

Jungle Scout

Consumer Trends Report | Q4 2020



Introduction & Key Takeaways

Jungle Scout's 2020 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.

This report focuses on third-quarter behaviors and fourth-quarter projections for 2020. It explores how both political events (including the U.S. Presidential election) and the holiday season will affect consumer spending and the overall economic outlook for 2020 and beyond.

1 Half of consumers have reduced their overall spending.

- a. From July-September 2020, consumers say their overall spending largely decreased.
 - i. 46% of consumers say spending decreased
 - ii. 32% of consumers say spending stayed the same
 - iii. 22% of consumers say spending increased
- b. These trends are mostly consistent with spending trends since the start of the COVID-19 pandemic. However, while no more consumers have *increased* their spending, more have maintained it from July-September than have continued reducing it, suggesting a slight stabilization in consumer spending.

2 The critical end-of-year shopping season is more precarious than ever.

- a. It's dependent on U.S. political events.
 - i. Consumers say the outcome of the U.S. Presidential election is causing either a 30% increase OR decrease in holiday spending.
 - ii. 23% of Americans plan to reduce their 2020 holiday spending in the absence of a stimulus check.
- b. 1 in 3 Americans say they will decrease overall spending until the end of the year
- c. 1 in 4 Americans say they will spend less on holiday shopping this year than they spent in 2019.
- d. Holidays will feature "essential" gifts: 21% of consumers will buy essential items (groceries, toiletries, etc.) as gifts this holiday season.

3 Ecommerce is surging during the 2020 COVID-19 pandemic.

- a. 34% of consumers say their online spending increased in Q3 even while overall spending was dropping.
- b. For nearly every category of product, consumers prefer to shop for them online rather than in stores. Only for essential products — groceries, cleaning products, and over-the-counter medicines — do consumers prefer to buy in stores, though more than 1/3 of consumers are still buying these products exclusively online.
- c. 48% of consumers say they would be fine if they never shopped in a physical store again — up from 39% in the first half of 2020.
- d. 74% of consumers believe the majority of consumer shopping will happen online in the future — [up from 69%](#).

4 Amazon is continuing to dominate ecommerce.

- a. 70% of consumers say they shopped on Amazon in Q3 (during the COVID-19 pandemic) — compared to 35% who shopped on Walmart.com and 26% on Target.com.
- b. 58% of consumers say they are shopping *more frequently* on Amazon since the COVID-19 pandemic than they did previously.
- c. 76% of consumers would spend up to \$100 for a product on Amazon.

5 Consumers are more price-conscious than ever.

- a. The #1 reason consumers say they shop for a specific brand is that it has consistently lower prices than its competitors.
- b. When shopping online, 74% of consumers say they are looking for the product with the lowest price.
- c. 23% of consumers say they would leave a product review online after receiving a product and determining it was more expensive than it was worth.

**"Third-quarter" or "Q3" data references questions about consumer behaviors between July and September 2020; "fourth-quarter" or "Q4" data references planned consumer behaviors between October and December 2020.

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Chapter 1

Q4 Insights: Politics & the Holiday Season

The fourth quarter of every year brings the excitement and commercial boom of the holiday shopping season. Most brands — especially those that are consumer-facing — see higher sales than normal due to holiday shopping, end-of-year promotions, and a seasonal swell of gift-giving, social events, and more.

But in 2020, as with most trends this year, things are different. The COVID-19 pandemic has changed consumer priorities and spending, shifted shopping behaviors even further toward ecommerce, and even bankrupted some major retailers, extinguishing household name brands forever.

Further, with 2020 being an election year, Americans have political outcomes to consider. Hotly debated issues and projections of how various candidates will govern in the years to come are significantly impacting consumers' spending plans.

How U.S. Politics Affect Consumer Spending

When asked in early October, 2020 (about a month before the U.S. Presidential election took place), U.S. consumers said they would significantly modify their holiday spending depending on the outcome of various political events.

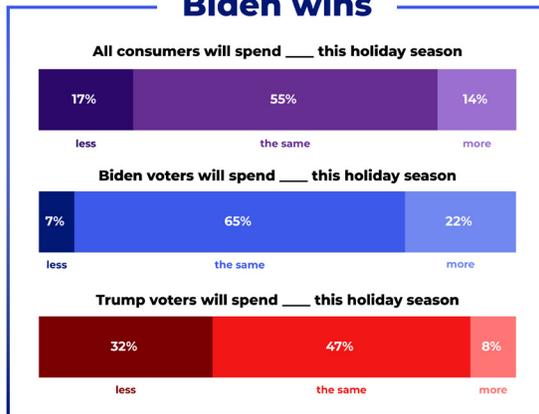
The outcome of the U.S. Presidential election is causing either a 30% increase OR decrease in voters' holiday spending.

How would consumer spending change if Joe Biden were to win the election?

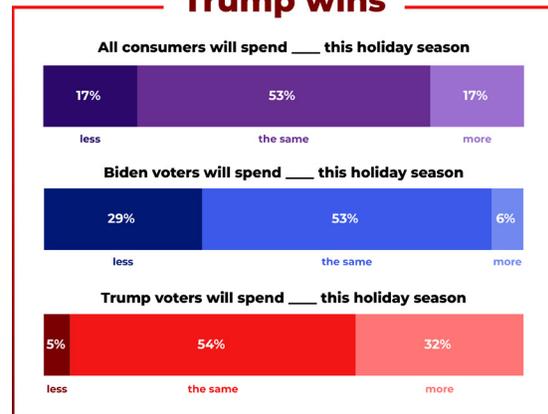
How would consumer spending change if Donald Trump were to win the election?



Biden wins



Trump wins



Further, both Biden and Trump voters' holiday spending was more likely to change with a Trump presidential victory than with any other political outcome, including a Democratic Senate takeover and a new Supreme Court appointment, and 23% of U.S. consumers would reduce their 2020 holiday spending if no new stimulus package were passed.



23% ↓

of U.S. consumers would reduce their 2020 holiday spending if no new stimulus package were passed

01. Q4 INSIGHTS: POLITICS & THE HOLIDAY SEASON

Shopping preferences and behaviors* also vary between voter segments:

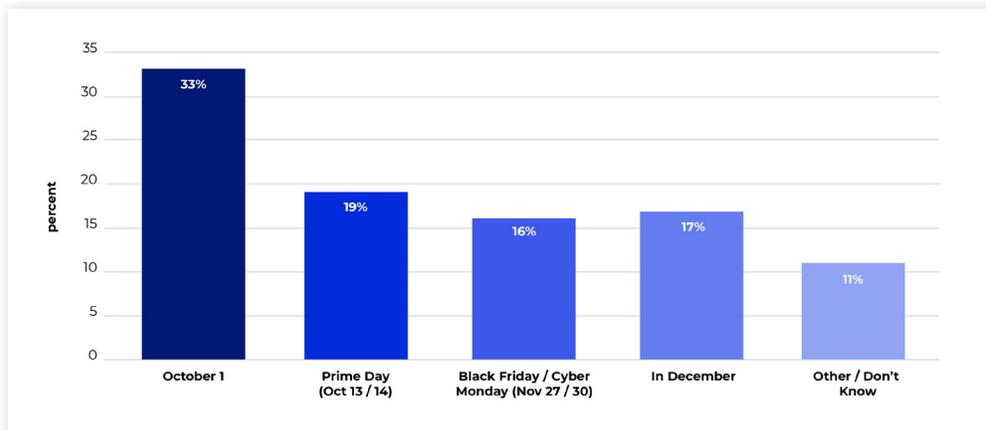
- **What they shop for:** Biden voters have bought more Cleaning Supplies, more Beauty & Personal Care products, and more Arts & Crafts products while Trump voters have bought more Toys & Games and Garden & Outdoor products.
- **Where they shop:** Biden voters are more likely to have shopped on Amazon, at Target (in-store and online), Etsy.com, and Macy's (in-store and online) while Trump voters are more likely to have shopped on ebay.com, Houzz, and on social media platforms (such as Facebook and Instagram). Trump voters are more likely to have shopped at Walmart in-store, and Biden voters are more likely to have shopped at Walmart.com.
- **Who shops online more:** More Biden voters (61%) shop online weekly than Trump voters (56%), and more Biden voters (18%) shop online daily than Trump voters (13%).

*From July-September 2020

See more about how politics affect consumer spending and behavior in our [special report](#).

2020 Holiday Season

When does the holiday shopping season begin?

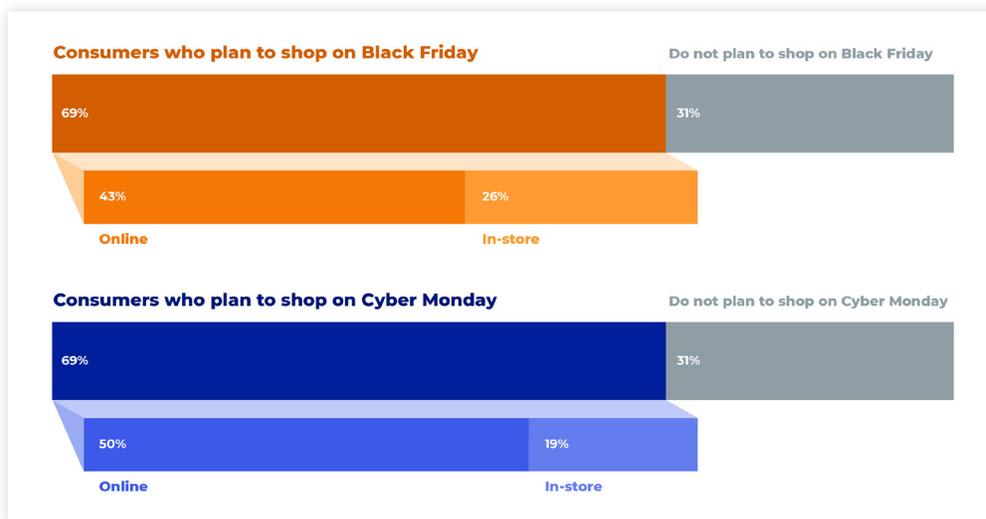


1/3

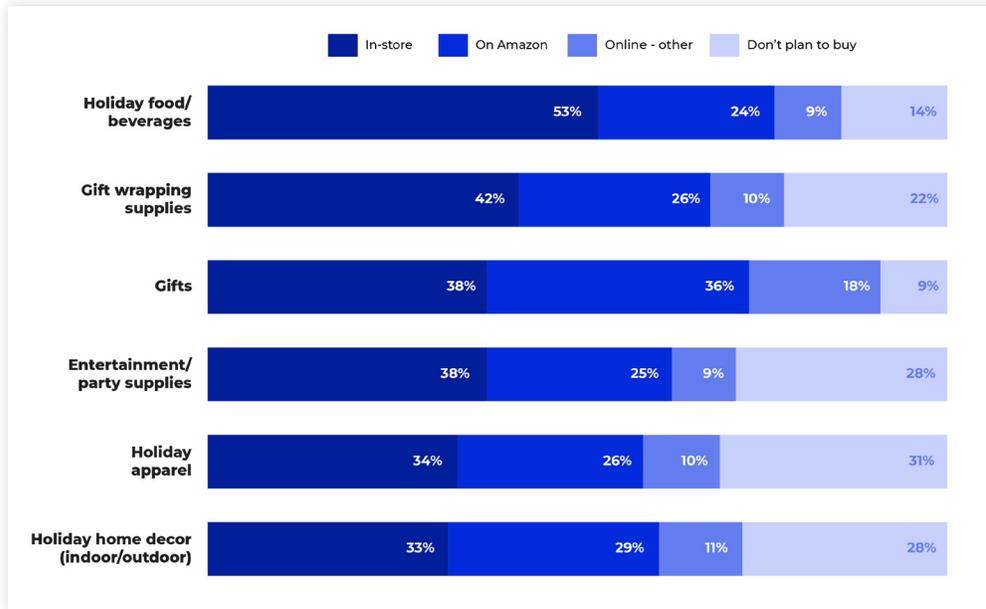
of consumers had already started their holiday shopping by October 1.

Black Friday & Cyber Monday

The same amount of consumers plan to shop on Black Friday as Cyber Monday, but Black Friday will draw more shoppers to stores.



Where will consumers shop for different holiday items?



Who will people give gifts to this holiday season?

Who people will give gifts to	Percent
Child/children	44%
Partner/spouse	42%
Parents	36%
Friends	30%
Siblings	28%
“Myself”	26%
Pets	23%
Extended family	21%
In-laws	12%
Grandparents	9%
Neighbors	8%
Coworkers	8%
Essential workers	5%
Other (Grandchildren, roommates, nieces / nephews)	3%



34%

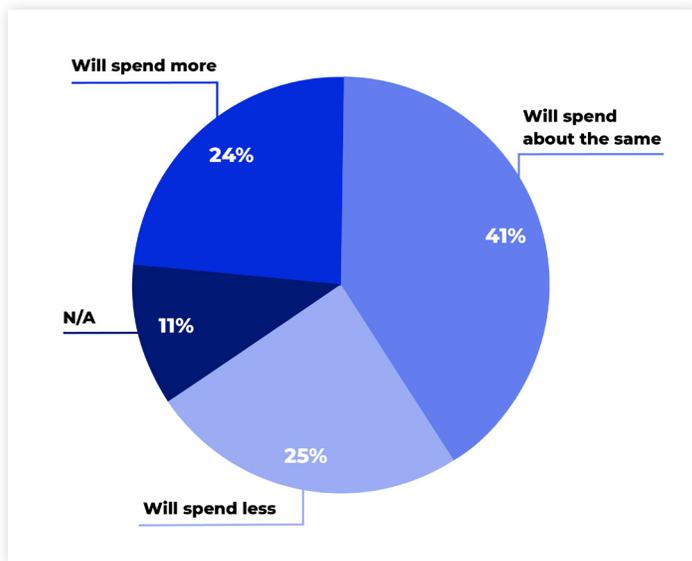
of consumers shop for deals when buying holiday gifts for others, while 14% are willing to pay full-price for luxury gift items.

21%

of consumers will buy essential items (groceries, toiletries, etc.) as gifts this holiday season.

Holiday Spending

Are consumers spending more or less on holiday shopping than in 2019?



1 in 4

Americans say they will spend less on holiday shopping this year than they spent in 2019.



“Happy Holidays to Me!”

More than 1/4

of consumers plan to shop for themselves this holiday season!

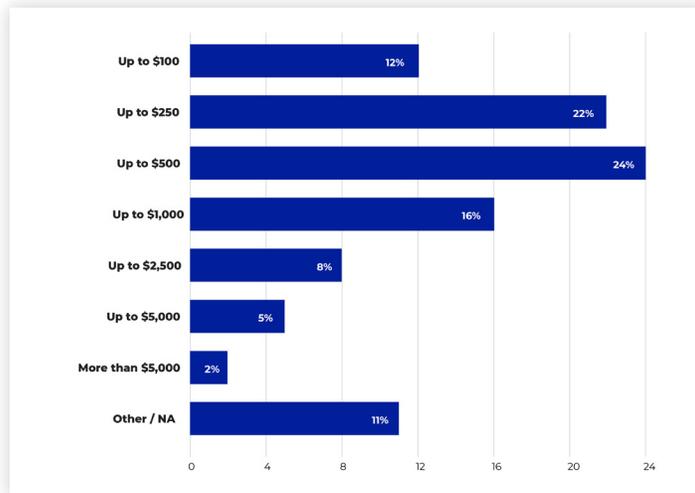
In fact, more people will give gifts to themselves than to their in-laws, grandparents, neighbors, coworkers, and essential workers.



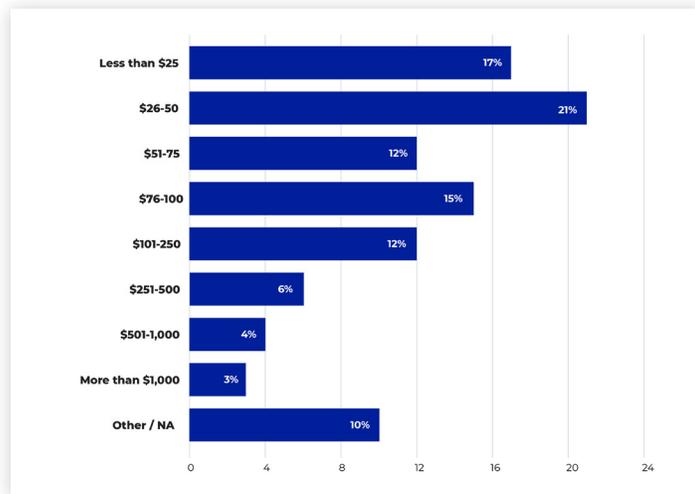
1 in 5

people have already made their “wish list” of gifts they want to receive from others this holiday season.

How much will consumers spend on holiday shopping?



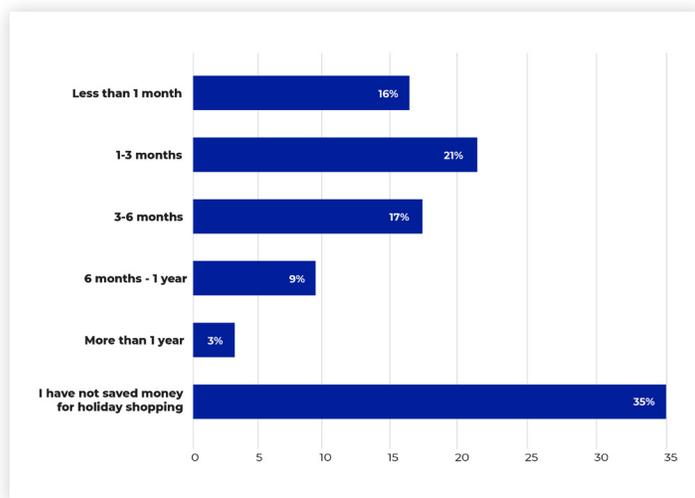
What's the highest amount consumers will spend on a single gift?



How long do consumers save for holiday expenses?



35%
of shoppers have not saved for the 2020 holiday season.



*By October 1-2, 2020

Chapter 2

Trending Spending: Consumer Pulse Report

Where, how, and what consumers are buying has shifted over time, and shifted quickly throughout 2020. We explore what areas of their lives consumers are prioritizing right now, how they are adjusting their spending, and the products and stores that are earning their business.

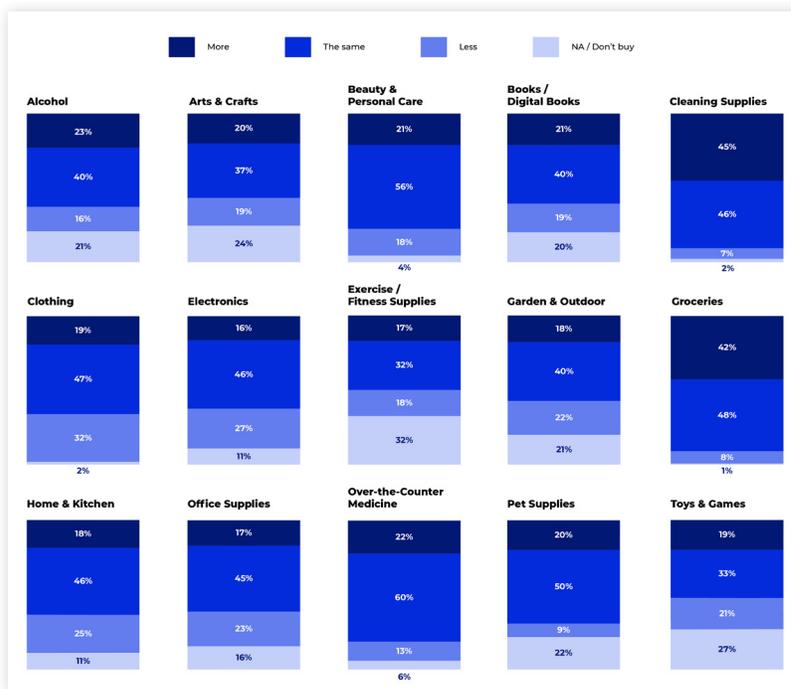
First, what do consumers care about right now?

Priority	Consumers focusing on this
My family	65%
My physical health and well-being	49%
My mental health and well-being	46%
My pets	37%
My friends	33%
My hobbies and interests	33%
Spending time outside	29%
My love life	28%
My career	20%
Travel	14%
My education	12%
Civic engagement (i.e. political, environmental, cultural causes)	11%

*Consumers answered which have been priority focus areas for them during the July-September 2020 period.

Popular Products: What Consumers Are Buying

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



While many consumers are still focused on essential products, 62% said they have recently purchased a product related to a hobby.

★ INSIGHTS

What are consumers buying more of than before? More than 40% of consumers are saying they are buying more groceries and cleaning supplies, which many would consider “essential” items in the time of the COVID-19 pandemic.

What are consumers buying less of, overall? More than 1 in 4 consumers say their clothing, electronics, and home and kitchen purchases are down.

Which product categories rose the most during Q3 compared to earlier in 2020?

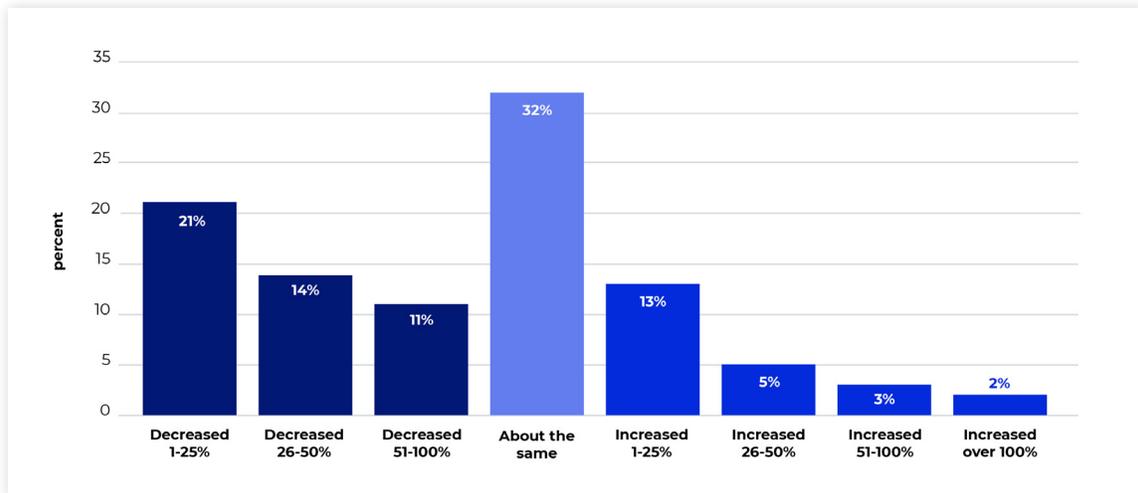
- Beauty & Personal Care
- Clothing
- Exercise Equipment
- Pet Supplies
- Toys & Games
- Alcohol

Consumers Spending & Projections

The data in this section reflects consumer spending within Q3 as well as projections for Q4 2020.

See consumer spending data for the first half of 2020 [here](#).

Has overall consumer spending changed in the past three months?



★ INSIGHTS

In Q3, consumers say their overall spending largely decreased.

- **46% of consumers say spending decreased**
- 32% of consumers say spending stayed the same
- 22% of consumers say spending increased

These trends are mostly consistent with spending trends since the start of the COVID-19 pandemic. However, while no more consumers have *increased* their spending, more have *maintained* it from July-September than have continued reducing it, suggesting a slight stabilization in consumer spending.

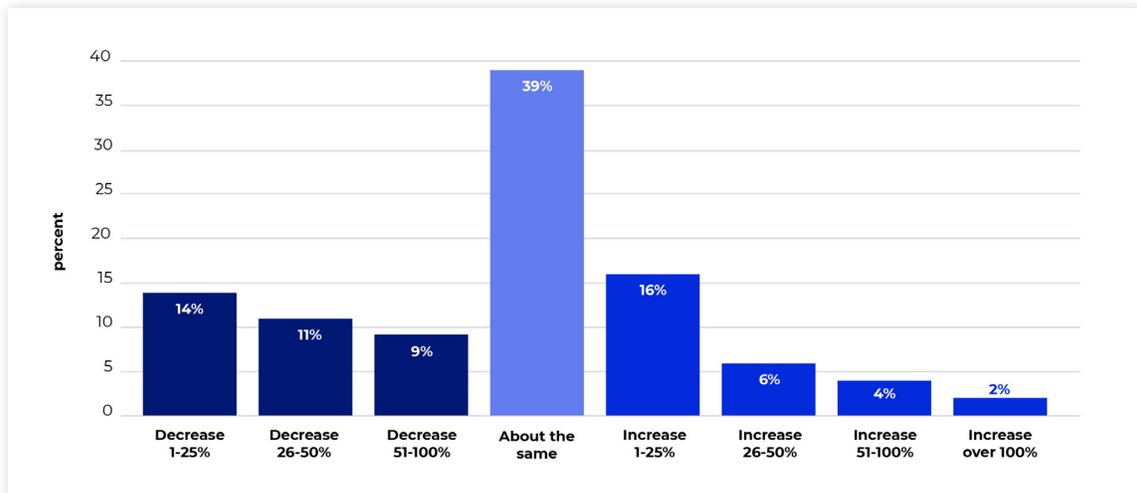


61%

of consumers are worried about their current financial situation.

*up from 56%

Will overall consumer spending change in Q4 2020?



★ INSIGHTS

When asked about their anticipated spending behaviors during the last three months of 2020 (during the typically busy holiday shopping season), most consumers said they expect their spending to stay the same or increase, but 1/3 still plan to reduce spending.

- 33% of consumers say spending will decrease
- 39% of consumers say spending will stay the same
- 27% of consumers say spending will increase



66%

of consumers plan to reduce spending on non-essential items in the future.

*up from 61%

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

Consumers shared which of the biggest retail stores they shopped at (in store or online) during Q3.

1	 Amazon.com	70%	14	 HomeDepot.com	6%
2	 Walmart	53%	15	 Best Buy	6%
3	 Walmart.com	35%	16	 Wayfair.com	5%
4	 Target	26%	17	 Lowe's.com	5%
5	 eBay.com	19%	18	 Macy's	4%
6	 Target.com	16%	19	 Costco.com	4%
7	 Home Depot	14%	20	 Wish.com	4%
8	 Lowe's	12%	21	 Facebook Shops	4%
9	 Costco	9%	22	 SamsClub.com	3%
10	 Sam's Club	8%	23	 Google Shopping	3%
11	 BestBuy.com	8%	24	 Instagram Shop	2%
12	 Etsy.com	7%	25	 Houzz	1%
13	 Macys.com	6%			

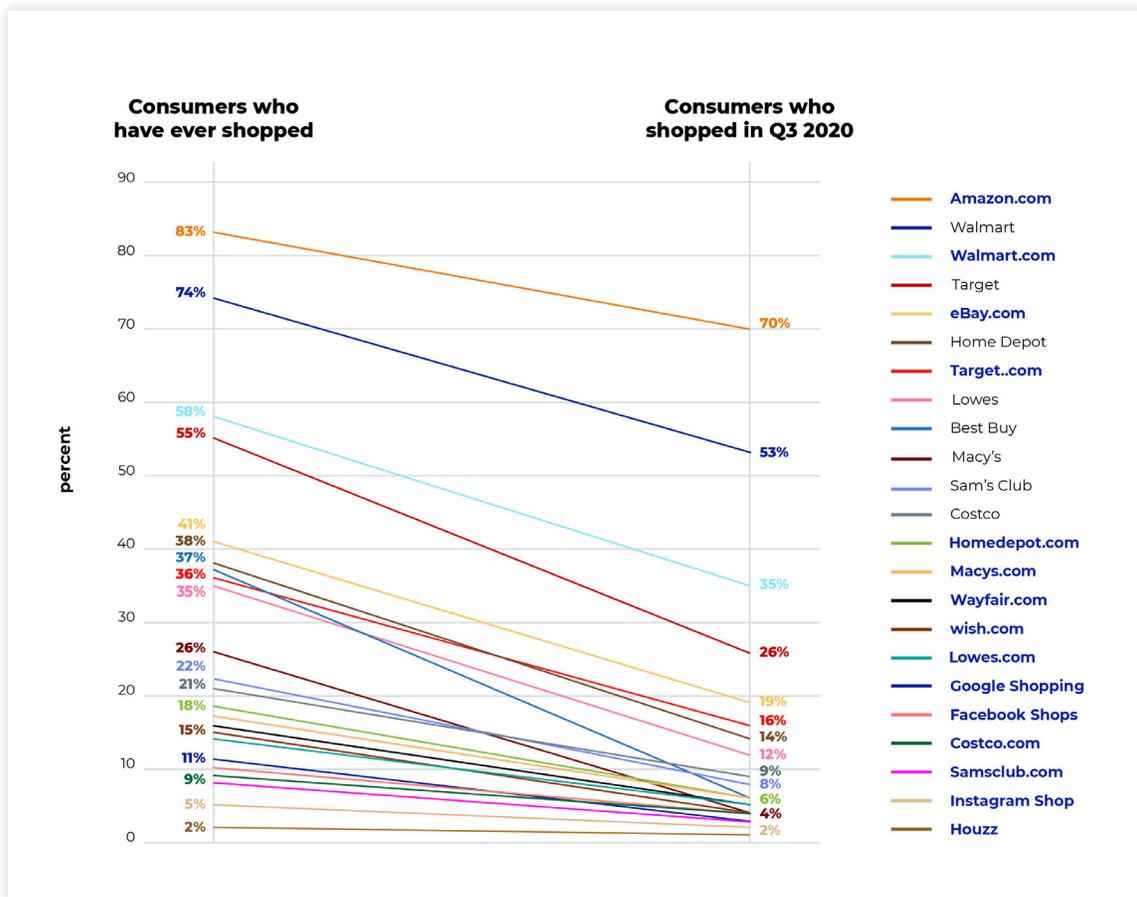
★ INSIGHTS

Just 1% of consumers have shopped at specialty independent, local, or boutique stores in recent months.

Top Shops: Which Stores Are Gaining or Losing Consumer Favor?

Consumer behavior and spending have changed for every retailer in 2020 — though some have experienced much more abrupt changes than others. The following data lists the stores in which consumers have ever shopped compared to those they shopped at within Q3, ranking by the greatest difference.

In other words — which stores or sites have consumers dropped?



★ INSIGHTS

Best Buy and Macy's in-store shoppers have dropped off more than 80%, based on where consumers say they've been spending money during Q3 2020; on the other hand, Amazon and Walmart (both online and in-store) have the most consistent consumer shopping in recent months.

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



★ INSIGHTS

Consumers plan to buy most types of products online rather than in store.

For every type of product, consumers who plan to buy the product online prefer to buy it on Amazon than another online store.

The types of products consumers prefer to shop online for are: arts & crafts, books/digital books, clothing, electronics, exercise/fitness equipment, garden/outdoor products, home & kitchen items, offices supplies, pet supplies, and toys & games. Of these, consumers go first to Amazon than any other store for: books and exercise/fitness equipment.

The types of products consumers prefer to shop in-store for (more so than on any website, including Amazon) are frequently available at most grocery stores: alcohol, beauty and personal care, cleaning supplies, groceries, and over-the-counter medicine.

Chapter 3

Ecommerce Report

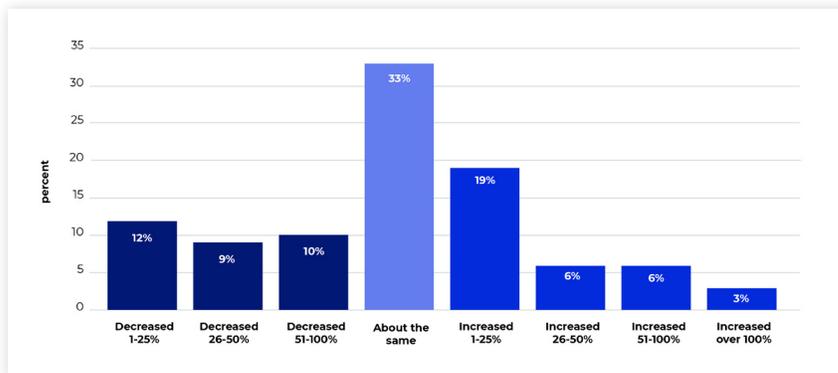
Whether due to American consumers continuing to quarantine in their homes during the 2020 COVID-19 pandemic, the convenience of online shopping, advances in technology or other factors, ecommerce is winning in 2020. We explore the reasons consumers favor ecommerce, online shopping habits, and all things Amazon.

Online Spending

The data in this section reflects **online** consumer spending within Q3 as well as projections for Q4 2020.

See online consumer spending data for the first half of 2020 [here](#).

Has *online* consumer spending changed in the past three months?



Data from Q2 2020

Online spending changes since start of COVID-19



Online predicted spending as stores reopen



*N/A accounts for consumers who do not shop on Amazon or online, respectively

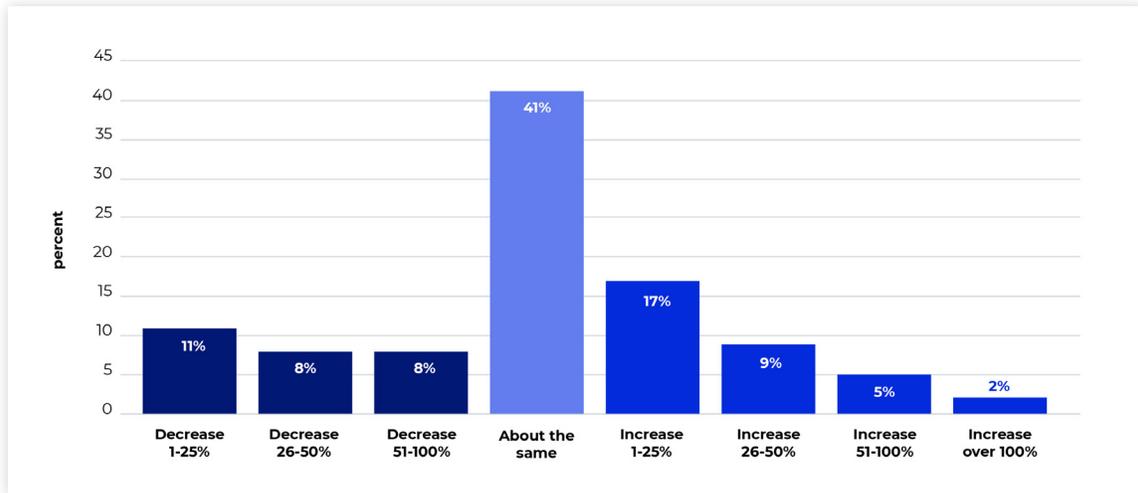
★ INSIGHTS

In Q3, consumers say their online spending increased.

- 31% of consumers say spending has decreased
- 32% of consumers say spending has stayed the same
- **34% of consumers say spending has increased**

While overall spending trends are mostly consistent with spending trends since the start of the COVID-19 pandemic, the amount of consumers who have increased their **online** spending is notably higher than in the first half of 2020. The same amount of consumers say their spending is the same, but previously 46% of consumers had decreased spending and only 22% increased it.

Will *online* consumer spending change in Q4 2020?



★ INSIGHTS

Most consumers said they expect their online spending to stay the same or increase during Q4.

- 27% of consumers say spending will decrease
- 41% of consumers say spending will stay the same
- 32% of consumers say spending will increase

Online Shopping Preferences

Reasons Consumers Prefer to Shop Online — Ranked:

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



52%

of consumers say they often leave items in an online shopping cart and forget about them.

55%

of consumers have recently made an impulse purchase 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:



★ INSIGHTS

Highly rated products are as important as price for most consumers!

Why do consumers leave product reviews online?

1	The product was excellent	53%
2	The product was unsatisfactory for reason other than arriving broken	38%
3	I want to help other buyers understand the product's size or other relevant characteristics	37%
4	I get an incentive for leaving a review	31%
5	The product arrived broken	29%
6	The product was more expensive than I felt it was worth	23%
7	I had ideas about how to improve the product	21%

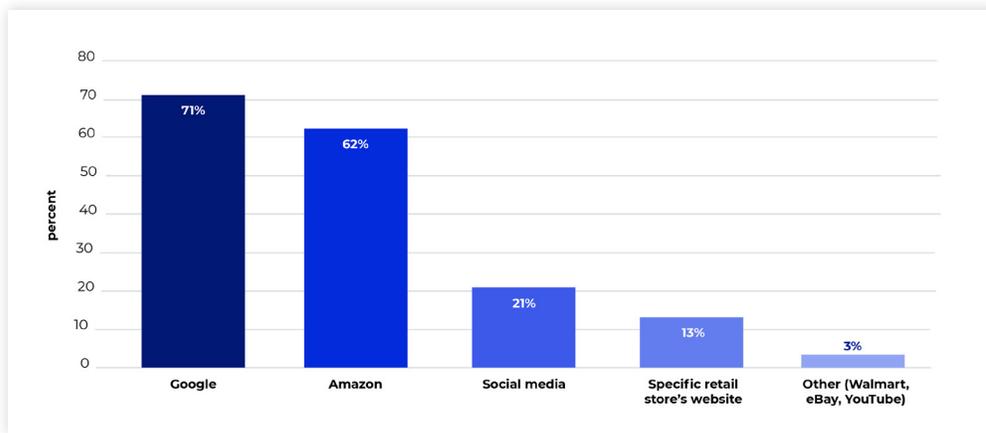
*Respondents could select multiple answers.

★ INSIGHTS

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

13%
of consumers *never* leave a product review.

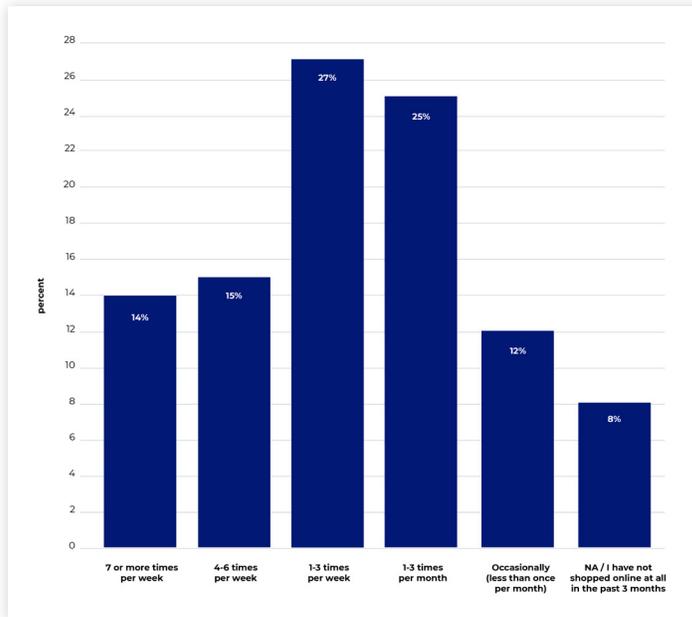
When consumers shop for a product online, where do they start their search?



*Respondents could select multiple answers.

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

How frequently do consumers shop online?



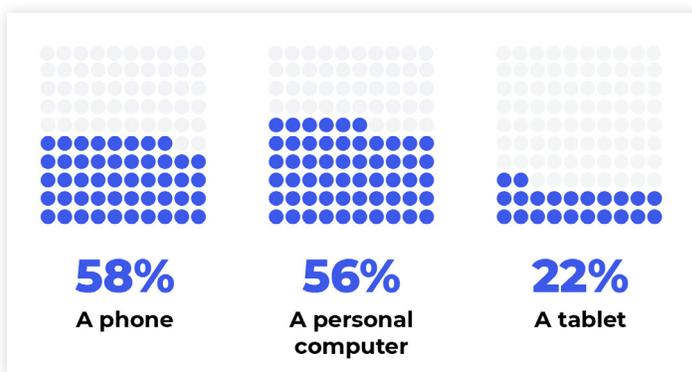
★ INSIGHTS

More than half of consumers (56%) have shopped online at least weekly in the past three months.

74% of consumers believe the majority of consumer shopping will happen online in the future — up from 69%.

48% of consumers say they would be fine if they never shopped in a physical store again — up from 39%.

When shopping online, what device do most consumers use?

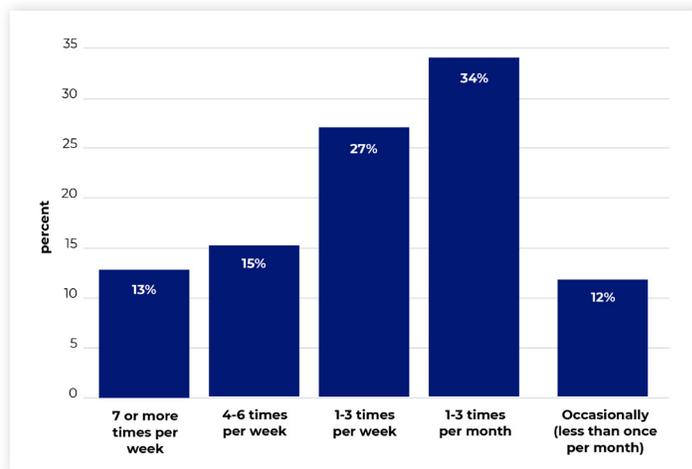


*Respondents could select multiple answers.

57% of consumers have purchased a product online that they first heard about through social media, and 17% of consumers plan to buy holiday gifts based on ideas they get from social media.

Amazon's Prevalence in 2020

Amazon shoppers: How frequently do you make purchases on Amazon.com?



60%

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

★ INSIGHTS

Among consumers who shopped on Amazon in Q3 2020, they are making purchases on Amazon with even higher frequency.

- 88% of Amazon shoppers purchase **monthly** or more
- 55% of Amazon shoppers purchase **weekly** or more
- 13% of Amazon shoppers purchase **daily** or more

Up to 90% of all U.S. consumers have shopped on Amazon at some point, and they are also continuing to make purchases on Amazon with increasing regularity.

- 9% of U.S. consumers shop on Amazon **daily** or more
- 38% of U.S. consumers shop on Amazon **weekly** or more
- 61% of U.S. consumers shop on Amazon **monthly** or more

What is the maximum amount consumers would spend on a product from Amazon?



★ INSIGHTS

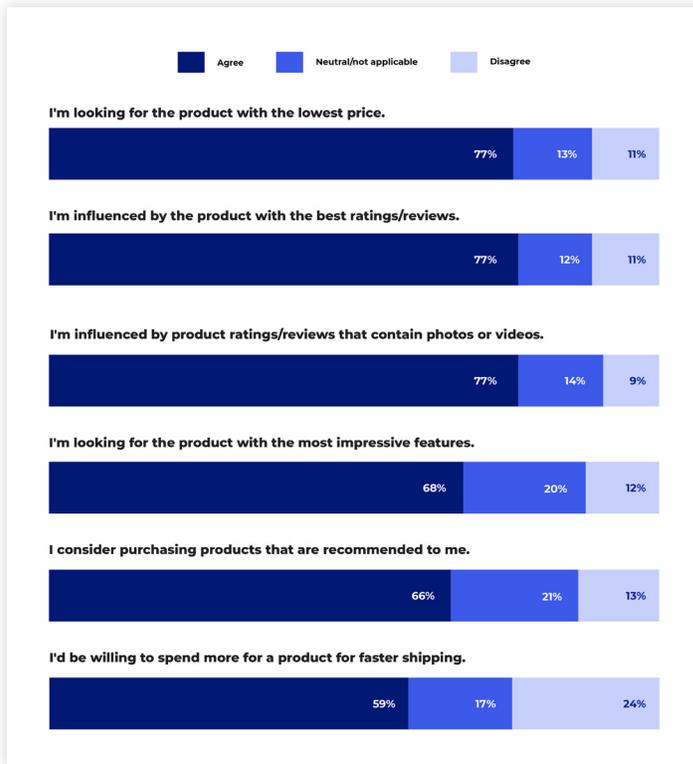
Spending higher amounts of money for a product on Amazon indicates that consumers trust the site for more major purchases. This gives product categories such as furniture, electronics, and higher-end clothing and fashion accessories greater potential for success on Amazon.

76% of consumers would spend up to **\$100** for a product on Amazon

32% of consumers would spend up to **\$500** for a product on Amazon

15% of consumers would spend up to **\$1,000** for a product on Amazon

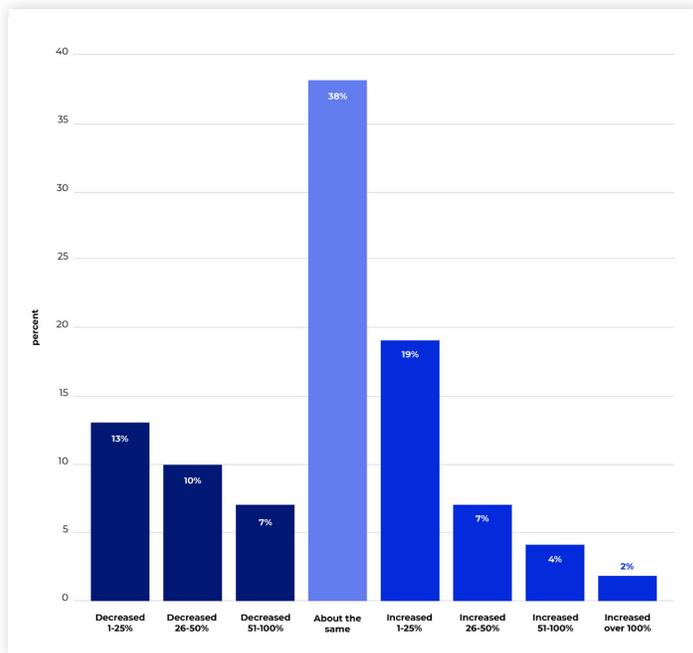
When shopping on Amazon, some benefits are more important than others:



★ INSIGHTS

For each of these preferences, Amazon shoppers have even higher expectations than general online consumers. Amazon shoppers expect the lowest price, the best ratings, and the best features... but they *will* pay more for faster shipping.

Has Amazon consumer spending changed in the past three months?

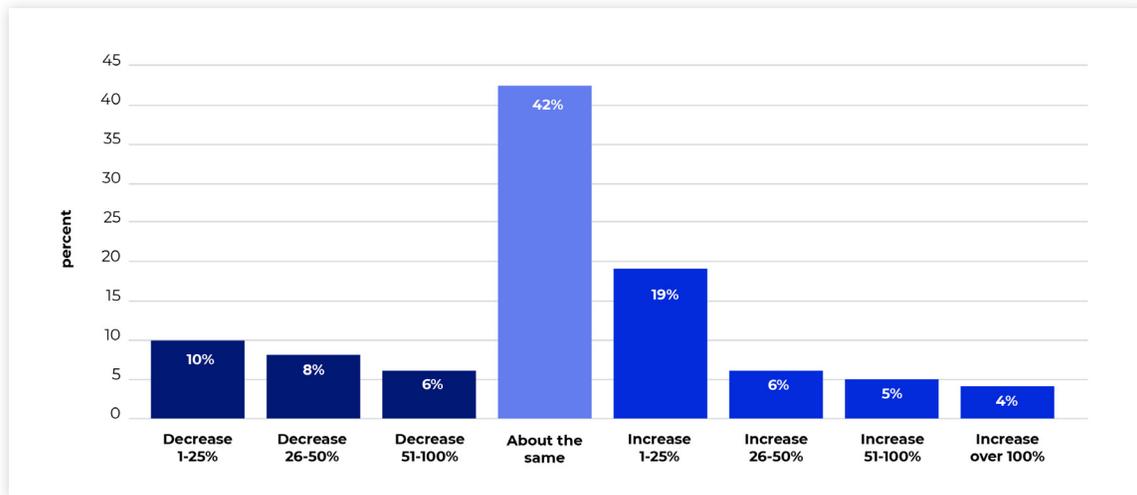


★ INSIGHTS

In Q3, consumers say their Amazon spending stayed the same.

- 30% of consumers say spending has decreased
- **38% of consumers say spending has stayed the same**
- 32% of consumers say spending has increased

Will Amazon consumer spending change in Q4 2020?



★ INSIGHTS

Most consumers said they expect their Amazon spending to stay the same or increase during Q4.

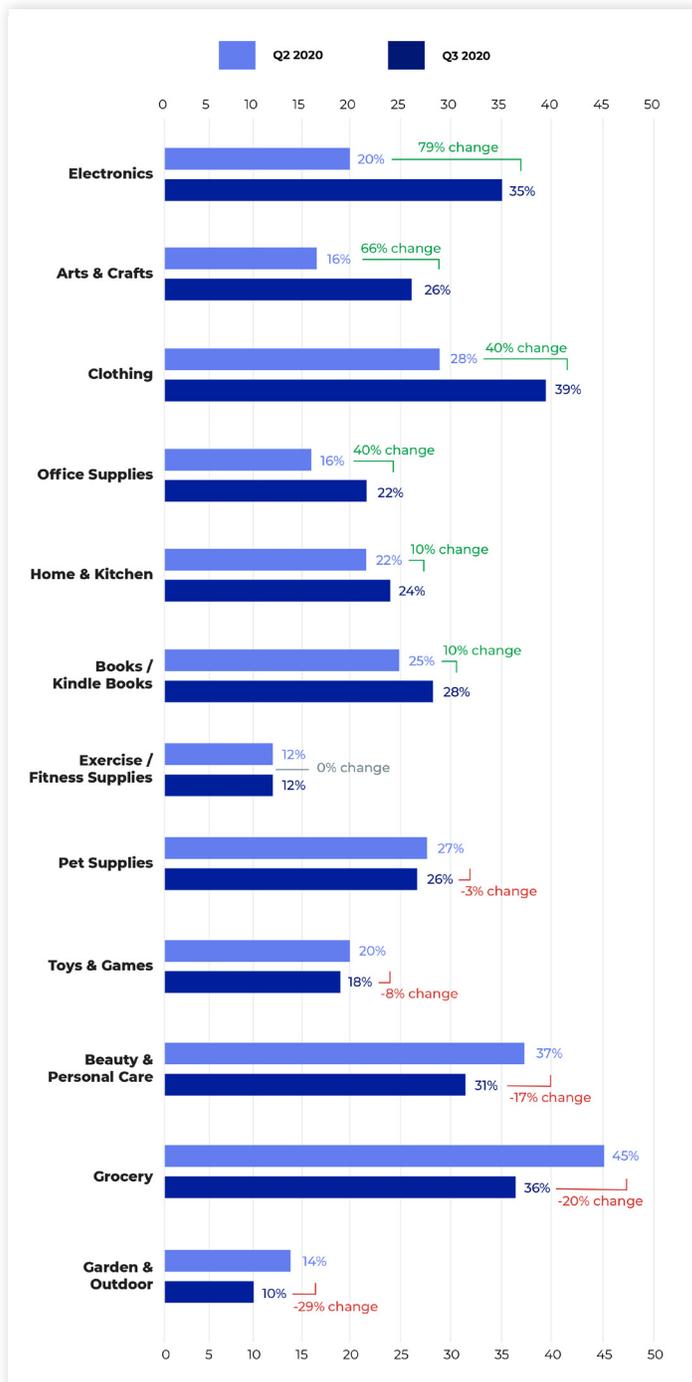
- 24% of consumers say spending will decrease
- 42% of consumers say spending will stay the same
- 34% of consumers say spending will increase

61% of Amazon shoppers like using its subscription feature to make repeat purchases.

Amazon Spending by Category: Quarterly Changes 2020

Amazon spending is rising for some categories more than others.

See how consumers shopped on Amazon in various product categories in Q3 2020 compared to earlier in 2020 shortly after the COVID-19 pandemic began:



Other products Amazon shoppers were purchasing in Q3 include: cleaning supplies (19%), over-the-counter medicine (11%), and alcohol (4%).

★ INSIGHTS

Shopping on Amazon for certain essential categories (grocery, beauty and personal care) has slowed.

Shopping on Amazon for electronics, arts & crafts, clothing, and office supplies have increased, perhaps in time with a new school year (in which many students are learning from home).

*Q2 references general start of COVID-19 pandemic in the U.S., with approximate date range of March-May.

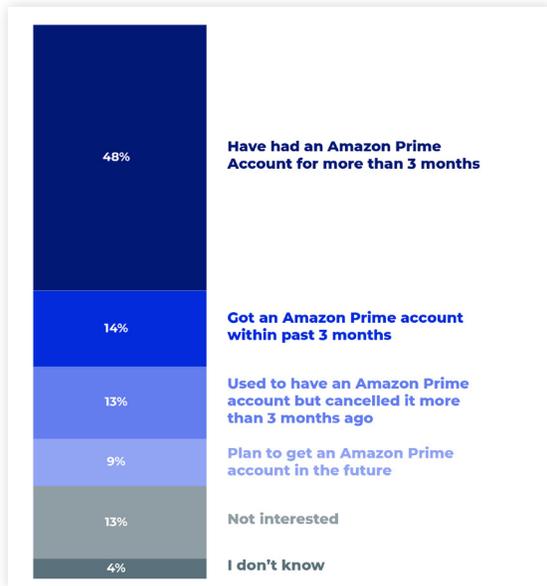
And for those opting *not* to shop on Amazon, their reasons include:

1	I haven't needed anything from Amazon in the past 3 months.	24%
2	I have been trying to spend less money.	21%
3	I prefer shopping in stores for the product(s) I've needed during this time.	15%
4	Amazon's prices are too high for me.	13%
5	I don't have an Amazon Prime account.	13%
6	I don't like Amazon.	12%
7	Amazon did not have the product(s) I was looking for in stock.	11%
8	The quality of products I've bought from Amazon has been poor.	10%
9	I prefer other online shopping options.	9%
10	Amazon does not have the type of product(s) I am looking for.	9%
11	I've been deterred by the duration or uncertainty of shipping times.	9%
12	I can't get the brands I'm looking for on Amazon.com.	8%

★ INSIGHTS

Only 9% of consumers did not purchase products on Amazon due to stock or shipping delay concerns, compared to 24% of consumers in the first half of 2020. This may suggest that delays due to COVID-19 and its effects on the global supply chain and Amazon operations have lessened in recent months.

Amazon Prime membership



Prime Day

43%

of consumers have shopped on Amazon Prime Day in the past.

42%

definitely plan to shop on Amazon Prime Days and another 33% say they consider it.

★ INSIGHTS

61% of consumers are currently Amazon Prime members.

All Prime members plan to keep their Prime accounts for **another 3 months.**

Another 9% of consumers plan to get Amazon Prime accounts in the future.

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

1	The brand has consistently lower prices than its competitors	42%
2	The brand has products of superior quality or performance than its competitors	41%
3	The brand has good customer service	40%
4	I can easily purchase products from the brand online	35%
5	The brand meets my health and safety standards	28%
6	I can easily purchase products from the brand in-store	27%
7	The brand is committed to sustainability	26%
8	The brand represents a lifestyle I identify with	25%
9	The brand represents ethical standards I support	23%
10	The brand has had fewer product recalls than its competitors	23%
11	I like the brand's packaging	21%



20%

of consumers look for specific brands when shopping for gifts for others.

Brand Preferences by Product Category

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

Category	Always	Sometimes	Never	Don't buy	Always + Sometimes
Cleaning Supplies	33%	54%	10%	3%	87%
Groceries	35%	52%	10%	4%	86%
Beauty & Personal Care	37%	49%	9%	6%	86%
Over-the-Counter Medicine	32%	53%	9%	6%	85%
Electronics	33%	51%	9%	7%	84%
Clothing	28%	56%	13%	3%	84%
Home & Kitchen	24%	55%	14%	8%	78%
Pet Supplies	34%	36%	9%	21%	70%
Office Supplies	21%	49%	17%	13%	70%
Alcohol	31%	37%	11%	22%	67%
Toys & Games	21%	42%	15%	23%	62%
Books / Digital Books	22%	39%	21%	19%	61%
Arts & Crafts	18%	41%	18%	22%	60%
Garden & Outdoor	17%	41%	22%	19%	59%
Exercise / Fitness Supplies	20%	35%	15%	30%	55%

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



92%*
Cleaning supplies



91%
Groceries

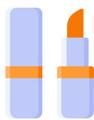


91%
Clothing



57%

of consumers identify as
“brand loyal.”



91%
Beauty &
Personal Care



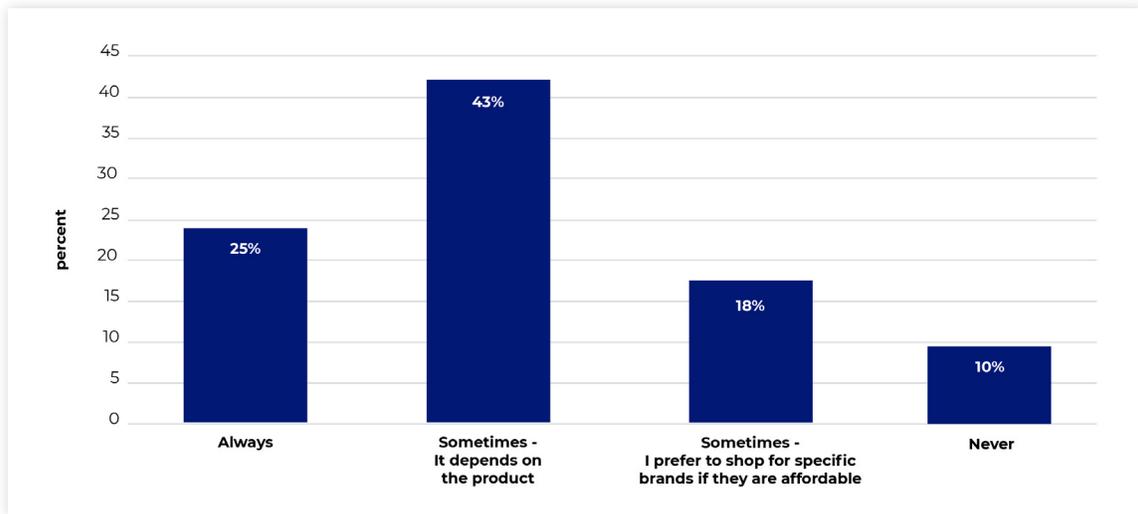
89%
Electronics



88%
Over-the-counter
medicine

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

Among all consumers, when shopping online, they look for certain brands:



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.



72%

of consumers value being able to shop 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.

63%

of consumers have a greater appreciation for Amazon now than they did prior to the COVID-19 pandemic.

Chapter 5

About the Report

Methodology

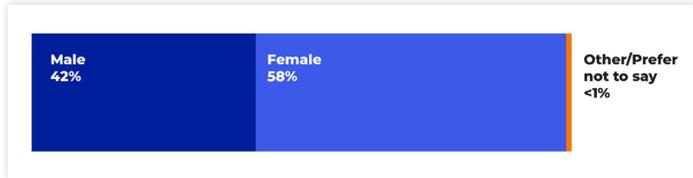
Between October 1-2, 2020, Jungle Scout conducted an anonymous survey among a panel of 1,002 U.S. consumers about their buying preferences and behaviors. Respondents represent every U.S. state, all genders, and ages 18 to 75+, as well as all employment types and varying income levels.

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

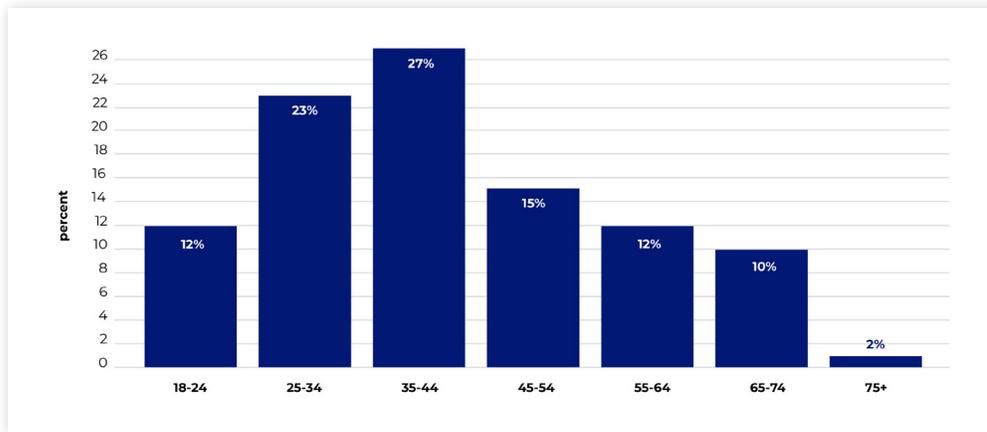
Certain analysis also compares responses from this survey to the previous [Consumer Trends Survey](#), which explored consumer behaviors from approximately March-May 2020.

Demographic Data

Gender



Age



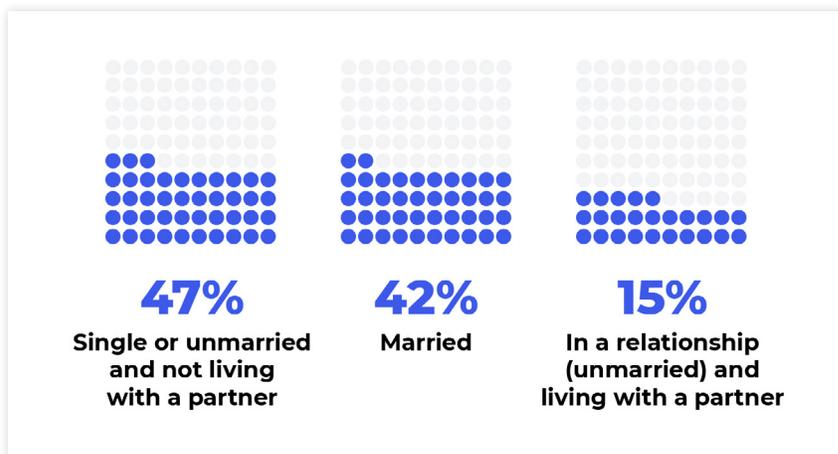
Location



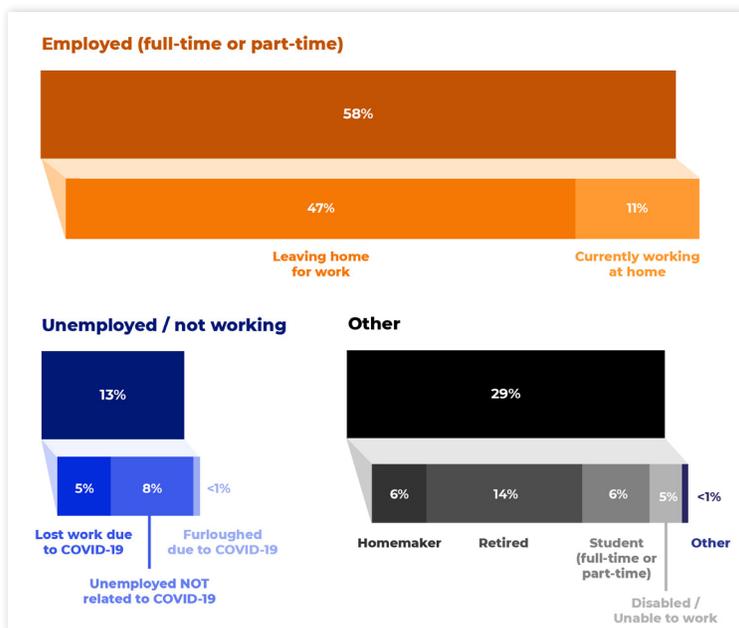
Household income



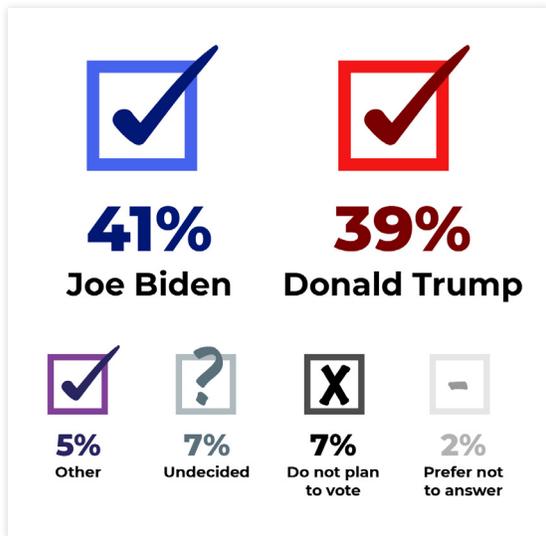
Relationship status



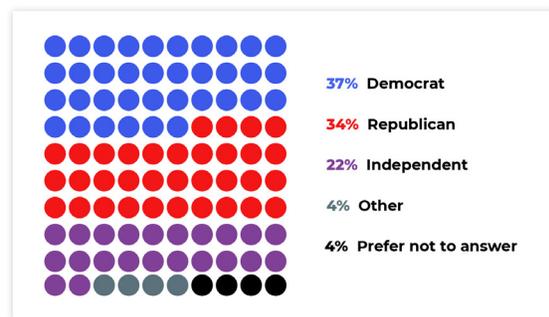
Employment status



How plan to vote in U.S. Presidential election



Political party affiliation



Using the data

We invite you to explore **Jungle Scout's 2020 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.