Jungle Scout

Consumer Trends Report | Q3 2021

Introduction & Key Takeaways

Jungle Scout's Consumer Trends Report is a quarterly study of 1,100 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 in particular.

This report focuses on consumers' attitudes and behaviors over the third quarter (July through September) of 2021 with some comparison to previous quarters. It explores changes in ecommerce, brand activism, social media and influencer marketing and the emerging technology that impacts consumers' day-to-day purchasing.

1. **Consumers are increasingly adopting emerging ecommerce and other financial technologies.**
   - Nearly half of all consumers (48%) prefer shopping from retailers that offer flexible payment options like "buy now, pay later," cryptocurrency, etc. (an increase of 7% from last quarter). Additionally, 44% of consumers use deal-finding browser extensions or plug-ins (Honey, Pricescout, Amazon Assistant, etc.) when shopping online.
   - Consumers increasingly value being able to compare prices easily as they browse for products online. And on Amazon in particular, shoppers say the easy-to-use website and app are among the top reasons they shop there.

2. **40% of consumers search for products to buy while on social media.**
   - The most influential social media platforms are Facebook, YouTube, Instagram and TikTok.
   - 1 in 4 consumers follow fashion or beauty influencers online.
   - More than half of consumers (56%) consider purchasing products that are recommended to them when shopping online.

3. **Consumers are seeking greater accountability and transparency from brands.**
   - 58% of consumers say a brand's social activism impacts their impression of a brand — including whether they choose to buy from that brand.
   - 43% of consumers view brands more positively when they take a leading or active role in enacting social change; however, 15% of consumers view brand activism negatively.
   - More than half of all consumers say they would be more inclined to buy from brands or companies that treat their employees well, are transparent, and are locally sourced or eco-friendly.

4. **Walmart dominates when it comes to in-store shopping, nearly catching up to Amazon and ecommerce.**
   - Nearly as many shoppers (63%) have purchased from a Walmart store as have shopped online on Amazon (65%) in the past 3 months.
   - 56% of consumers say they choose to shop in stores as a way to get out of their homes and 54% can't wait to get back to shopping in a physical store.
   - Walmart wins in-store shopping in categories like grocery, OTC medications, vitamins and supplements, cleaning supplies, beauty and personal care and pet supplies. These "essential" items may continue to experience high demand due to COVID-19.

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Chapter 1

Q3 Insights: Consumer Preferences

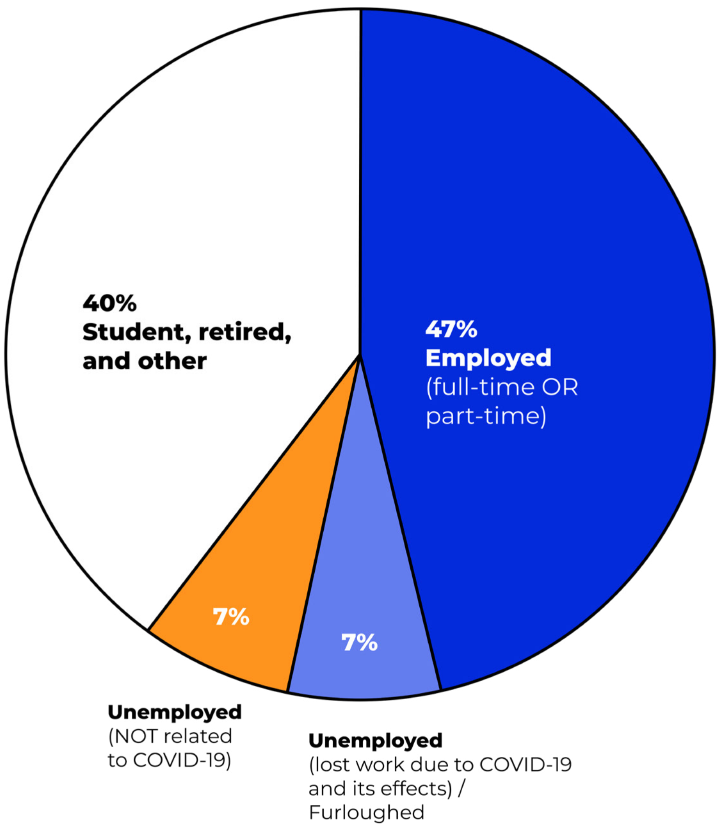
Despite widespread reopening of businesses and public places, consumer behavior and attitudes are very different today compared to how they were prior to the COVID-19 pandemic.

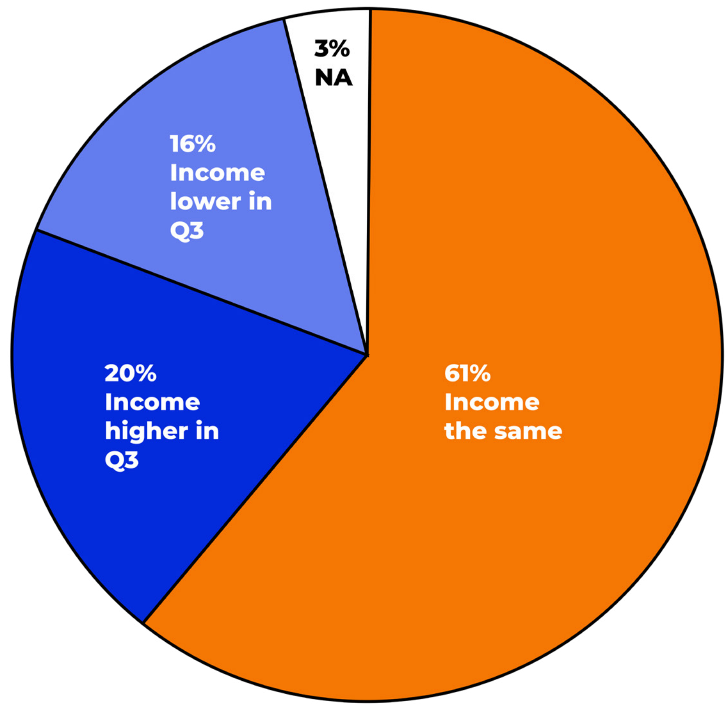
In this chapter, consumers share how they've adjusted their lifestyles, day-to-day activities, and priorities. What is the current state of their employment and income? Is there a pent-up demand for travel now that it has been over a year since the onset of the COVID-19 pandemic? Are consumers planning to spend more or less on upcoming events and holidays? Our findings reveal how consumers' plans and sentiments are constantly evolving.

Employment and Income Changes During the Pandemic

How is the pandemic continuing to impact consumer employment and income? Compared to the previous quarter, consumers' employment and income have shown little fluctuation. The majority of consumers' employment situations and incomes have started the same.

Employment and income:





See Methodology for full demographic data.

Life in Fluctuation

As the COVID-19 crisis develops, people are responding and adapting in various ways. 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 as a result of COVID-19 pandemic:

Worked from home - **20%**

Adopted or bought a new pet - **12%**

Changed jobs - **11%**

Set up a specific work-from-home space - **10%**

Renovated/remodeled my home - **9%**

Set up a gym at home - **9%**

Moved to a new city - **8%**

Gone back to school - **6%**

Bought a home - **6%**

Moved into a smaller home - **6%**

Moved into a bigger home - **5%**

Moved to the suburbs/ countryside - **5%**

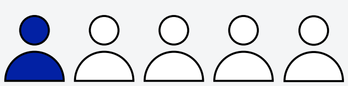
My partner and/or I have had a baby or adopted a child - **4%**

Gotten engaged - **4%**

Gotten married - **4%**

Sold a home - **3%**

Divorced or separated from a spouse or partner - **3%**



In the last 12 months, **1 in 5** consumers worked from home as a result of the pandemic.

Family, physical and mental well-being, and finances remained top consumer priorities throughout Q3.

What consumers are prioritizing in Q3 2021:

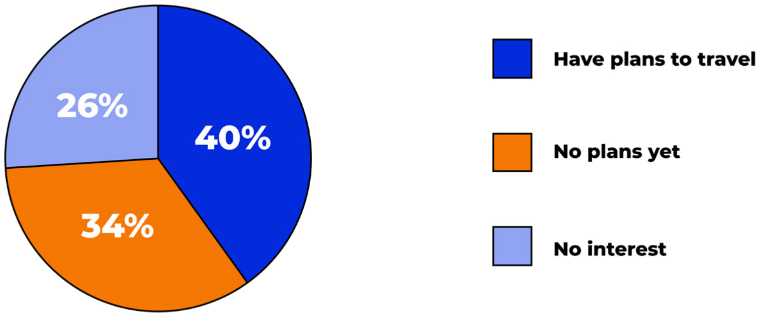
1. **Family**
2. **Physical health and well-being**
3. **Mental health and well-being**
4. Finances
5. Friends
6. Love life
7. Spirituality
8. Hobbies and interests
9. Pets
10. Spending time outside
11. Career
12. Education
13. Travel
14. Politics/Civic engagement (including environmental, social, cultural causes, etc.)

Love life ranked higher among consumers in Q3 while politics/civic engagement dropped to the lowest priority.

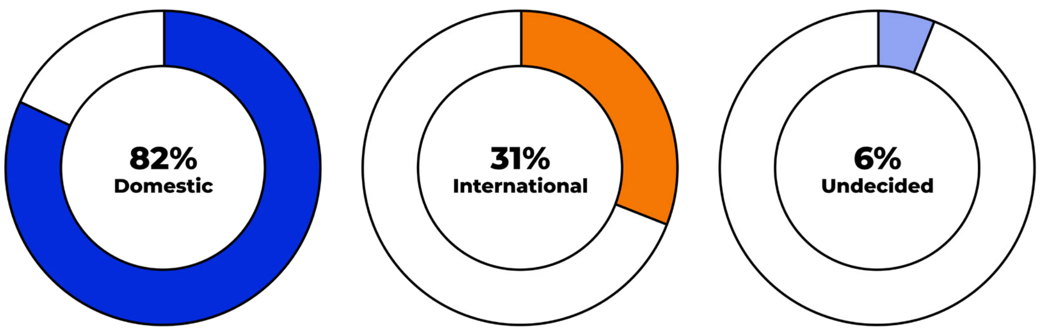
The Current Travel Mindset

Many consumers are longing to travel and have made plans for future trips. However, safety is a priority with the vast majority opting-in for domestic travel, staying with friends or family versus hotels, or commuting via a personal car versus other forms of transportation.

Travel plans for the remainder of 2021:

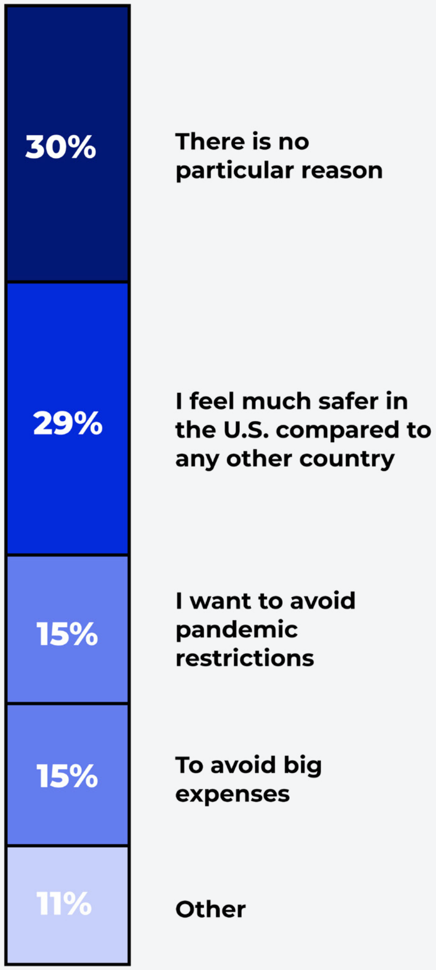


Type of travel plans (among those planning to travel):



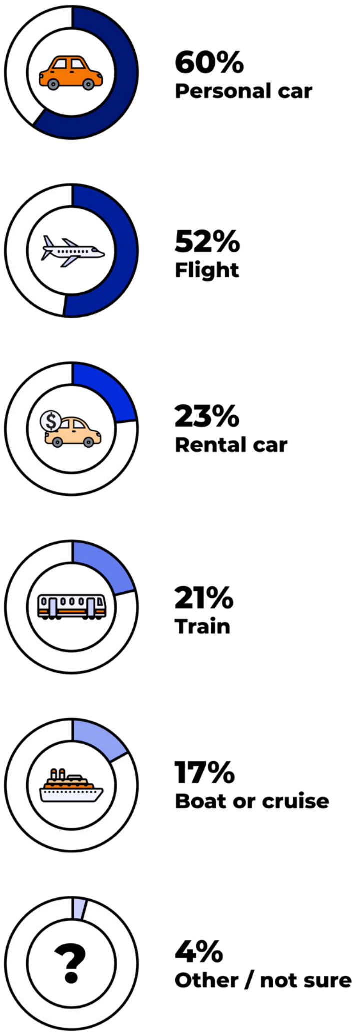
Respondents could select multiple answers.

Main reason for planning domestic travel:



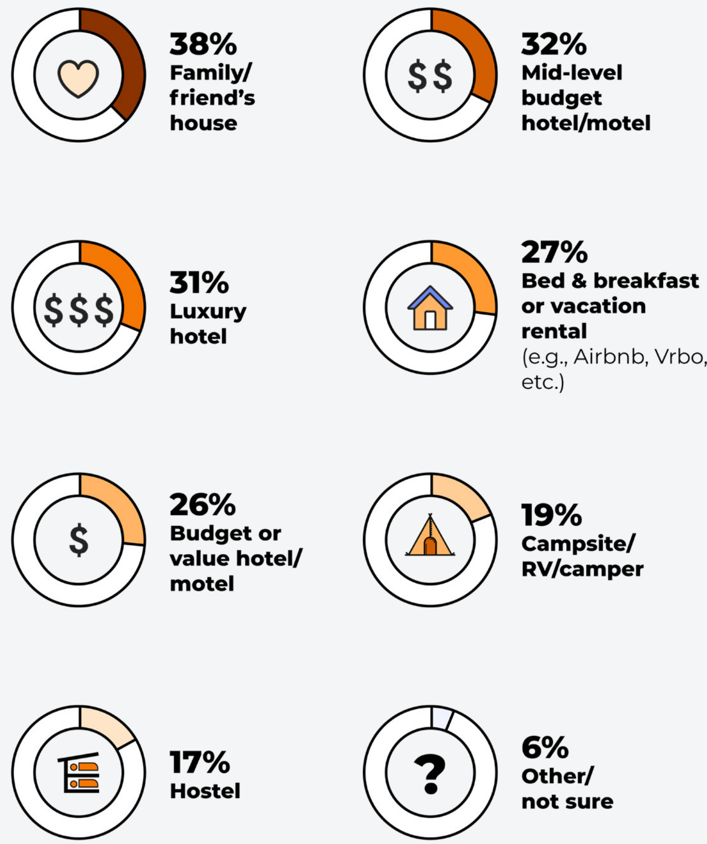
Other responses include to visit family or friends.

Preferred travel transportation:



Respondents could select multiple answer options.

Preferred travel lodging:

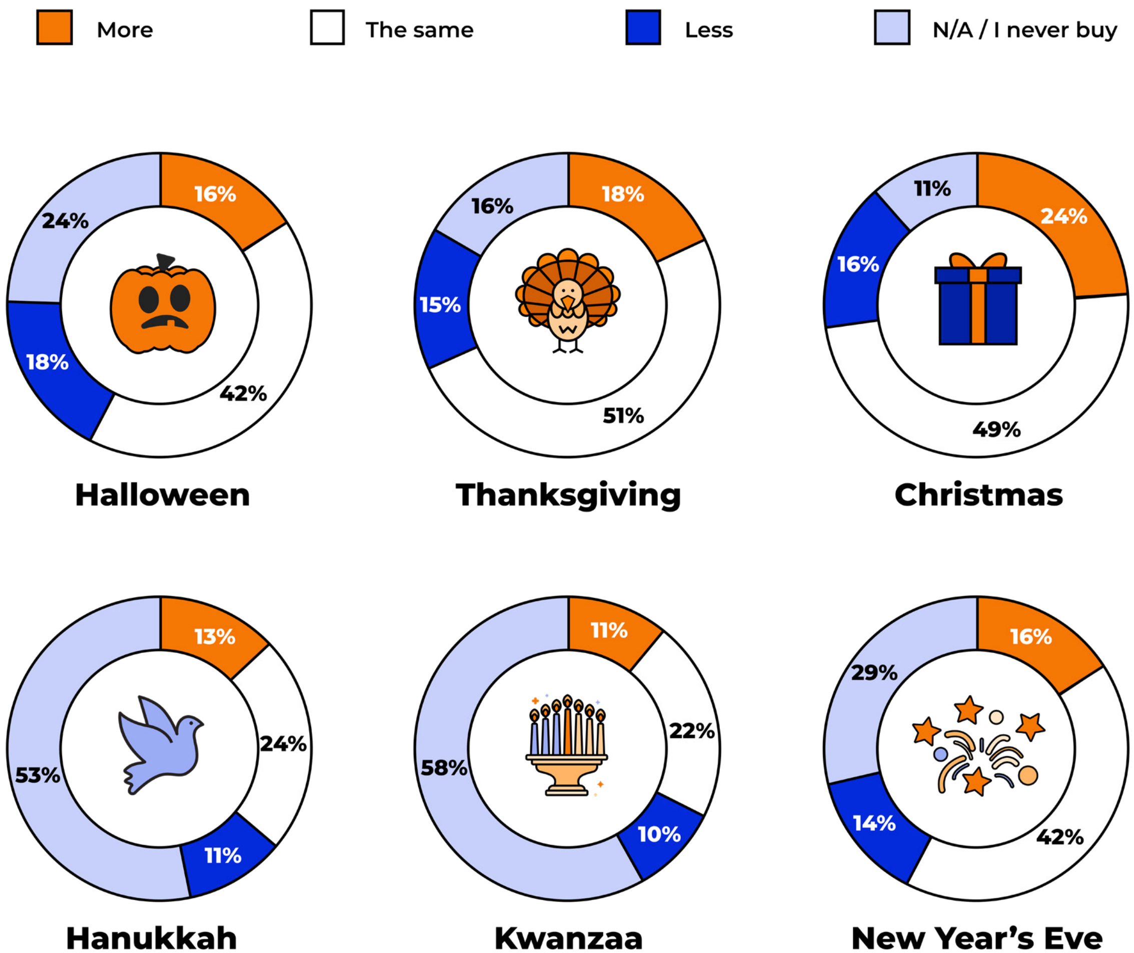


Respondents could select multiple answer options.

38% of travelers plan to stay with family or friends in 2021.

2021 Holiday Season Expectations

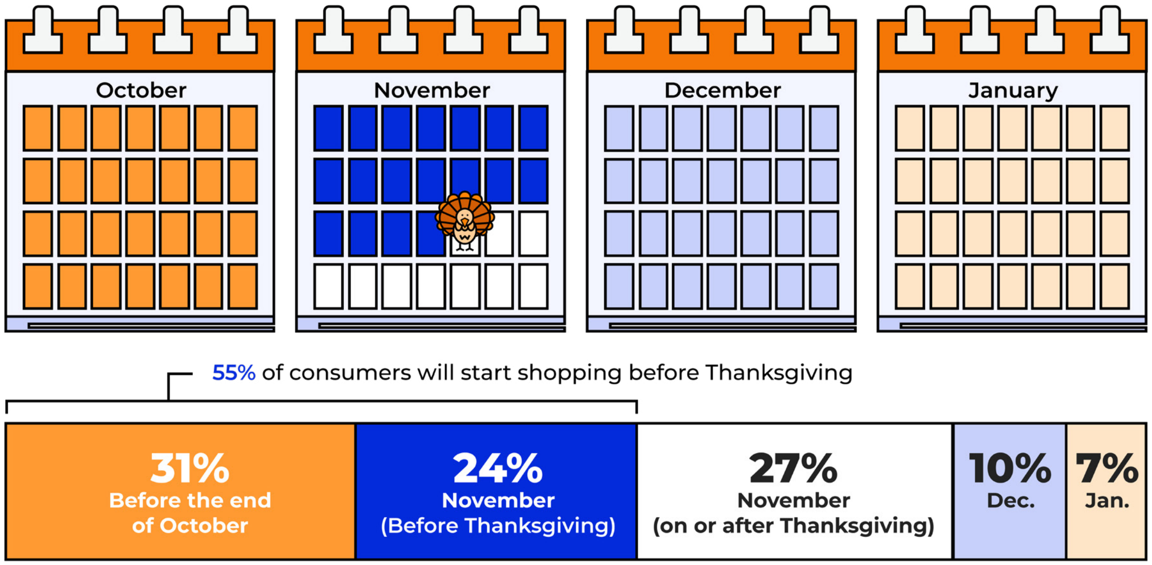
Will consumers spend more or less on holidays this year?



★ INSIGHTS

What holidays are consumers planning to spend more on this year compared to last year? Nearly 1 in 4 consumers (24%) are planning to spend more on Christmas. The next most popular spending holidays are Thanksgiving and Halloween.

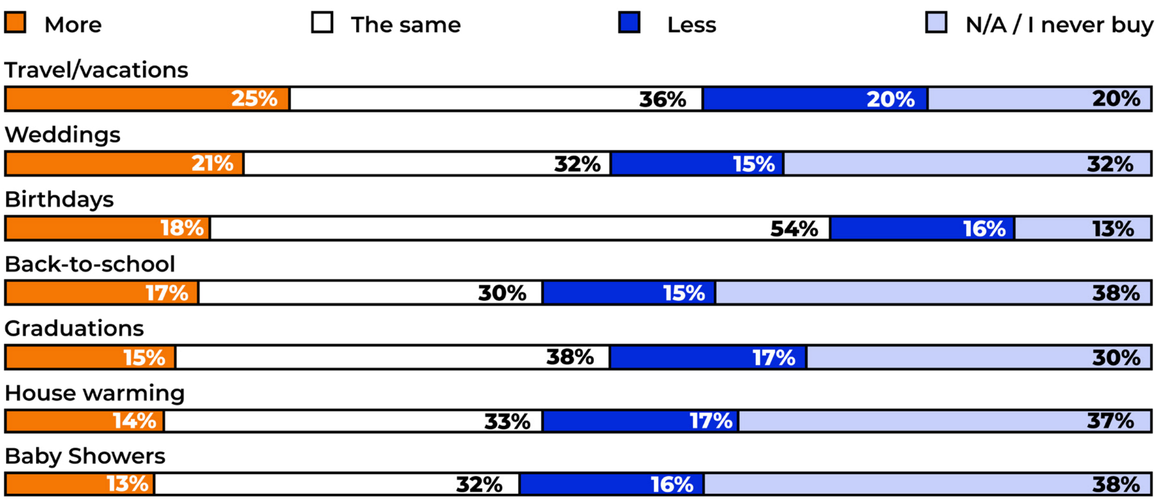
When consumers will start their 2021 holiday season shopping:



★ INSIGHTS

Consumers are planning to start their winter holiday shopping early with nearly a third saying they will start shopping before the end of October.

Consumer spending on events & entertainment:



★ INSIGHTS

1 in 4 consumers say they plan to spend more on travel or vacations this year and 1 in 5 plan to spend more on weddings.

Chapter 2

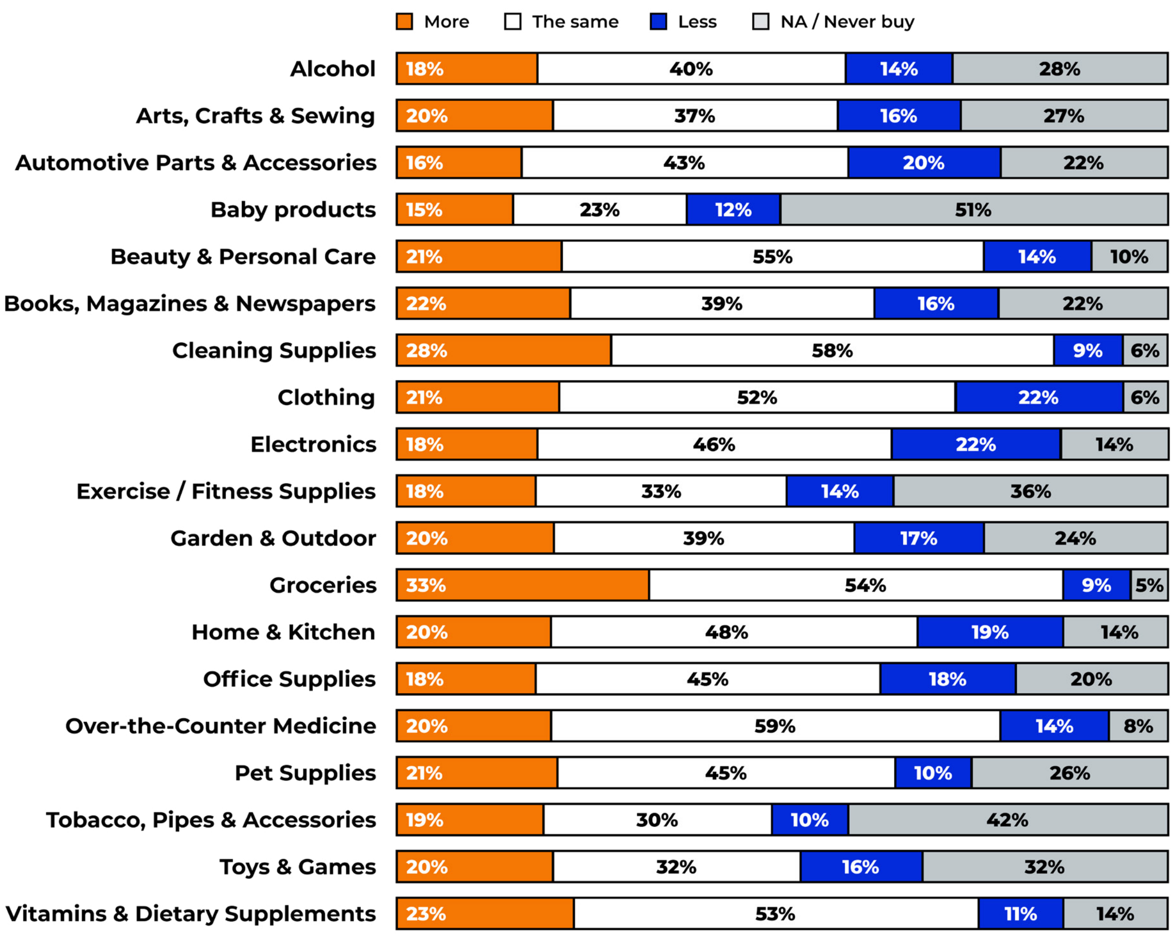
Trending Spending: Consumer Pulse Report

In this chapter, we explore where consumers shop, what they are buying, and how they are adjusting their spending over time. Discover which products and stores are earning consumers' dollars in Q3 2021.

Popular Products: What Consumers Are Buying

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

Product categories among consumers in Q2:



Q2 (April-June 2021)

★ INSIGHTS

What are consumers buying more of than before? 33% of consumers are buying more groceries and 28% are buying more cleaning supplies. Consumers are also buying more vitamins and dietary supplements.

What are consumers buying less of, overall? 14% of consumers are buying fewer electronics. Additionally, clothing and automotive purchases are down.

Which product categories rose the most since last quarter?

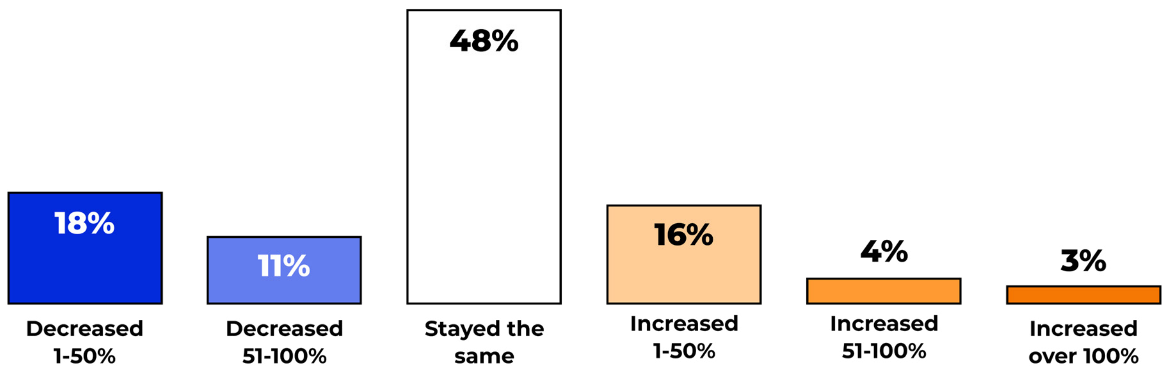
- Office supplies (up 37%)
- Tobacco, pipes and accessories (up 21%)
- Beauty and personal care (up 18%)

Consumers Spending & Projections

The data in this section reflects consumer spending from Q2 2021 as well as projections for Q3 2021.

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

Did *overall* consumer spending change in Q2?

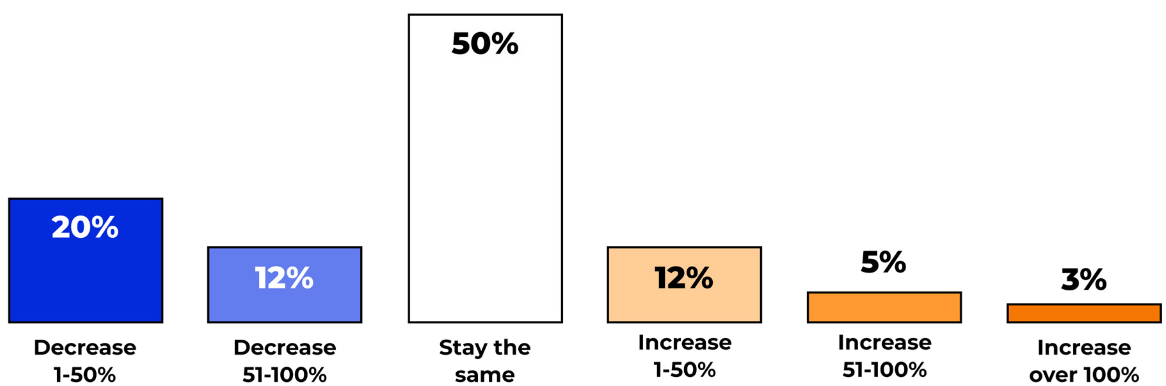


★ INSIGHTS

In Q2 (April through June) 2021, consumers say their overall spending **stayed the same or decreased.**

- **29%** say spending decreased
- **48%** say spending stayed the same
- **23%** say spending increased

Will *overall* consumer spending change in Q3?



★ INSIGHTS

Most consumers said they expect their spending to **stay the same in Q3,** however nearly a third plan to **decrease spending.**

- **32%** say spending will decrease
- **50%** say spending will stay the same
- **19%** 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 Q2 2021.

In-store

Shopped in-store in the last 3 months:

Walmart	63%
Target	25%
Walgreens	18%
Lowe's	17%
HomeDepot	16%
Amazon Go or Amazon Grocery	15%
Kroger	12%
Kohl's	11%
Apple	11%
Sam's Club	11%
Costco	10%
Best Buy	8%
Macy's	6%
Albertsons	5%

Online

Shopped online in the last 3 months:

Amazon	65%
Walmart.com	37%
eBay.com	17%
Target.com	13%
Apple.com	11%
BestBuy.com	8%
Etsy.com	8%
HomeDepot.com	7%
Lowes.com	7%
Kohls.com	6%
Macys.com	6%
Sam's Club	5%
Specialty, independent, local or boutique	5%
Facebook Shops	5%
Costco.com	5%
Walgreens.com	5%
Kroger.com	4%
Wayfair	4%
Wish	4%
Instacart	4%
Google Shopping	4%
Instagram Shop	4%
Albertsons.com	2%
Houzz	2%

★ INSIGHTS

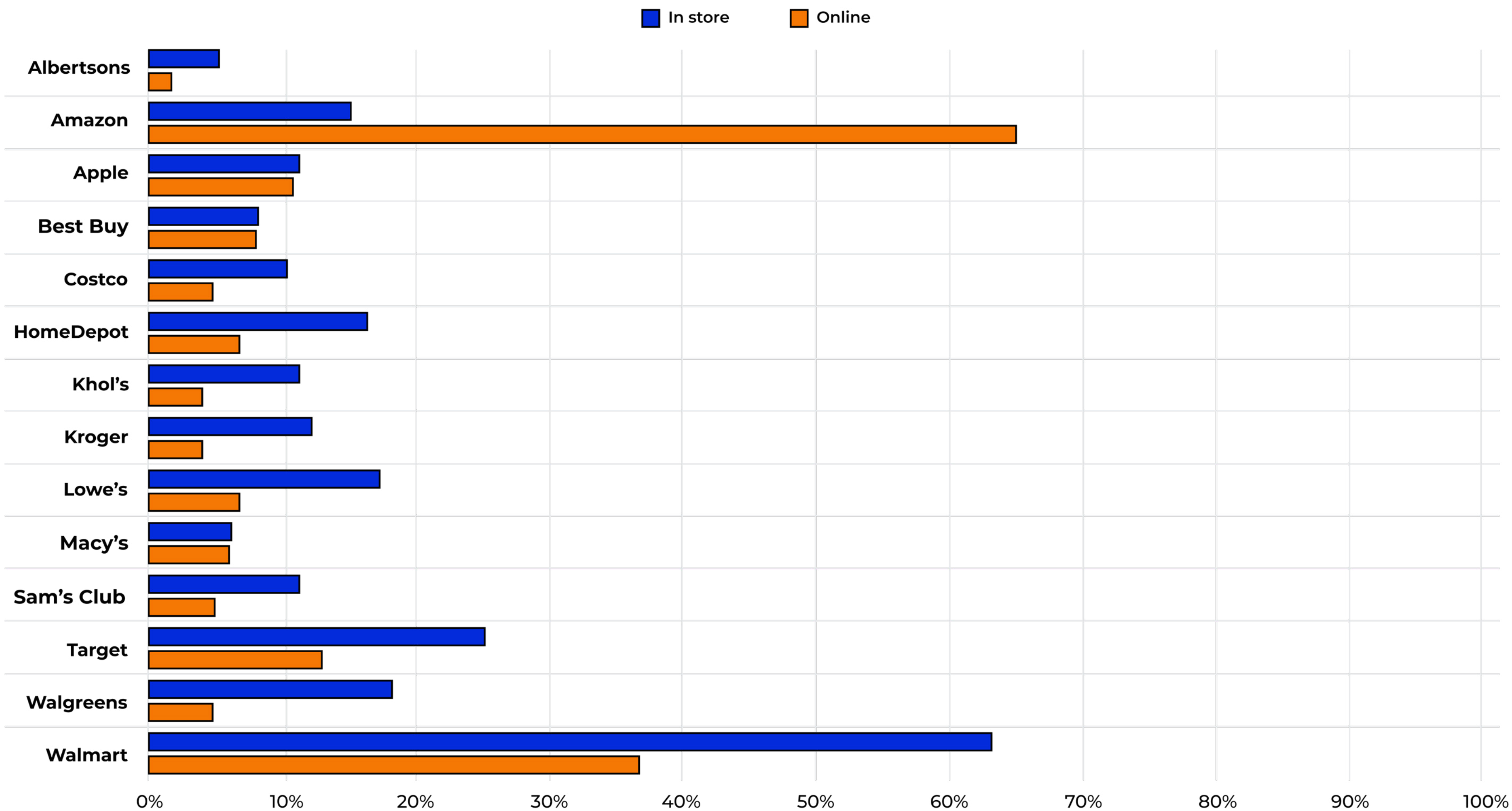
Walmart leads when it comes to in-store shopping. Nearly as many shoppers (63%) have purchased from a Walmart store as have shopped on Amazon.com (65%) in the past 3 months.

60% of consumers say they choose to shop in stores as a way to get out of their homes.

In-store vs. online

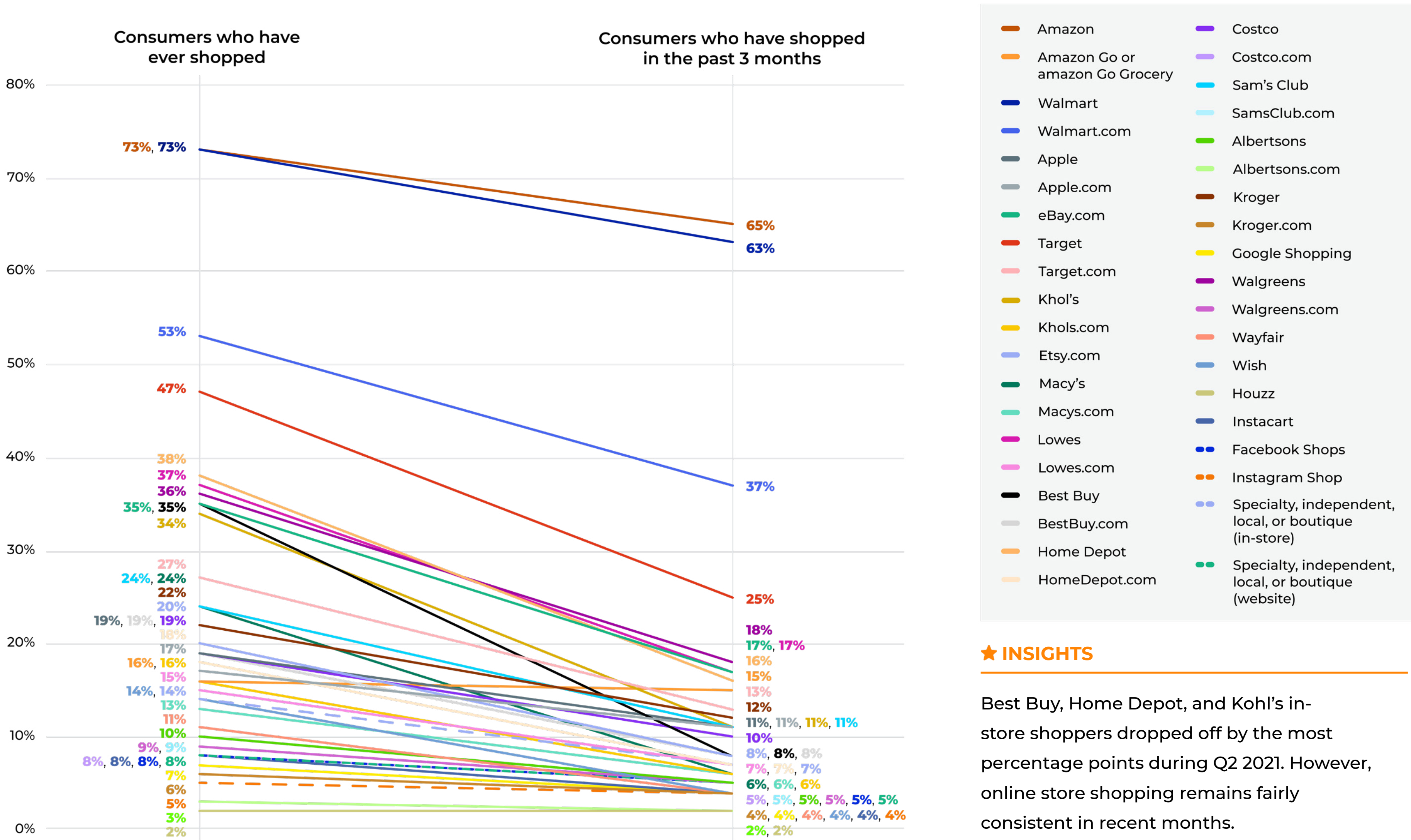
Retail giants like Walmart, Target, Home Depot, and others have about half as many online customers as they do in-store.

Where consumers shopped during Q2:



The following data shows the stores in which consumers have shopped at some point 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:

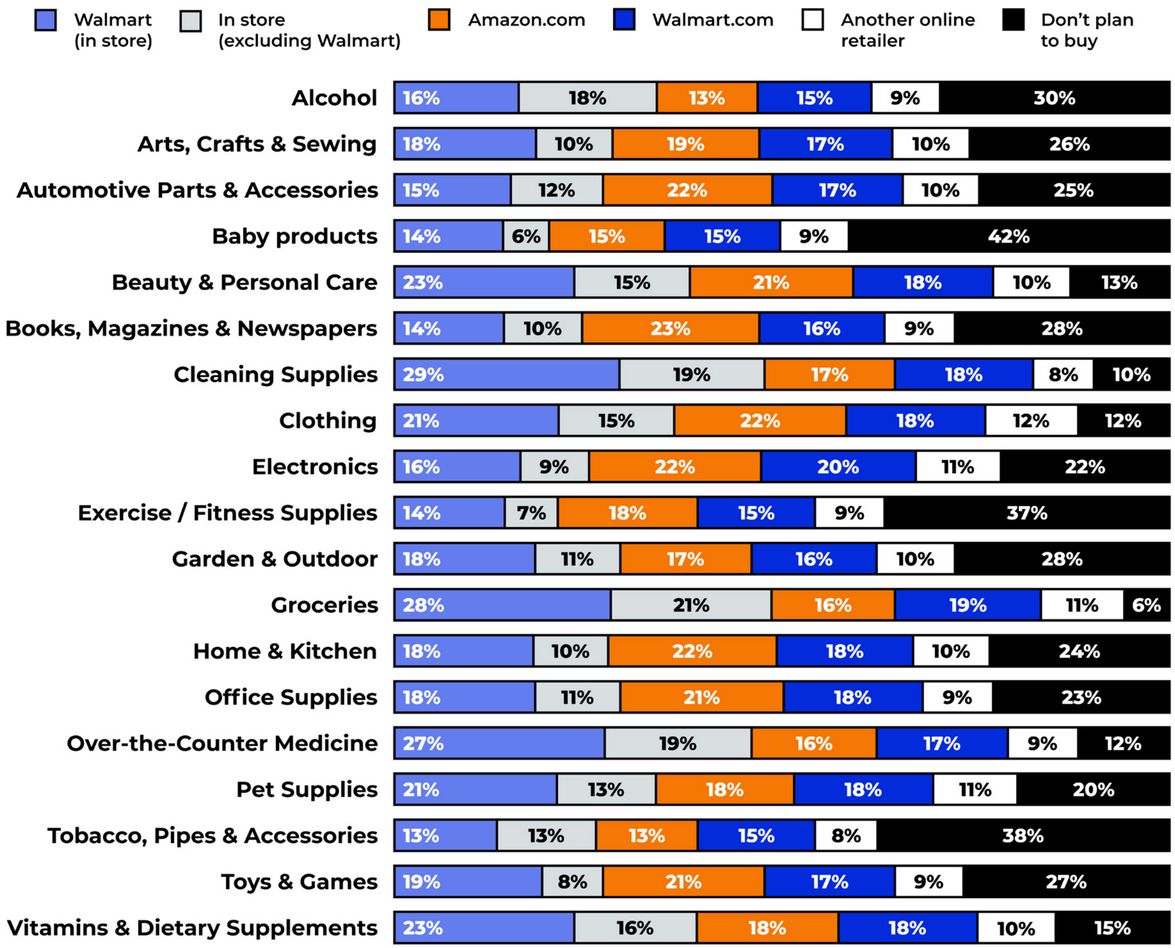


★ INSIGHTS

Best Buy, Home Depot, and Kohl's in-store shoppers dropped off by the most percentage points during Q2 2021. However, online store shopping remains fairly consistent in recent months.

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

Where consumers plan to shop by product category:



Q3 (July-September 2021).

★ INSIGHTS

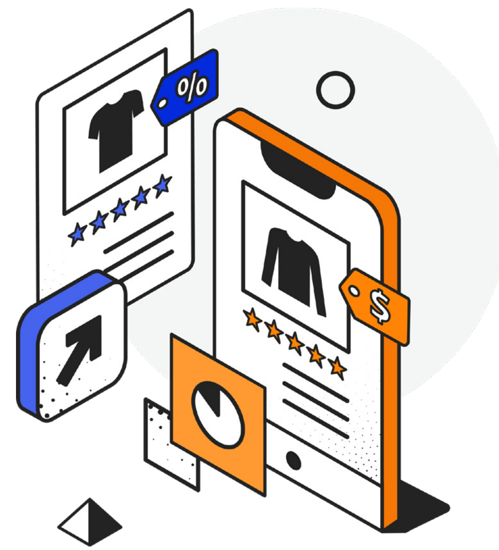
- For the majority of product categories, consumers who plan to buy online prefer to buy it on Amazon compared to Walmart.com or another online store. However, some product categories were rated closely: arts & crafts, garden/outdoor products, baby products, and tobacco, pipes and accessories.
- The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

Chapter 3

Ecommerce Report

Online shopping climbed with COVID-19's onset, but will consumer reliance on ecommerce persist? Even as Americans return to in-store shopping, digital remains a crucial channel for getting goods and products to shoppers.

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

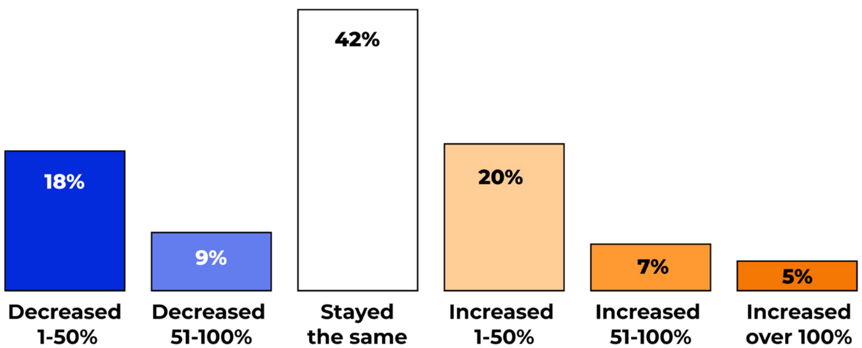


Online vs. In-Store: Spending & Shopping Preferences

The data in this section reflects **online** consumer spending from Q2 2021 as well as projections for Q3 2021.

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

Did *online* consumer spending change in Q2?

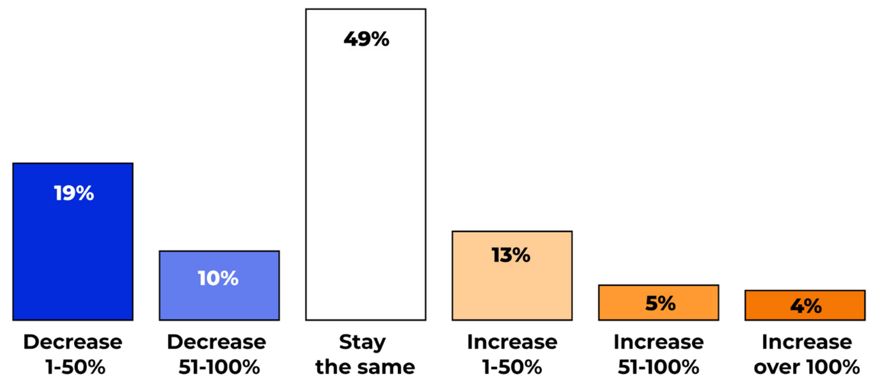


★ INSIGHTS

In Q2 2021 (April through June), consumers say their online spending **increased.**

- **27%** say spending decreased
- **42%** say spending stayed the same
- **32%** say spending increased

Will *online* consumer spending change in Q3?



★ INSIGHTS

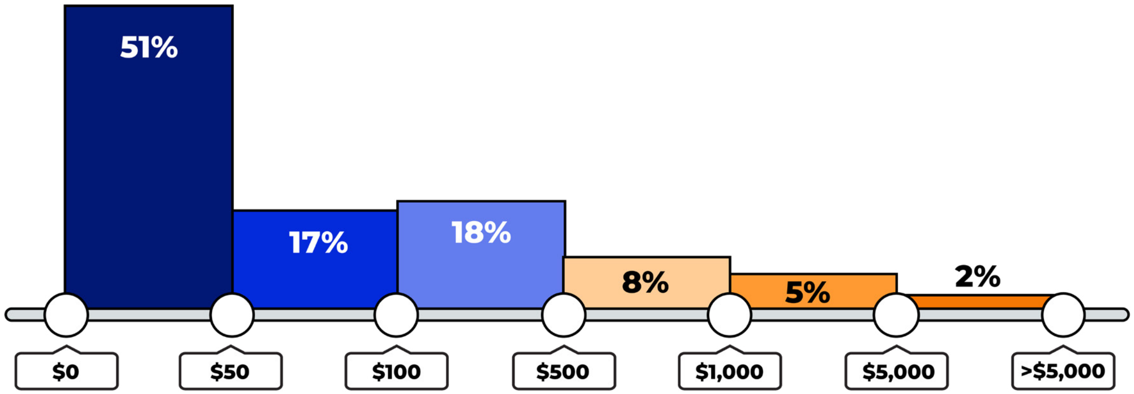
Most consumers said they expect their online spending to **stay the same or decrease** during Q3 (July through September 2021).

- **29%** say spending will decrease
- **49%** say spending will stay the same
- **22%** say spending will increase

62% of consumers believe the majority of consumer shopping will happen online in the future (down 13% from Q2).

Consumer Spending & Projections

How much did you spend *online* in Q2?



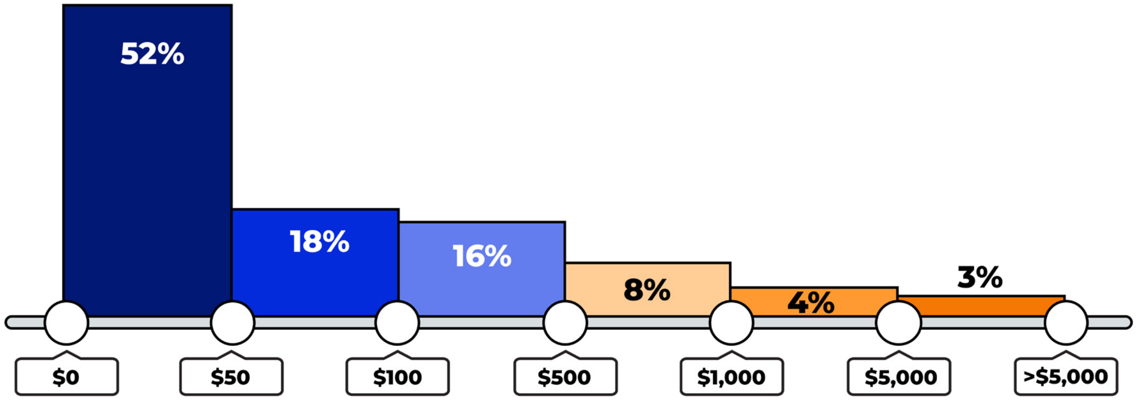
Excludes Amazon and Walmart.com

★ INSIGHTS

In Q2 (April through June) 2021, consumers say their online spending **stayed under $500.**

- **85%** less than $500
- **15%** over $500
- **7%** over $1,000

How much will you spend *online* in Q3?



Excludes Amazon and Walmart.com

★ INSIGHTS

Most consumers expect to keep their spending **under $500** in Q3.

- **86%** less than $500
- **14%** over $500
- **7%** over $1,000

Reasons consumers prefer to shop online — ranked:

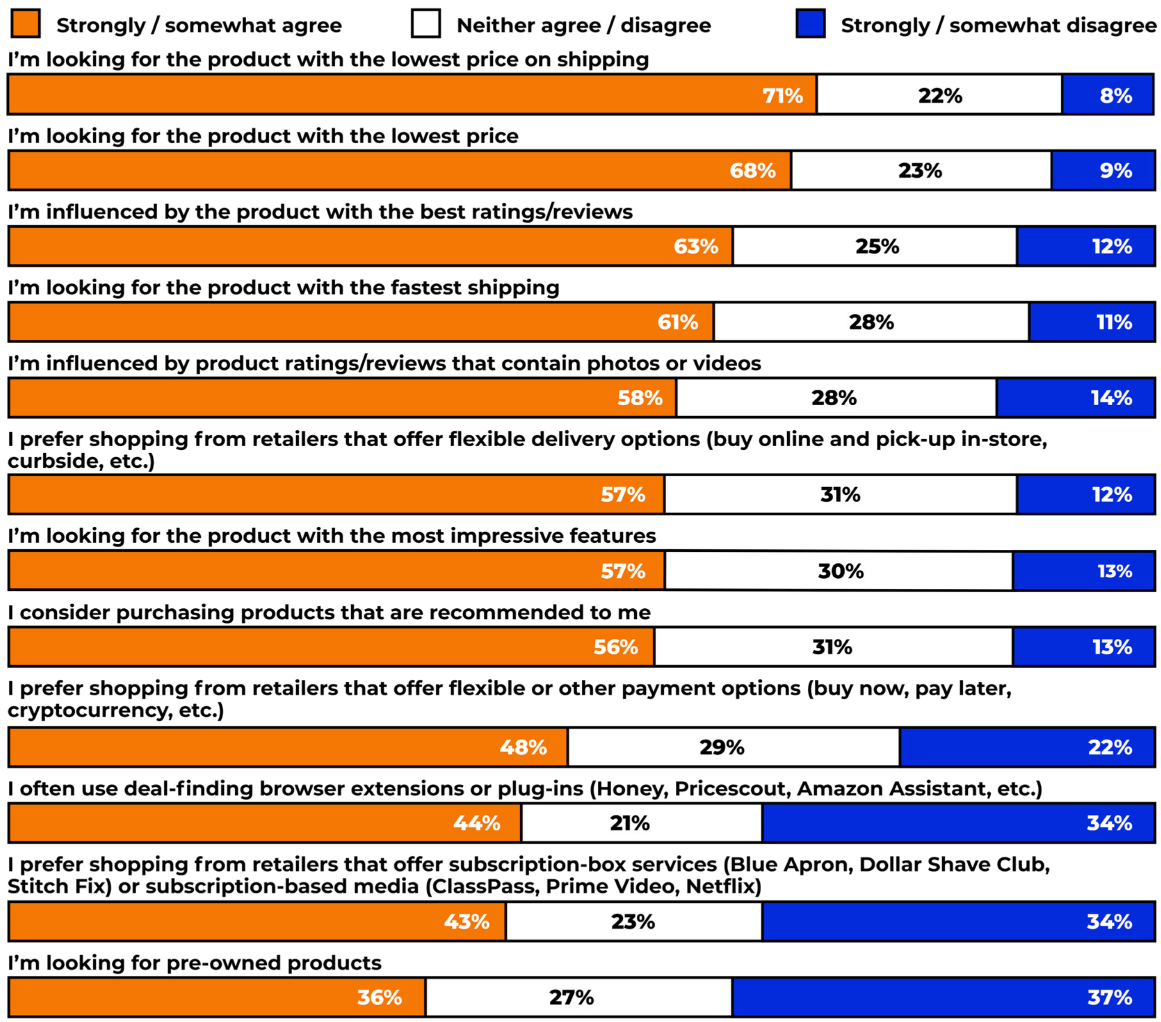
1. **Lower prices**
2. **Convenience**
3. **Price comparison**
4. Free/low-cost shipping
5. Fast shipping
6. Discounts
7. Search for certain brand
8. Product options
9. See reviews from other customers
10. Safety (avoid public places)
11. Find new brands
12. Products only sold online

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

★ INSIGHTS

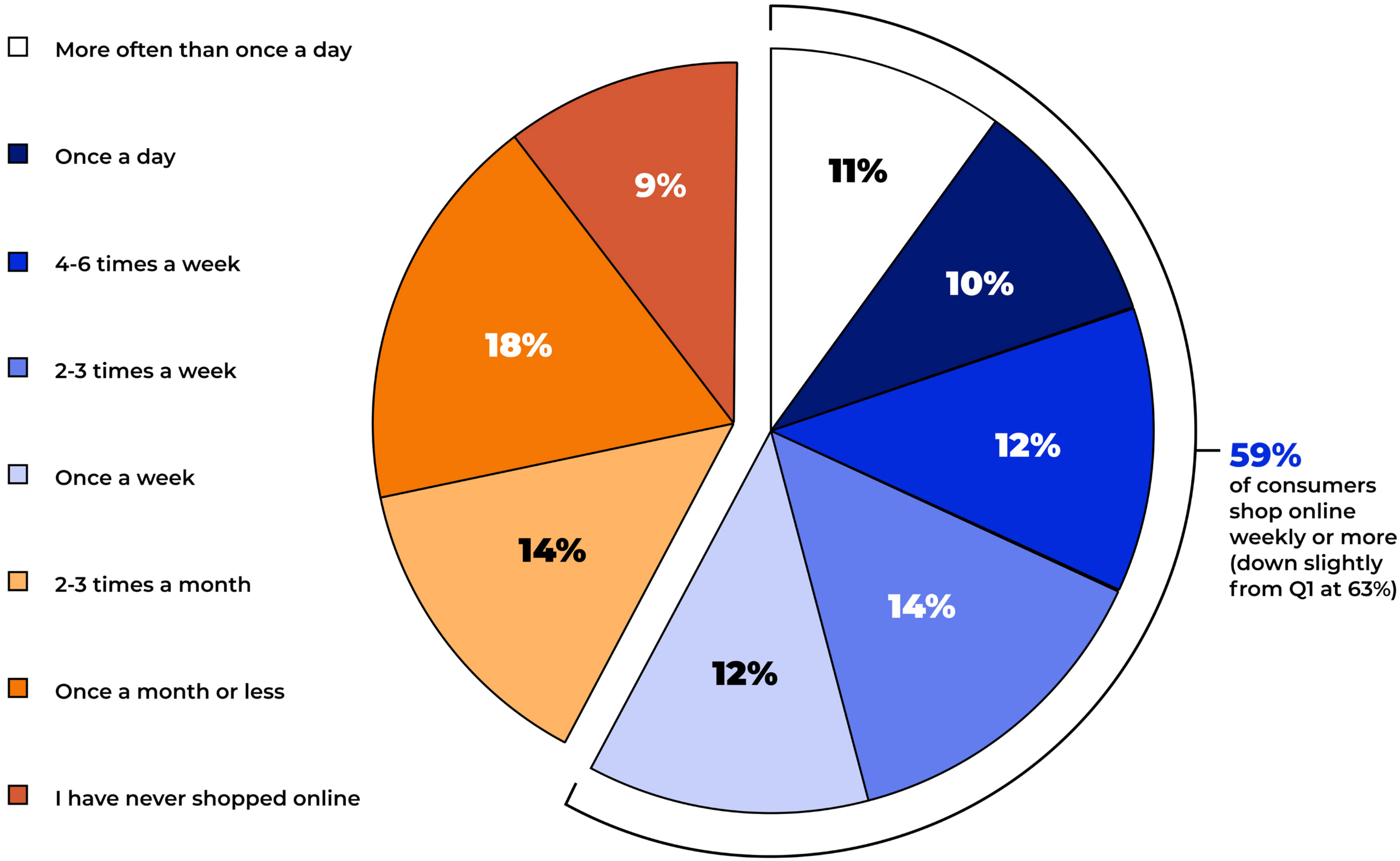
- Lower price is the top reason consumers prefer to shop online in Q3. This differs from Q2 where the top reason for purchasing online was free shipping.
- Even though the COVID-19 pandemic continues to impact consumers, shopping online for safety reasons ranked lower than other reasons.

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



43% of consumers prefer shopping from retailers that offer subscription-box services or media (e.g., Blue Apron, Dollar Shave Club, Stitch Fix, Prime Video or Netflix).

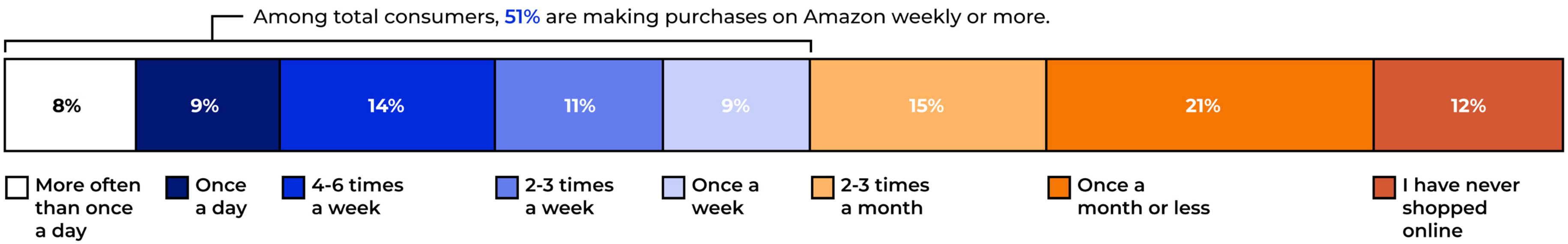
How frequently consumers shop online:



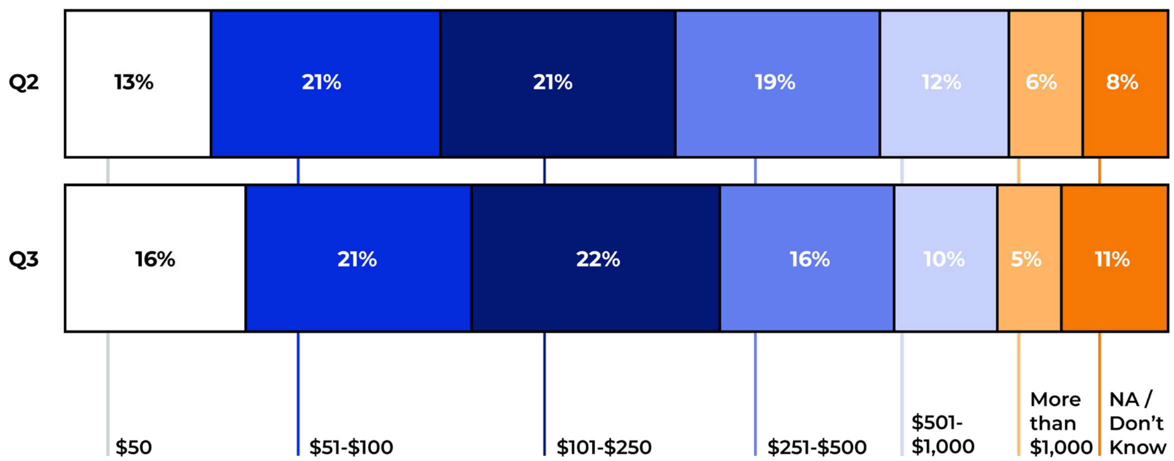
Amazon's Prevalence in 2021 & Prime Membership

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

How frequently consumers shop on Amazon:



Maximum amount consumers would spend on a product from Amazon:

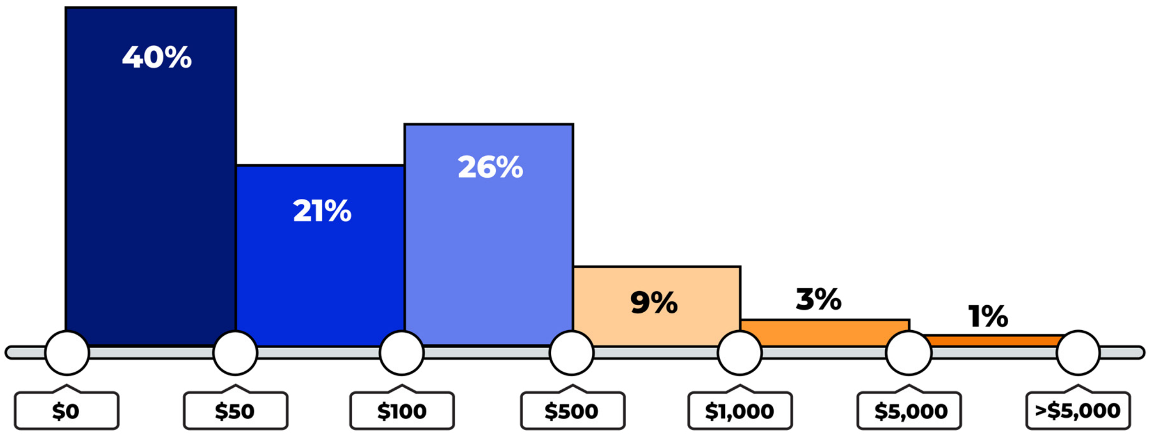


★ INSIGHTS

- Consumer spending on Amazon has shifted toward lower-priced items in Q3.
- 52% of consumers would spend over $100 for a product on Amazon and 15% would spend over $500 (both down from Q2).

The data in this section reflects the amount of Amazon consumer spending from Q2 2021 as well as projections for Q3 2021.

How much did you spend on *Amazon* in Q2?

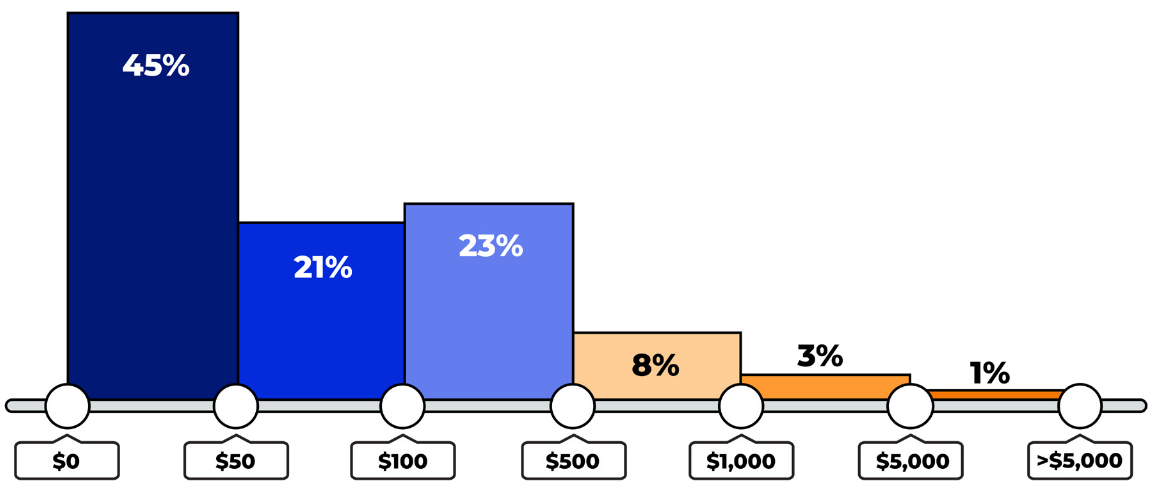


★ INSIGHTS

In Q2 (April through June) 2021, most consumers say their Amazon spending **stayed under $500.**

- **87%** less than $500
- **13%** over $500
- **4%** over $1,000

How much will you spend on *Amazon* in Q3?



★ INSIGHTS

The majority of consumers said they expect to keep their Amazon spending **under $500** in Q3.

- **88%** less than $100
- **12%** over $500
- **4%** over $1,000

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 Q2 (April through June) compared to Q1 (January through March):

INSIGHTS

- Shopping increased on Amazon for categories including Tobacco, Pipes and Accessories, Groceries, Electronics and Arts, Crafts & Sewing.
- Shopping slowed on Amazon for Books, Magazines & Newspapers and Beauty and Personal Care.

Category	Q1	Q2	% change
Groceries	23%	26%	3%
Electronics	24%	25%	1%
Arts, Crafts & Sewing	18%	19%	1%
Tobacco, Pipes & Accessories	11%	12%	1%
Baby Products	~	10%	NA
Automotive Parts & Accessories	13%	13%	0%
Over-the-Counter Medicine	15%	15%	0%
Garden & Outdoor	15%	14%	-1%
Office Supplies	20%	19%	-1%
Pet Supplies	24%	23%	-1%
Vitamins & Dietary Supplements	31%	30%	-1%
Clothing	38%	36%	-2%
Alcohol	13%	10%	-3%
Home & Kitchen	24%	20%	-4%
Exercise/Fitness Supplies	17%	13%	-4%
Toys & Games	25%	20%	-5%
Cleaning Supplies	27%	22%	-5%
Books (print or digital), Magazines & Newspapers	28%	22%	-6%
Beauty & Personal Care	35%	26%	-9%

Other products Amazon shoppers were purchasing in Q2 include: miscellaneous items, movies, medical equipment, music, gift cards or decorations. Baby products not measured in Q1.

Top reasons consumers are shopping on Amazon:

1. **Have a Prime account**
2. **Like Amazon's shipping prices**
3. **Like Amazon's product prices**
4. Can get the product I need fast
5. Find the website easy to use and navigate
6. Like the Amazon mobile app
7. Can get products that are hard to find in stores
8. Like Amazon's return policy
9. Can find the brands I'm looking for
10. Have always shopped at Amazon
11. Familiar with Amazon's products
12. Prefer getting products from Amazon to Walmart
13. Can get coupons, discounts and incentives when shopping from Amazon
14. Easy to re-order products or setup recurring ordering

Other reasons include because they received a gift card or to find a specific size product.

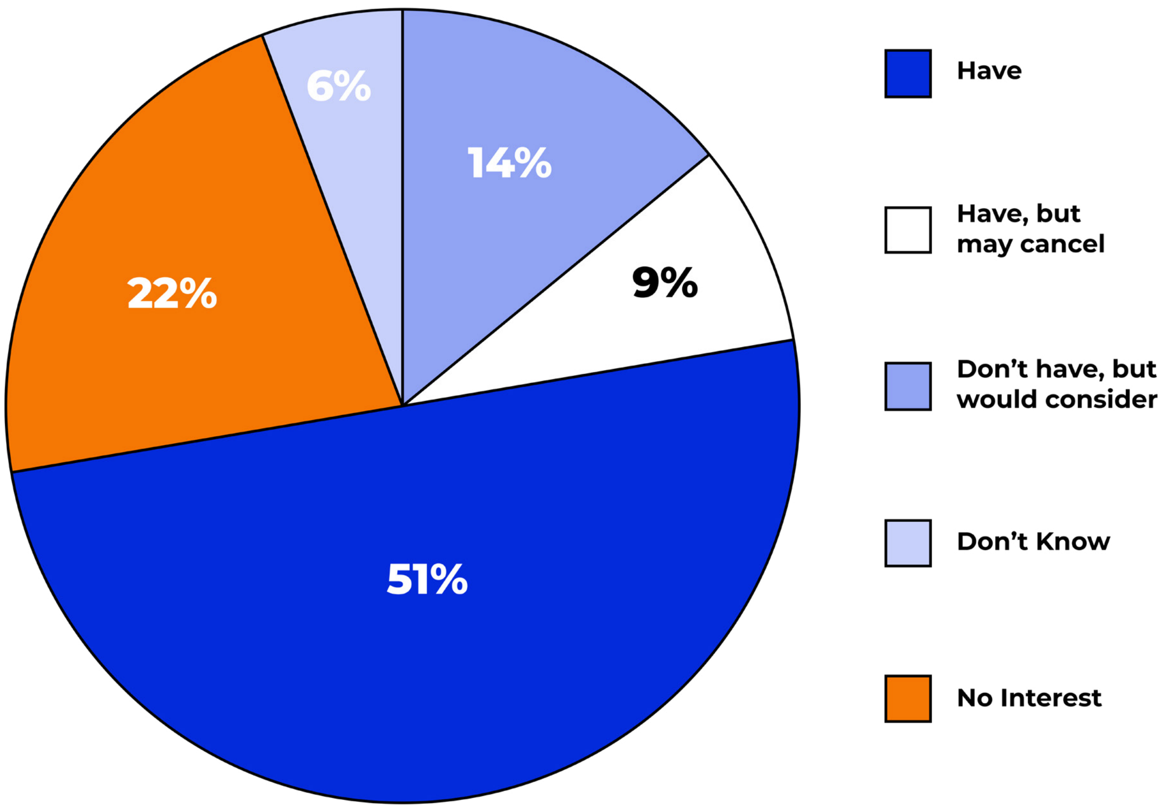
Top reasons consumers DON'T shop on Amazon:

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

Other reasons include didn't like the experience selling on Amazon or being sold on Prime.

Amazon Prime Membership

Amazon Prime membership & interest:



- **46%** of customers often leave items in their Amazon shopping cart and forget about them.
- **45%** of consumers have shopped on Amazon Prime Day in the past.
- **42%** use Amazon's subscription feature

★ INSIGHTS

60% of consumers are currently Amazon Prime members (down from 68% in Q2).

Consumer Sentiment Toward Amazon vs. Walmart

Activity	Amazon vs. Walmart	Difference
When I'm shopping for a product online and need to get it fast, I go to ________ to buy it	Amazon 62% Walmart 47%	+15
When I need to purchase a product from a specific brand, I look to see if I can purchase it on ________	Amazon 65% Walmart 57%	+8
I think ________ is a good company for consumers	Amazon 68% Walmart 63%	+5
I find it easy to return products from ________	Amazon 57% Walmart 59%	+2
If I were only able to buy products from a single store, it would be ________	Amazon 55% Walmart 52%	+3

% strongly / somewhat agree with statement

★ INSIGHTS

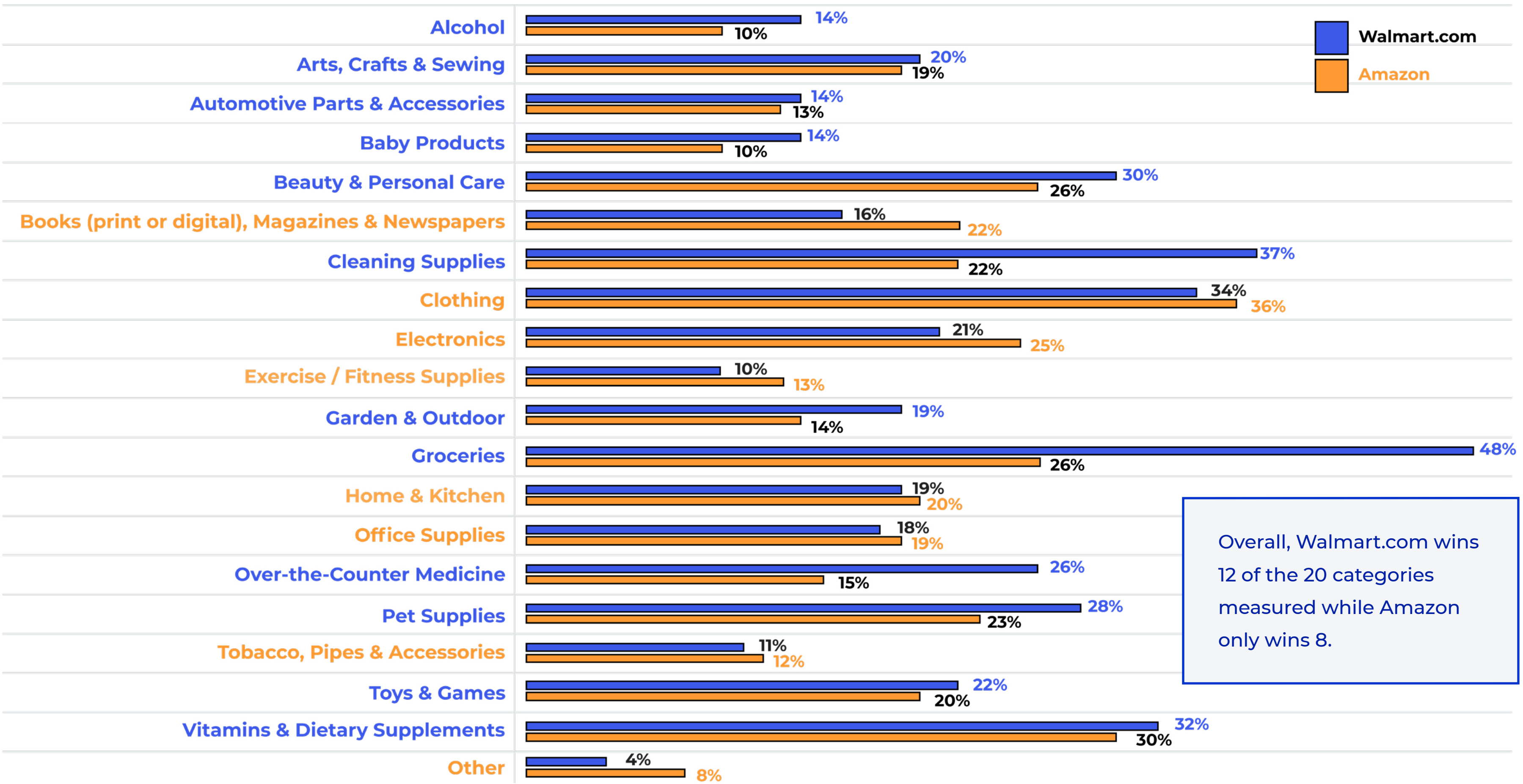
- Overall, consumers have a slightly more positive attitude toward Amazon, its products, offerings, and the overall brand compared to Walmart.
- However, consumers favor Walmart to Amazon when it comes to returning products.

The Growth of Walmart, Walmart.com & Walmart+

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

Walmart.com Spending by Category

See how consumers shopped on Walmart.com compared to Amazon.com in various product categories in Q2 (April through June).



Overall, Walmart.com wins 12 of the 20 categories measured while Amazon only wins 8.

Among consumers who shopped on Walmart.com or Amazon.com in Q2

Top reasons consumers shop on Walmart.com:

1. **Like Walmart's prices on products**
2. **Familiar with Walmart's products**
3. **Can get the products I need fast**
4. There is a Walmart near me for easy pick-up or returns
5. Like the Walmart app
6. Like Walmart's prices on shipping
7. Find the website easy to use and navigate
8. Have always shopped from Walmart
9. Walmart offers free shipping options
10. Like Walmart's return policy
11. Can find the brands I'm looking for
12. Can do curbside pickup
13. Have a Walmart+ account
14. Prefer getting products from Walmart to Amazon
15. Can get coupons, discounts and incentives when shopping from Walmart

Other reasons include because they received a gift card from Walmart or can buy gift cards.

★ INSIGHTS

- 41% of consumers say Walmart's product prices are the top reason they purchased from Walmart.com in Q2 (compared to 32% on Amazon).
- 33% of consumers have purchased on Walmart.com because they are familiar with its products (compared to only 23% for Amazon).
- A third of consumers say they can get the products they need fast (similar to those that have purchased on Amazon).

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

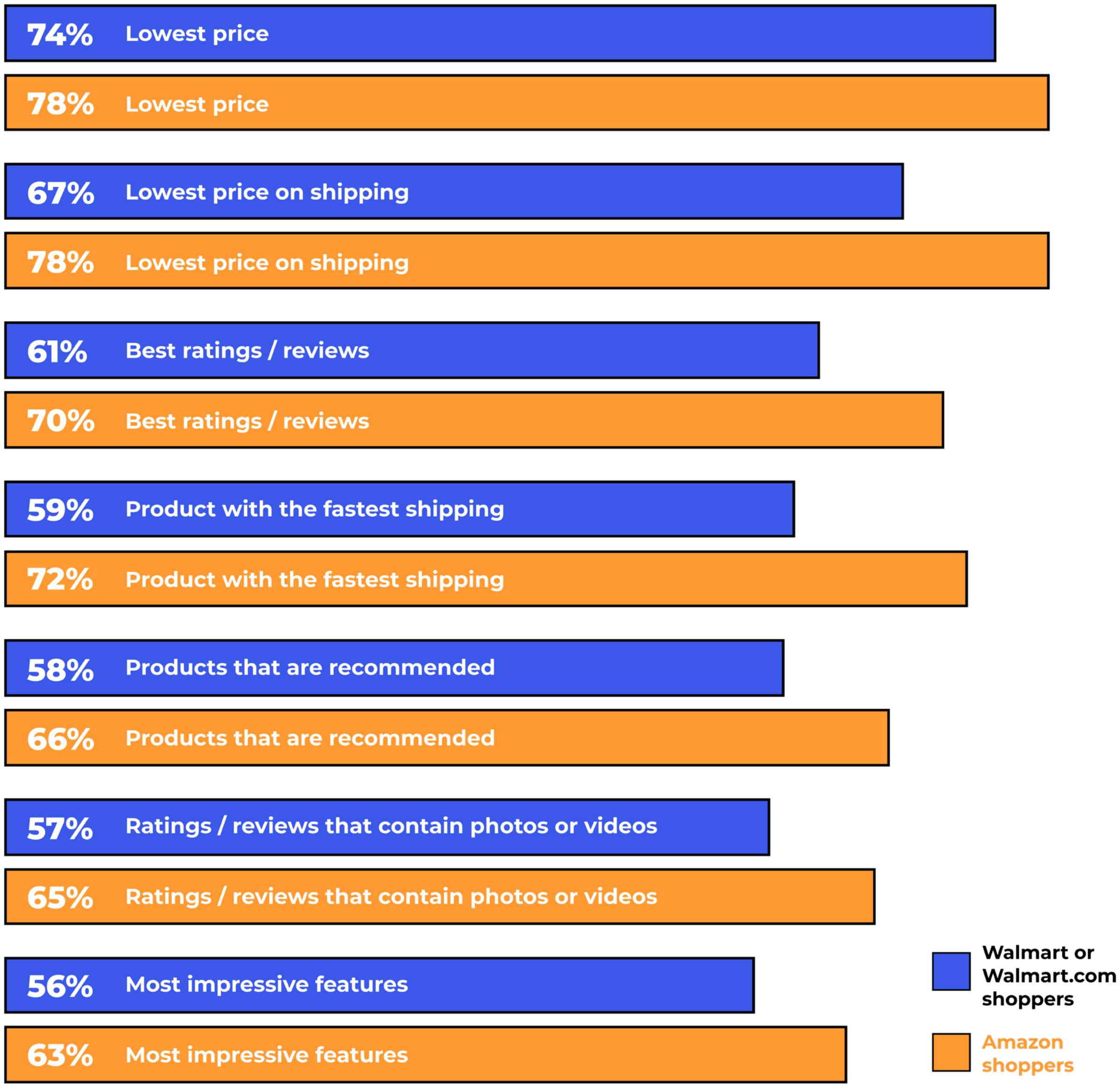
1. **Prefer shopping in stores**
2. **Don't have a Walmart+ account**
3. **Haven't needed anything from Walmart**
4. Trying to spend less money
5. Prefer other online shopping options
6. I don't like Walmart or have negative attitudes about the brand
7. Deterred by the duration or uncertainty of shipping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

Other reasons include poor customer service and account security concerns.

★ INSIGHTS

- The main reason consumers didn't shop on Walmart.com in Q2? They preferred to shop in stores.
- 20% of consumers said that not having a Walmart+ account is a barrier to shopping there (compared to only 4% of non-Prime members for shopping on Amazon).
- 14% of consumers prefer other online shopping options to Walmart.com (compared to only 8% who prefer other options over Amazon).

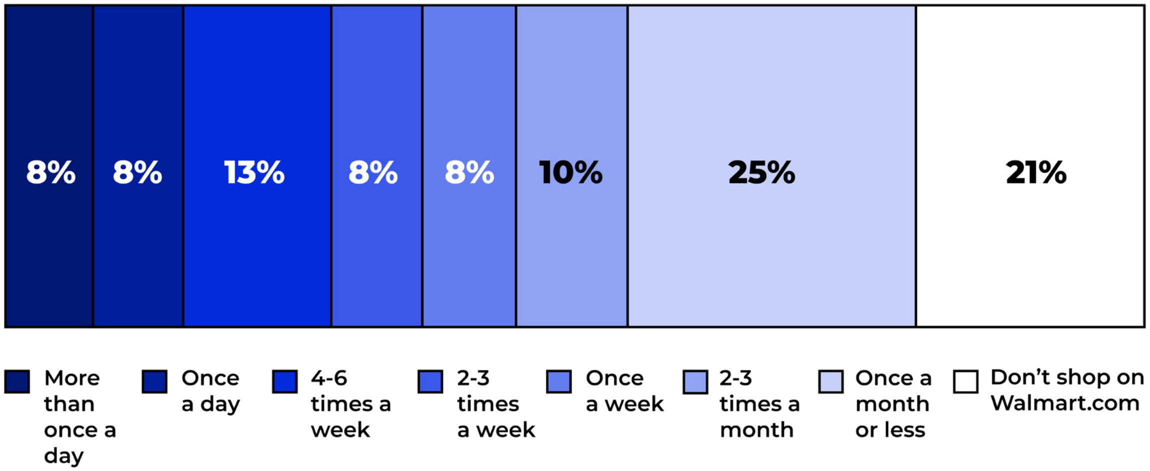
What benefits are more important? Walmart shoppers vs. Amazon shoppers:



% strongly / somewhat agree with statement

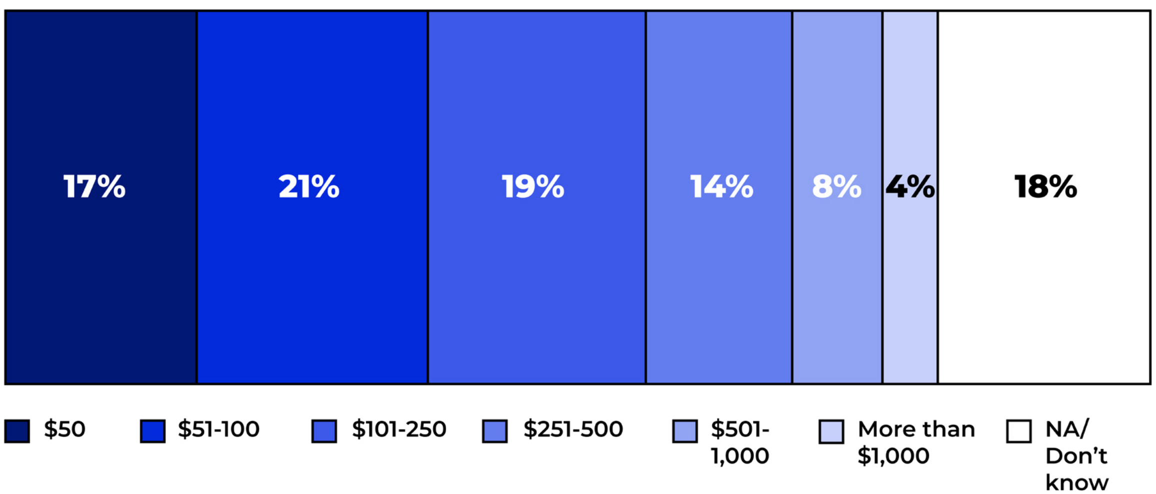
- Overall, Amazon shoppers have higher standards for all tested factors than Walmart shoppers.
- Among total consumers shopping on Walmart or Walmart.com, **only 59%** are influenced by products with the fastest shipping compared to 72% when shopping on Amazon. In fact, just 51% would be willing to spend more for faster shipping compared to 58% among Amazon shoppers.
- **42%** of Walmart or Walmart.com shoppers like using the Mobile Scan and Go feature.

How frequently consumers shop on Walmart.com:



Among total consumers, **44%** are making purchases on Walmart.com weekly or more.

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

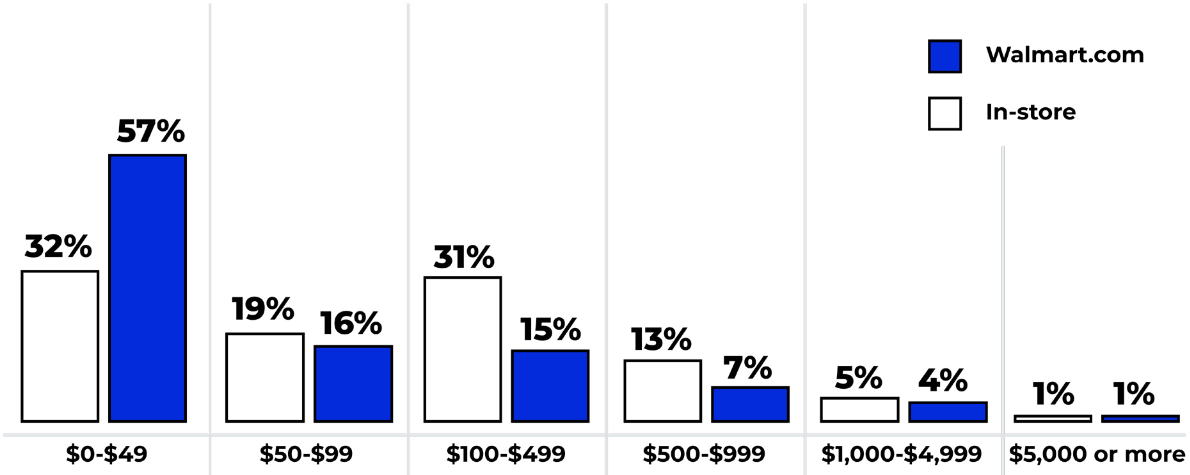


★ INSIGHTS

- 45% of consumers would spend over $100 for a product on Walmart.com (lower compared to Amazon at 52%).
- Only 12% of consumers would spend over $500 for a product on Walmart.com (again, lower compared to Amazon at 15%).

The data in this section reflects the amount of Walmart consumer spending from Q2 2021 as well as projections for Q3 2021.

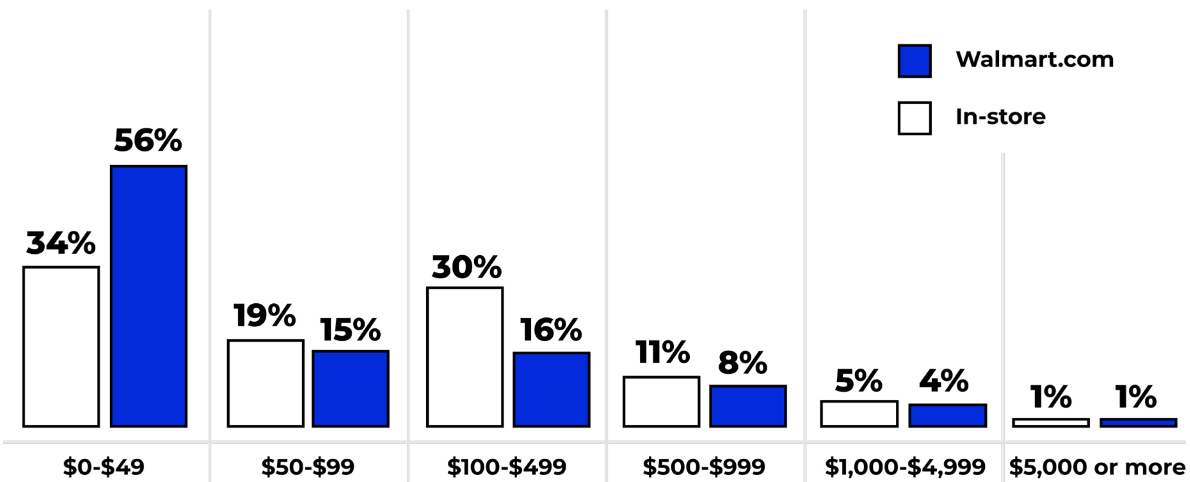
How much did you spend on *Walmart* in Q2?



★ INSIGHTS

In Q2 (April through June) 2021, 82% of consumers say their Walmart in-store spending and 88% said their Walmart.com spending **stayed under $500.**

How much will you spend on *Walmart* in Q3?

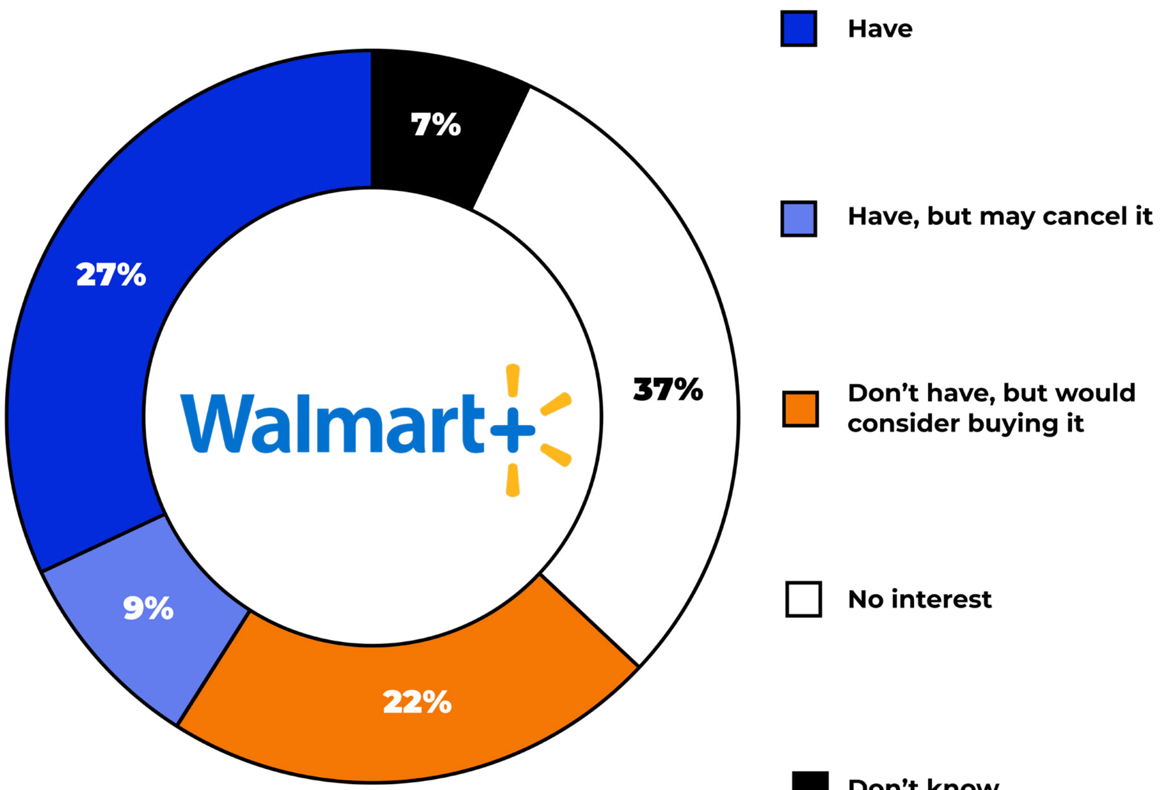


★ INSIGHTS

83% of consumers say their Walmart in-store spending and 87% said their Walmart.com spending **will remain under $500** in Q3.

Walmart+

Walmart+ membership & interest:



INSIGHTS

- 36% of consumers are currently Walmart+ members (down slightly from 41% in Q1). However, more consumers would consider getting an account.
- A third of consumers have shopped on Walmart's Deals for Days in the past.

Chapter 4

Emerging Technology & Social Media

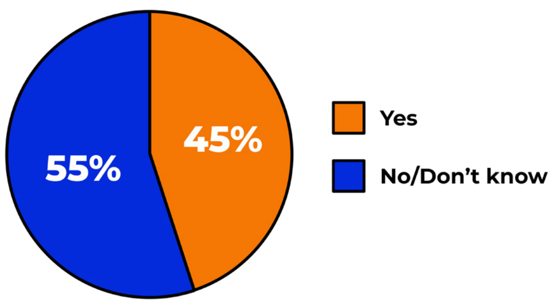
Consumers are changing their approach to how they make purchases in 2021. We investigate what motivates consumers to purchase and how some brands are revolutionizing the way consumers shop.

In this chapter, we gauge consumer reactions to brand activism (which is defined as when brands or business plays a leading role in the processes of social change), as well as dive into some evolving and innovative trends in social media (e.g., influencer marketing in fashion and beauty) and emerging financial technologies.

Fintech & Ecommerce Tech Trends

With the rise and constant innovations in digital technology, financial services are more accessible to consumers than ever before. Whether it's contactless apps to make purchases or apps to help with budgeting, consumers are taking full advantage of greater flexibility surrounding managing their money and conducting transactions. Discover how consumers use financial technology "fintech" to automate transactions and deliver services.

Do consumers use financial, banking, or budgeting apps?

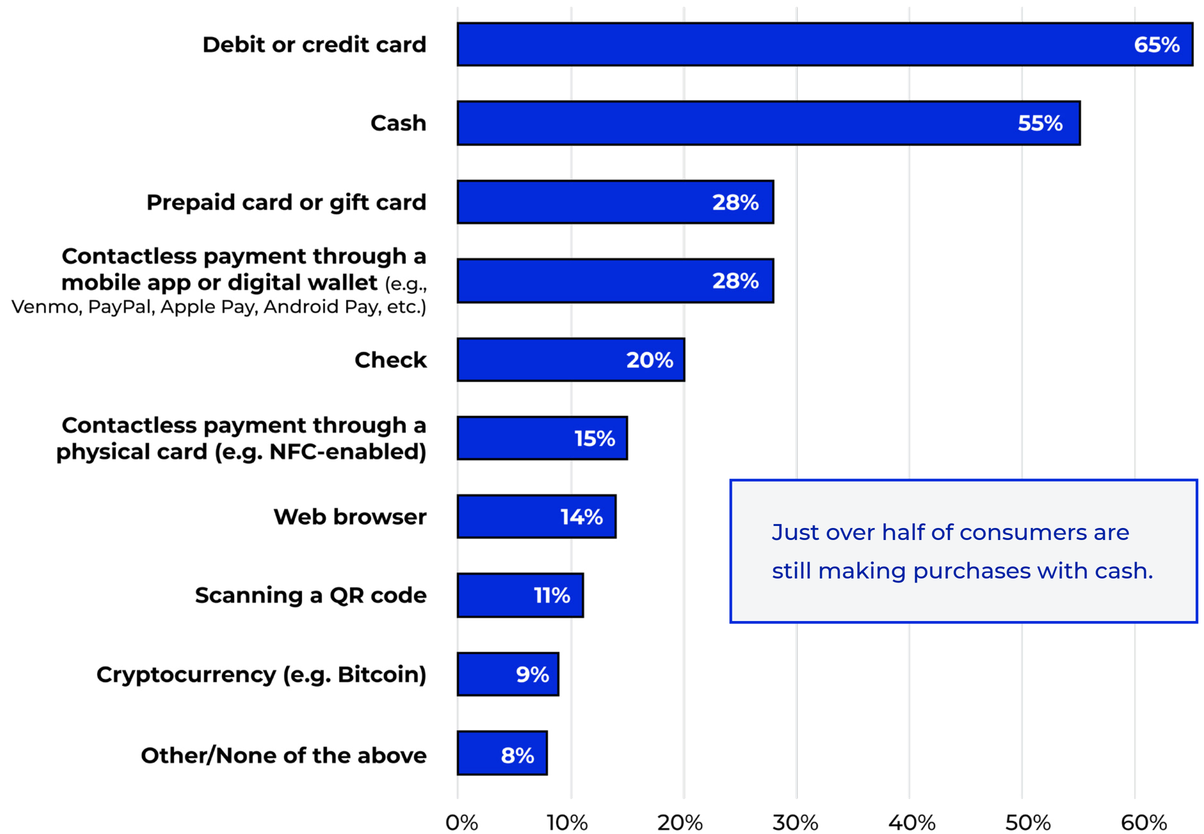


Types of apps used:

1. Banking apps - **73%**
2. Credit history or credit score montitoring - **44%**
3. Investing - **26%**
4. Budgeting or financial management - **26%**
5. Tax - **20%**
6. Specific financial education or support - **17%**
7. Other - **1%**

Among those who use fintech apps. Respondents could select multiple answer options.

How are consumers making purchases?



Respondents could select multiple answer options. Responses will not equal 100%.

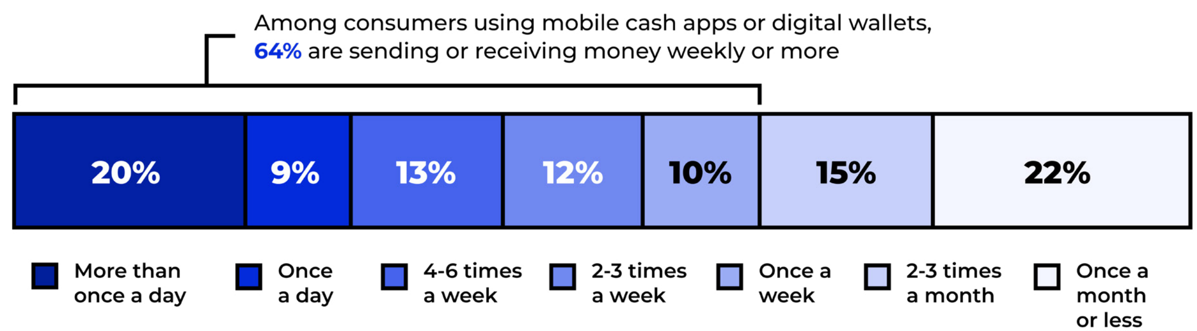
Types of contactless payments:

PayPal	67%
Cash App	41%
Venmo	33%
Apple Pay	31%
Google Pay	26%
Android Pay	23%
Zelle	16%
Circle Pay	11%
LevelUP	10%
Samsung Pay	9%
Visa Checkout Pricing	9%
Square Cash	8%
Quickbooks Go Payments	6%
Veem	6%
Xoom	6%
Other	3%

Other responses include Robinhood and Facebook Pay. Respondents could select multiple answer options.

Among consumers who use contactless payments, **67%** have used PayPal – that's over twice as much as some of the other apps like Venmo or Apple Pay.

How frequently consumers send or receive money through a mobile app or digital wallet:



Top reasons consumers use a mobile app or digital wallet:

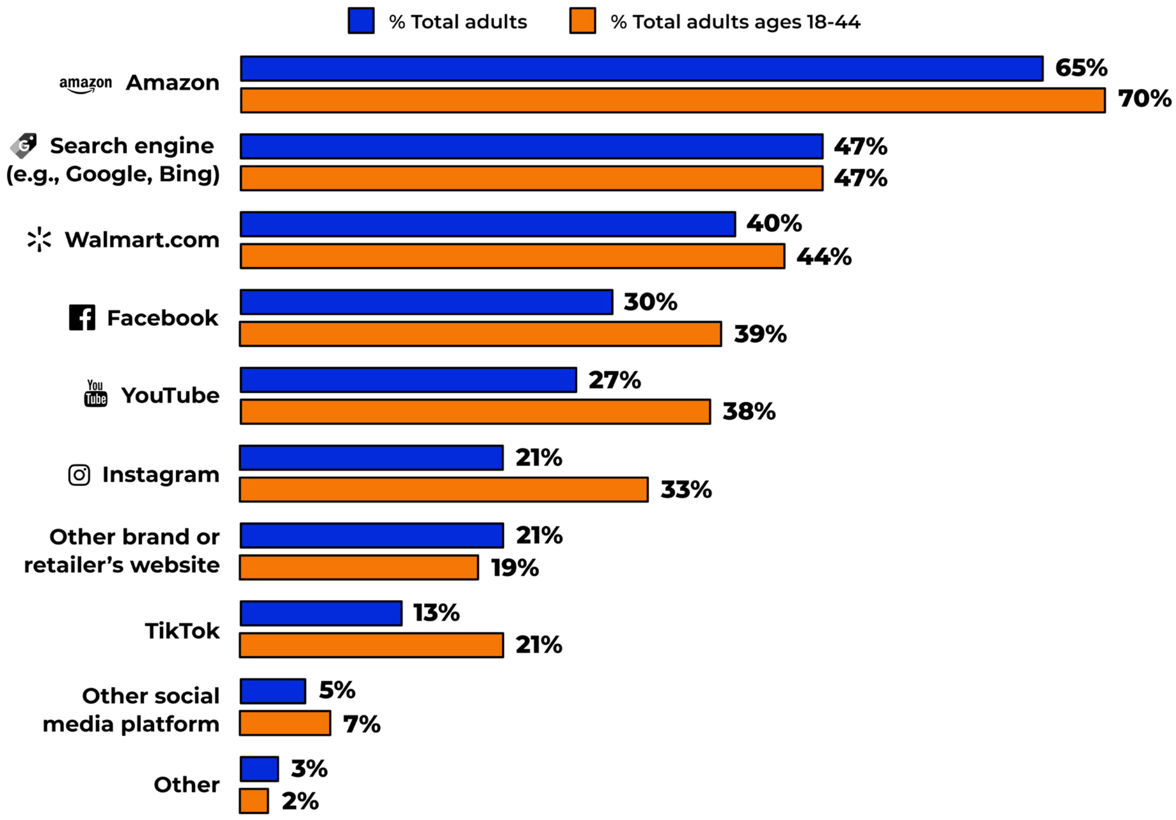
1. More convenient than using cash
2. To pay people I know
3. Safer than using cash
4. Pay people I don't know
5. All my friends/family use mobile apps or digital wallets
6. Never have cash/dislike carrying cash
7. Use to provide tips for service/entertainment industry workers

60% of consumers say they use mobile apps or digital wallets to send or receive money because it is more convenient than using cash.

Social Media & Influencers

Due to the rise of online shopping, social media influencers can have a direct and immediate impact on consumer buying decisions (especially among younger adults). This terminology has become widely utilized to describe someone who has influence over others' buying decisions and is typically associated with social media marketing.

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



Respondents could select multiple answers.

★ INSIGHTS

- 65% of consumers begin their search for a product online on Amazon — that's 18 points higher than the amount of consumers who use a traditional search engine like Google or Bing.
- 40% of consumers begin their online search for products on a social media site, and the majority are using Facebook.

Category Snapshot: Fashion and Beauty

This section delves into the fashion and beauty categories, and particularly the influencers and platforms that are leading consumers to purchase these products.

Top online fashion retailers:

Amazon Fashion	26%	Bonobos	7%
Walmart	26%	Boohoo	6%
AliExpress	16%	Express	6%
American Eagle & Aerie	14%	Shein	5%
Target	14%	Depop	4%
Nike	13%	Eloquii	4%
Etsy	10%	Poshmark	3%
Forever 21	10%	Zara	3%
ASOS	9%	Zappos	3%
H&M	9%	Free People	3%

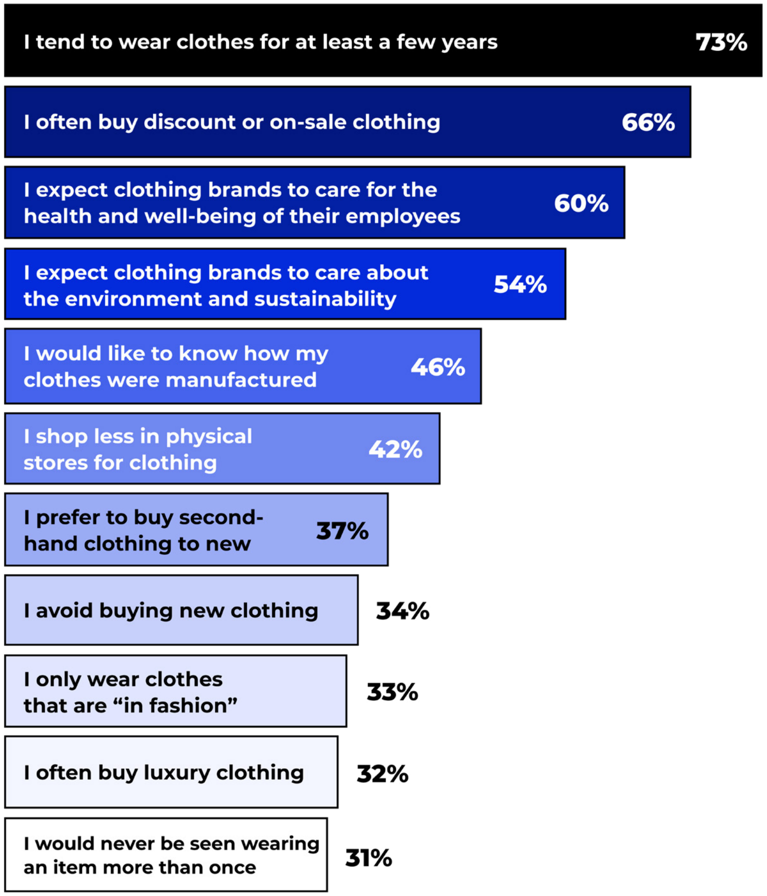
Other online retailers <3%.

Amazon Fashion and Walmart lead among online clothing retailers with more than 1 in 4 consumers stating that they purchased clothing from these retailers in Q2.

35% of consumers say they have unintentionally or intentionally purchased a fake or counterfeit product online.

> *"It was cheaper and I didn't realize [the products] were fake until I got them."*
>
> *"It looked authentic but I found out later it was a fake."*
>
> *"[The products are] cheaper and look the same. I don't care that they're fake as I'm not in it for the name brand."*

When shopping for clothing online, consumer attitudes indicate a desire to save and be socially responsible.

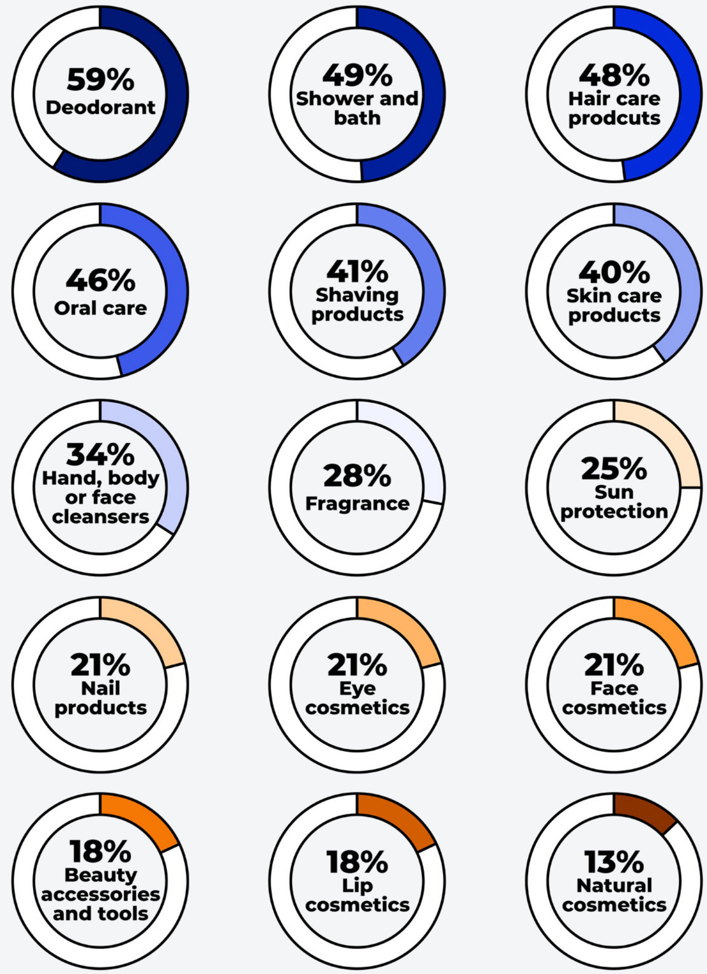


% strongly / somewhat agree with statement

49% of consumers would describe themselves as "brand loyal" (down 15 points from Q2).

27% of consumers are spending more time on their self-care or beauty routines in 2021, and 32% have discovered or adopted a new self-care or beauty routine over the last 12 months.

Beauty or self-care products purchased in the past 12 months:



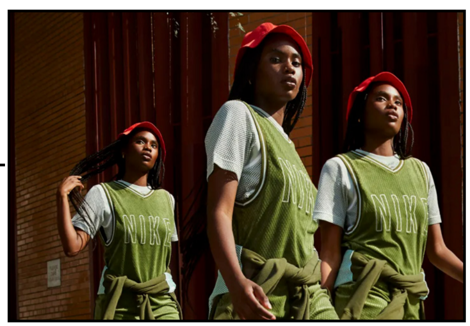
Fashion and Beauty Influencers

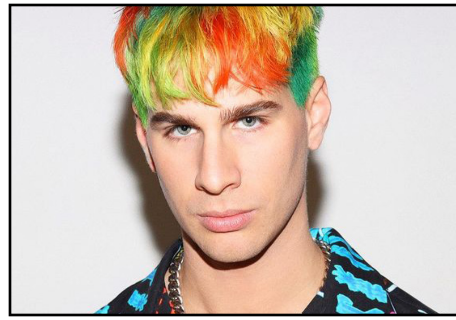
27% of consumers are currently following fashion or beauty influencers on social media.

Some of the top influencers they are following:

Fashion influencers

- Ashley Graham
- Bella and Gigi Hadid
- Emma Chamberlain
- Gucci
- Jennifer Lopez
- Justin Bieber
- Kanye West
- Kevin Hart
- Lauren Conrad
- Nike
- Kendall Jenner
- Kim Kardashian
- Kylie Jenner
- Versace





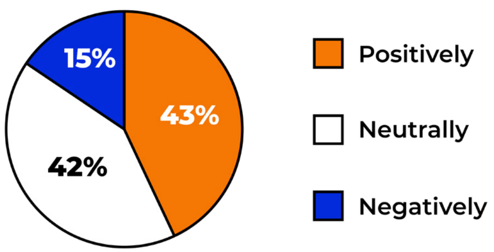
Beauty influencers

- Brad Mondo
- Bailey Sarian
- Beyoncé
- Carli Bybel
- Hyram Yarbro
- James Charles
- Jaclyn Hill
- Jeffree Star
- Kathleen Lights
- Kendall Jenner
- Kim Kardashian
- Kylie Jenner
- Rihanna
- Selena Gomez

Brand Activism in 2021: Top Reasons Consumers Buy

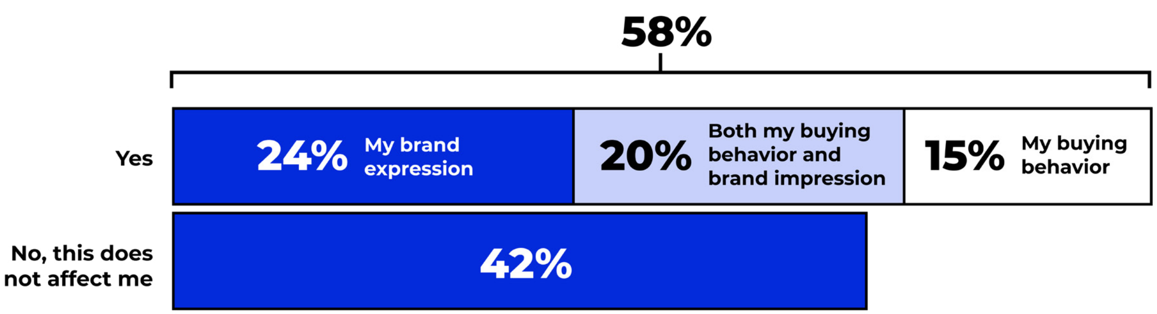
In today's political and social climate, consumers may feel that brands — some with massive followings, sophisticated communications strategies, and deep pockets — have a uniquely powerful influence on their audiences, which could lead them to drive change. Over the past year, some brands have made efforts to address social issues like racial equality, climate change, and gender-neutrality, among many others. The data below describes consumer reactions to brand activism.

How do consumers view social activism?



43% of consumers view brands more positively when they take a leading or active role in enacting social change; however, **15%** of consumers view brand activism negatively.

Brand activism impact on consumer purchasing behavior or brand impression:



58% of consumers say a brand's social activism impacts their impression of a brand — including whether they choose to buy from that brand.

Most influential brand activism attributes:

1. The company treats its employees well - **63%**
2. The company is transparent about its policies (e.g., where it sources materials, employee stats, etc.) - **60%**
3. The brand is local or locally sourced - **56%**
4. The brand is environmentally or eco-friendly - **56%**
5. The brand supports and acts upon causes we have in common - **53%**
6. The brand connects me to others like me and gives me a sense of community - **49%**
7. The brand takes a political stance on issues close to me - **45%**

Consumers have a variety of preferences when it comes to selecting certain brands. The data below describes the overall reasons consumers would buy from a specific brand.

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 Q2.

Chapter 5

About the Report

Methodology

Between August 6-9, 2021, Jungle Scout conducted an anonymous survey among a panel of 1,100 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, which have collected data on a quarterly basis starting in June 2020.

Q2 refers to the months of April through June 2021. Q3 refers to the months of July through September 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	48%
Female	52%
Other/prefer not to say	1%

Age

18-24	11%
25-34	22%
35-44	22%
45-54	12%
55-64	12%
65-74	15%
75+	8%

Household income

Less than $25,000	29%
$25,000 to $34,999	16%
$35,000 to $49,999	15%
$50,000 to $74,999	15%
$75,000 to $99,999	10%
$100,000 to $124,999	7%
$125,000 to $149,999	6%
$150,000 or more	5%

Region

West	17%
Midwest	22%
Northeast	18%
South	44%

Parent or guardian

Yes	39%
No	62%

Relationship status

Single or unmarried and not living with a partner	44%
Married	40%
In a relationship (Unmarried) and living with a partner	16%

Employment status

Employed (NET)	**47%**
Employed (full-time OR part-time) and leaving my home for work	38%
Employed (full-time OR part-time) and currently working at home	10%

Not working (NET)	**49%**
Unemployed (lost work due to COVID-19 and its effects)	6%
Unemployed (NOT related to COVID-19)	7%
Furloughed (due to COVID-19 and its effects)	<1%
Student (full-time OR part-time)	3%
Homemaker	8%
Retired	22%
Disabled/unable to work	6%
Other	1%