Jungle Scout

Consumer Trends Report | Q2 2021

Introduction & Key Takeaways

Jungle Scout's 2021 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 in particular.

This report focuses on consumers' attitudes and behaviors over the first quarter (January through March) and second quarter (April through June) of 2021. It explores how a year of COVID-19-related social distancing and isolation at home, increased dependency on online shopping, and a focus on the "essentials" has shaped consumer behaviors and preferences — perhaps permanently.

1 Fast and low-cost shipping is now essential for keeping online shoppers happy.

- When ordering online, 80% of consumers expect free shipping when ordering a certain dollar amount of items and 66% expect free shipping for all orders.
- Shoppers want immediate gratification; 91% of consumers expect to receive an online order within a week and 9% expect all online orders to arrive the same day.
- Consumers say fast or same-day shipping has a major impact on their decision to purchase. Further, 70% stated they would be upset if an order didn't arrive on time.

2 Where does Walmart beat Amazon? Prices and Grocery.

- Walmart attracts price-conscious consumers and those drawn to the familiarity of the store. Consumers rank price as the top reason they shopped on Walmart.com in Q1. Also, 12% of consumers say they don't purchase from Amazon because the prices are too high, compared to 8% who say the same for Walmart. Additionally, 39% of Walmart.com shoppers say they have shopped there over the last three months due to familiarity with the store's products.
- Walmart still leads in grocery. More than half of Walmart.com shoppers say they have purchased groceries in Q1 compared to only 23% of Amazon.com shoppers.
- Walmart has a huge customer base, with 54% of consumers shopping in store and 39% online in Q1. However, the retailer still lags compared to Amazon. 71% of consumers say they shopped on Amazon in the same time. And 68% of consumers are Amazon Prime members compared to 41% who subscribe to Walmart+.

3 Over the past year, more consumers got in on the secondhand market to earn extra income or save.

- Nearly a third (32%) of consumers say they are looking for pre-owned products when they shop online. 44% of consumers say they have bought or sold something pre-owned online over the last 12 months.
- Amazon has served as a popular vehicle for buying and selling pre-owned items online. Among consumers buying or selling pre-owned items online, 66% say they did so on Amazon.
- 3 in 4 consumers indicate their income is either the same or lower compared to what it was in Q2. Additionally, 60% of consumers say they are currently looking for additional ways to earn money.

Note: Q1 refers to the last survey measurement period (January through March 2021). Q2 refers to the survey measurement period (April through June 2021).

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Chapter 1

Q2 Insights: Consumer Preferences a Year into COVID

Over a year has passed since the onset of the COVID-19 pandemic (beginning its extensive global reach in March 2020). The pandemic touched all aspects of daily life, causing shifts in routines, work and income, housing, health-related behavior, social interactions, shopping and more. A year after such a dramatic disruption began, many U.S. consumers are beginning to rebuild and return to their "normal" activities.

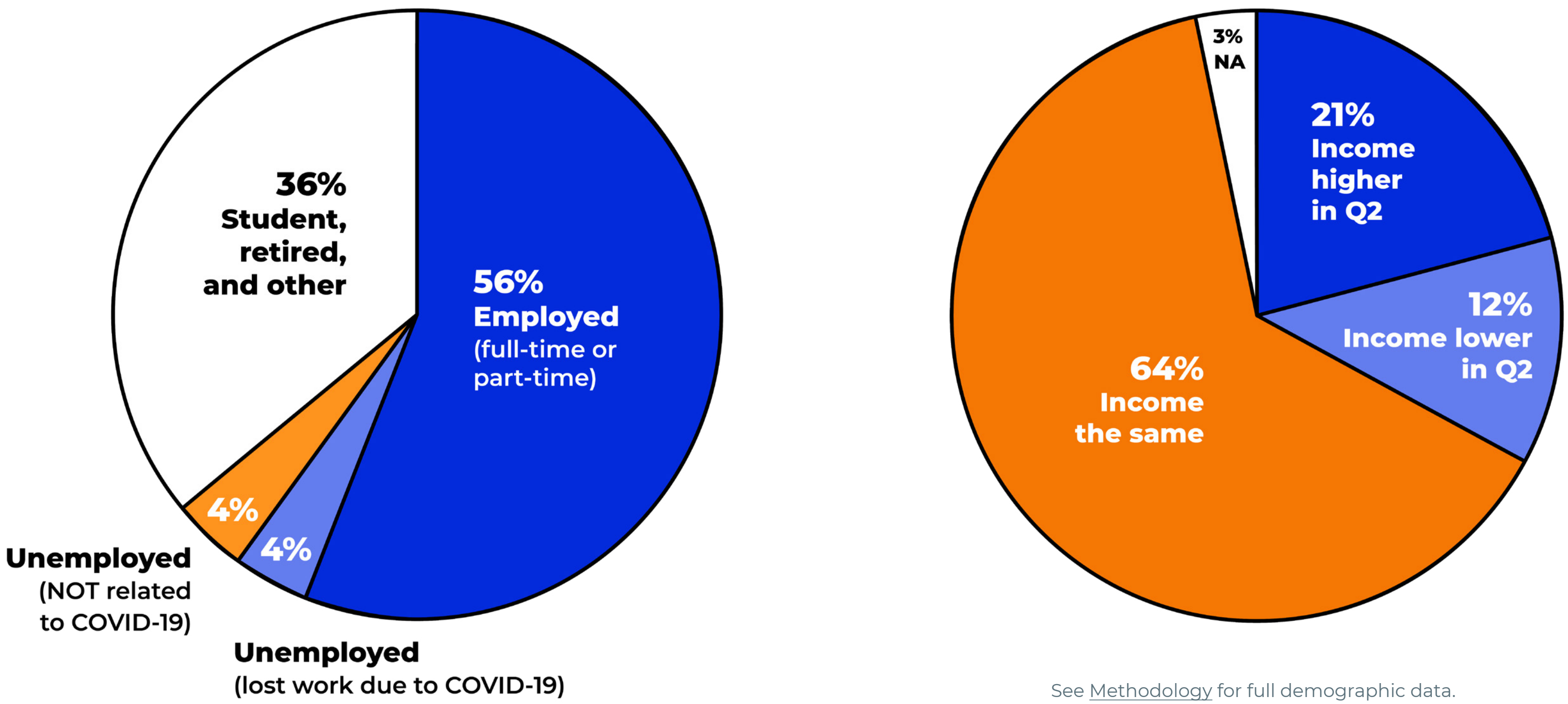
In this chapter, we'll explore how consumers adjusted their lifestyles, priorities and day-to-day activities. Which changes have had long-lasting effects and which have headroom to stick around? Which activities do consumers feel the most and least comfortable getting back to? What does their current economic condition look like? Additionally, we evaluate consumer behaviors and expectations surrounding shipping, inventory and fulfilment, as well as buying or selling secondhand items online.

Consumer Lifestyle & Priorities

Employment and Income Changes During the Pandemic

How is the pandemic continuing to impact consumer employment and income? Compared to the previous quarter, consumers' economic situations are showing signs of improvement. Among consumers surveyed, only 4% are currently unemployed or furloughed due to COVID-19 — down from 8% when measured in Q1. Additionally, only 12% of consumers say their household incomes are lower than they were three months ago — down from 22% in Q1.

Employment and income:



See Methodology for full demographic data.

Life in Lockdown

As the COVID-19 crisis has continued to evolve, people are living and buying differently. And even during disruptive times, many consumers indicate having made big life changes over the last year like switching jobs, adopting pets, or moving homes.

Lifestyle changes experienced in the last 12 months:

- Adopted or bought a new pet - **18%**
- Sold a home - **7%**
- Changed jobs - **13%**
- Become engaged or married - **6%**
- Moved homes - **12%**
- Had or adopted a child - **6%**
- Bought a home - **11%**

Nearly **1 in 5** consumers welcomed home a new pet in the last 12 months.

Consumer priorities remained consistent compared to Q1. Family, physical and mental well-being, and finances remained top focus areas throughout Q2.

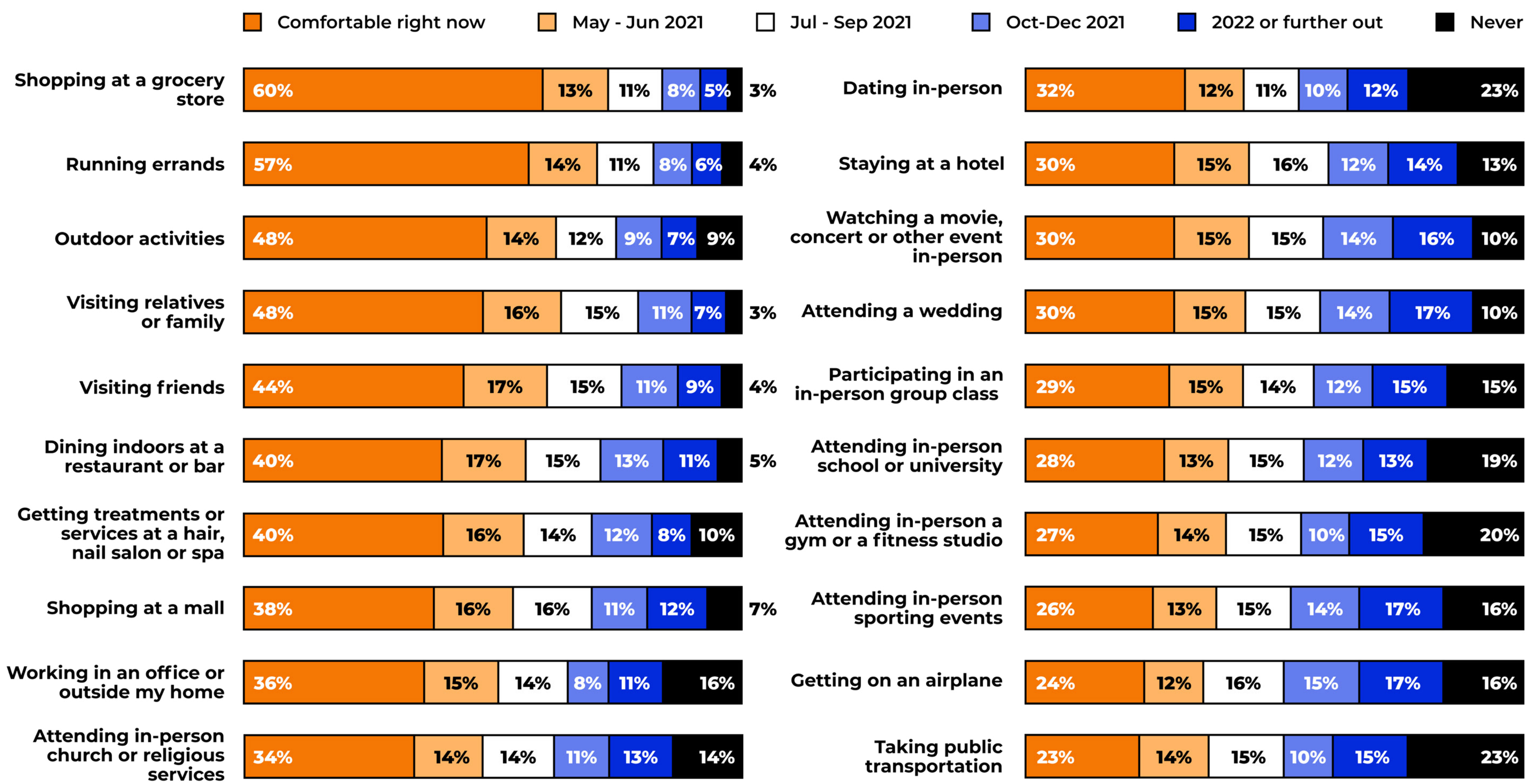
What U.S. consumers are prioritizing in Q2 2021:

1. Family - **65%**
2. Physical health and well-being - **48%**
3. Mental health and well-being - **42%**
4. Finances - **39%**
5. Friends - **37%**
6. Pets - **36%**
7. Hobbies and interests - **34%**
8. Spirituality - **27%**
9. Spending time outside - **27%** (up 43%)
10. Love life - **26%**
11. Career - **25%**
12. Politics/Civic engagement (including environmental, social, cultural causes, etc.) - **18%**
13. Education - **17%** (up 34%)
14. Travel - **14%** (up 42%)

Prioritization of spending time outside, travel and education have increased since the start of 2021. However, consumers continue to place travel as the bottom priority, perhaps due to continued concern for health and safety.

COVID-era Consumers: Which Behaviors & Preferences Will or Won't Stick

Consumers' comfort level with public activities:



Which pandemic behaviors will consumers drop or keep as they start to venture outside their homes?

Quarantine activities consumers are keeping and dropping:

Activity	Consumers doing more of this in last 12 months	Consumers planning to continue doing this in next 12 months	% of consumers planning to drop activity
Watching movies/TV	55%	42%	-13%
Cooking at home	50%	38%	-12%
Cleaning	44%	31%	-13%
Purchasing goods online	39%	26%	-13%
Making coffee at home	37%	27%	-10%
Reading	36%	27%	-9%
Video calls with family or friends	35%	24%	-11%
Exercising at home	35%	28%	-7%
Sleeping more	34%	20%	-14%
Eating healthy	34%	29%	-5%
Purchasing groceries online	30%	22%	-8%
Working from home	27%	19%	-8%
Home improvement projects	23%	16%	-7%
DIY activities	20%	14%	-6%
Starting / running a business	10%	7%	-3%

Other responses include spending time online and texting.

★ INSIGHTS

- Among consumers participating in activities at home, expectations are that they will decrease the majority of their in-home activities moving forward.
- Consumers expect working from home to taper down. While more than 1 in 4 consumers (27%) say they have increased working from home in the last 12 months, only 19% believe they will continue doing so in the next year.
- 10% of consumers say they are not likely to continue doing more of any in-home activity.

The in-home activities consumers expect will **decrease** the most are: watching movies/TV, cleaning, and sleeping.

The activities consumers believe will **continue** the most are: eating healthy, running a business, and DIY activities.

In the past year, consumers have turned to learning new skills, focusing on hobbies or things they wouldn't have had time otherwise to do.

"I became interested in embroidering and baking. *I somewhat completed them. Embroidering is still a work in progress since I can always improve on my skills. As for baking, I'll bake a new recipe every week or so."*

"I started playing a new video game *with my husband to pass the time during lockdown. I still participate because we still don't feel comfortable going out."*

"I repainted both bathrooms, *including the vanities. I stripped and repainted all 5 exterior doors and painted the other 18 doors in our house.* ***I've done lots of work in our 1,300 sq. foot garden.*** *And I've started to do socially-distanced volunteer work."*

"I've worked on improving my software development skills *over the past couple of months. I've learned new programming languages and programmed a couple of apps to put on my resume in the future. I completed my projects in the past couple of months because* ***I've had more time on my hands at home."***

The Online Secondhand Market

Americans aren't necessarily looking for the lowest-priced items when shopping online, but they are looking for ways to save.

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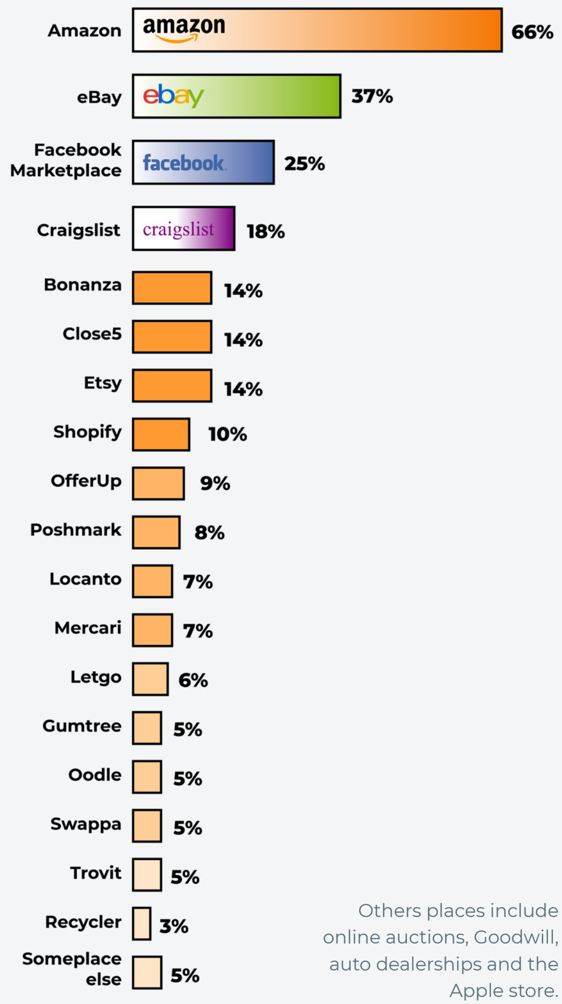
- Nearly a third of consumers (32%) are looking for pre-owned products when they shop online.
- 44% of consumers are using deal-finding browser extensions or plug-ins (e.g., Honey, Pricescout, Amazon Assistant, etc.).
- 60% of consumers say they are looking for additional ways to earn money right now.

44% of consumers say they have bought or sold something that was pre-owned online over the last 12 months. Among those consumers, **66%** say they have bought or sold a pre-owned item on Amazon.

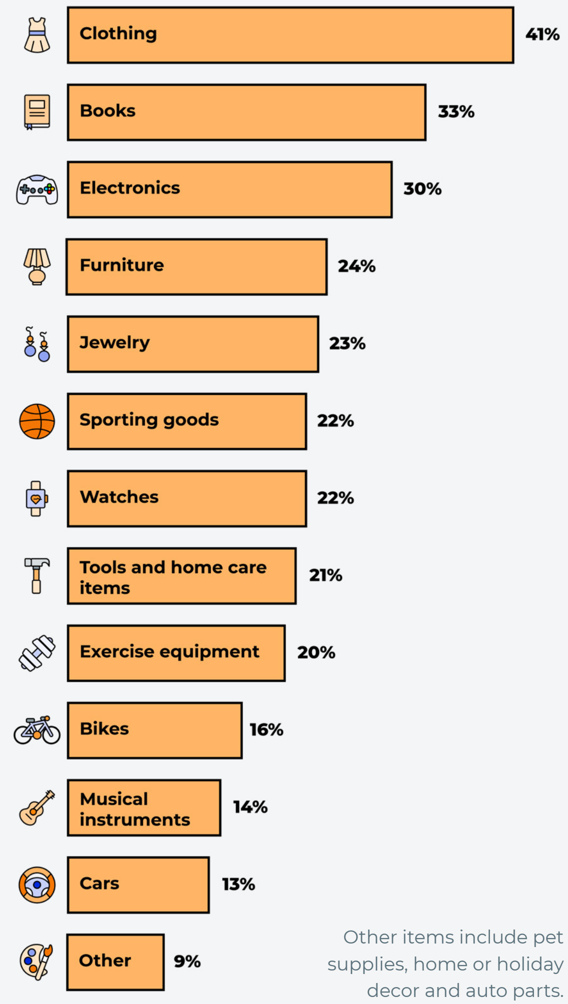
The abundance of online shopping platforms to buy or sell used goods makes it easy for consumers.

Where consumers have bought or sold pre-owned products online:



Others places include online auctions, Goodwill, auto dealerships and the Apple store.

Top pre-owned products consumers have bought or sold online:



Other items include pet supplies, home or holiday decor and auto parts.

Consumer Motivations for Buying or Selling Pre-Owned Products

Consumers have different motivations for secondhand shopping and selling. Some simply want to generate income or dispose of redundant or no-longer-utilized items. Some are looking for specific items or good deals. However, there are others with more emotional reasons:

*"I have sold mostly clothing. I sold it **to make extra money and also to clear out unwanted items** from my home."*

*"I bought a cute retro/vintage necklace online because **I'm very picky and haven't seen one like it anywhere else** and it was a good deal."*

*"I bought the pre-owned items because I appreciate a good deal. **I would never reject a good deal** just because a product was lightly used by someone else in the past."*

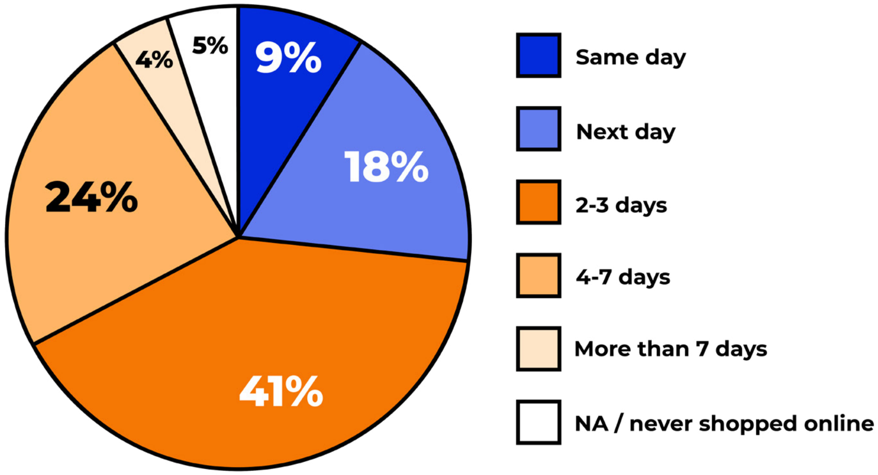
***"Sustainability.** It's good for the environment and great for saving money."*

*"[Buying or selling pre-owned items] is **fun** and we **needed the income."***

Delivery & Shipping During the Pandemic

Attitudes and expectations towards delivery and shipping are evolving as consumers have grown to adopt and rely on ecommerce during the COVID-19 pandemic. Online shoppers demonstrate an increased demand for fast and low-cost shipping.

Consumers' online delivery expectations:



★ INSIGHTS

27% of consumers expect to receive something they've purchased online the same day or within the next day. However, two- to three-day shipping is seen as the standard for online orders with 41% of those surveyed saying that they expect to receive items purchased online within this timeframe.

Fast shipping is essential. 47% of consumers would be willing to spend more for a product for faster shipping.

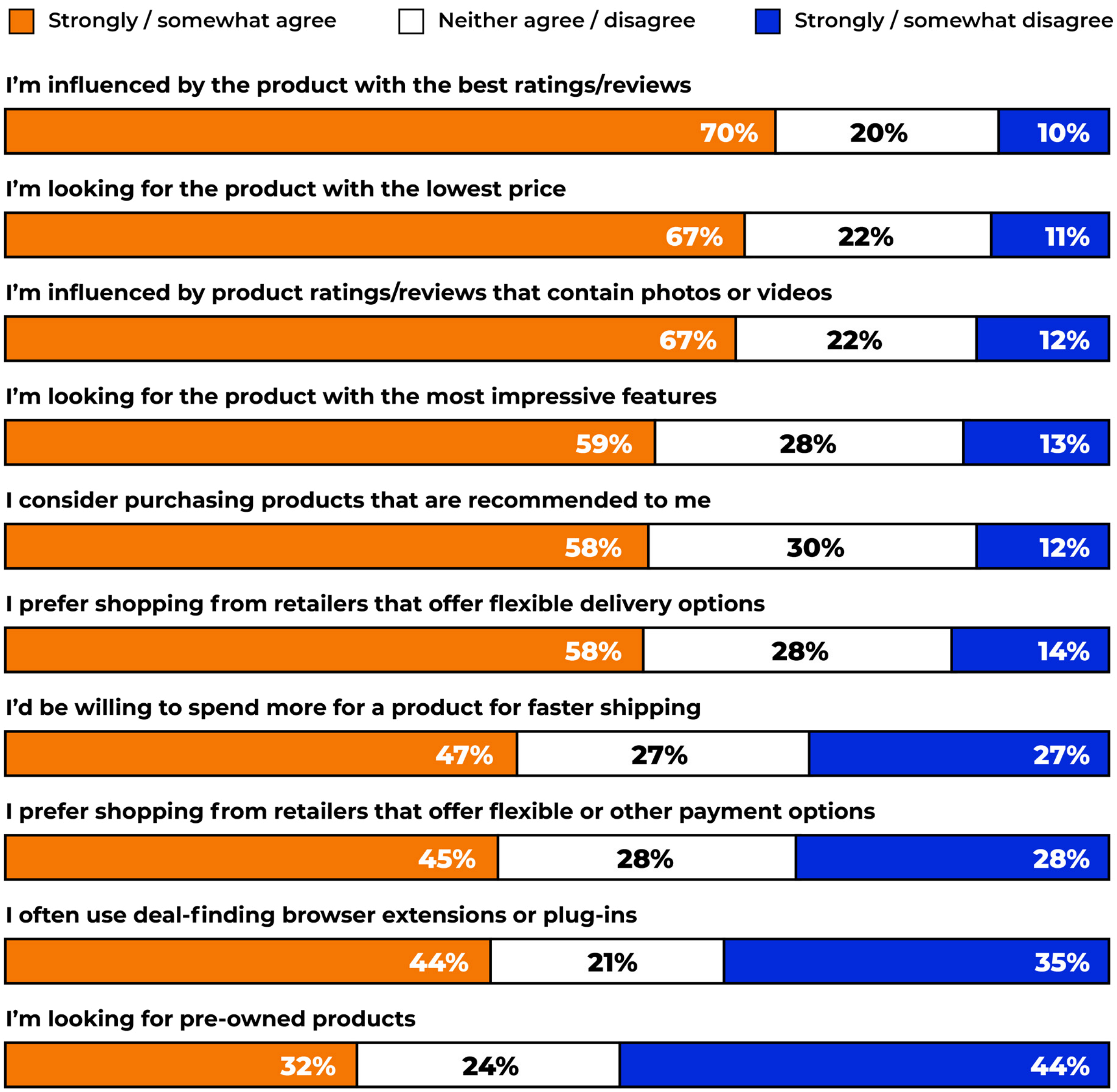
Have consumers noticed changes in online shipping speed over the last year? Among consumers surveyed, reactions were mixed, although over a third felt that shipping times have been about the same.

Consumers' observation of shipping speeds over the past year:

- Items arrive faster - **28%**
- Shipping time is about the same - **38%**
- Items arrive slower - **28%**
- N/A - **6%**

Shipping speed refers to the time it takes for the product to leave the warehouse to arrive at your destination.

Expectations when ordering online:



★ INSIGHTS

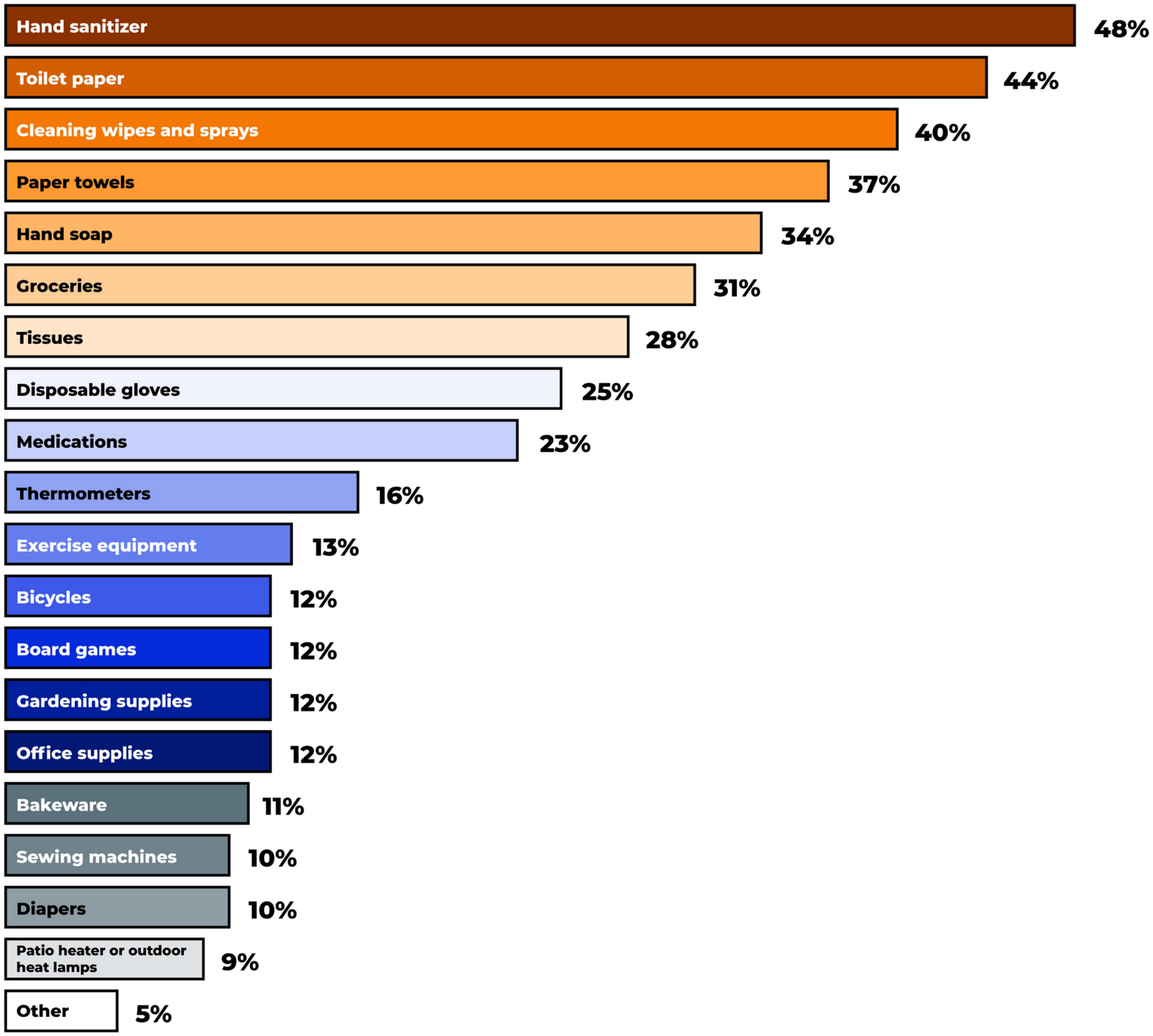
- When ordering online, 80% of consumers expect free shipping when ordering a certain dollar amount of items and 66% expect free shipping for all orders.
- Delivery timing is important to consumers with 70% stating they would be upset if an order didn't arrive on time.

Most important delivery options — ranked:

1. Same-day delivery
2. Free return shipping
3. Delivery at a specific time slot
4. Order online and pick up in store
5. Eco-friendly packaging

Same-day delivery is ranked as more important/more likely to influence consumers to make a purchase compared to delivery at a specific time slot.

Products that have been difficult to find since the outbreak of COVID-19:



Based among those that have had trouble finding products online.

Other responses include beauty supplies, books, clothing, arts and craft supplies and small appliances.

53%

of consumers have had trouble finding certain products online since the beginning of the pandemic. Essential items like toilet paper, hand sanitizer, cleaning products and groceries have been the most difficult to find.

Chapter 2

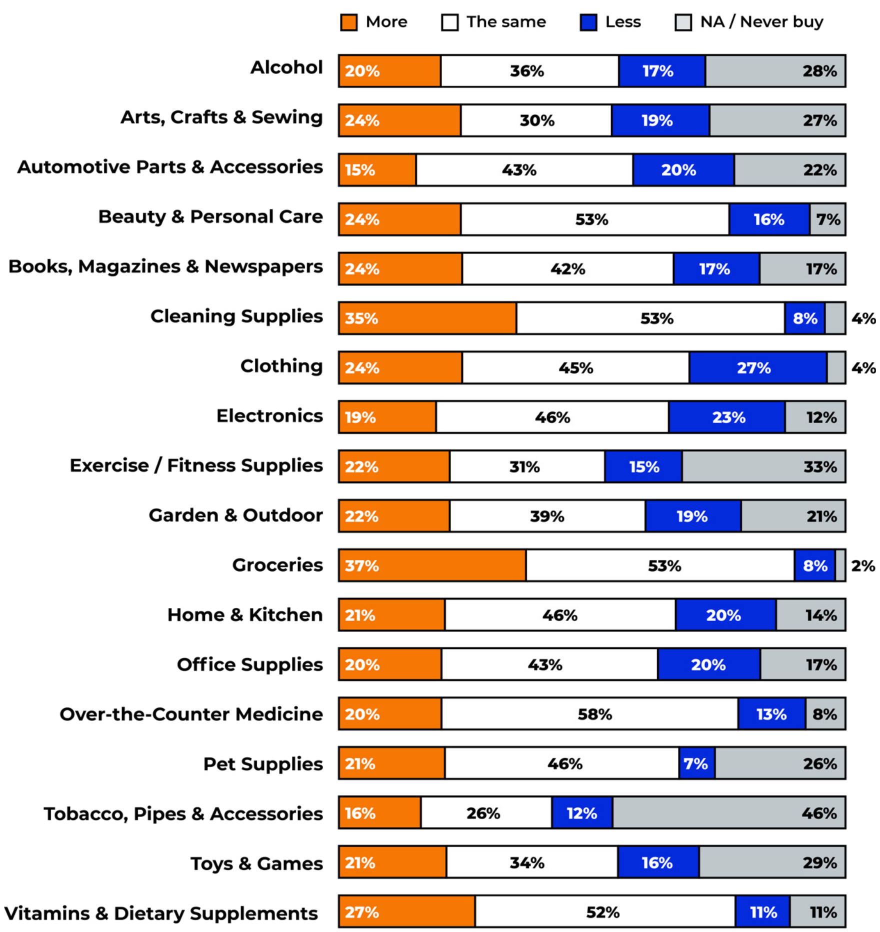
Trending Spending: Consumer Pulse Report

Where, how, and what consumers are buying has shifted over time, and could shift quickly throughout 2021. We explore what consumers are buying, how they are adjusting their spending, and the products and stores that are earning their business.

Popular Products: What Consumers Are Buying

Among common consumer product categories, shoppers have continued to prioritize essential products over non-essential items.

Product categories consumers are buying more or less of in Q1:



★ INSIGHTS

What are consumers buying more of than before? 37% of consumers are saying they are buying more groceries and 35% are buying more cleaning supplies, which many would consider "essential" items in the time of the COVID-19 pandemic. Consumers are also buying more health and personal care items.

What are consumers buying less of, overall? Nearly a third of consumers (27%) say they are buying less clothing. Additionally, electronics and home and kitchen purchases are down.

Which product categories rose the most (Q1 2021 compared to Q4 2020)?

- Garden & Outdoor (up 83%)
- Office Supplies (up 33%)
- Automotive Parts & Accessories (up 25%)
- Exercise/Fitness Supplies (up 24%)

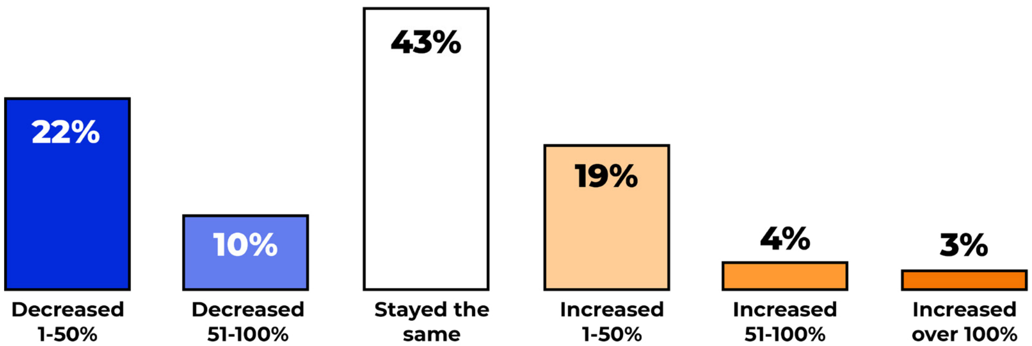
In Q1, individuals spent more according to how their lifestyles have evolved during the pandemic. 22% of consumers are spending more on garden and outdoor products and 20% are spending more on office supplies (likely due to working from home).

Consumers Spending & Projections

The data in this section reflects consumer spending from Q1 2021 as well as projections for Q2 2021.

See consumer spending data for the first quarter of 2021 ***here***.

Did *overall* consumer spending change in Q1?

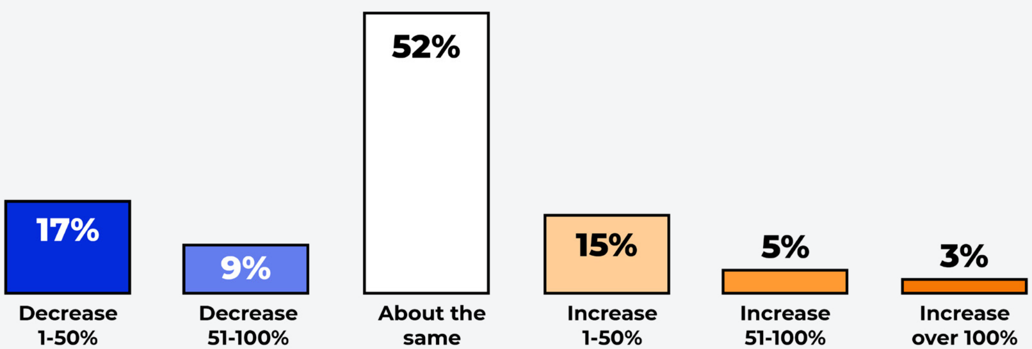


★ INSIGHTS

In Q1 (January through March) 2021, consumers say their overall spending **stayed the same or decreased.**

- **32%** say spending decreased
- **43%** say spending stayed the same
- **26%** say spending increased

Will *overall* consumer spending change in Q2?



★ INSIGHTS

When asked about their anticipated spending behaviors during Q2 of 2021 (April through June), most consumers said they expect their spending to **stay the same,** but 23% still plan to **increase spending.**

- **26%** say spending will decrease
- **52%** say spending will stay the same
- **23%** say spending will increase

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

Consumers were asked which of the biggest retail stores they shopped at (in store or online) during Q1 2021.

In-store

Shopped in-store in the last 3 months:

Walmart	54%
Target	30%
Walgreens	16%
Amazon Go or Amazon Grocery	16%
Lowe's	16%
HomeDepot	15%
Apple	14%
Kroger	13%
Costco	12%
Kohl's	10%
Sam's Club	10%
Best Buy	9%
Macy's	7%
Specialty, independent, local, or boutique	6%
Albertsons	4%

Online

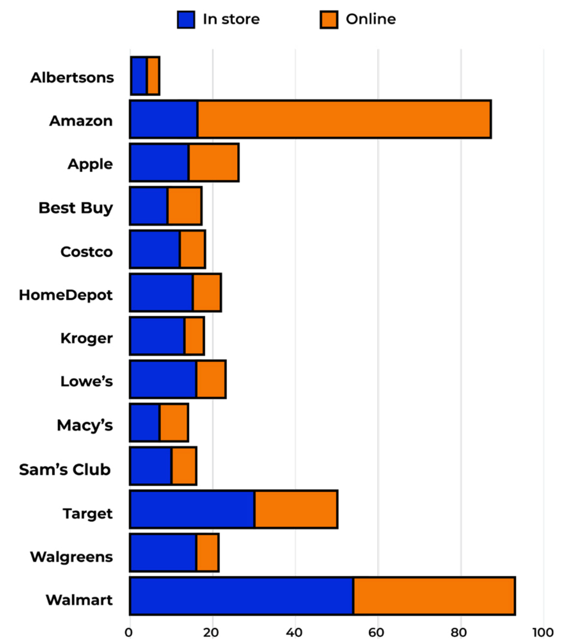
Shopped online in the last 3 months:

Amazon	71%
Walmart.com	39%
Target.com	20%
eBay.com	19%
Apple.com	12%
Kohls.com	10%
Etsy.com	8%
BestBuy.com	8%
HomeDepot.com	7%
Macys.com	7%
Facebook Shops	7%
Lowes.com	7%
Costco.com	6%
Sam's Club	6%
Wayfair	5%
Instagram Shop	5%
Walgreens.com	5%
Wish	5%
Kroger.com	5%
Instacart	4%
Google Shopping	4%
Specialty, independent, local or boutique	3%
Albertsons.com	3%
Houzz	2%

In-store vs. online

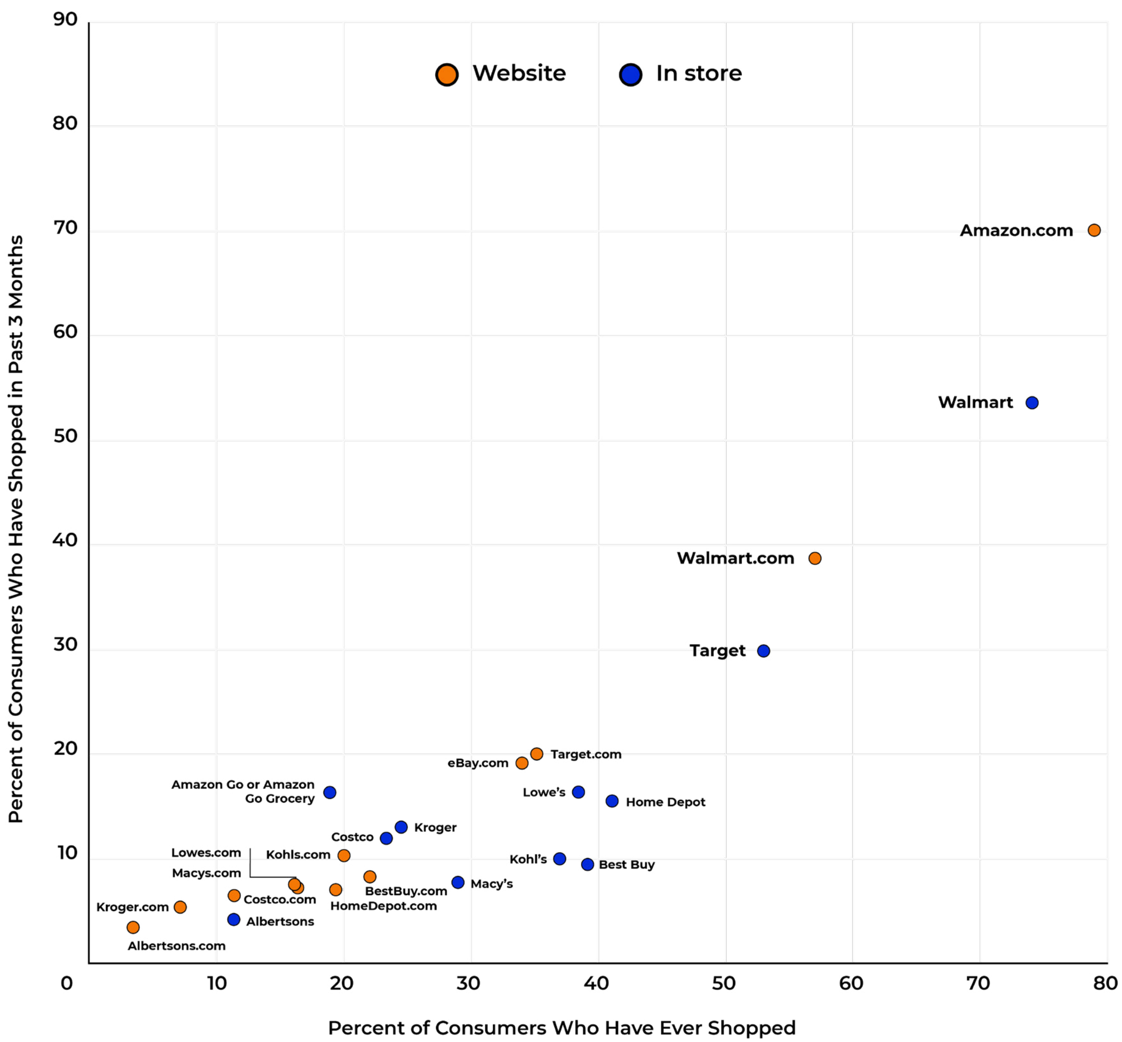
Across some of the major retailers, online shopping is coming close to surpassing in-store. Stores like Best Buy, Apple and Macy's have as many or nearly as many consumers saying they shop online as they do in store.

Shopped online during Q1:



In-store and online shopping has changed for every retailer in 2021. The following data shows the stores in which consumers have at some point shopped compared to those they've shopped at in the past three months, revealing the stores consumers may be dropping in 2021.

Retail stores & sites consumers are dropping:

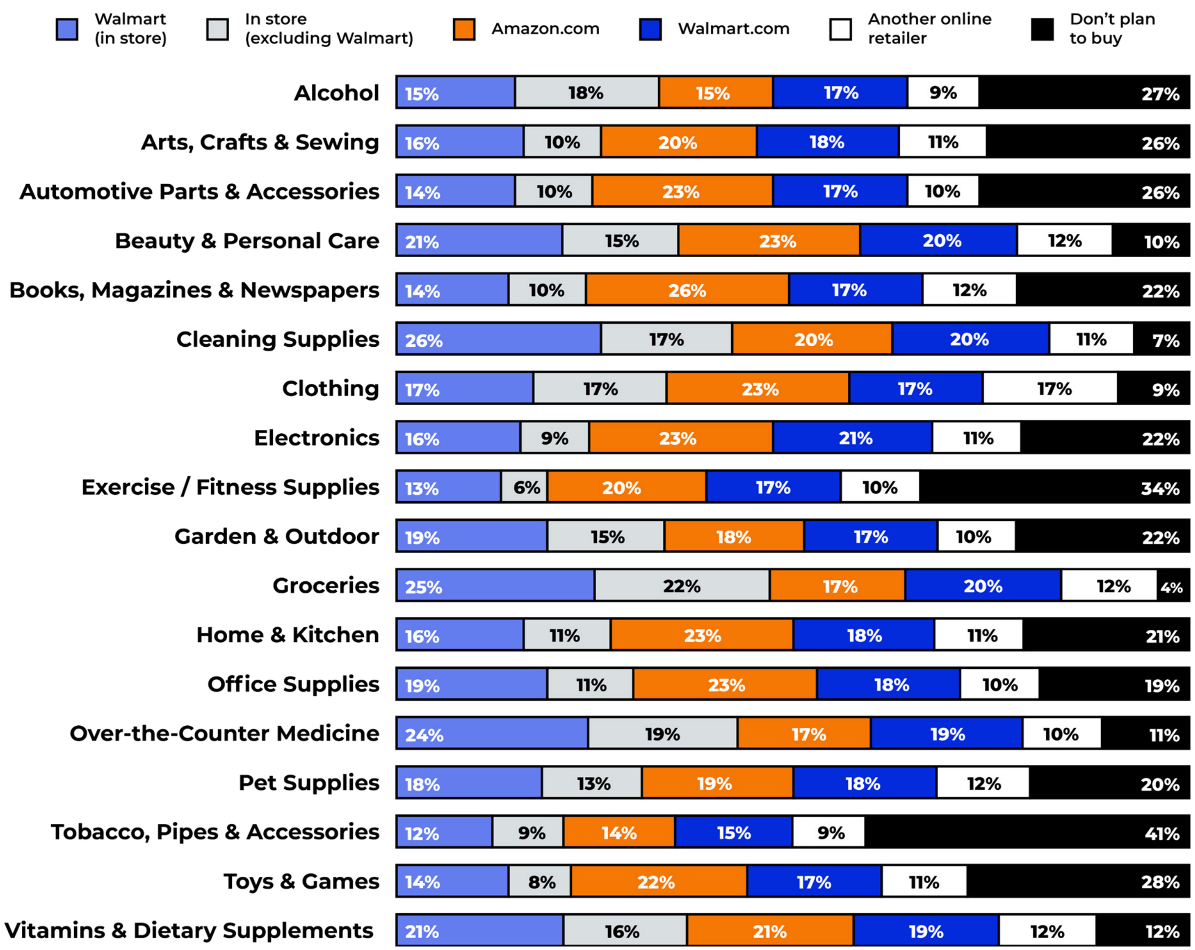


★ INSIGHTS

Following trends from Q4, there's a continued Q1 decline when it comes to in-store shopping at certain large retail stores. For example, shopping in the last three months at Best Buy, Kohl's, Home Depot, Macy's, Target, and Lowe's in store has dropped off. On the other hand, online sites for large retailers (Amaon.com, Walmart.com, Ebay.com and Target.com) have remained strong.

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

Where consumers plan to shop by product category:



★ INSIGHTS

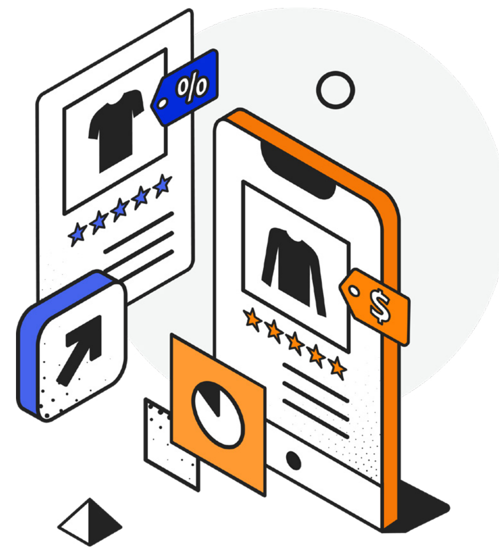
- In Q2, consumers plan to buy in all types of product categories measured **online rather than in store.**
- For most types of products, consumers who plan to buy online prefer to buy it on Amazon compared to Walmart.com or another online store. However, some product categories were rated closely: beauty and personal care, cleaning supplies, electronics, exercise/fitness equipment, garden/outdoor products, pet supplies, and vitamins & dietary supplements.
- The types of products consumers plan to **shop on Amazon.com** for are: arts & crafts, automotive parts & accessories, books/digital books, clothing, home & kitchen items, office supplies, and toys & games.
- The types of products consumers plan to **shop on Walmart.com** for (more compared to any website, including Amazon) are frequently available at most discount or mass merchandise retail stores: alcohol, groceries, tobacco, pipes & accessories and over-the-counter medicine.

Chapter 3

Ecommerce Report

Even with physical stores reopening in many parts of the U.S., online shopping isn't going away anytime soon. Consumers are continuing to lean into ecommerce for their everyday purchases. And with retailers and companies hurrying to meet demand, consumers have more options to buy online than ever before.

This section explores the reasons consumers favor ecommerce, online shopping habits, as well as how consumers shop on Amazon and Walmart.com.

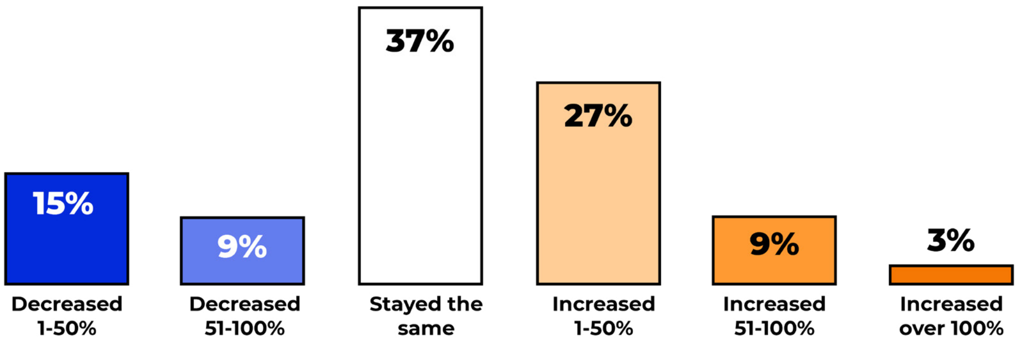


Online Spending & Shopping Preferences

The data in this section reflects **online** consumer spending from Q1 2021 as well as projections for Q2 2021.

*See online consumer spending data for the first half of 2021 **here**.*

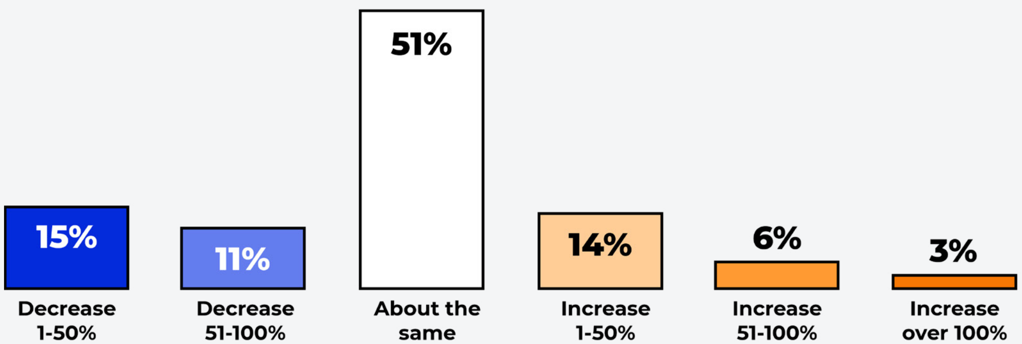
Did *online* consumer spending change in Q1?



★ INSIGHTS

- From Q1 2021, consumers say their online spending has **increased.**
  - **24%** say spending decreased
  - **37%** say spending stayed the same
  - **39%** say spending increased
- While overall spending trends are mostly consistent with spending trends late in 2020, the amount of consumers who have increased their online spending is higher — a 5% increase since this time period. Additionally, there was a 6% increase in the percentage of consumers who said their spending stayed the same.

Will *online* consumer spending change in Q2?



★ INSIGHTS

- Most consumers said they expect their online spending to **stay the same or decrease** during Q2 (April through June 2021).
  - **26%** say spending will decrease
  - **51%** say spending will stay the same
  - **23%** say spending will increase

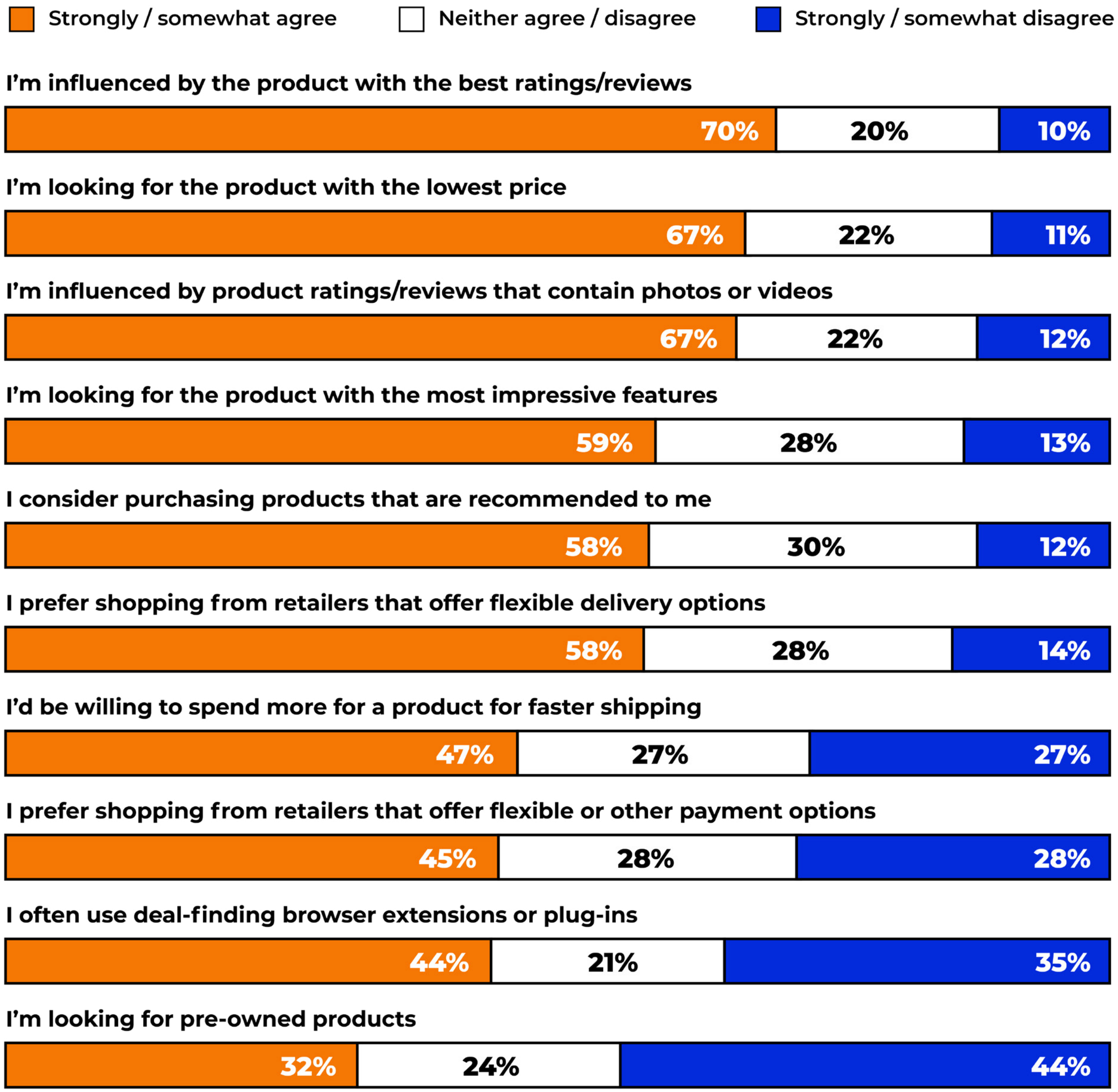
Reasons consumers prefer to shop online — ranked:

	Q2 2021	Q1 2021
1.	**Free shipping**	**Free shipping**
2.	**Convenience**	**Lower prices**
3.	**Lower prices**	**Convenience**
4.	More product options	Price comparison
5.	Search for certain brand	More product options
6.	Price comparison	Discounts
7.	Fast shipping	Search for certain brand
8.	Safety (avoid public places)	Fast shipping
9.	Discounts	Safety (avoid public places)
10.	See reviews from other customers	See reviews from other customers
11.	Products only sold online	Products only sold online
12.	Find new brands	Find new brands

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

Free shipping remains the number one reason consumers prefer to shop online in Q2.

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

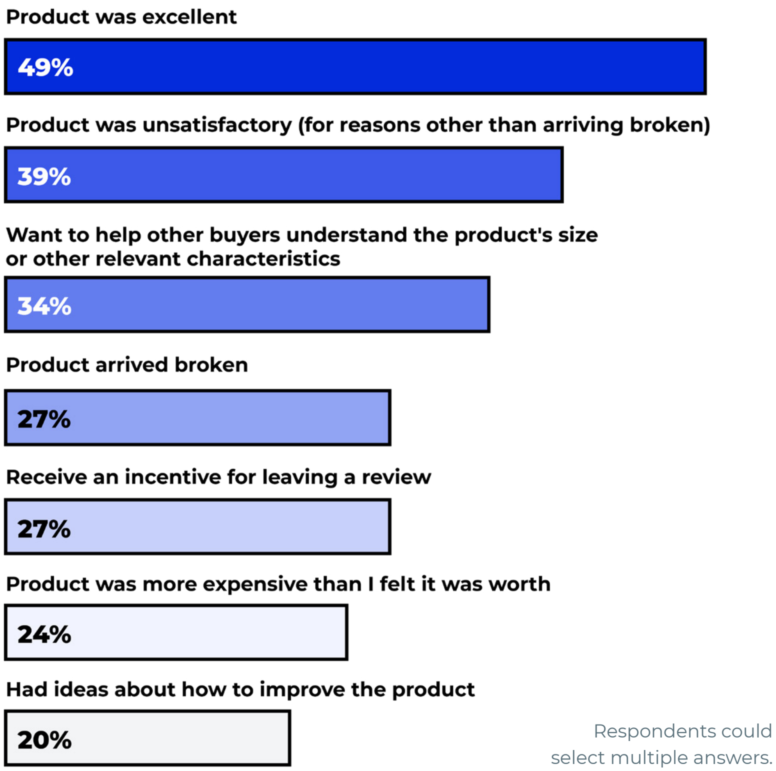


Among consumers that shop online.

★ INSIGHTS

- Highly rated products continue to appeal to consumers more than low-priced products. 70% of consumers are influenced by products with the best ratings or reviews.
- Flexible payment and delivery options are important to the majority of consumers. 58% of consumers agree they prefer shopping with retailers that offer flexible delivery options (buy online and pick-up in store, curbside, etc.). 45% of consumers say they prefer shopping from retailers that offer payment options such as "buy now, pay later," cryptocurrency, and more.

Top reasons consumers leave product reviews online:



14%

of consumers never leave a product review — up slightly from those surveyed in Q1.

More consumers leave reviews when they love a product than when they hate it.

Likelihood of returning a product:

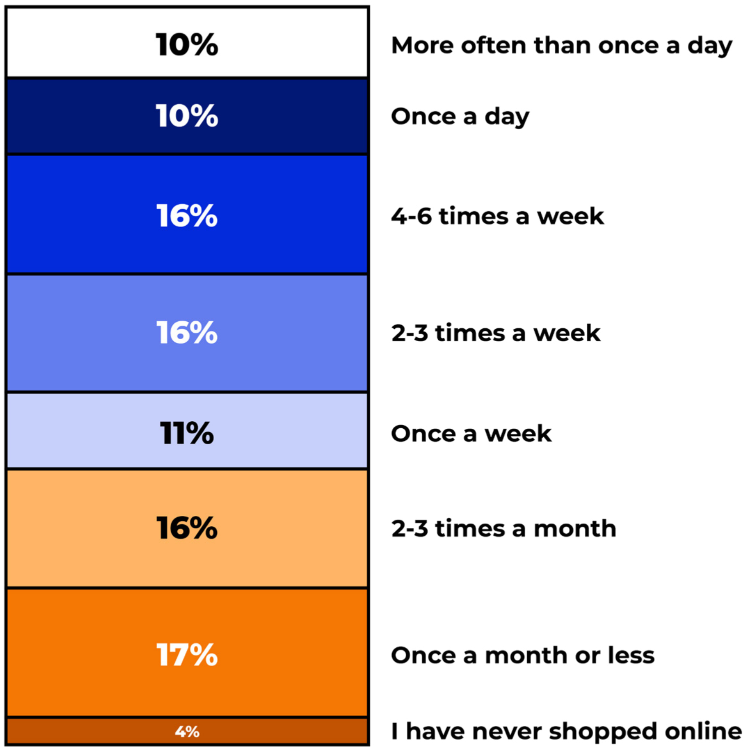
Location	% always / sometimes return an item
Physical or brick-and-mortar store	**45%**
Amazon	**45%**
Other online store or retailer (excluding Amazon or Walmart.com)	**42%**

Walmart	**47%**
Walmart.com	**40%**

★ INSIGHTS

- Consumers indicate they are just as likely to send products back from Amazon as they are from a physical store. However, they are slightly more likely to return items to Amazon compared to another online store or retailer.
- Consumers are more likely to send products back from Walmart compared to Walmart.com.

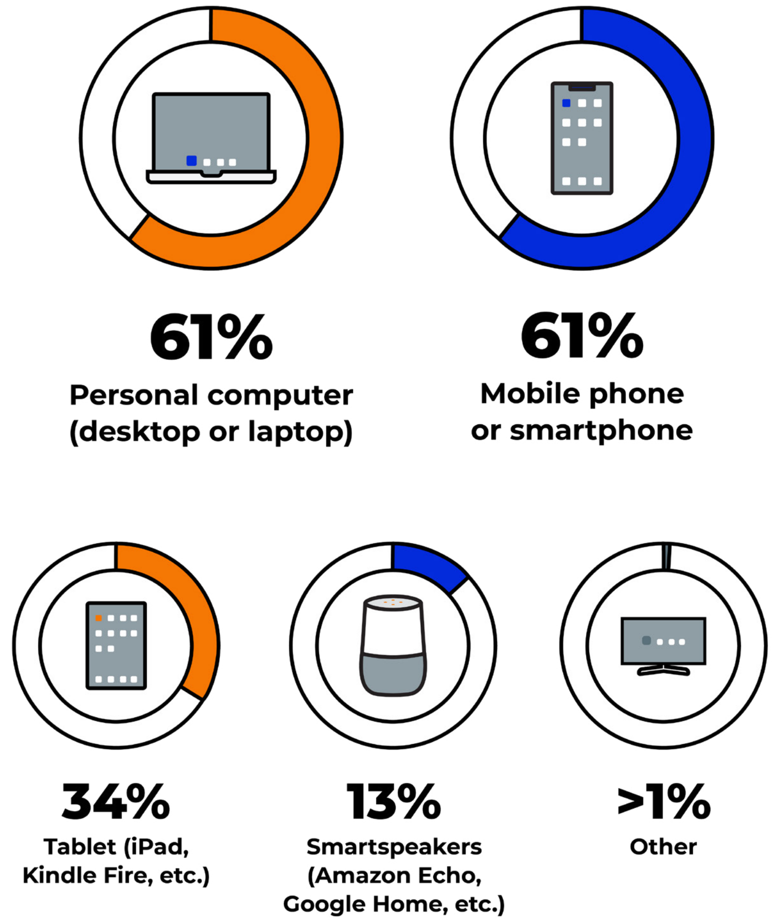
How frequently consumers shop online:



★ INSIGHTS

63% of consumers shop online weekly or more often.

Top devices consumers use to shop online:

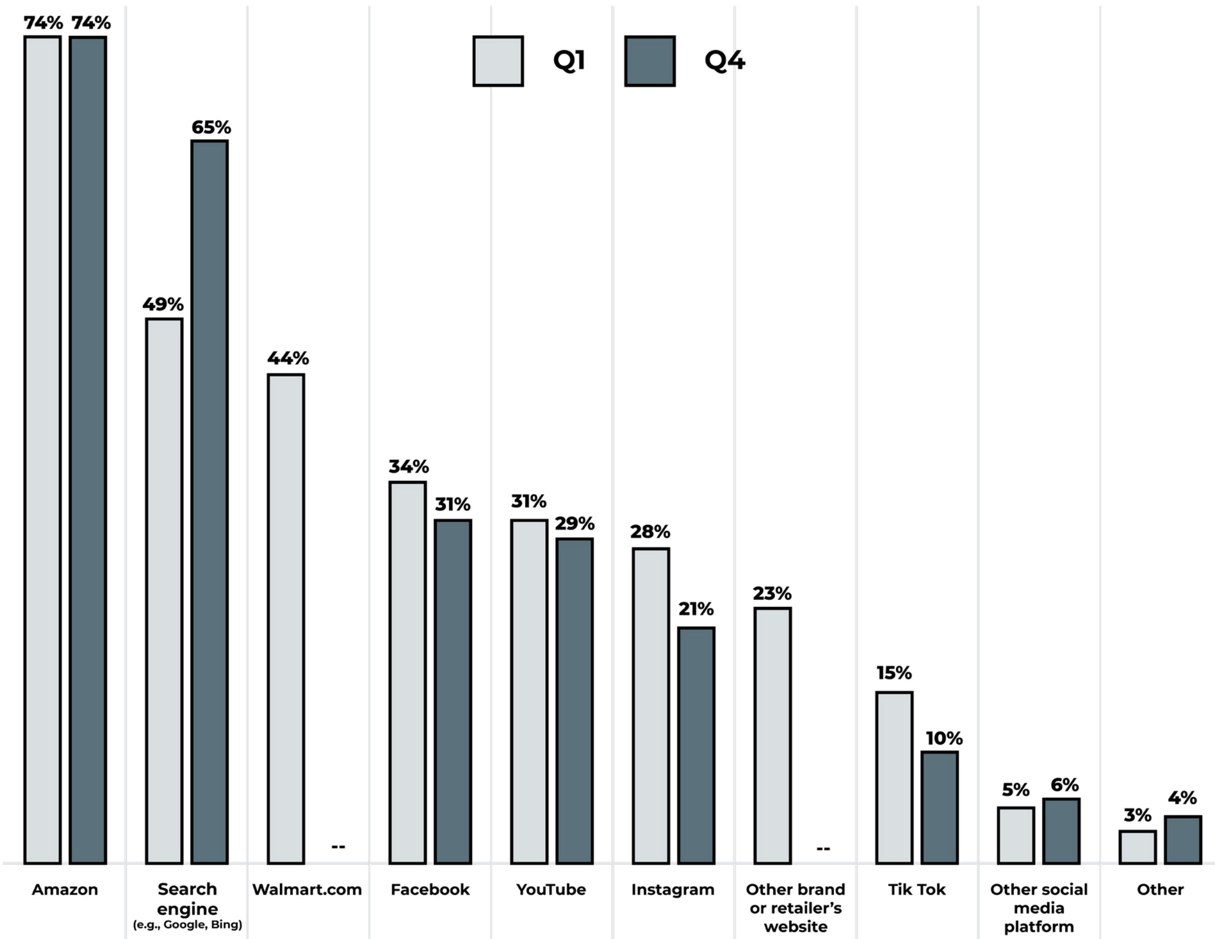


Respondents could select multiple answers.

Amazon's Prevalence in 2021 & Prime Membership

Customers continue to value and rely on the world's largest marketplace for finding the products they need fast.

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



Q1 (January-March 2021). Q4 (November-December 2020). Respondents could select multiple answers. -- means not measured in Q4.

★ INSIGHTS

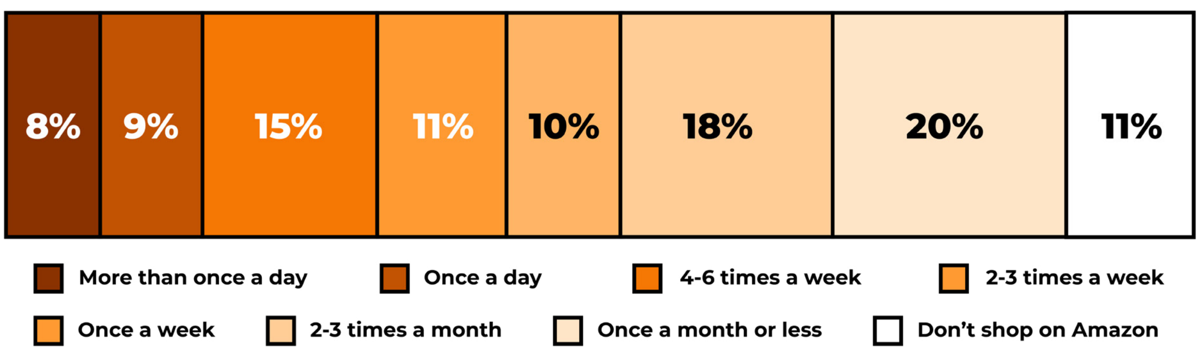
- 74% of consumers say they begin their search for a product online on Amazon.
- Although Amazon is on top a substantial number of consumers (44%) begin their search for products online at Walmart.com.
- The number of consumers starting their search via search engine continues to decline while those beginning on social media sites has increased.

64%
of consumers say when they need to get a product fast, they look for it on Amazon.

How Amazon shoppers use and value Amazon:

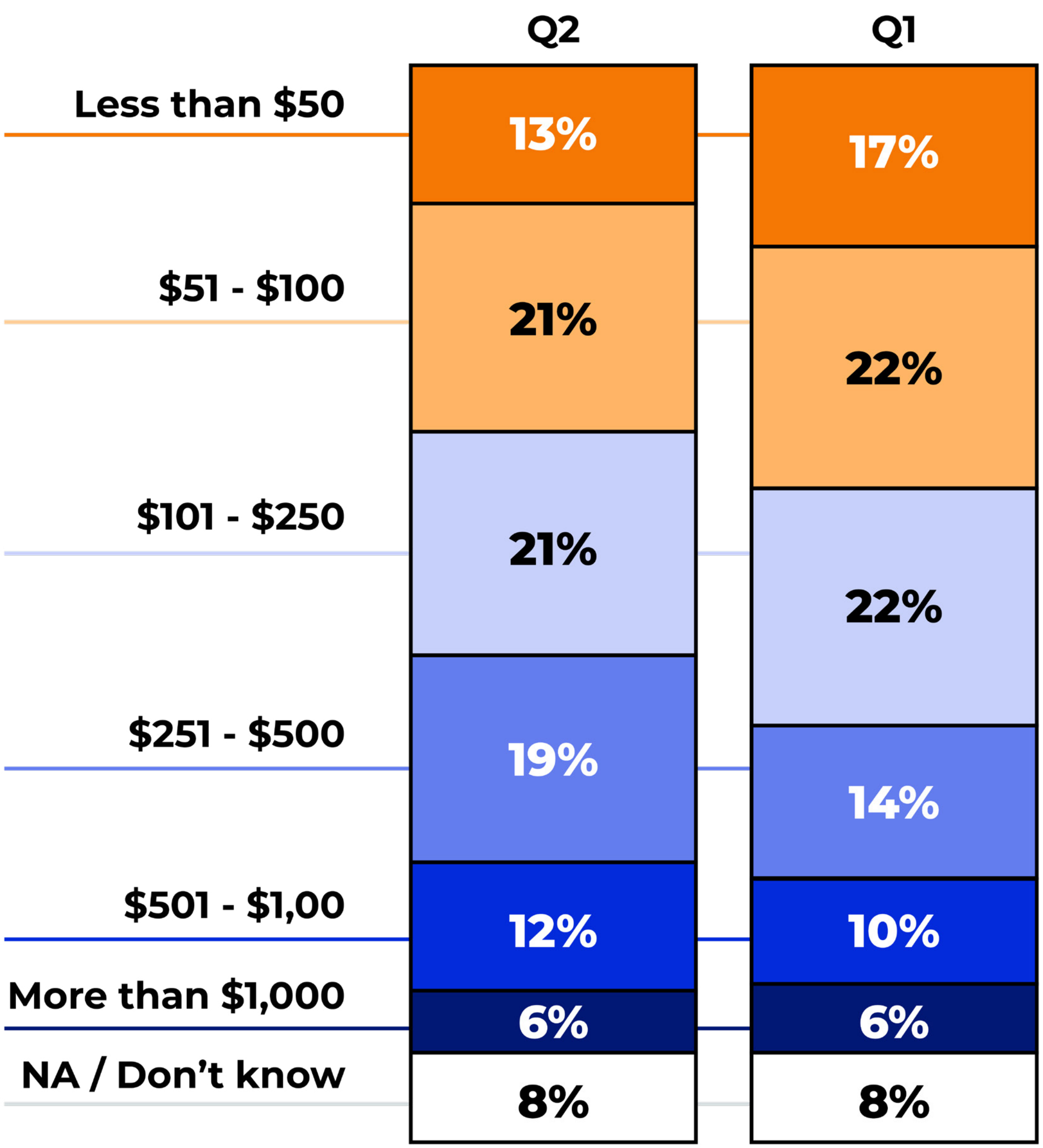
58%
of U.S. consumers say that if they were only able to buy products from a single store, it would be Amazon.

How frequently do consumers shop on Amazon:



Among total consumers, 52% are making purchases on Amazon weekly or more.

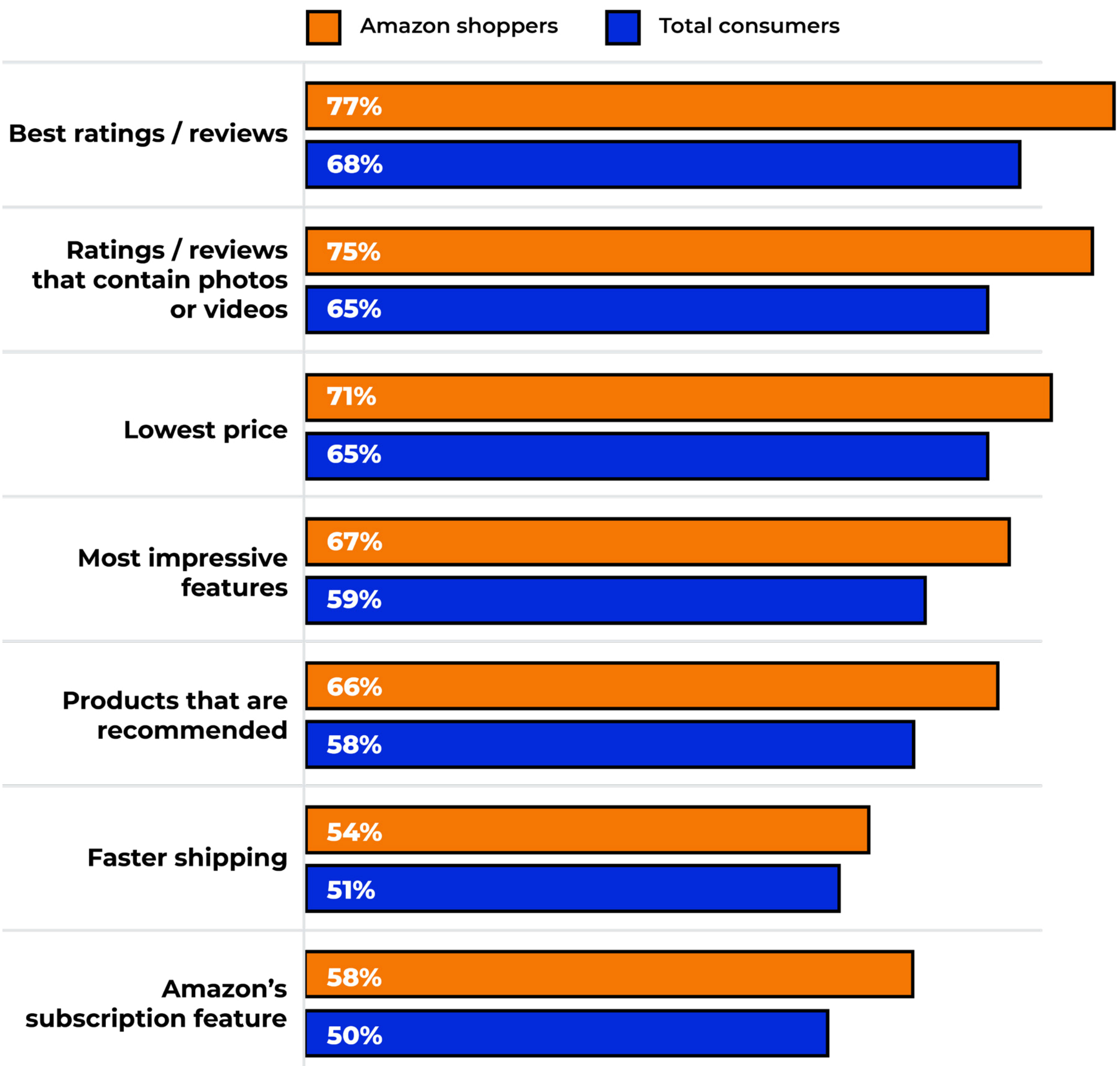
Maximum amount consumers would spend on a product from Amazon:



★ **INSIGHTS**

- Spending higher amounts of money for a product on Amazon indicates that consumers trust the site for more major purchases. This gives product categories such as furniture, electronics, and higher-end clothing and fashion accessories greater potential for success on Amazon.
- 58% of consumers would spend over $100 for a product on Amazon (up 10% from Q1).
- 18% of consumers would spend over $500 for a product on Amazon (up 13% from Q1).

When shopping on Amazon, some benefits are more important than others:

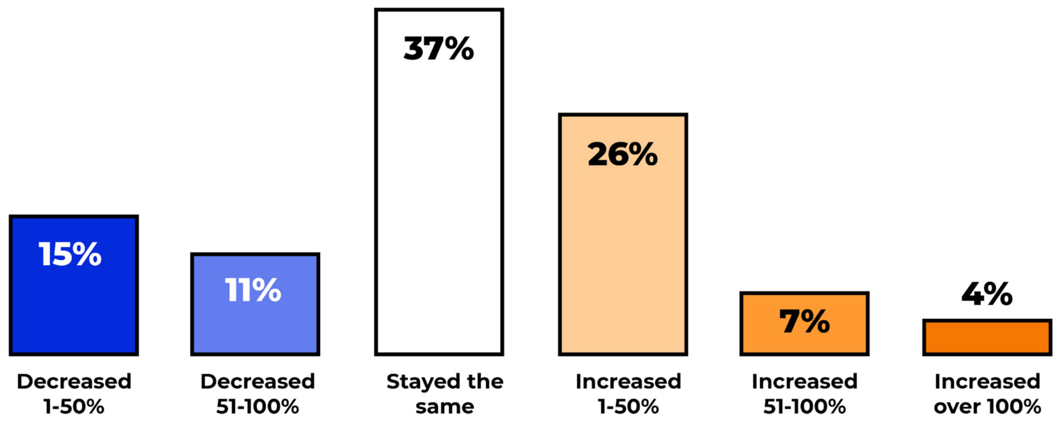


% strongly/somewhat agree with statement.

★ INSIGHTS

Amazon shoppers have higher expectations for product detail and quality — but they are more price-sensitive compared to general consumers.

Did *Amazon* consumer spending change in Q1?

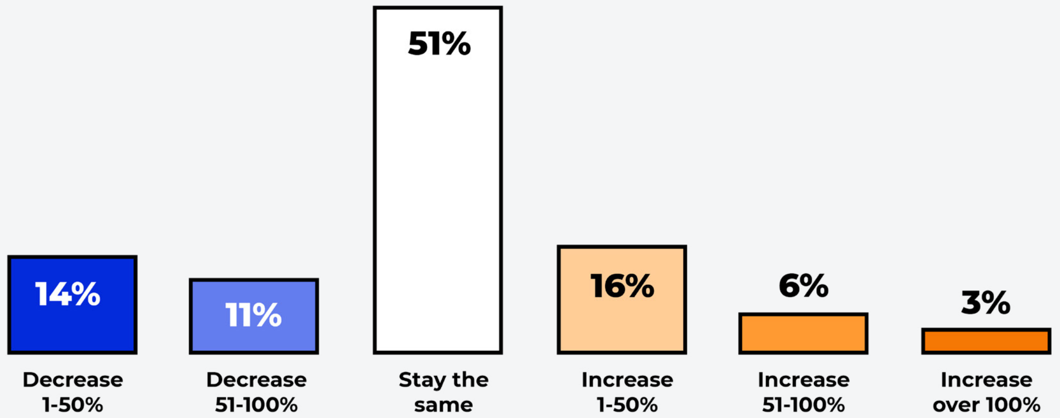


★ INSIGHTS

In Q1 (January-March) 2021, consumers say their Amazon spending **stayed the same or increased.**

- **26%** say spending decreased
- **37%** say spending stayed the same
- **37%** say spending increased

Will *Amazon* consumer spending change in Q2?



★ INSIGHTS

Most consumers (51%) say they expect their Amazon spending to **stay the same** during Q2 (April-June) 2021.

- **25%** say spending will decrease
- **50%** say spending will stay the same
- **25%** say spending will increase

Amazon Spending by Category: Quarterly Changes

Amazon spending is rising for some categories more than others. See how consumers shopped on Amazon in various product categories in Q1 (January through March) compared to Q4 (October through December):

★ INSIGHTS

- Shopping on Amazon for categories including Groceries, Clothing and Electronics has slowed.
- Shopping on Amazon for Garden & Outdoor, Exercise/Fitness Supplies and Alcohol has picked up in Q1, likely due to consumers spending more time outdoors or getting back to typical activities.

Category	Q1	Q4	% change
Garden & Outdoor	15%	8%	75%
Alcohol	13%	9%	50%
Exercise / Fitness Supplies	17%	13%	34%
Tobacco, Pipes & Accessories	11%	9%	20%
Beauty & Personal Care	35%	31%	13%
Home & Kitchen	24%	21%	13%
Vitamins & Dietary Supplements	31%	29%	10%
Cleaning Supplies	27%	25%	8%
Over-the-Counter Medicine	15%	14%	8%
Books, Magazines & Newspapers	28%	26%	8%
Automotive Parts & Accessories	13%	12%	5%
Arts, Crafts, & Sewing	18%	17%	2%
Office Supplies	20%	21%	-5%
Toys & Games	25%	27%	-6%
Pet Supplies	24%	26%	-7%
Electronics	24%	27%	-12%
Clothing	38%	44%	-14%
Groceries	23%	31%	-28%
Other	5%	7%	32%

Other products Amazon shoppers were purchasing in Q1 include: miscellaneous items, music, gift cards or decorations.

Top reasons consumers DON'T shop on Amazon:

1. **Haven't needed anything from Amazon**
2. **Trying to spend less money**
3. **Prefer shopping in stores**
4. Don't have an Amazon Prime account
5. Amazon's prices are too high
6. Don't like Amazon
7. Prefer other online shopping options
8. Amazon has been out of stock of any products they were looking for
9. Believe Amazon does not have the type of product(s) they're looking for
10. Can't get the brands they're looking for on Amazon
11. Quality of past Amazon purchases has been poor
12. Deterred by the duration or uncertainty of shipping times

Other reasons include finding the website difficult to navigate, too many options, or never home for delivery.

★ INSIGHTS

Among those not shopping on Amazon:

- 12% of consumers feel that Amazon's prices are too high.
- 10% of consumers did not purchase products on Amazon due to stock concerns, compared to 5% of consumers in Q4 (October through December).
- Only 16% of consumers said that they have been trying to spend less money, compared to 26% of consumers in Q4.

How COVID-19 has affected shopping on Amazon:

3 out of 5 consumers...

are shopping more frequently on Amazon since the COVID-19 pandemic than previously (62%).

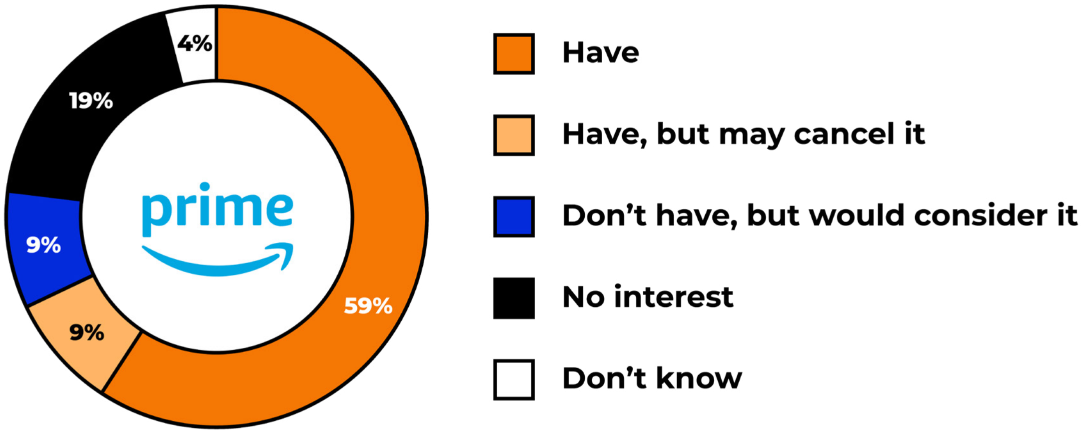
have a greater appreciation for Amazon now than they did prior to the COVID-19 pandemic (61%).

say Amazon has provided products that they could not get anywhere else during the COVID-19 pandemic (62%).

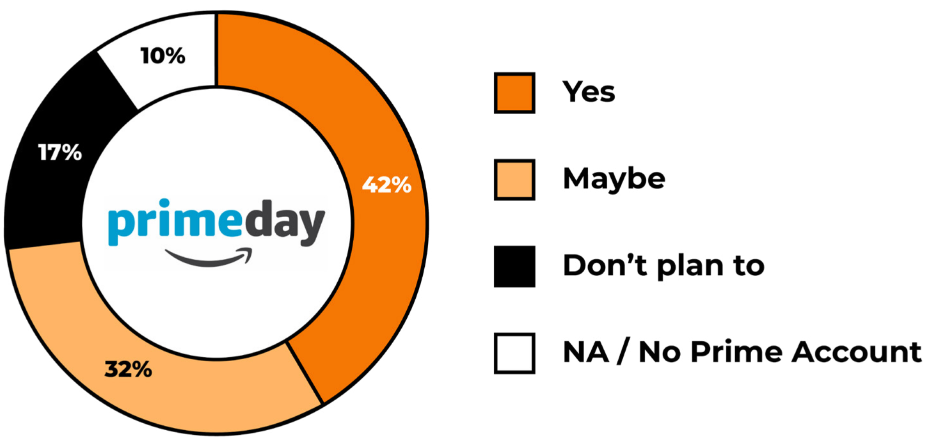
In Q2, 45% of consumers say they would be fine if they never shopped in a physical store again — up slightly from 43% in Q1.

Amazon Prime Membership

Amazon Prime membership & interest:



Planning to Shop on Prime Day 2021



★ INSIGHTS

68% of consumers are currently Amazon Prime members (down slightly from 70% in Q4).

48% of consumers have shopped on Amazon Prime Day in the past (up slightly from 45% in Q4).

48% of consumers often leave items in their Amazon shopping cart and forget about them.

The Growth of Walmart, Walmart.com & Walmart+

Competition in the ecommerce space continues to increase as large retailers like Walmart add online innovations and offerings.

★ INSIGHTS

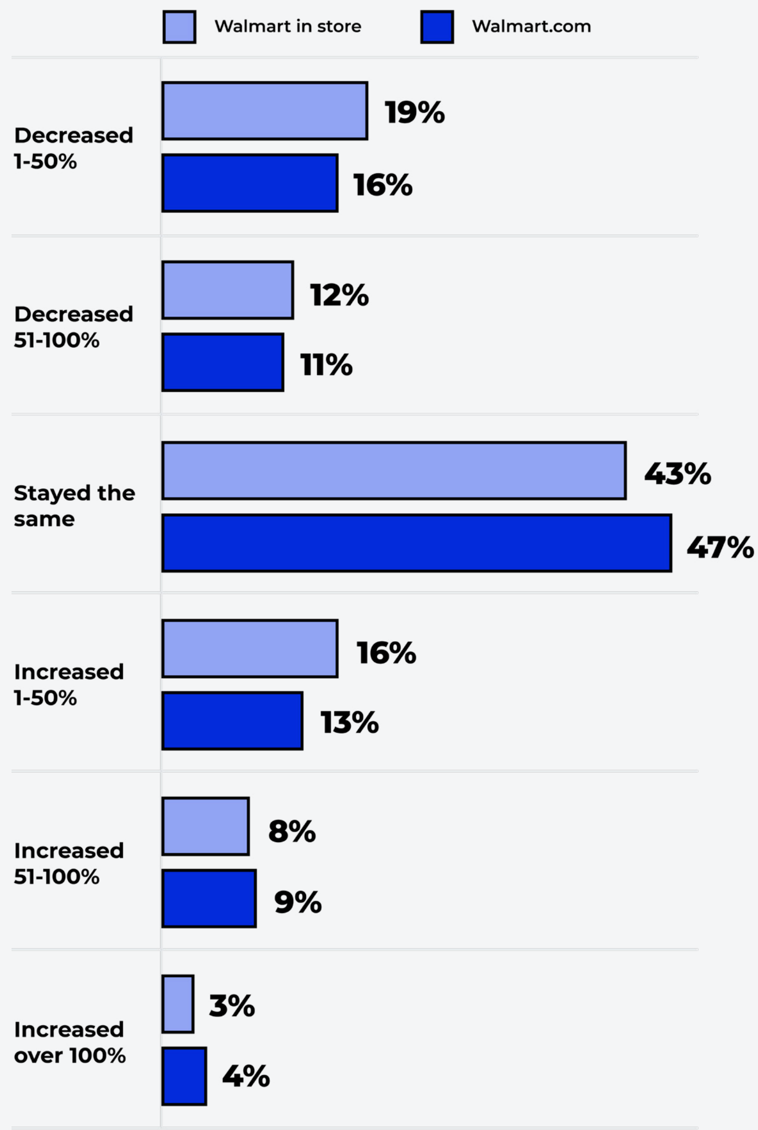
In Q1 ((January-March) 2021, consumers say their Walmart in store spending **stayed the same or decreased.**

- **31%** say spending decreased
- **43%** say spending stayed the same
- **26%** say spending increased

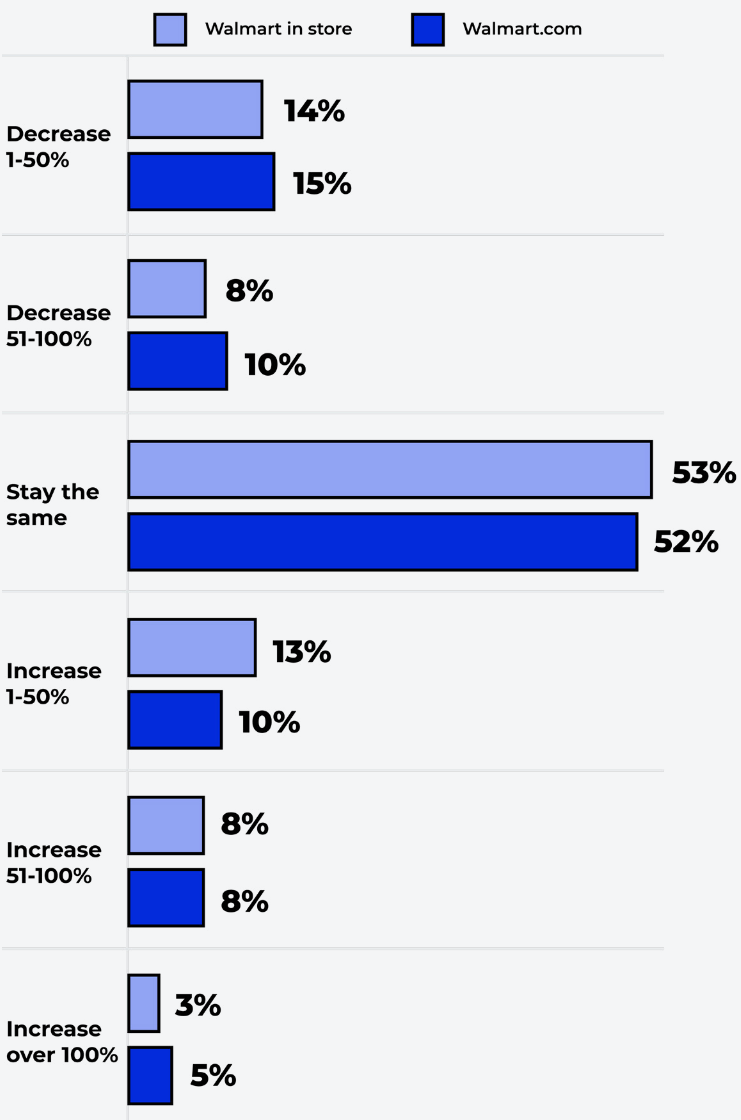
Walmart.com spending has largely **stayed the same** although 27% of consumers say their spending has increased.

- **27%** say spending decreased
- **47%** say spending stayed the same
- **27%** say spending increased

Did *Walmart* consumer spending change in Q1?



Will *Walmart* consumer spending change in Q2?



★ INSIGHTS

In Q2 (April-June) 2021, consumers expect their **in-store Walmart** spending to **stay the same.**

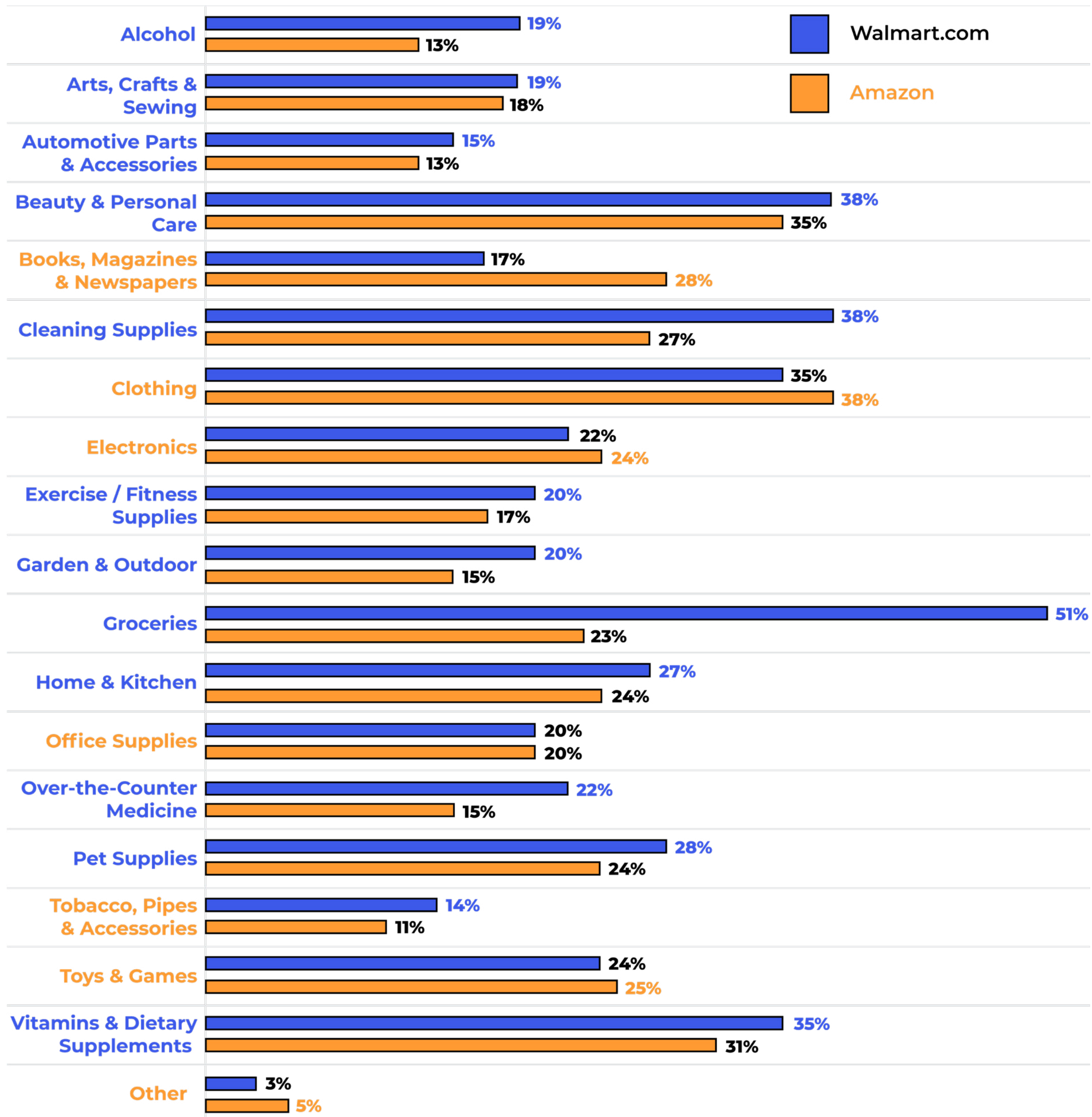
- **22%** say spending decreased
- **53%** say spending stayed the same
- **24%** say spending increased

In Q2, consumers expect their **Walmart.com** spending to **stay the same.**

- **25%** say spending decreased
- **52%** say spending stayed the same
- **23%** say spending increased

Walmart.com Spending by Category

See how consumers shopped on Walmart.com compared to Amazon.com in various product categories in Q1 (January through March).



Among those that have shopped on Walmart.com or Amazon.com in Q1.

Top reasons consumers shop on Walmart.com in Q1:

1. **Like Walmart's prices**
2. **Familiar with Walmart's products**
3. **Can get the products I need fast**
4. Can find the brands I'm looking for
5. There is a Walmart near me for easy pick-up or returns
6. Have always shopped from Walmart
7. Find the website easy to use and navigate
8. Like the Walmart app
9. Have a Walmart+ account
10. Free next-day delivery without having to have a membership
11. Curbside pickup
12. Prefer getting products from Walmart to Amazon

Other reasons include Walmart's insurance program and convenient delivery slots/ tracking.

★ INSIGHTS

- 50% of consumers say price is the top reason they have purchased from Walmart.com in Q1.
- 2 in 5 consumers have purchased on Walmart.com because they are familiar with its products.
- 1 in 5 consumers say they prefer getting products from Walmart compared to Amazon.

Top reasons consumers DON'T shop on Walmart.com:

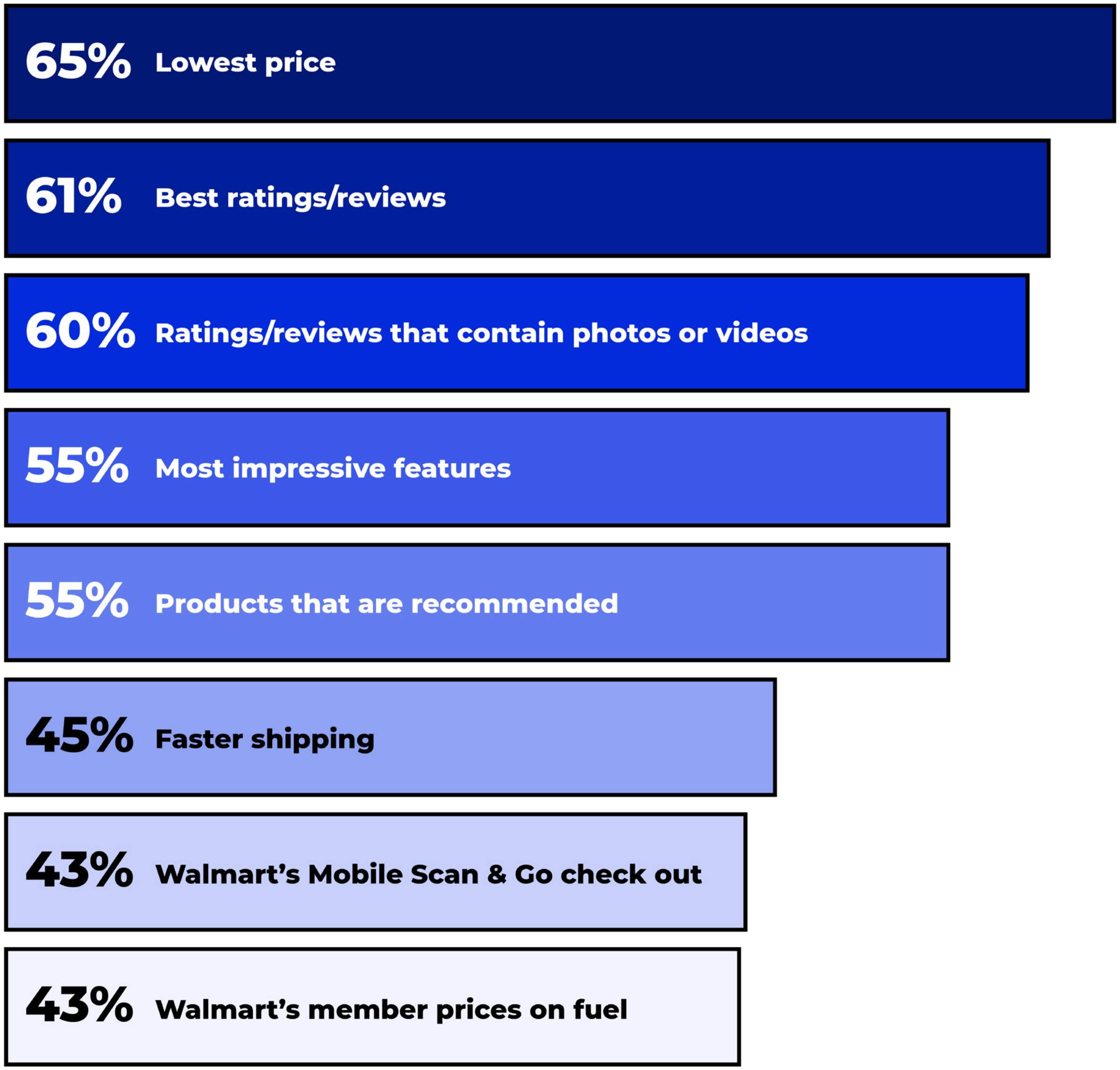
1. **Prefer shopping in stores**
2. **Haven't needed anything from Walmart**
3. **Don't have a Walmart+ account**
4. Prefer other online shopping options
5. Trying to spend less money (ranked 2nd for Amazon.com)
6. Walmart has been out of stock of any products they were looking for
7. I don't like Walmart
8. The quality of products I've bought from Walmart has been poor.
9. Walmart does not have the type of product(s) I am looking for.
10. Walmart prices are too high
11. Can't get the brands I'm looking for on Walmart
12. Found the website difficult to use or navigate
13. Deterred by the duration or uncertainty of shipping times

Other reasons include shipping costs and the concerns surrounding the quality of merchandise.

★ INSIGHTS

- The main reason consumers cited for not shopping on Walmart.com in Q1 was because they prefer to shop in stores.
- Only 8% of consumers don't shop on Walmart.com because prices are too high compared to 12% for shopping on Amazon.
- Not having a membership is higher on the list of reasons consumers don't shop on Walmart.com when compared to Amazon (ranked 4th).
- Among consumers that haven't shopped on Walmart.com, only 7% say it is because the website was too difficult to navigate (the same when compared to Amazon.com) and only 6% say it's due to the uncertainty of shipping times (compared to 8% for Amazon).

When shopping on Walmart.com, some benefits are more important than others:

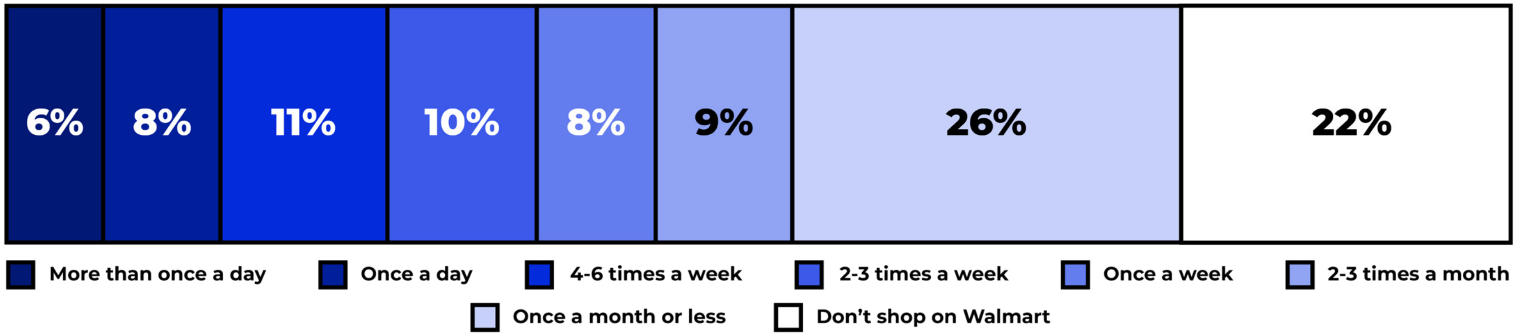


% strongly / somewhat agree with statement.

★ INSIGHTS

Among total consumers shopping on Walmart or Walmart.com, 61% are influenced by products with the best ratings and reviews compared to 68% when shopping on Amazon.

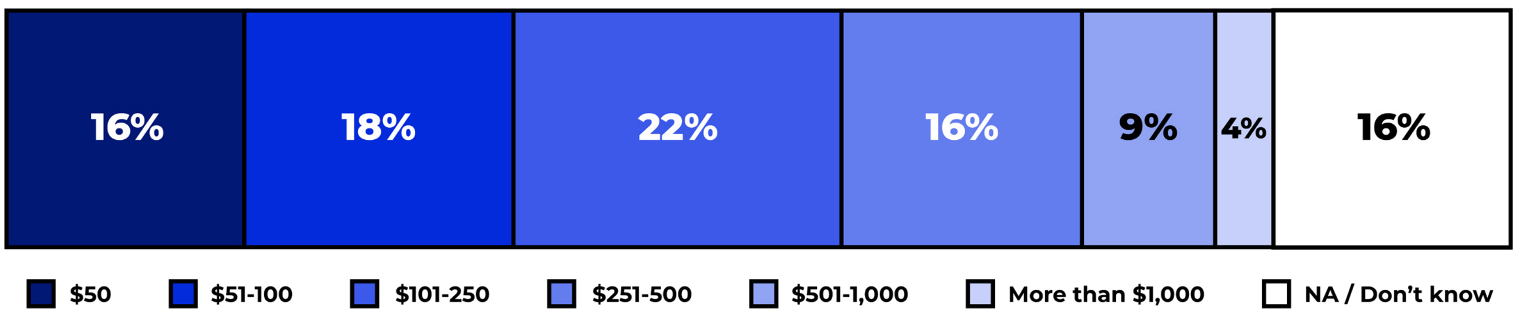
How frequently consumers shop on Walmart.com:



% strongly / somewhat agree with statement.

Among total consumers, **43%** are making purchases on Walmart.com weekly or more.

Maximum amount consumers would spend on a product from Walmart.com:



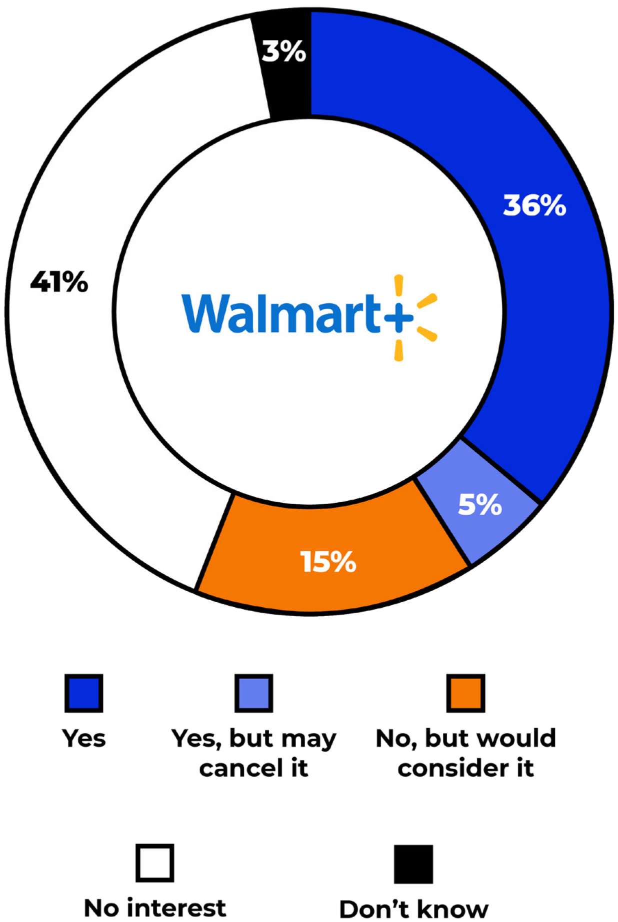
% strongly / somewhat agree with statement.

★ INSIGHTS

- 50% of consumers would spend over $100 for a product on Walmart.com (lower compared to Amazon at 58%).
- Only 13% of consumers would spend over $500 for a product on Walmart.com (again, lower compared to Amazon at 18%).

Walmart+

Walmart+ membership & interest:



★ INSIGHTS

41% of consumers are currently Walmart+ members (up slightly from 38% in Q1).

Among Walmart+ members:

74%

also have an Amazon prime account that they use frequently to infrequently.

6%

don't have an Amazon prime account, but would consider getting one.

14%

have an Amazon prime account but plan to cancel it.

Chapter 4

Brand Loyalty

Whether in store, online, or on Amazon, brands are increasingly being challenged to differentiate themselves in order to gain market share and retain customer loyalty. So what do consumers care about when it comes to brands? We dig into brand preferences by product category and more.

Brand Tips: Top Reasons Consumers Buy

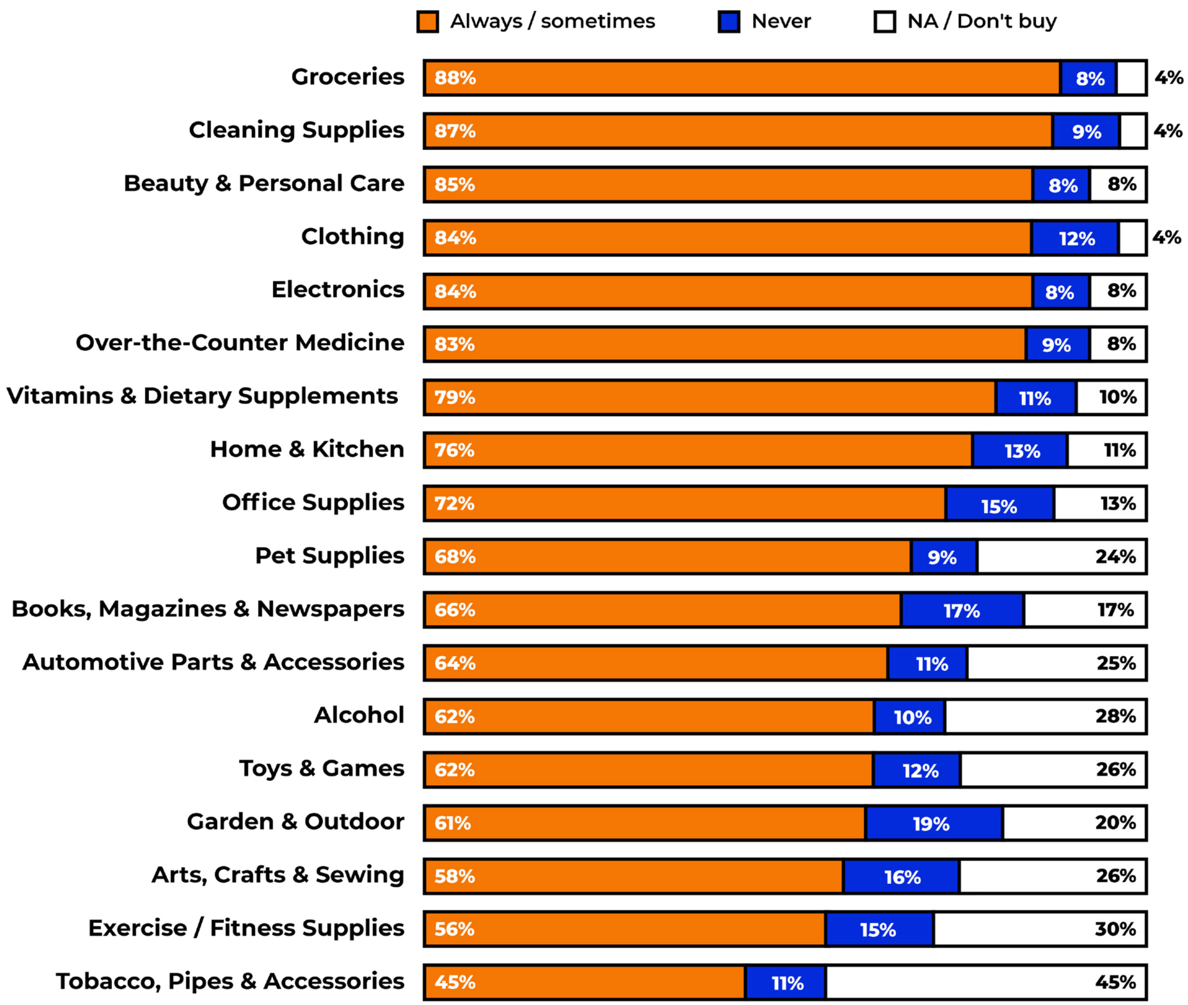
Top reasons consumers buy from a specific brand:

1.	Superior quality or performance over competitors	39%
2.	Consistently lower prices than competitors	35%
3.	Good customer service	35%
4.	Can easily purchase products from the brand online	33%
5.	Can easily purchase products from the brand in store	33%
6.	Meets their health and safety standards	29%
7.	Brand is local	24%
8.	Committed to sustainability	21%
9.	Represents a lifestyle they identify with	21%
10.	Fewer product recalls than competitors	20%
11.	Represents ethical standards they support	20%
12.	Like the packaging	18%

58% of consumers would describe themselves as brand loyal — a 7% increase since Q1.

Brand Preferences by Product Category

Consumers shop for *specific brands* of these types of products most:



Brand loyalists look for *specific brands* of these types of products most:

88%
Groceries

87%
Cleaning Supplies

85%
Beauty & Personal

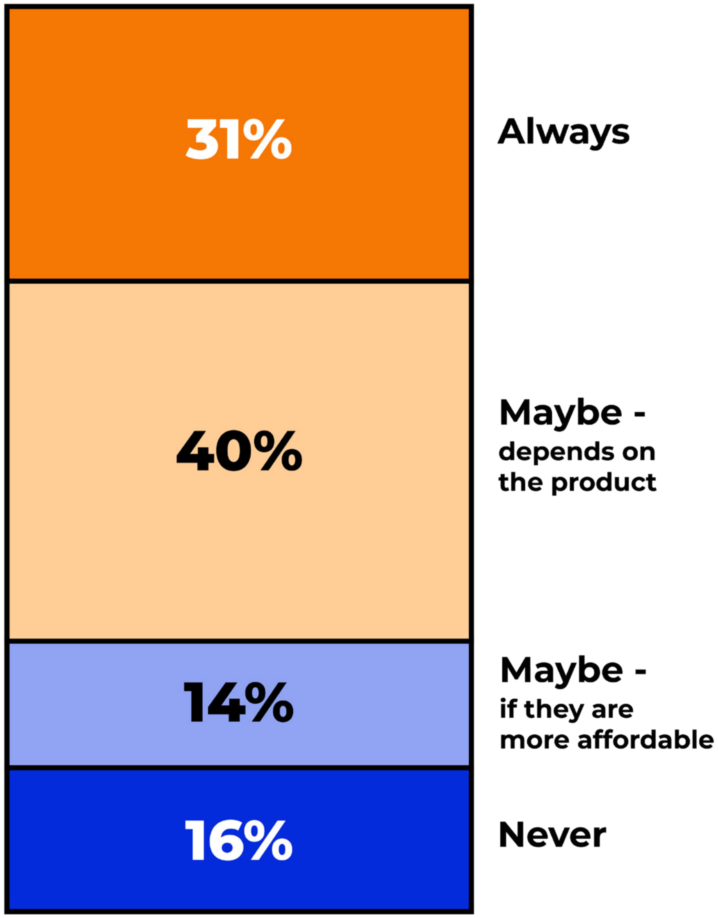
84%
Clothing

84%
Electronics

83%
OTC Medicine

Percentage of consumers who would always or sometimes look for a specific brand of this type of product.

Do consumers look for specific brands online?



Nearly a third of consumers say they always look for certain brands when shopping online - this is up from 19% when asked in Q1.

Brand loyalty persists among Amazon shoppers.

Despite Amazon being known as "The Everything Store," on which consumers can find countless options for a particular product, consumers say they still look for a particular brand when shopping on Amazon.

69%

of consumers say that when they need to purchase a product from a specific brand, they look to see if they can purchase it on Amazon.

Chapter 5

About the Report

Methodology

Between April 16-19, 2021, Jungle Scout conducted an anonymous survey among a panel of 1,066 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 Survey, where data was collected in January and covers a timespan from October 2020 to March 2021.

Q1 refers to the months of January through March 2021. Q2 refers to the months of April through June 2021.

Using the data

We invite you to explore **Jungle Scout's *2021 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 selling on Amazon, with the mission of providing powerful data and insights to help entrepreneurs and brands grow successful Amazon businesses.

Demographic Data

Gender

Male	44%
Female	56%
Other/prefer not to say	<1%

Age

18-24	11%
25-34	22%
35-44	23%
45-54	12%
55-64	11%
65-74	15%
75+	7%

Region

West	21%
Midwest	21%
Northeast	21%
South	37%

Household income

Less than $25,000	19%
$25,000 to $34,999	12%
$35,000 to $49,999	11%
$50,000 to $74,999	16%
$75,000 to $99,999	11%
$100,000 to $124,999	12%
$125,000 to $149,999	8%
$150,000 or more	11%

Household members

1	18%
2	30%
3	20%
4	21%
5 or more	11%

Parent or guardian

Yes	41%
No	59%

Relationship status

Married	53%
Single or Unmarried and not living with a partner	36%
In a relationship (Unmarried) and living with a partner	11%

Employment status

Employed (NET)	**56%**
Employed (full-time OR part-time) and leaving my home for work	43%
Employed (full-time OR part-time) and currently working at home	13%

Not working (NET)	**39%**
Unemployed (lost work due to COVID-19 and its effects)	4%
Unemployed (NOT related to COVID-19)	4%
Furloughed (due to COVID-19 and its effects)	<1%
Student (full-time OR part-time)	4%
Homemaker	4%
Retired	23%
Disabled/unable to work	4%
Other	<1%