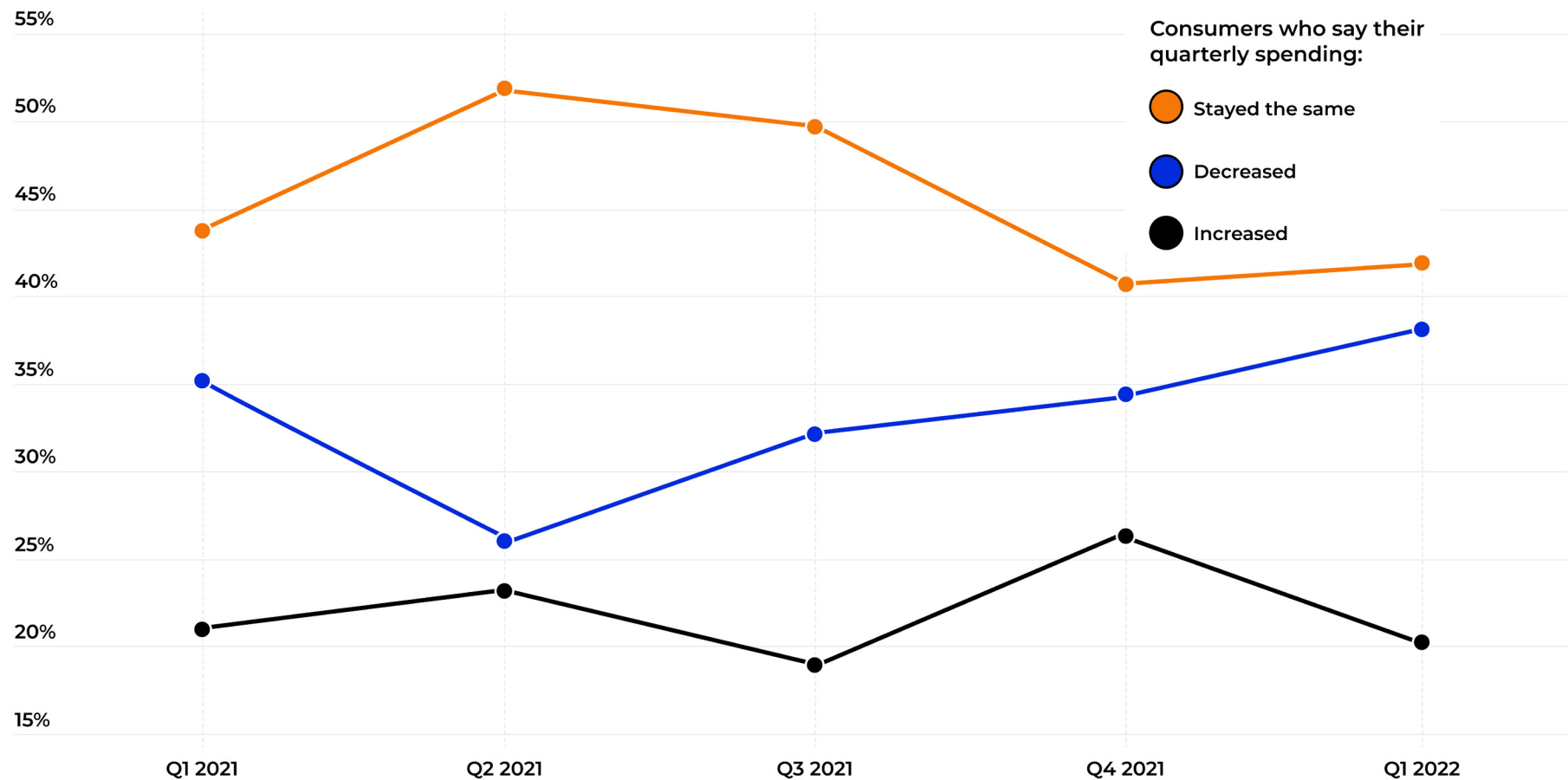
We examined what the current reduced consumer spending means for retail, the effect of discount pricing on online purchasing, and how consumers plan to navigate lifestyle changes in their third pandemic year.



Consumers Choose to Save, Not Spend

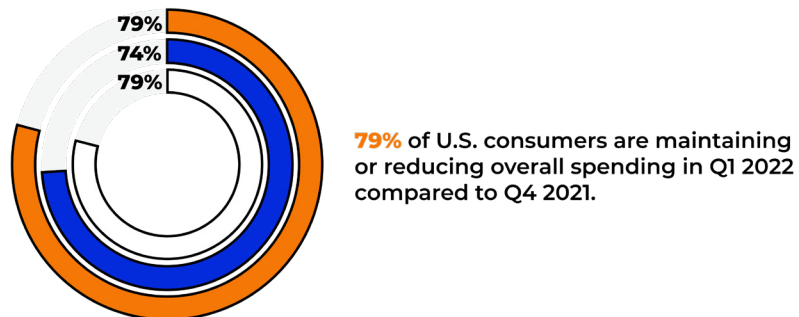
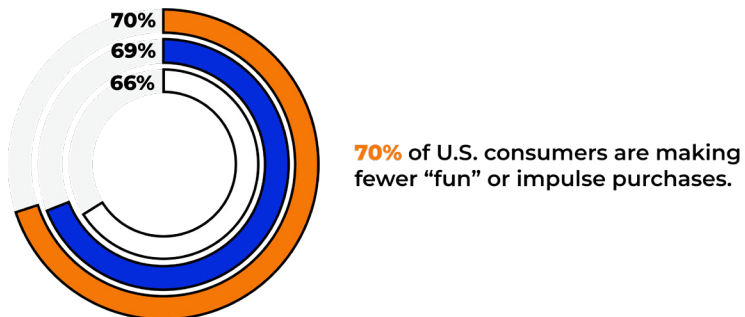
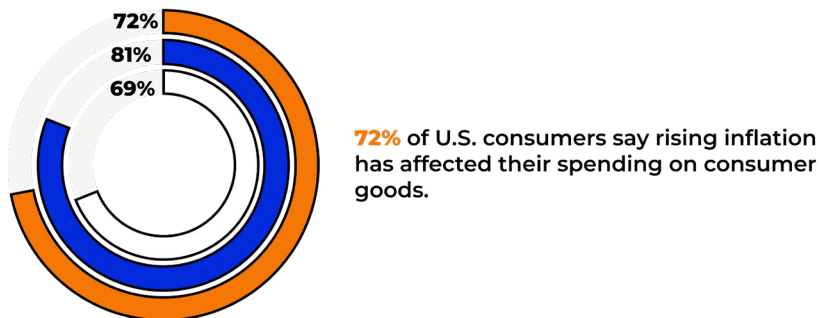
U.S. inflation climbed to 7.5% over the past year, breaking a decades-old record in January of 2022. In reaction to inflation and elevated prices on a range of goods including gas and food, many consumers are reducing their spending in Q1. In fact, **more consumers anticipate spending less money this quarter than they have in any quarter in the past year.**

Quarterly changes in consumer spending since January 2021



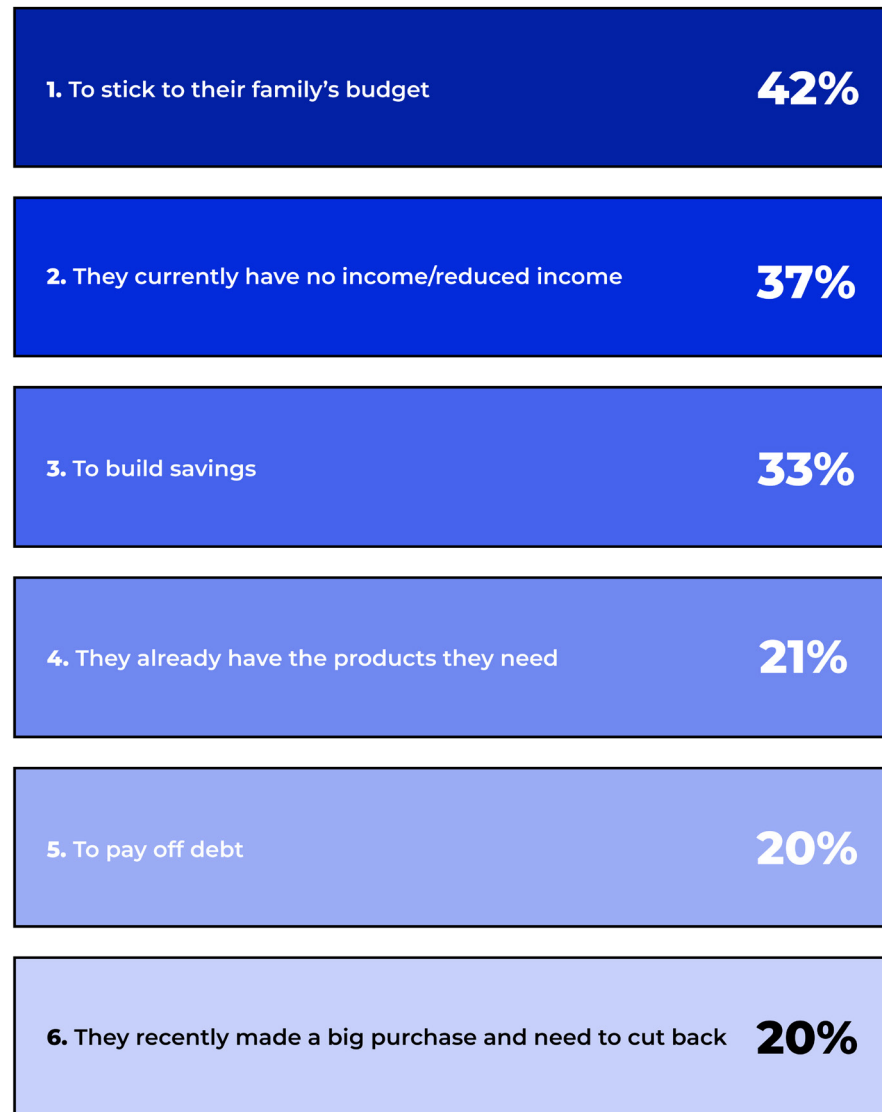
Inflation & Reduced Spending in 2022

● Total U.S. Consumers
 ● Parents*
 ○ Millennials



*Parents of children under age 18.

Top reasons consumers are reducing their spending

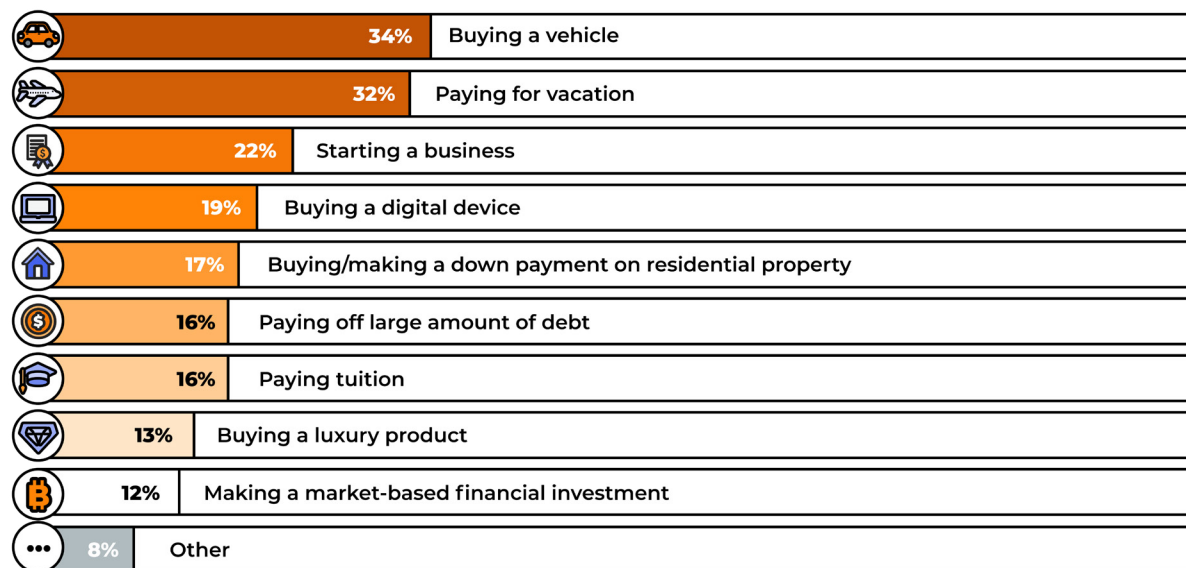


Percentages reflect the 38% of U.S. consumers who will reduce their overall or online spending in Q1 2022.

Savings Goals & Future Spending

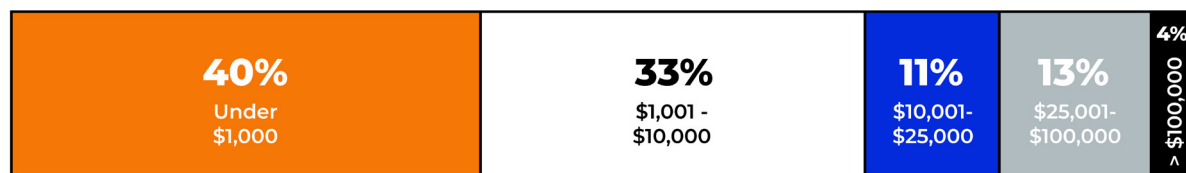
Another reason consumers are reducing their spending: 52% are currently saving up for a big purchase or expense that could set them back thousands of dollars.

Large expenses consumers are saving for



Other responses include paying for weddings, moving costs, remodeling a home, and medical expenses.

How much money are consumers looking to save?



Percentages reflect the 52% of consumers currently saving up for a big expense.

INSIGHTS



27%

of millennials are saving up to start a business

24%

of parents are saving up for college or graduate school tuition

23%

of all consumers are currently saving up for more than one large expense



62%

of savers will save \$5,000 or less for their big expense

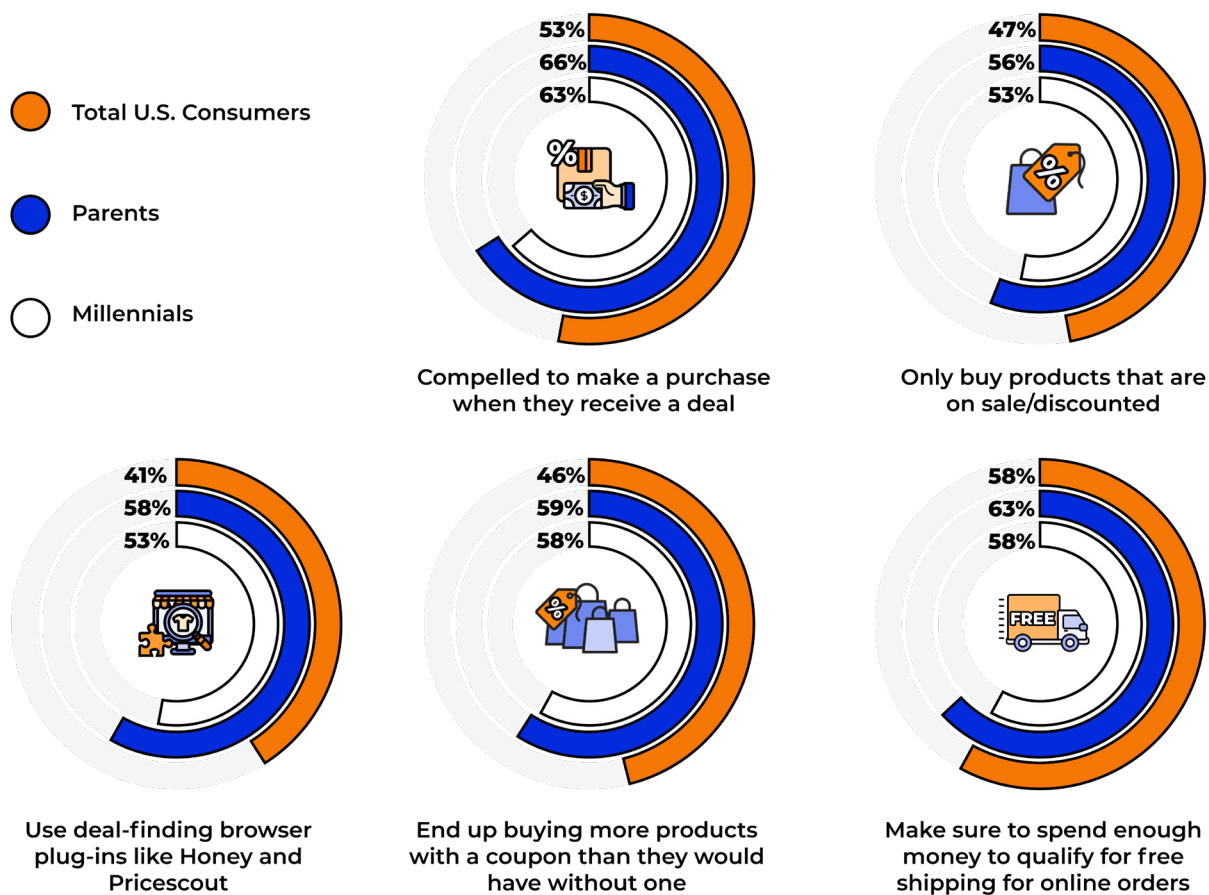
17%

of savers will save over \$25,000

Deals & Online Spending

Today's consumers are tech-savvy comparison shoppers who research their purchases to find the best prices. How might brands compel these budget-conscious shoppers to buy? Coupons and discounts do the trick for over half of U.S. consumers — and are especially impactful among parents and millennials.

How consumers are influenced by online deals



INSIGHTS



63%

of consumers do research to find deals on the products they want

61%

of consumers say they're good at finding deals and saving money

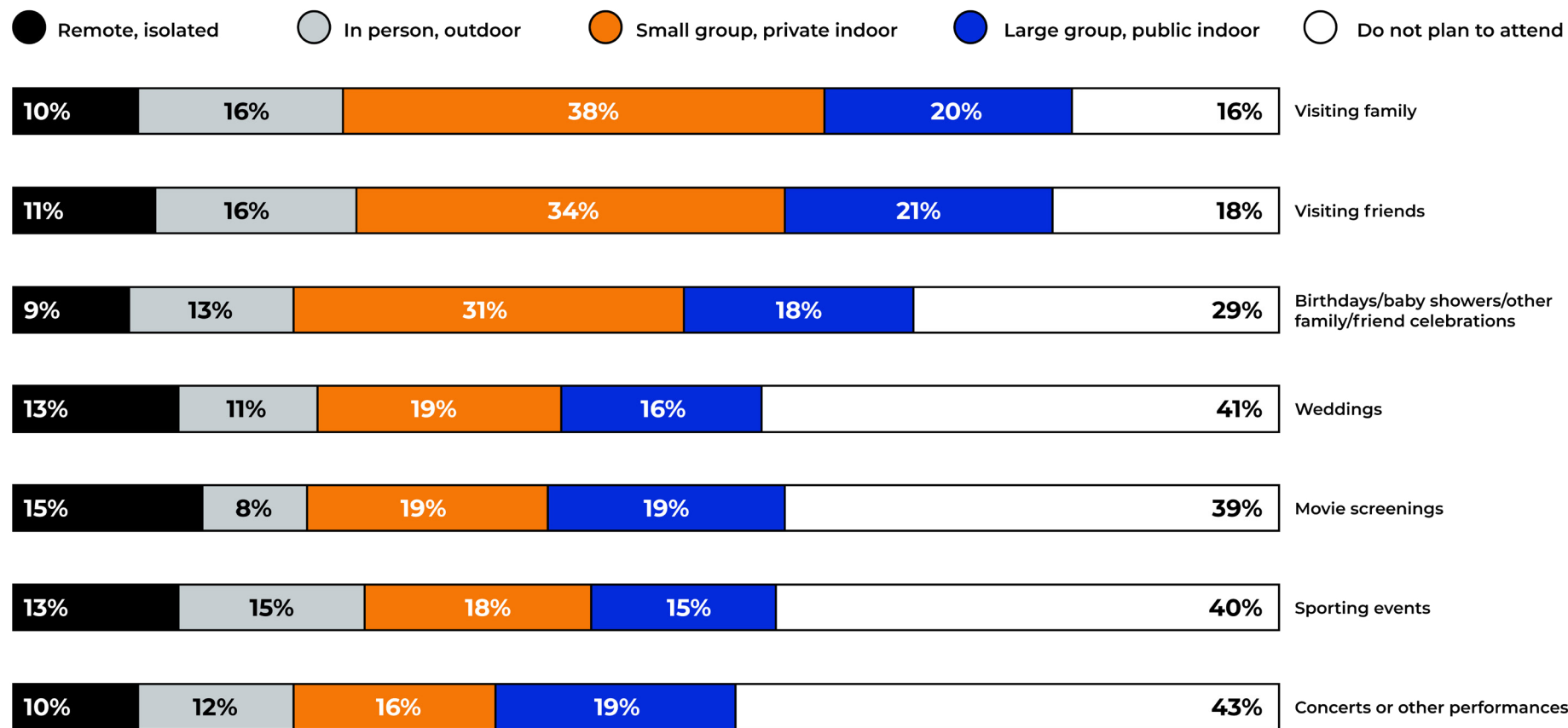
18%

of consumers would try out a new brand if offered a discount

Events, Safety & Staying In

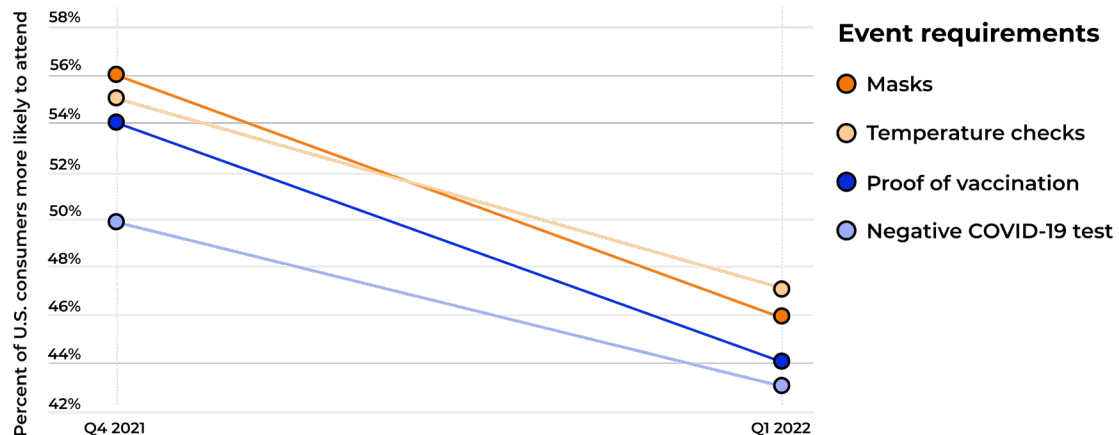
Many consumers still plan to avoid in-person social engagements and large events like concerts and weddings. As many as 16% of consumers still prefer to attend events held either remotely or outdoors over indoors. Those who do plan to attend social events at indoor venues are more likely to stick with small groups of friends and family at home, rather than join large crowds.

How consumers plan to attend events in 2022

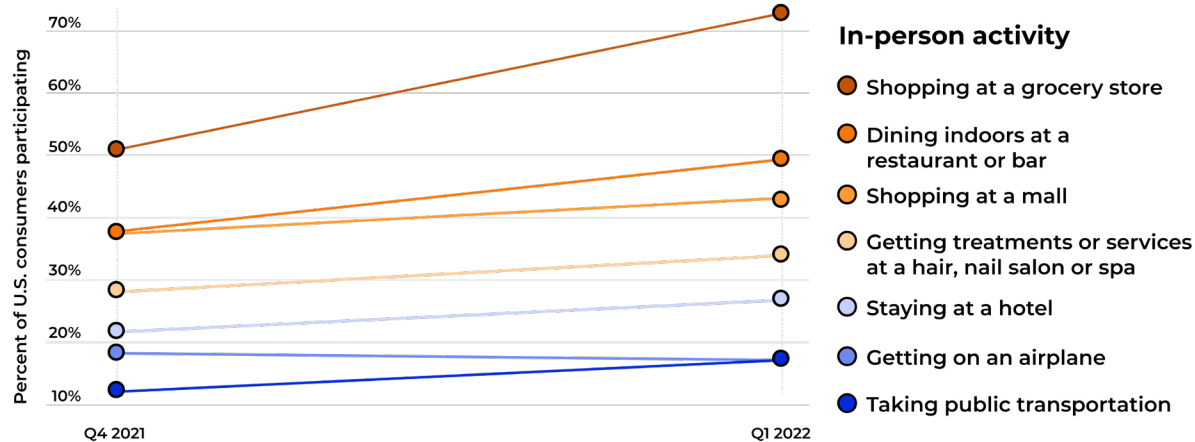


COVID-19 requirements like masks and proof of vaccination are now less likely to incentivize attendance at social events than they were in 2021.

How COVID-19 safety precautions influence participation in activities and events



Compared to last year, many more consumers will resume everyday activities that necessarily occur in-person and indoors.



What consumers are saying about social events and COVID-19 safety in 2022

“Until the pandemic is truly contained, I want social distancing, wearing masks, vaccine requirements to remain in place and be truly enforced.”

“I am fully vaccinated and willing to attend any event that I am interested in.”

“I would like to [socialize] but there are too many restrictions and people are weird now.”

Home Improvement & the Homebody Economy

Even with an increased willingness from some consumers to socialize in public, **60% plan to spend more time at home in 2022** than they did before the pandemic began. They won't be sitting idle: many will renovate or redecorate their homes and fuel the homebody economy — the millennial-driven market for home products, self-care, and other creature comforts.

The pandemic shifted consumers' outlook on home life. Compared to before the pandemic started...



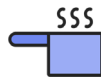
62%

of consumers now have a greater interest in self-care/wellness



56%

now have a greater interest in housekeeping/cleaning their homes



61%

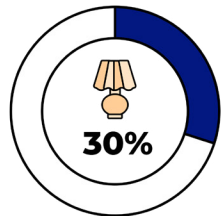
now have a greater interest in cooking/preparing food at home



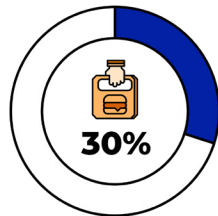
45%

now have a greater interest in interior design and home decor

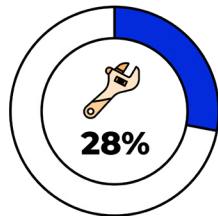
What “homebody economy” expenses consumers are spending on in 2022



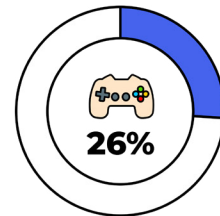
Home decor & furniture



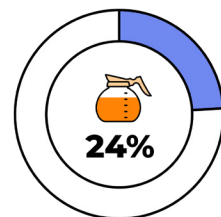
Takeout food pickup/delivery



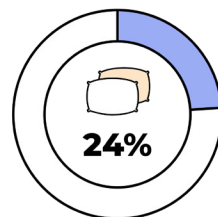
Home improvement & home hardware



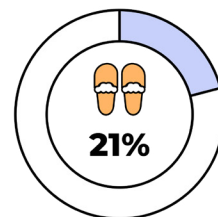
Digital entertainment



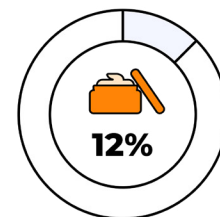
Small kitchen appliances



Bedding



Lounge clothing



Home beauty treatments

INSIGHTS



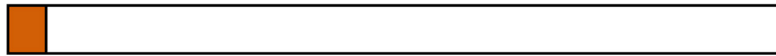
50%

of consumers are more willing to spend money on their homes now than before the pandemic started

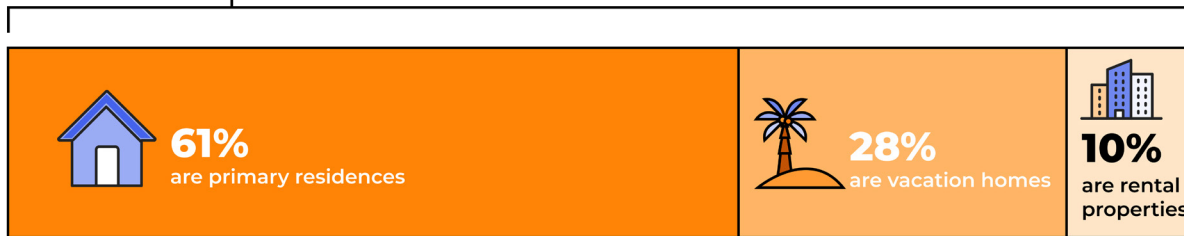
Other categories included meal kit delivery, large home appliances, and home fitness equipment.

Homeownership in 2022

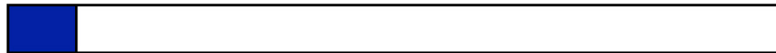
5% of consumers purchased a home in the past year



of those homes...



9% of consumers are currently saving up for a down payment on a residential property



of those properties...



INSIGHTS



65%

of recent home buyers are first-time homeowners

34%

of consumers who moved in the past year moved into a bigger home, and 47% moved into a smaller home

37%

of consumers who moved in the past year relocated to a new city, and 31% moved to the suburbs/countryside

Chapter 2

Trending Spending: Consumer Pulse Report

Consumer spending shifts over time, as shoppers navigate changes to their work, lifestyle, and families. This chapter explores how much consumers are spending, what they're buying, and where they're shopping.

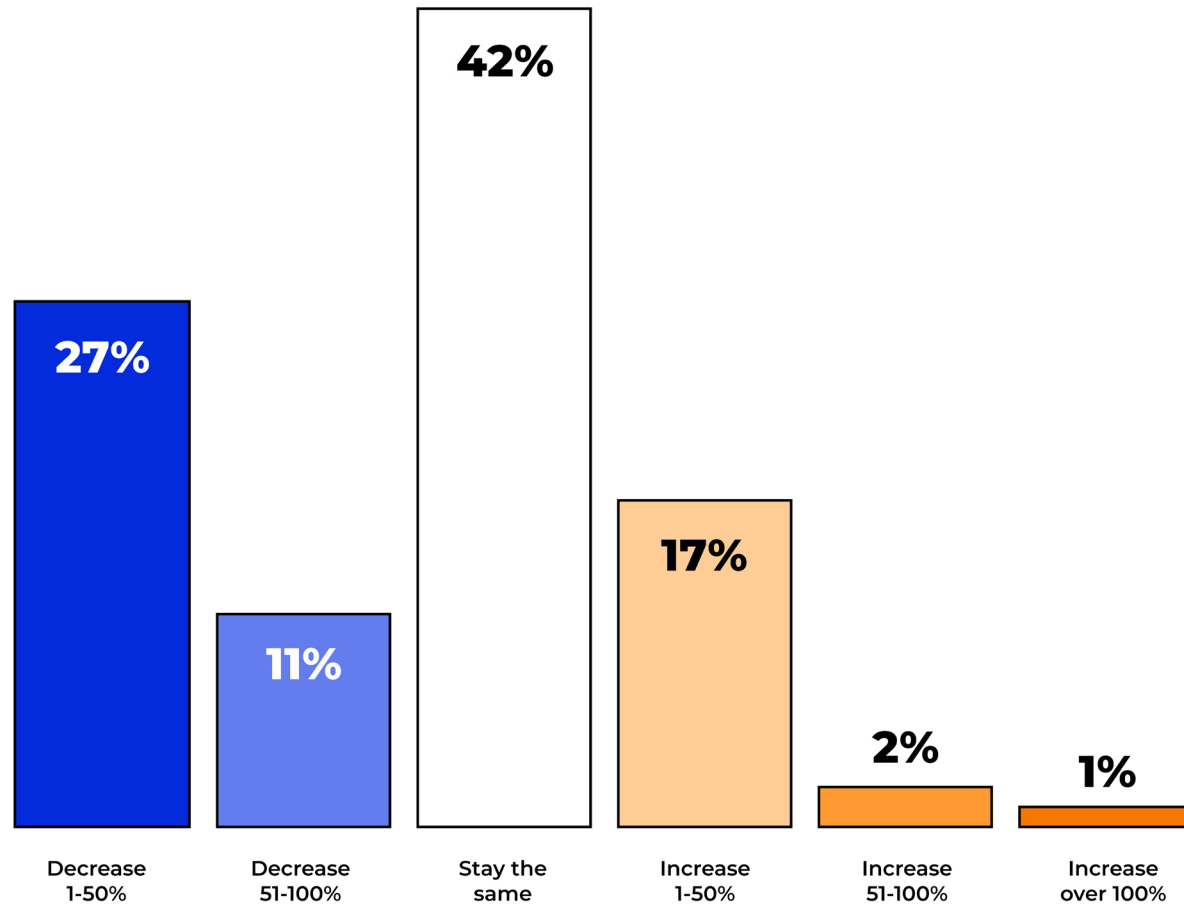


Consumer Spending & Projections

The data in this section reflects how consumer spending will change in Q1 2022 compared to Q4 2021.

See consumer spending data for the second half of 2021 [here](#).

Will overall consumer spending change in Q1?



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When asked about their anticipated spending during Q1 of 2022 (January through March), **most consumers said they expect their spending to decrease or stay the same** compared to Q4 of 2021 (October through December).

38%

say spending will decrease

42%

say spending will stay the same

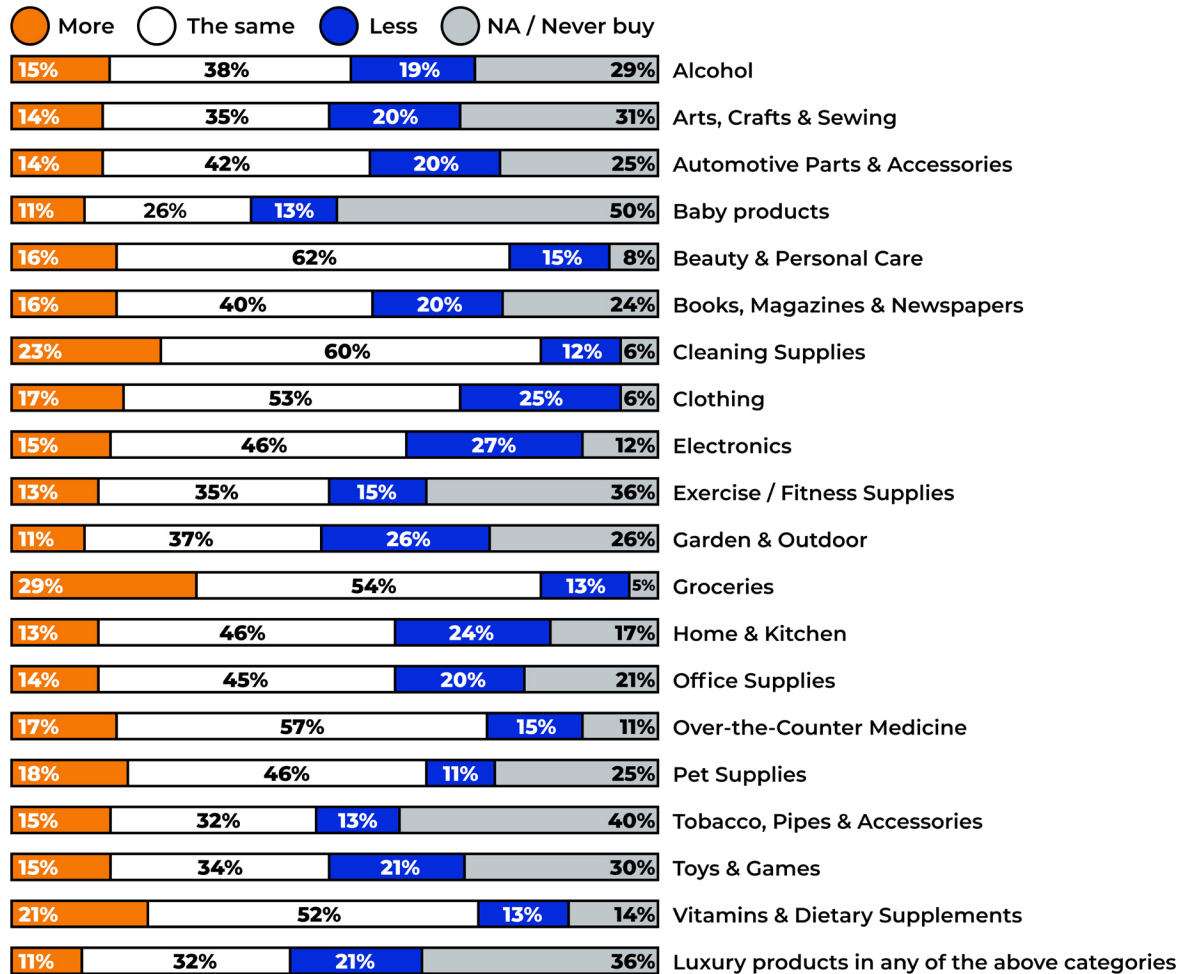
20%

say spending will increase

Popular Products: What Consumers Are Buying

Consumers are stocking up on essentials while spending less on electronics, clothing, and garden and outdoor products.

Top product categories | Q1 2022



INSIGHTS



Compared to last quarter, consumers are buying more:

- Groceries - **29%**
- Cleaning Supplies - **23%**
- Vitamins & Dietary Supplements - **21%**

Consumers are buying less:

- Electronics - **27%**
- Garden & Outdoor - **26%**
- Clothing - **25%**
























Where People Shop: The Most Popular Stores & Online Retail Sites

Consumers were asked which of the biggest retail stores they are shopping at (in-store or online) during Q1 2022.

In-store

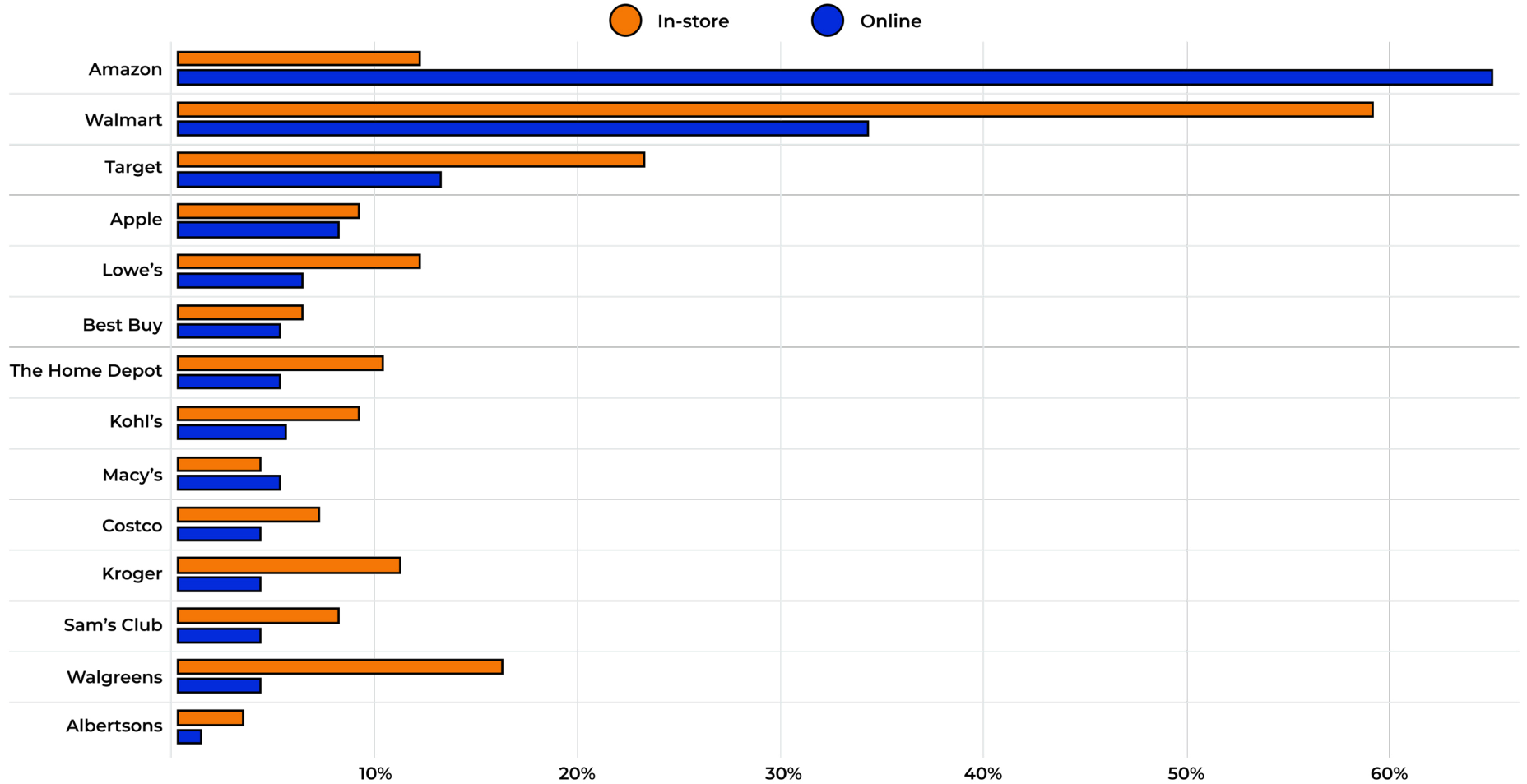
 Walmart	59%
 Target	23%
 Walgreens	16%
 Lowe's	12%
 Amazon Go or Amazon Go Grocery	12%
 Kroger	11%
 The Home Depot	10%
 Apple	9%
 Kohl's	9%
 Sam's Club	8%
 Costco	7%
 Best Buy	6%
 Macy's	4%
 Specialty, independent, local or boutique	3%
 Albertsons	3%

Online

 Amazon	65%
 Walmart.com	34%
 eBay.com	16%
 Target.com	13%
 Apple.com	8%
 Etsy.com	7%
 Lowe's.com	6%
 BestBuy.com	5%
 HomeDepot.com	5%
 Macy's.com	5%
 SamsClub.com	4%
 Costco.com	4%
 Walgreens.com	4%
 Kroger.com	4%
 Wish	4%
 Facebook shops	3%
 Instacart	3%
 Google Shopping	2%
 Wayfair	2%
 Specialty, independent, local or boutique	2%
 Instagram Shop	1%
 Albertsons.com	1%
 Houzz	1%

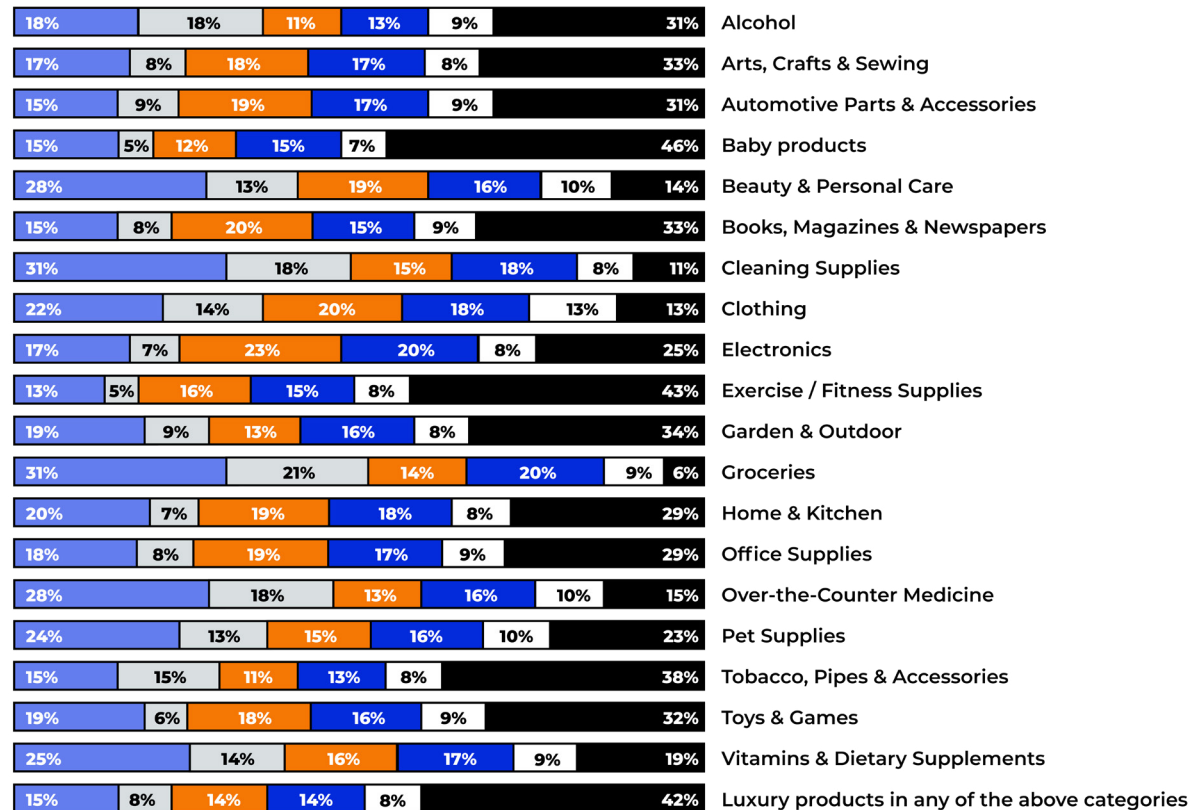
In-store vs. online

Compared to other retail giants, Amazon has far more online than in-store customers. Grocery stores and big-box retailers like Target and Walmart tend to see more foot traffic than clicks.



Where People Shop for Different Products: In-store, Online, Amazon, or Walmart

Where consumers are shopping by product category:



Q1 (January-March 2022).

INSIGHTS



Consumers **prefer to buy from Amazon** over any other retailer (online and in-store) in the following categories: Arts, Crafts & Sewing, Automotive Parts & Accessories, Books, Electronics, Exercise/Fitness Supplies, and Office Supplies.

Consumers **prefer Amazon over Walmart.com** for most non-essential product categories, whereas they prefer **Walmart.com over Amazon** for essential items like baby products, cleaning supplies, groceries, and over-the-counter medicine.

Consumers **prefer shopping at Walmart in-store over Walmart.com** in all product categories except Automotive Parts & Accessories, Electronics, and Exercise/Fitness Supplies. In terms of in-store shopping, consumers prefer Walmart over any other store for all product categories.

Spotlight on Luxury Spending

Though overall consumer spending is expected to decrease or stabilize this quarter, 11% of consumers will increase their spending on luxury goods.

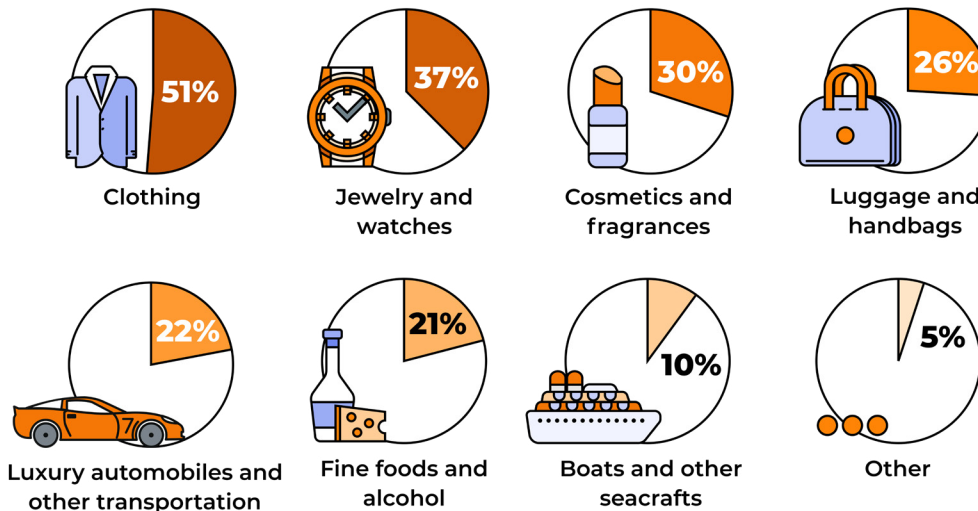
Why consumers are buying luxury goods in Q1

1. To treat themselves
2. To celebrate an occasion or milestone
3. As a gift for someone special
4. They received a pay raise and can afford it

Top destinations for luxury purchases

1. Amazon
2. Walmart.com
3. Walmart (in-store)
4. Another online retailer
5. Another in-store retailer

Top luxury goods categories for 2022:



Percentages reflect consumers who plan to buy luxury products in Q1 or are currently saving up for a luxury purchase. Other responses include sporting equipment, furniture, and musical instruments.



Products to Watch

As Americans take on lifestyle changes in 2022, the following categories may see a rise in consumer demand.

- **Rugs** - Unit sales up 67%
- **Eau de Parfum** - Unit sales up 30%
- **Cologne** - Unit sales up 27%
- **Caviar** - Unit sales up 14%
- **Women's Necklaces** - Unit sales up 17%

"It appears that after two years of restrictions due to COVID 19, consumers are ready to get back to normal life and begin 'treating themselves' again. This consumer attitude will bring a rise in demand for 'luxury' products. Brands that sell in these categories should optimize their listings and prepare their inventory for growth in 2022."

Eva Hart
Enterprise Ecommerce Expert

Contact sales@junglescout.com today to see how Jungle Scout Cobalt can help you dominate your segment and maximize your margins.

Chapter 3

Ecommerce Report

Consumers consistently turn to Amazon for their online purchases, though Walmart.com and social media channels are increasingly popular options for online shopping.

In this chapter, we explore how, where, and why consumers shop online, how Amazon and Walmart.com stack up among online shoppers, and how brand loyalty has changed during the pandemic.

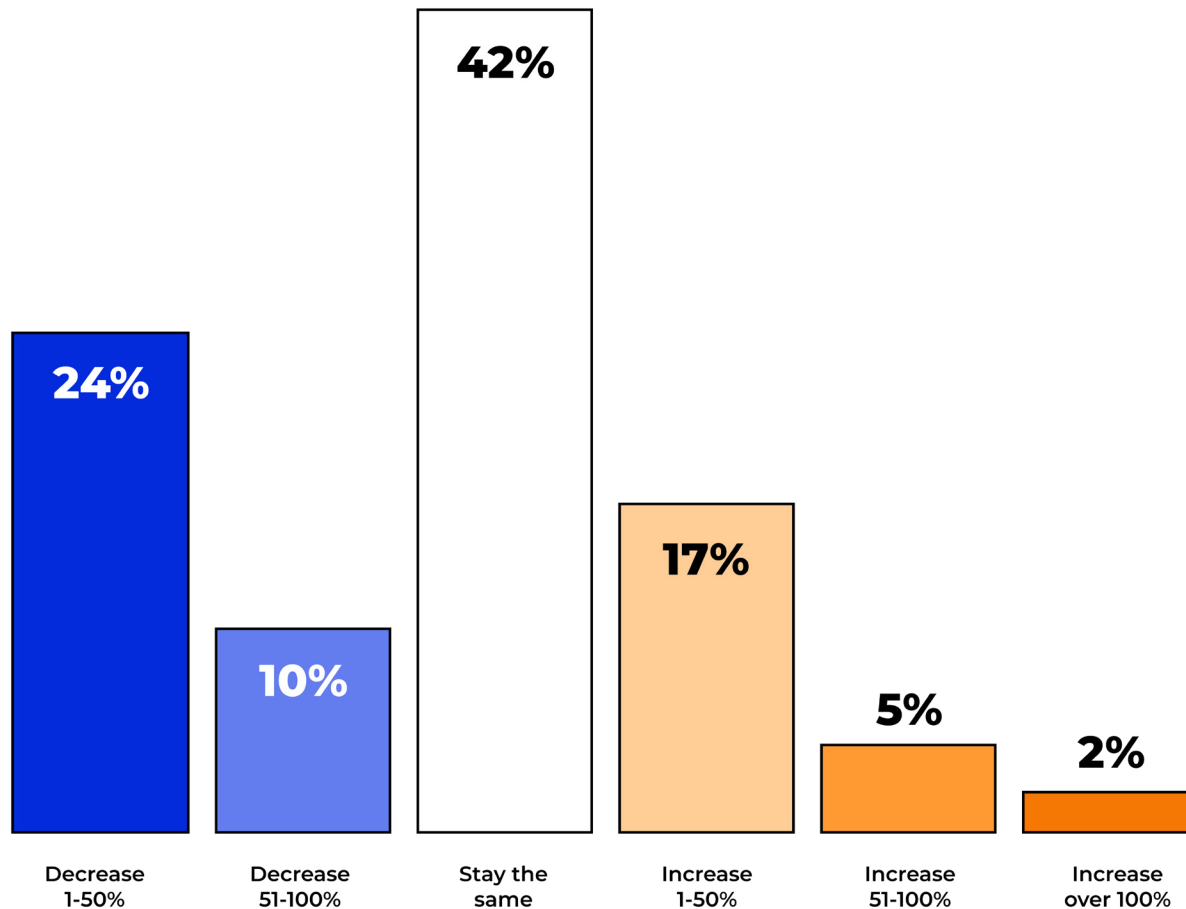


Online Spending & Shopping Preferences

The data in this section reflects *online* consumer spending for Q1 2022.

See *online consumer spending data for the latter half of 2021* [here](#).

Will *online* consumer spending change in Q1?



INSIGHTS



Similarly to their overall spending, most consumers expect their online spending to decrease or stay the same during Q1 (January through March 2022). More consumers expect a decrease in their online spending than at any time in the past year.

34%

say spending will decrease

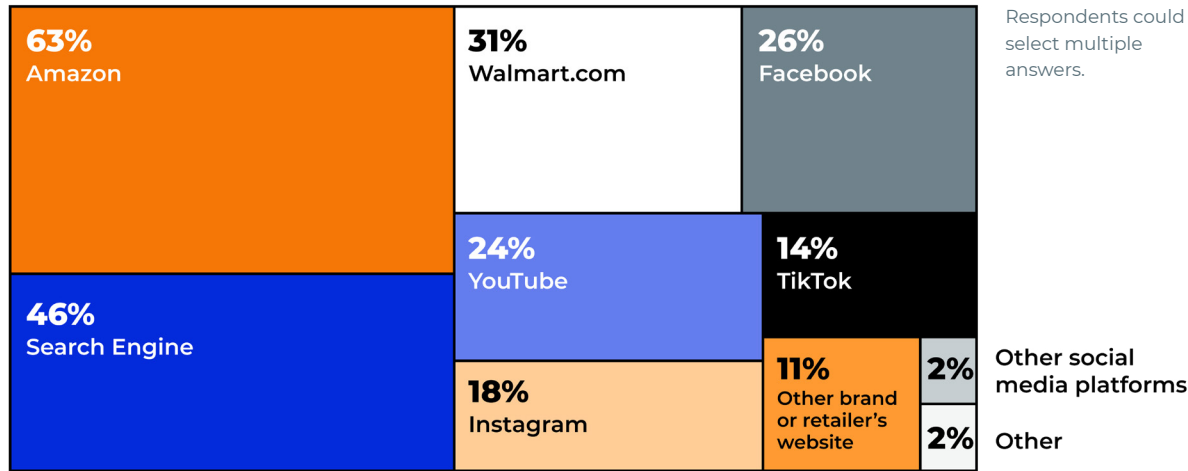
42%

say spending will stay the same

24%

say spending will increase

When consumers shop for a product online, where do they start their search?



INSIGHTS



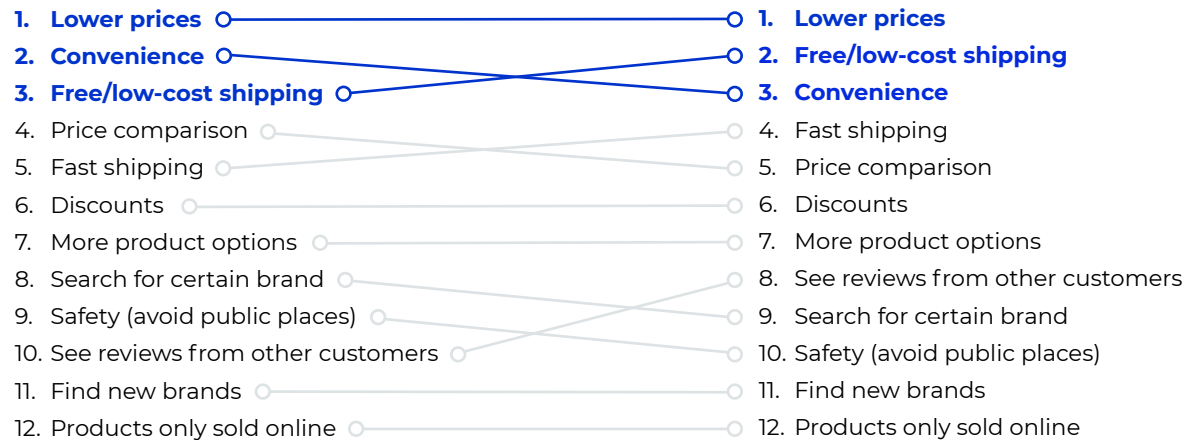
When searching the internet for products, most consumers start on Amazon.

Social media channels like Facebook, YouTube, and Instagram play important roles in consumers' online product searches.

Reasons consumers prefer to shop online — ranked:

Q1 2022

Q4 2021

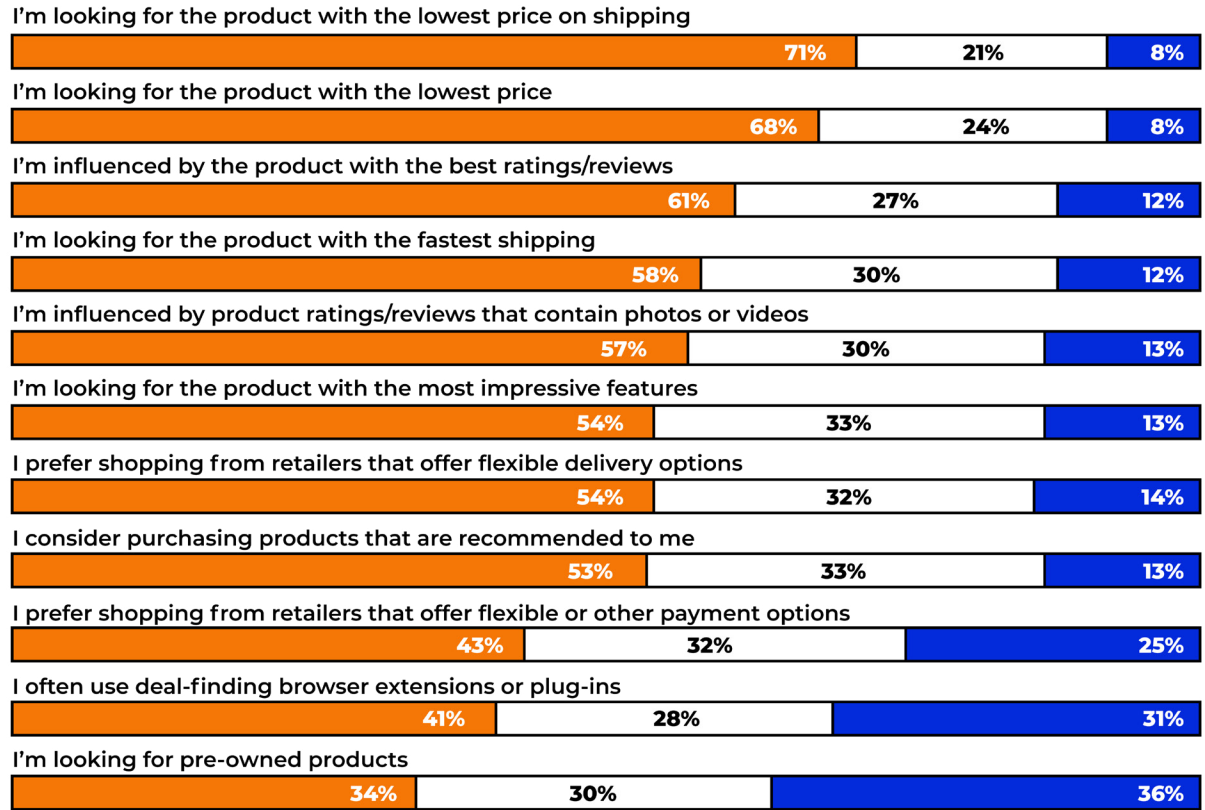


Lower prices remains the top reason consumers choose to shop online.

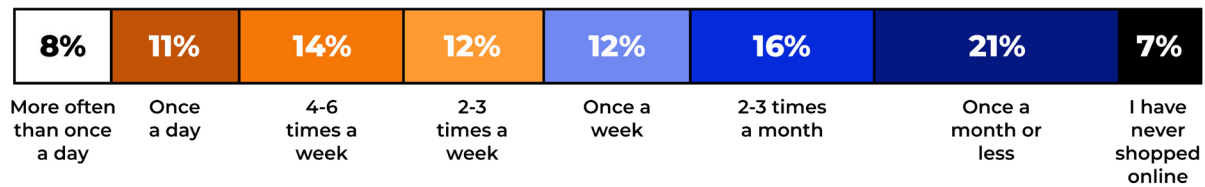
Additionally, some shoppers are physically unable to go to a store or do not live near a store.

When shopping online, some benefits are more important than others:

● Strongly / somewhat agree
 ○ Neither agree / disagree
 ● Strongly / somewhat disagree



How frequently consumers shop online:



INSIGHTS



For the second quarter in a row, shipping price is more influential than product price for online shoppers.

Over half of consumers are influenced by flexible purchase options.

Over one-third of consumers shop secondhand.



56% of consumers shop online weekly or more often, down from 61% in Q4 of 2021.

Amazon vs. Walmart.com: Consumer Preference Snapshot

Though Amazon and Walmart.com have similar appeal — huge product catalogs, affordable and fast shipping, and great prices — consumers value them for different reasons.

Reasons customers shop at...



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43%

of consumers like using Amazon's subscription feature.

34%

of consumers like using Walmart's Mobile Scan & Go feature.

How frequently consumers shop on Amazon and Walmart.com



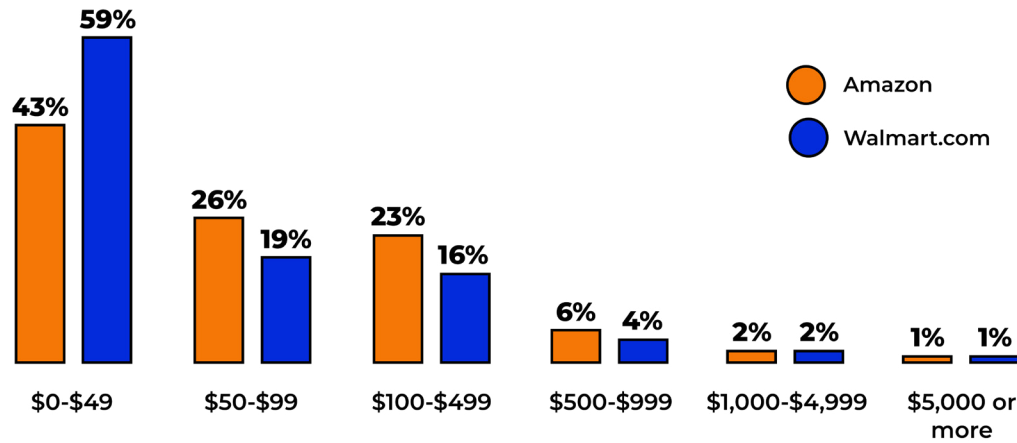
48%

of consumers shop on Amazon at least once per week.

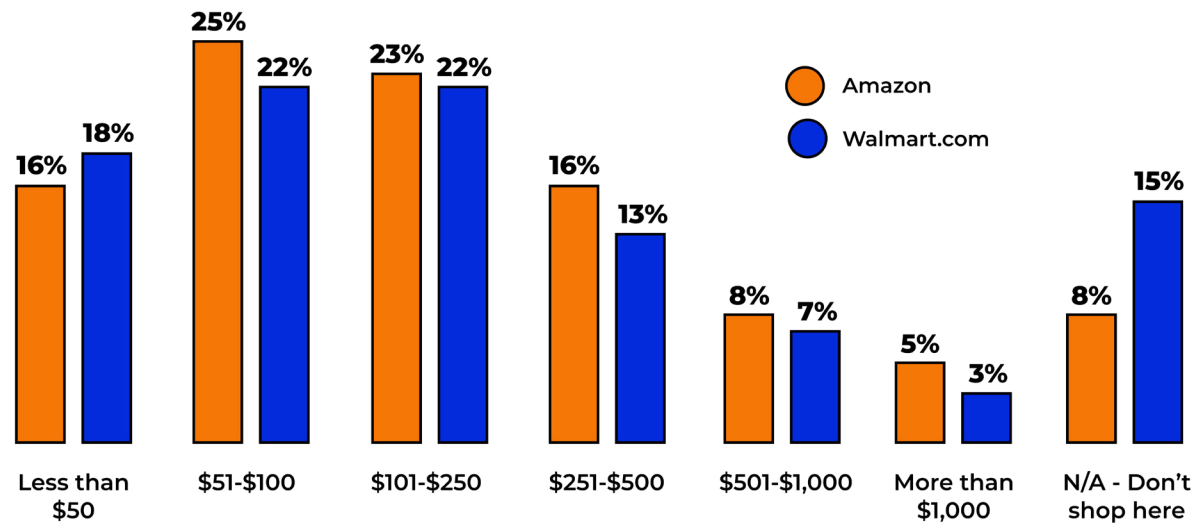
43%

of consumers shop on Walmart.com once per week.

How much consumers will spend on Amazon and Walmart.com in Q1:



How much consumers are willing to spend on a single item from Amazon or Walmart.com:



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In general, consumers spend more on Amazon: 57% of consumers say they will spend over \$50 on Amazon this quarter, versus 41% who will spend over \$50 on Walmart.com.

51%

would pay over \$100 for a single item from Amazon, versus 46% who would pay as much for a single item from Walmart.com.

Brand Loyalty in 2022






Amid recent product shortages and price hikes, shoppers have had to be flexible when it comes to buying from their favorite brands. In the past year, some brand loyalists have tried new brands because their favorites were out of stock, while others' budgets nudged them toward more affordable brands.

Now, brands are asking the million-dollar question: how loyal are today's consumers, and what drives repeat purchases in an economy shaken by supply chain issues and inflation? We dove deep into the state of brand loyalty in 2022 to understand how and why shoppers' allegiances are shifting.

Do consumers look for specific brands when shopping online?



Top Reasons Consumers Are Loyal to Specific Brands

1. Lower prices than competitors 
2. Superior quality or performance over competitors 
3. Brand is familiar to the consumer 
4. Brand is committed to sustainability 
5. Easy to purchase online 

INSIGHTS



The percentage of consumers who say they always shop for specific brands is **down 35%** from Q2 of 2021.

8% of consumers say they don't necessarily shop from leading brands — they just want a product that looks like the leading brand.

Reasons consumers try new brands

1. Favorite brand became unavailable (e.g., discontinued, out of stock) 41%	6. Recommendations by family or friends 17%
2. New brand is more affordable 35%	7. Ease of purchasing new brand in-store 14%
3. Favorite brand changed its product(s) 28%	8. Ease of purchasing new brand online 12%
4. New brand has superior quality 25%	9. New brand has better customer reviews 11%
5. Dissatisfaction with favorite brand 24%	10. New brand has more convenient shipping/delivery or pickup option 10%

Other responses include social media recommendations, eco-friendliness, packaging, curiosity, doctor recommendation, and buying locally-made products.

Brand loyalty by product category

In the past year, consumers were most likely to try a new brand when buying essential items.

Most volatile categories for brand loyalty			
	Groceries	Cleaning supplies	Clothing
Most stable categories for brand loyalty			
	Exercise/Fitness supplies	Home & Kitchen	Office supplies

INSIGHTS



33%

of consumers tried a new brand in the grocery category in 2021.

Just 6% of consumers shopped new brands for toys and games last year.

Chapter 4

About the Report

Methodology

Between February 4-8, 2022, Jungle Scout conducted an anonymous survey among a panel of 950 U.S. consumers about their buying preferences and behaviors. Respondents represent every U.S. state, all genders, and ages 18 to 75+, as well as all employment types and varying income levels.

The survey asked certain questions about behaviors during the ongoing COVID-19 pandemic, which is described as to have started in the U.S. in March 2020 for consistency among related responses.

Certain analysis also compares responses from this survey to the previous Consumer Trends Surveys, where data was collected on a quarterly basis starting in June 2020.

Q1 refers to the months of January through March 2022. Q4 refers to the months of October through December 2021.

Using the data

We invite you to explore Jungle Scout's 2022 Consumer Trends Report, and to share, reference, and publish the findings with attribution to "Jungle Scout" and a link to [this page](#).

For more information, specific data requests or media assets, or to reach the report's authors, please contact us at press@junglescout.com.

About Jungle Scout

Jungle Scout is the leading all-in-one platform for ecommerce sellers, supporting more than \$40 billion in annual Amazon revenue. Founded in 2015 as the first Amazon product research tool, Jungle Scout today features a full suite of best-in-class business management solutions and powerful market intelligence resources to help entrepreneurs and brands manage their ecommerce businesses. Jungle Scout is headquartered in Austin, Texas, and supports 10 global Amazon marketplaces.

Demographic Data

Gender

Male	48%
Female	50%
Non-binary	2%
Other/prefer not to say	1%

Age

18-24	13%
25-34	23%
35-44	21%
45-54	12%
55-64	12%
65-74	13%
75+	6%

Region

West	15%
Midwest	25%
Northeast	17%
South	42%

Household income

Less than \$25,000	30%
\$25,000 to \$34,999	19%
\$35,000 to \$49,999	17%
\$50,000 to \$74,999	15%
\$75,000 to \$99,999	9%
\$100,000 to \$124,999	5%
\$125,000 to \$149,999	2%
\$150,000 or more	2%

Parent or guardian

Yes	30%
No	70%

Relationship status

Single or unmarried and not living with a partner	53%
Married	29%
In a relationship (Unmarried) and living with a partner	16%
Other	2%

Employment status

Employed (NET)	58%
Employed (full-time OR part-time) and leaving my home for work	36%
Employed (full-time OR part-time) and currently working at home	12%
Not working (NET)	52%
Unemployed (lost work due to COVID-19 and its effects)	5%
Unemployed (NOT related to COVID-19)	10%
Student (full-time OR part-time)	5%
Homemaker	7%
Retired	20%
Disabled/unable to work	6%
Other	1%