Jungle Scout

Consumer Trends Report | Q2 2023

Introduction & key takeaways

Consumer behaviors and preferences continue to evolve alongside increasingly rapid advancements in technology and ecommerce. For businesses looking to better understand their customers, staying up to date on the latest trends is more important than ever.

Jungle Scout's Consumer Trends Report is a quarterly study of 1,000 U.S. consumers that explores how and where people are shopping, what they're buying, and the way in which inflation and other economic factors impact decision making and overall spending. This report covers consumer attitudes and behaviors in the second quarter of 2023, with a special lens on differences and similarities in the way men and women shop.

1. **Men shop more often — and from a wide variety of stores — than women.** The number of men online at least once a day is about 60% more than the number of women who do the same.

2. **Men turn to social media platforms like Facebook, TikTok, or YouTube to search for products nearly twice as often as women.** Still, Amazon remains the most popular starting point for both male and female consumers.

3. **While 60% rarely return purchases made online, consumers say they're twice as likely to return clothing than any other type of product.** They're also more likely to return orders when the process is free.

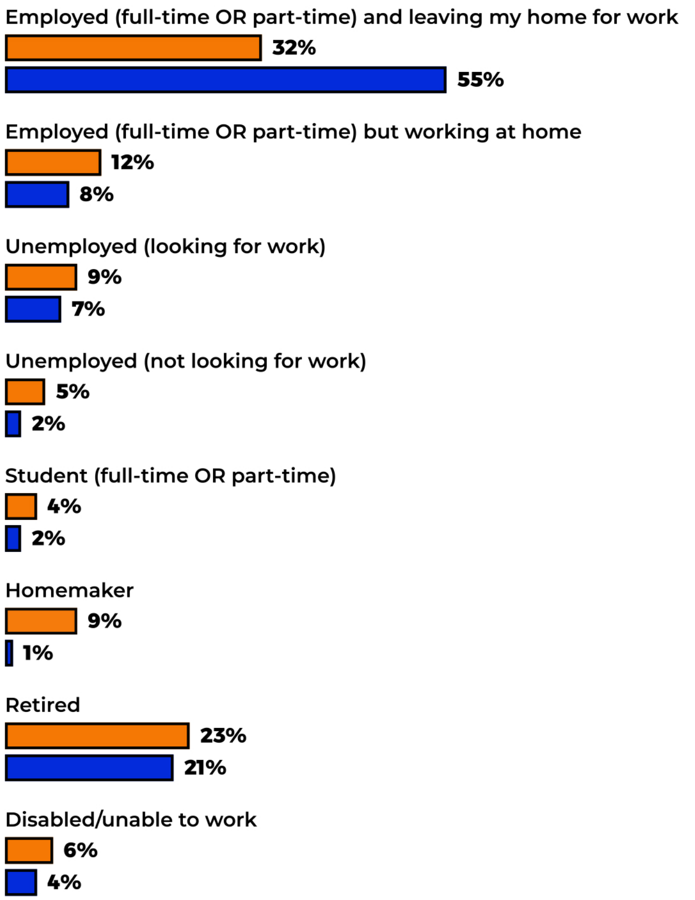
Throughout the report, percentages shown for men and women represent the respective portion of respondents that affirmatively selected the corresponding survey option(s).

Gender demographics

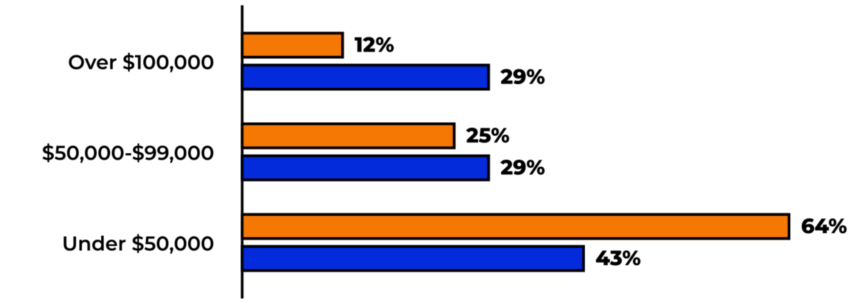
In exploring similarities and differences in the spending and shopping habits of men and women, it is important to acknowledge the impacts of socioeconomic factors that influence purchasing power, decision-making, and overall spending levels. Recognition of these impacts can provide a better understanding of the gender-segmented data throughout this report. Among the 1,000 U.S. respondents to our Q2 survey, 50% were women and 48% were men.

Women   Men

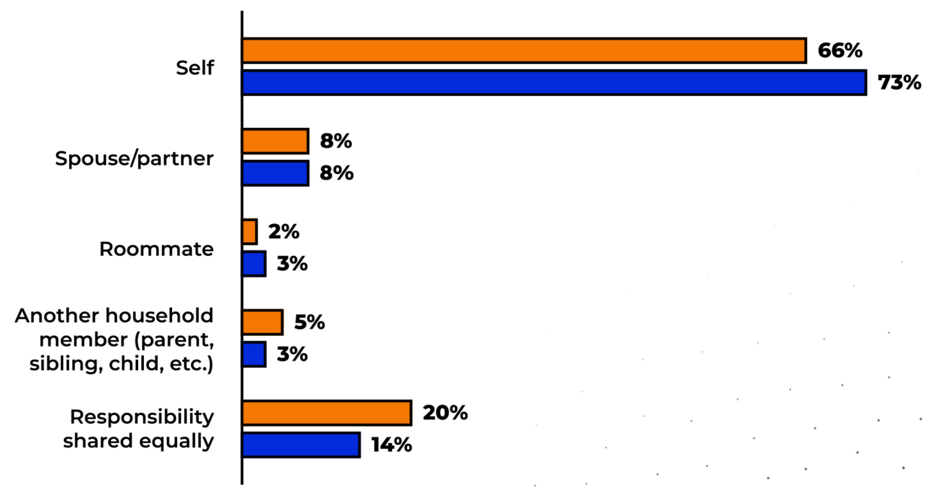
Employment status



Household income



Primary decision maker for household purchases



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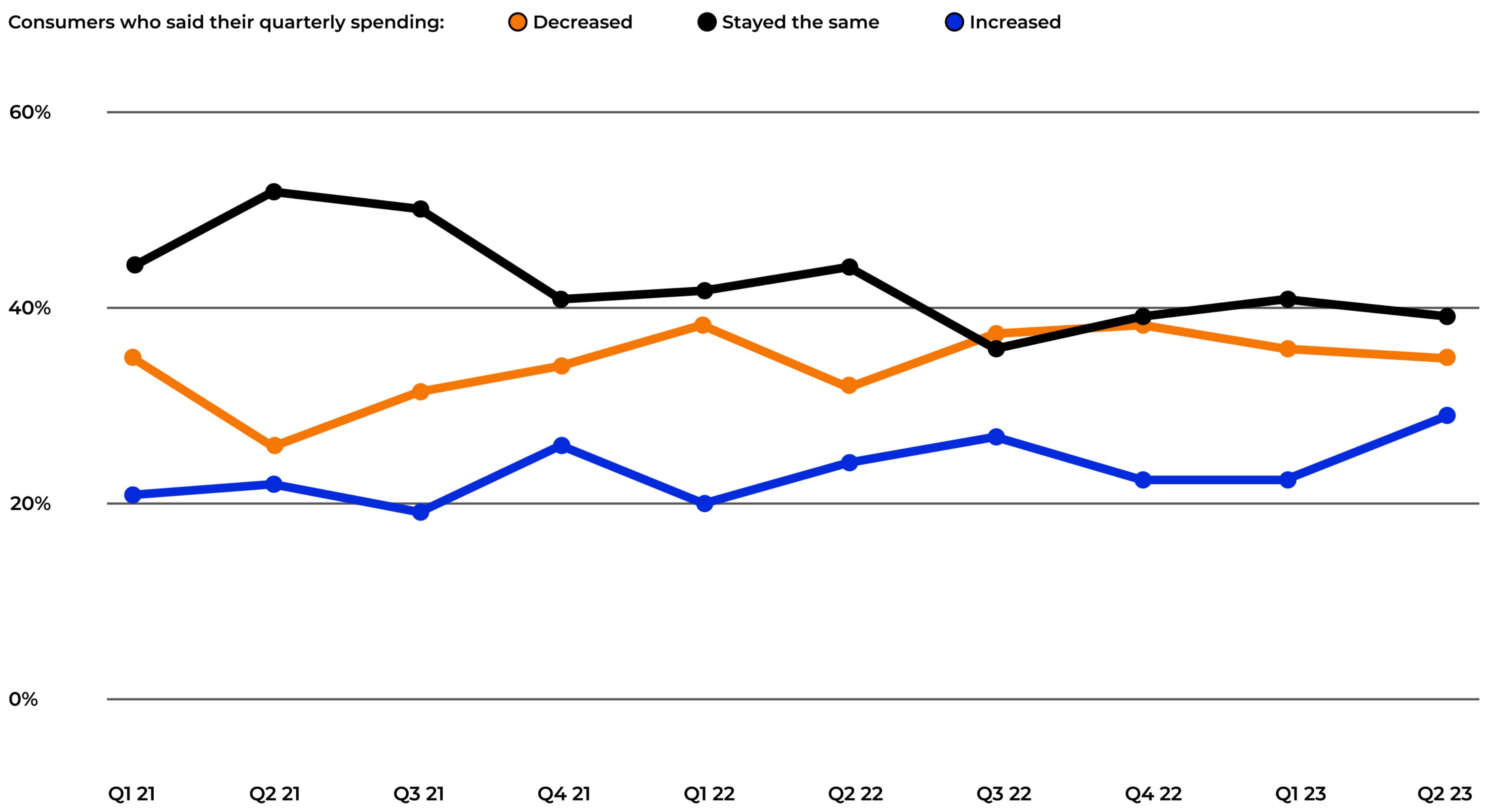
Chapter 1

Consumer Pulse Report: Trending Spending

Quarterly changes in overall spending

Consumers who say their overall spending ...

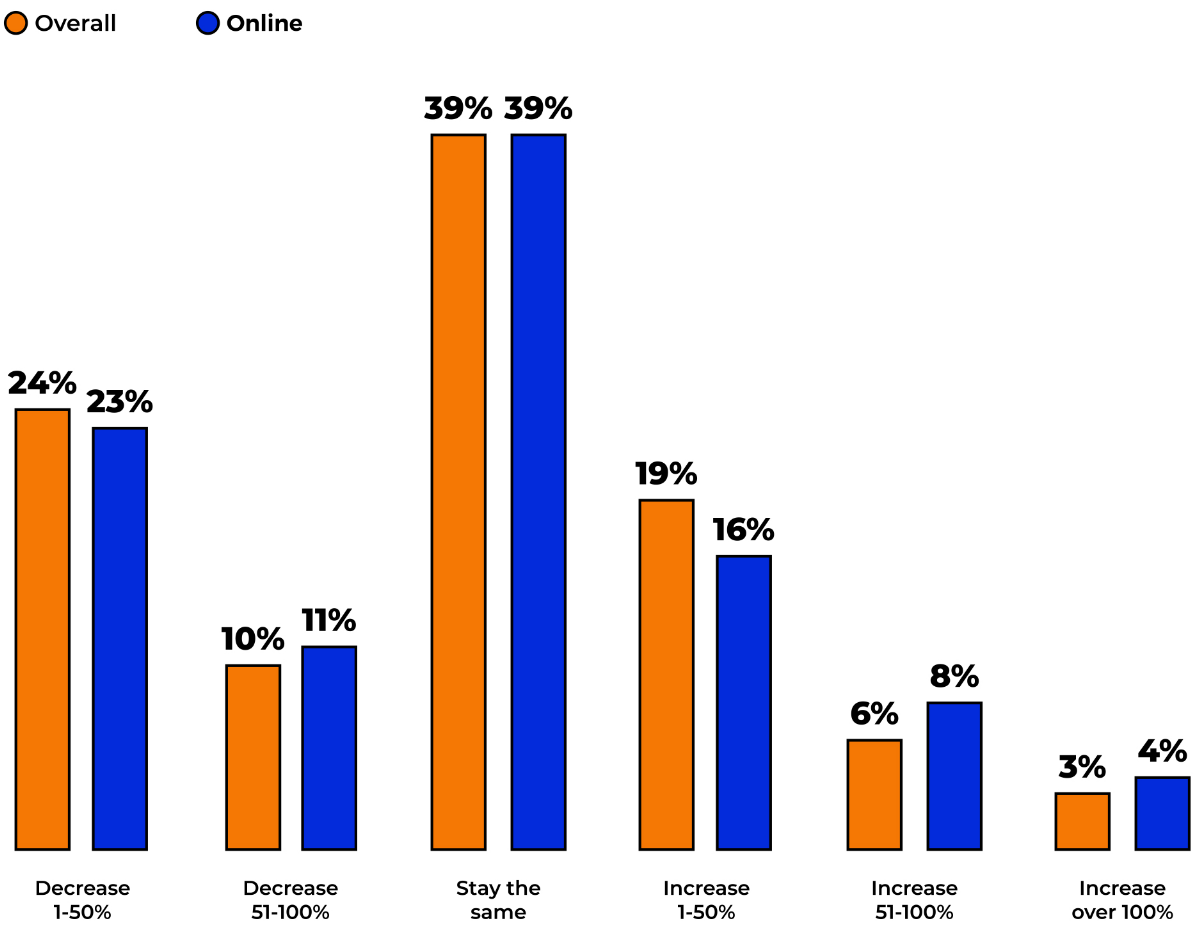


Overall and online spending in Q2

The data in this section reflects how consumers described their overall and online spending in the second quarter of 2023 compared to the first quarter of 2023.

See consumer spending data for the first quarter of 2023 here.

How is consumer spending changing in Q2?



INSIGHTS

While overall and online spending either decreased or stayed the same for the majority of consumers in Q2, overall (72%) and online (73%) spending decreased or stayed the same compared to the first quarter, the percentage whose overall spending increased in Q2 compared to the prior quarter was higher than it has been in any quarter since 2020.

28%

of consumers said their **overall** Q2 spending increased from Q1, compared to 23% in the first quarter of 2022.

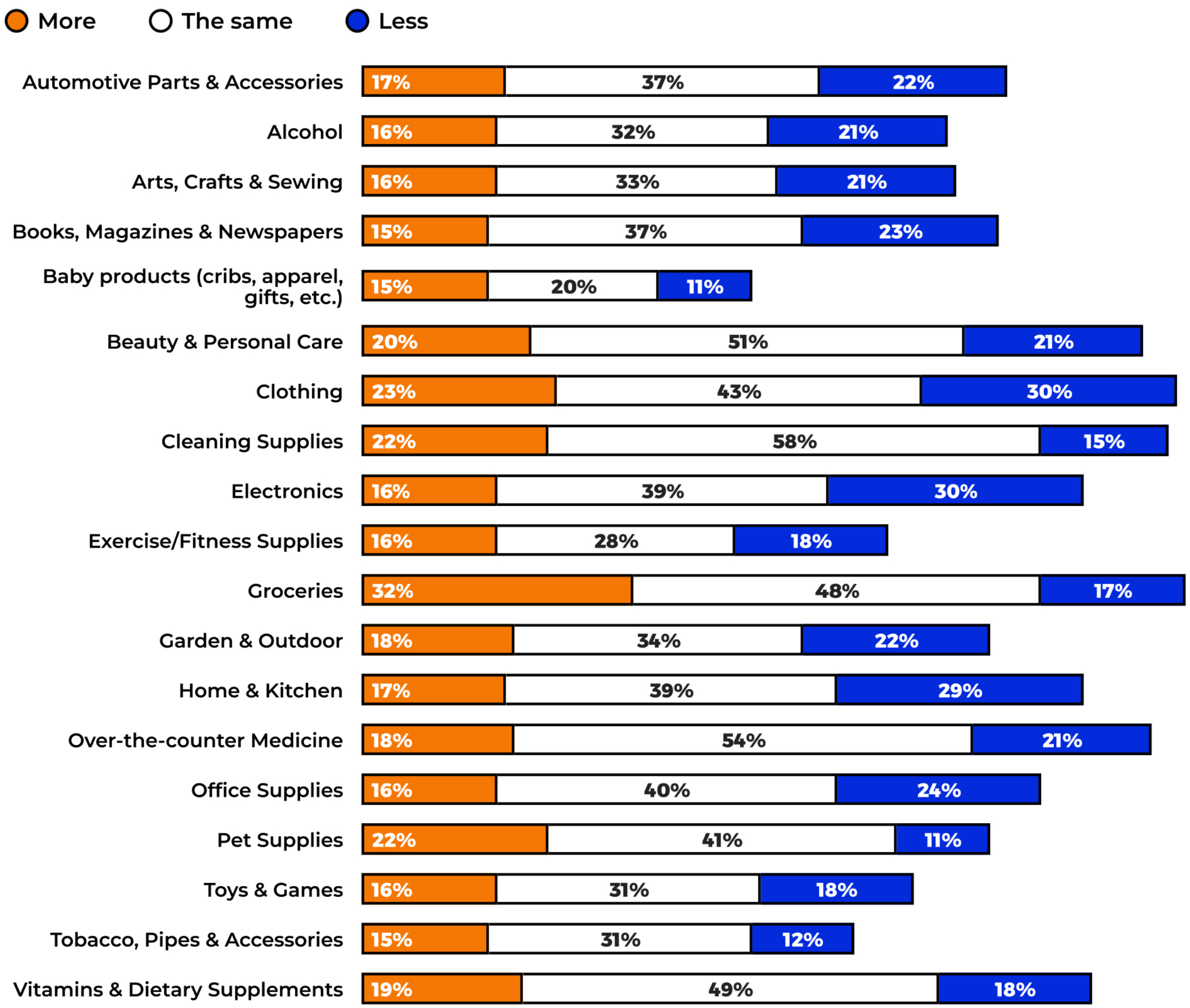
34%

of consumers said their **online** Q2 spending decreased from Q1, compared to 36% in the first quarter of 2022.

Popular products: What consumers are buying

Generally, consumers are buying the same amount of products across all categories in Q2 compared to Q1.

Top product categories | Q2 2023



INSIGHTS

Consumers are buying **more** ...

Groceries - 32%

Cleaning Supplies - 22%

Vitamins & Dietary Supplements - 19%

And **less** ...

Home & Kitchen - 29%

Electronics - 30%

Clothing - 30%

Where people shop: The most popular stores & online retail sites

Which of the biggest retail stores are consumers shopping from (in-store or online) in Q2?

In store

Walmart	60%
Target	26%
The Home Depot	18%
Walgreens	17%
Lowe's	16%
Kohl's	13%
Amazon Go or Amazon Go Grocery	13%
Costco	12%
Apple	12%
Kroger	12%
Sam's Club	12%
Best Buy	9%
Macy's	7%
Specialty, independent, local or boutique	7%
Albertsons	4%

Online

Amazon	70%
Walmart.com	40%
eBay.com	19%
Target.com	13%
Apple.com	9%
Kohls.com	9%
Etsy.com	9%
Macys.com	7%
BestBuy.com	6%
HomeDepot.com	6%
Lowes.com	6%
Instacart	5%
Wayfair	5%
Costco.com	5%
SamsClub.com	5%
Kroger.com	5%
Walgreens.com	4%
Facebook shops	4%
Specialty, independent, local or boutique	3%
Google Shopping	3%
Wish	3%
Instagram Shop	3%
Albertsons	1%
Houzz	1%
None of the above	5%

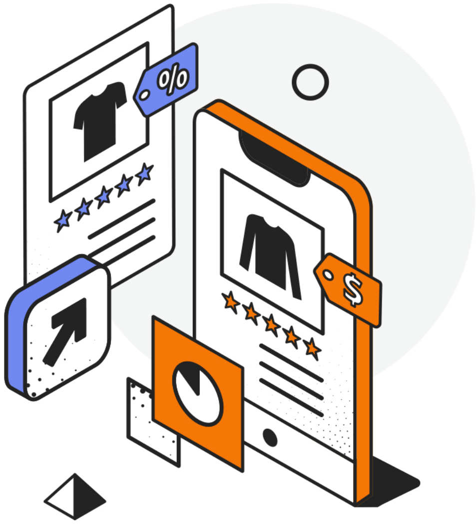
Respondents could select multiple options.

Chapter 2

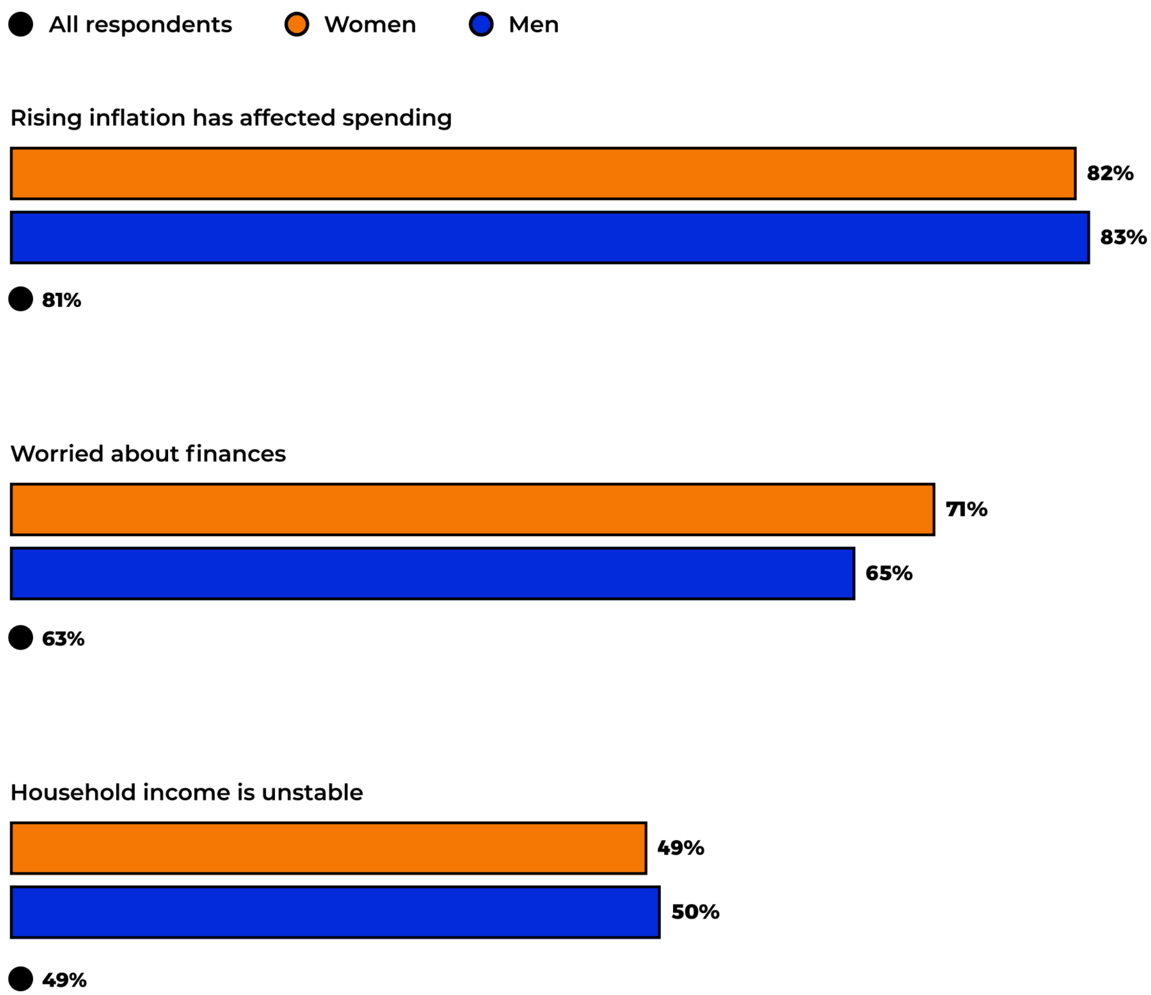
Q2 Insights: Signs of Optimism

Despite some uncertainty about the future primarily driven by higher-than-normal inflation rates over the past year, signs of optimism seen in the first quarter generally continued into Q2. Consumer spending levels (as outlined in Chapter 1) appear to be somewhat higher compared to survey data from the previous quarter and year. The 4.9% 12-month inflation rate in May (the most recent available) was the smallest it's been since April 2021.[1] Still, sustained slow economic growth in the U.S., China, and Europe and other risk factors remain in place supporting the general expectation that a recession will begin at some point this year. While inflation and other economic conditions impact different generations of consumers in varying ways (see the Q1 2023 Consumer Trends Report for more on this), our analysis of Q2 data reveals men and women appear to be more equally impacted.

[1] U.S. Bureau of Labor Statistics



Consumer sentiment at-a-glance



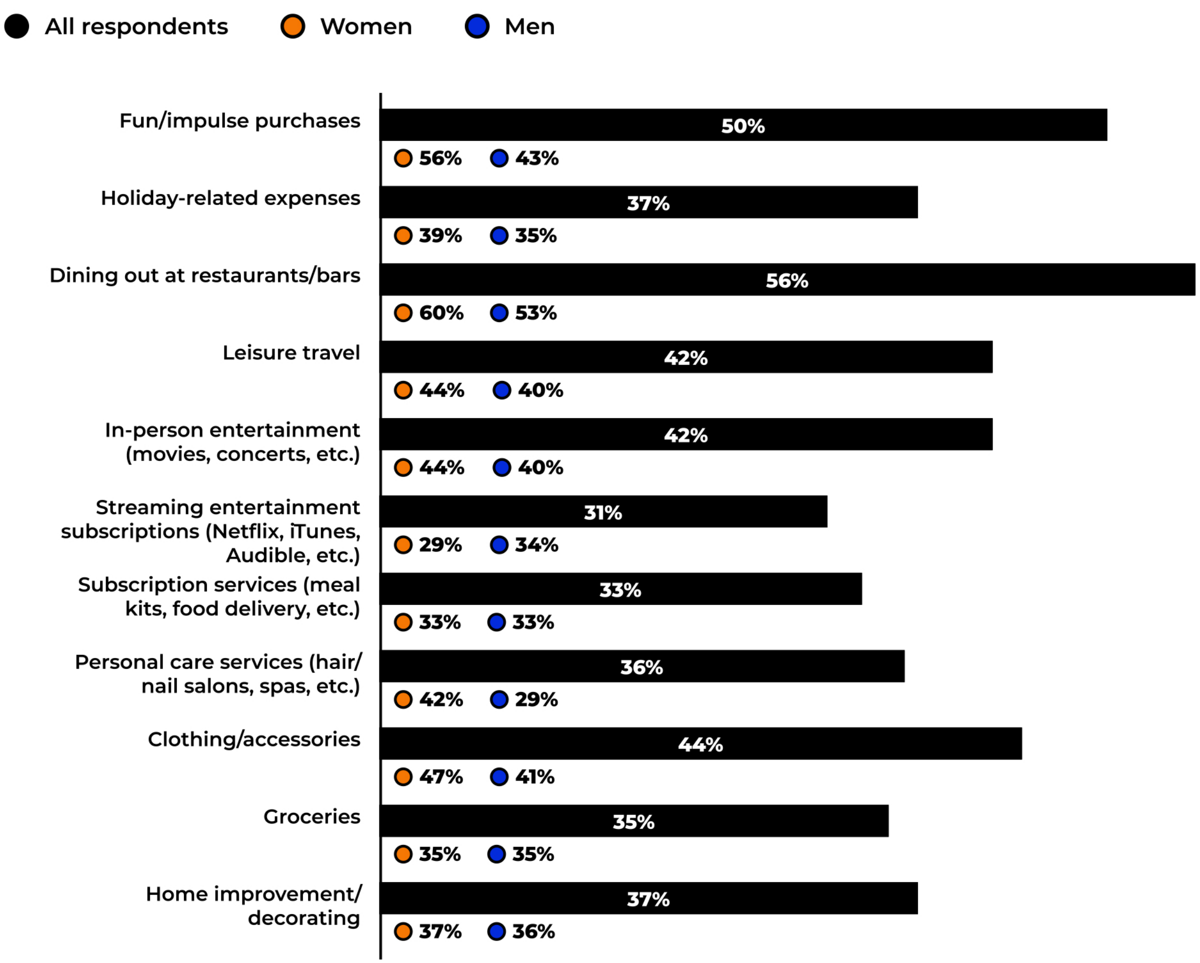
INSIGHTS

Our data indicates men and women are similarly affected by outside economic conditions. One area where they differ: Women respondents were more likely than men to worry about their or their families' financial situation.

Spending & saving

While inflation is impacting the personal spending of men and women about equally in Q2, differences emerge in the ways those same men and women are cutting back as a result.

Top categories where consumers are cutting back in Q2*



Totals do not equal 100% as respondents could select more than one option.

INSIGHTS

For a more detailed view of the ways each generation spends money — and how and where they try to save — read our [Q1 2023 Consumer Trends Report.]

Chapter 3

Ecommerce Report

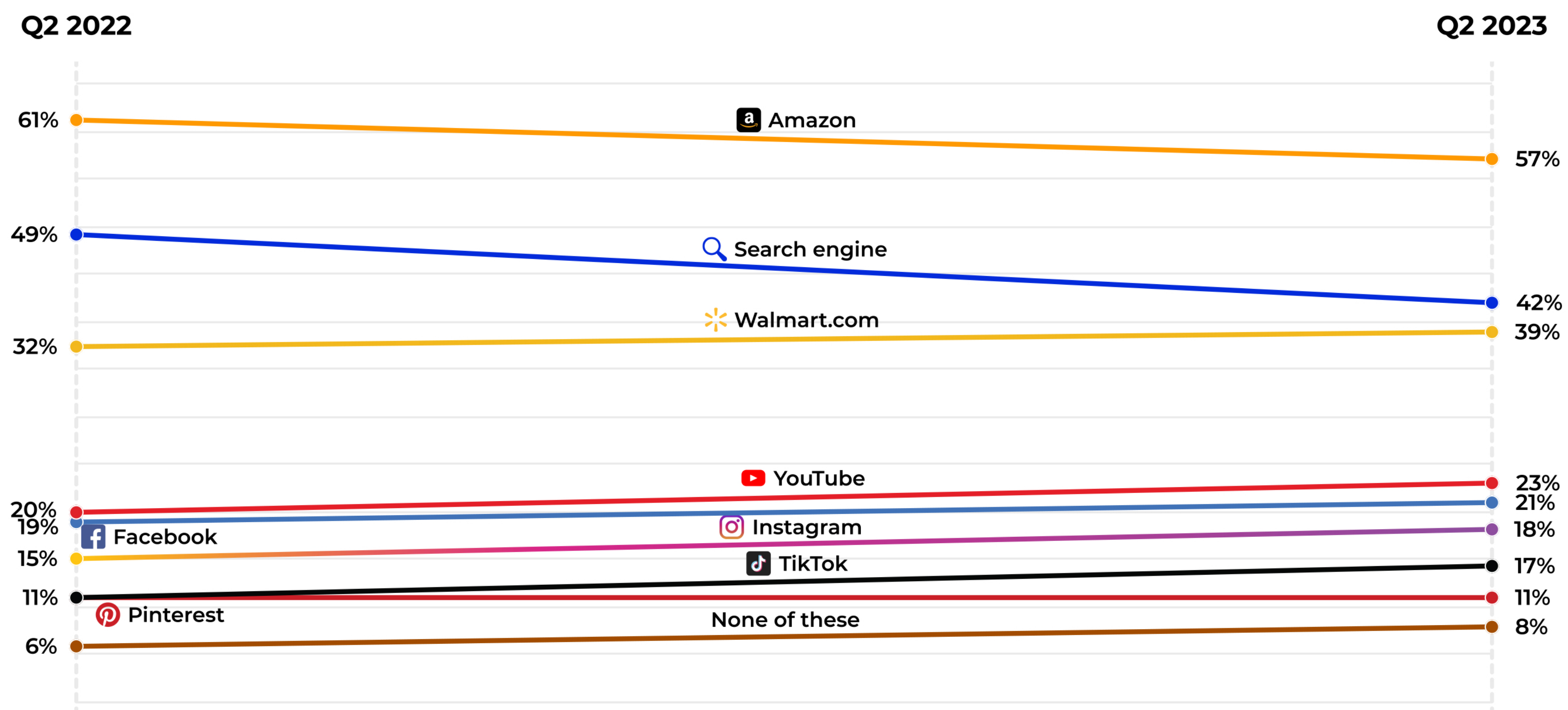
Consumers consistently turn to Amazon ahead of all other ecommerce sites for their online purchases, though social media channels are increasingly popular options, particularly among men, Gen Z, and Millennial shoppers. As Americans continue to shift all types of shopping to online retailers, and businesses accelerate their ecommerce operations in response, this chapter offers an overview of the evolving influences and preferences shaping consumer behaviors and habits in Q2 2023.

Go-to sites when searching for products

Across every generational and gender line, the majority of consumers start their online searches for products on Amazon. However, as social media platforms have ramped up and rolled out their own ecommerce capabilities in recent years, consumers are more comfortable than ever making purchases from sites such as Facebook, Instagram, and YouTube.

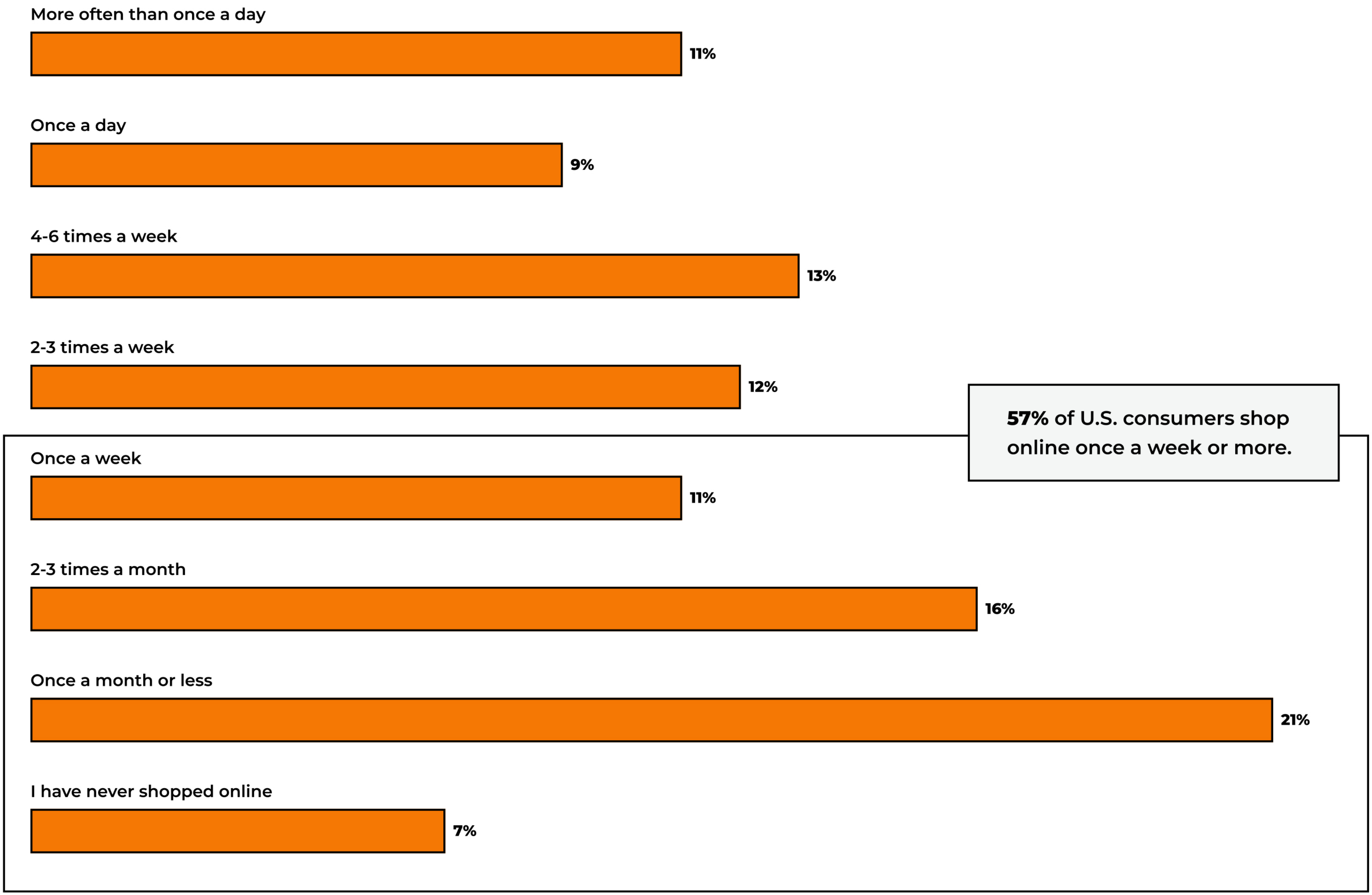
Compared to a year ago, the number of respondents to our quarterly survey that start their online search for products on TikTok increased six percentage points while the share of those starting on Amazon declined. Other ecommerce sites are ticking upward in popularity as well; Walmart.com searches, for example, increased notably over the past year.

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



Totals do not equal 100% as respondents could select more than one option.

How frequently do consumers shop online?



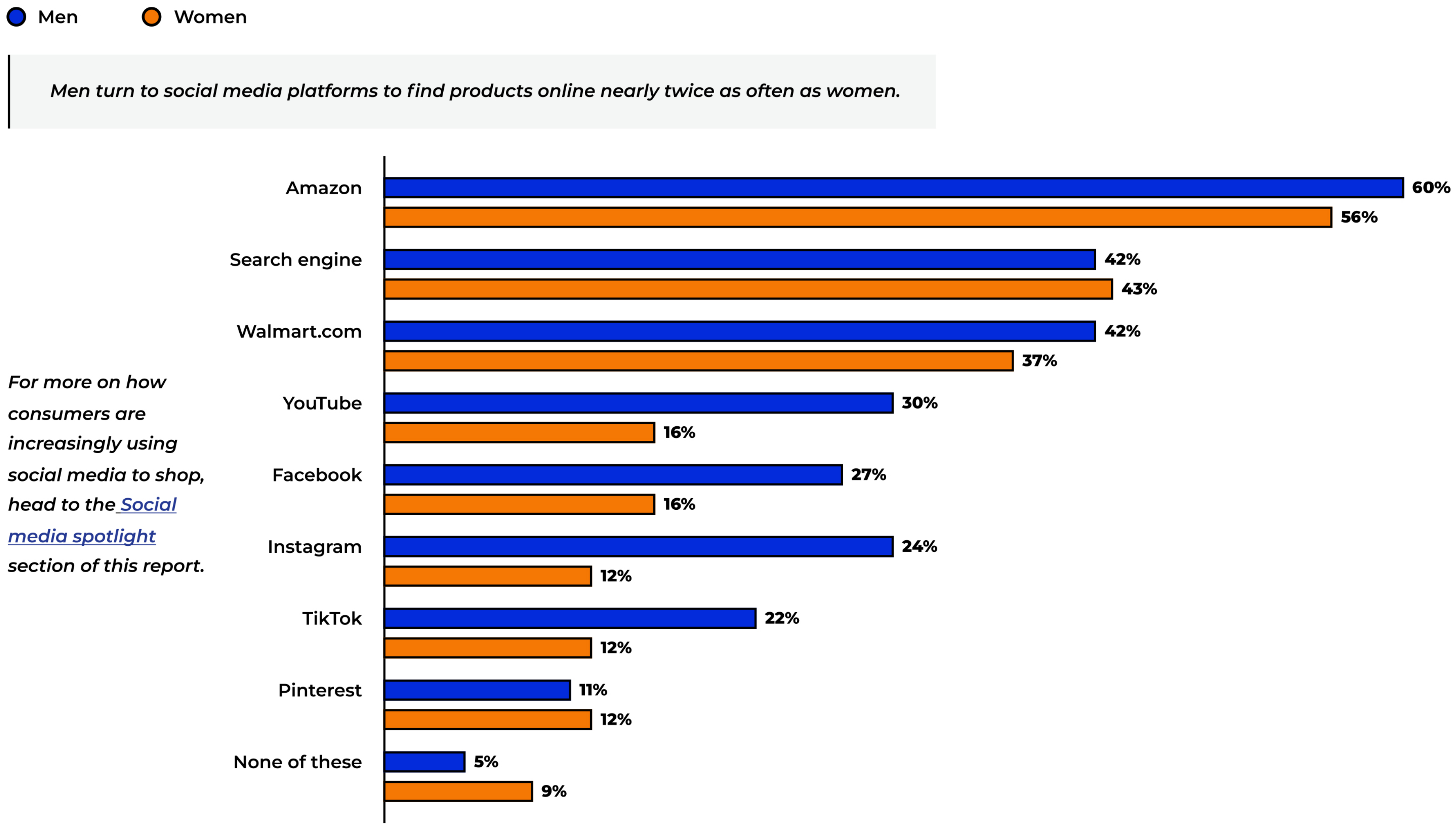
Where men and women diverge

Perhaps the most notable differences in the way men and women shop online, according to our Q2 survey results, are seen in comparing where and how often they're doing it. Men, on average, use a larger variety of platforms for both product searches and purchases.

Where men and women start their searches online*

> *Men turn to social media platforms to find products online nearly twice as often as women.*

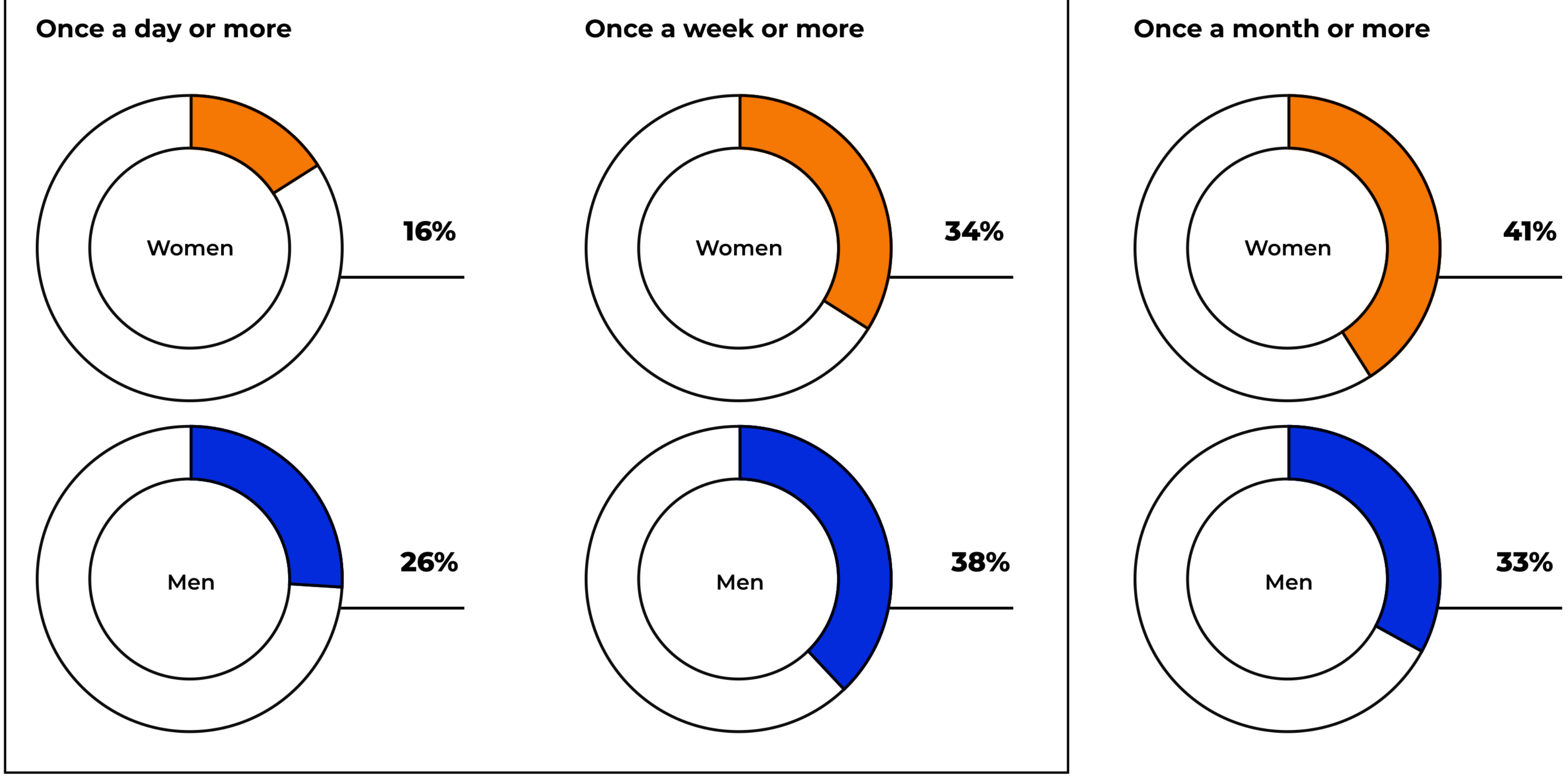
For more on how consumers are increasingly using social media to shop, head to the [Social media spotlight](#) section of this report.



How often men and women shop online

Women   Men

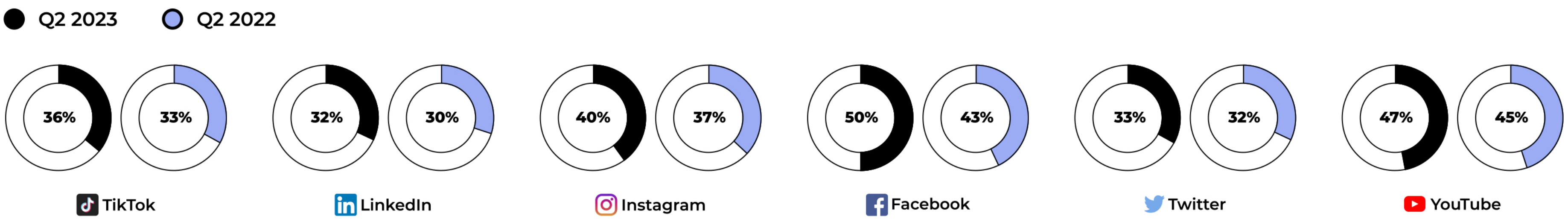
64% of male survey respondents shop online once a week or more, compared to **50%** of women who do the same.



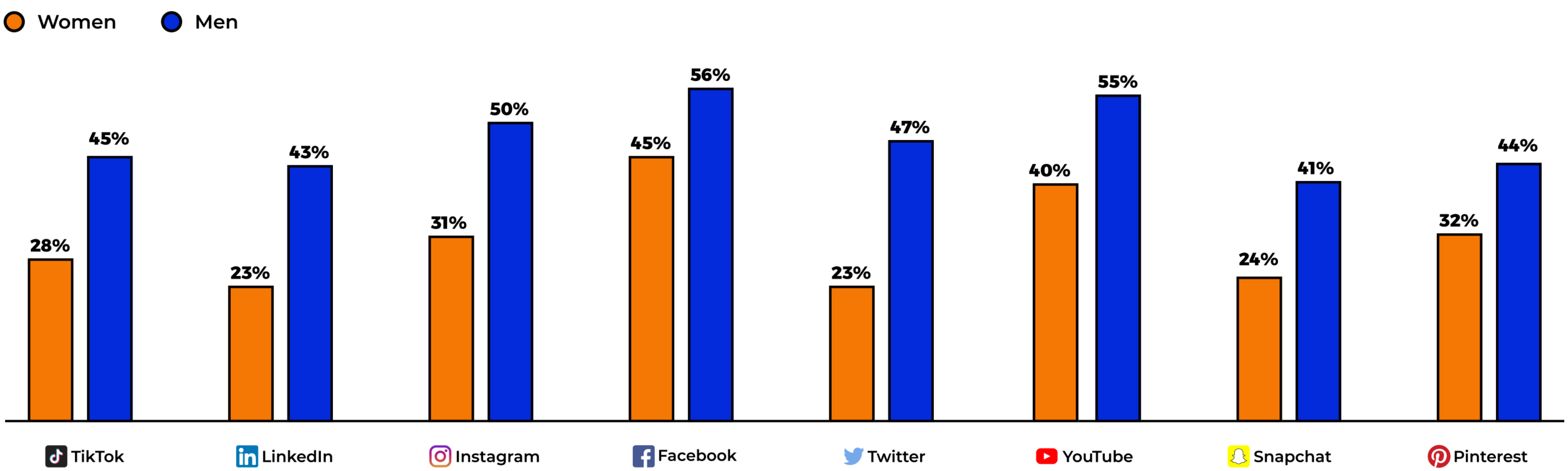
Social media spotlight

Compared to a year ago, more consumers are buying products directly from popular social media sites, with Facebook seeing the largest jump year over year. Gen Z and Millennials remain far more likely to shop directly from social media, followed by Gen X, with Boomers the least likely age group to do so. Additionally, men across all generations are generally more likely to buy products directly from these platforms than women, according to our Q2 survey results.

Percentage of consumers likely to purchase a product directly from social media*



Gender breakdown: Percentage of male vs. female respondents likely to purchase a product directly from social media*

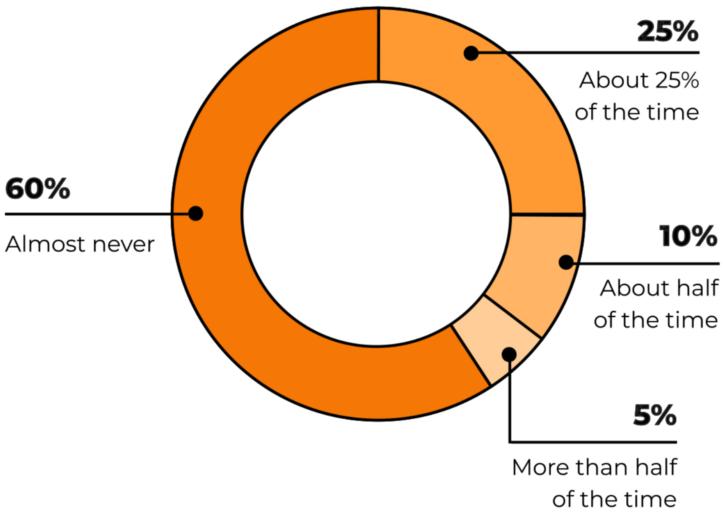


*Totals do not equal 100% as respondents could select more than one option.

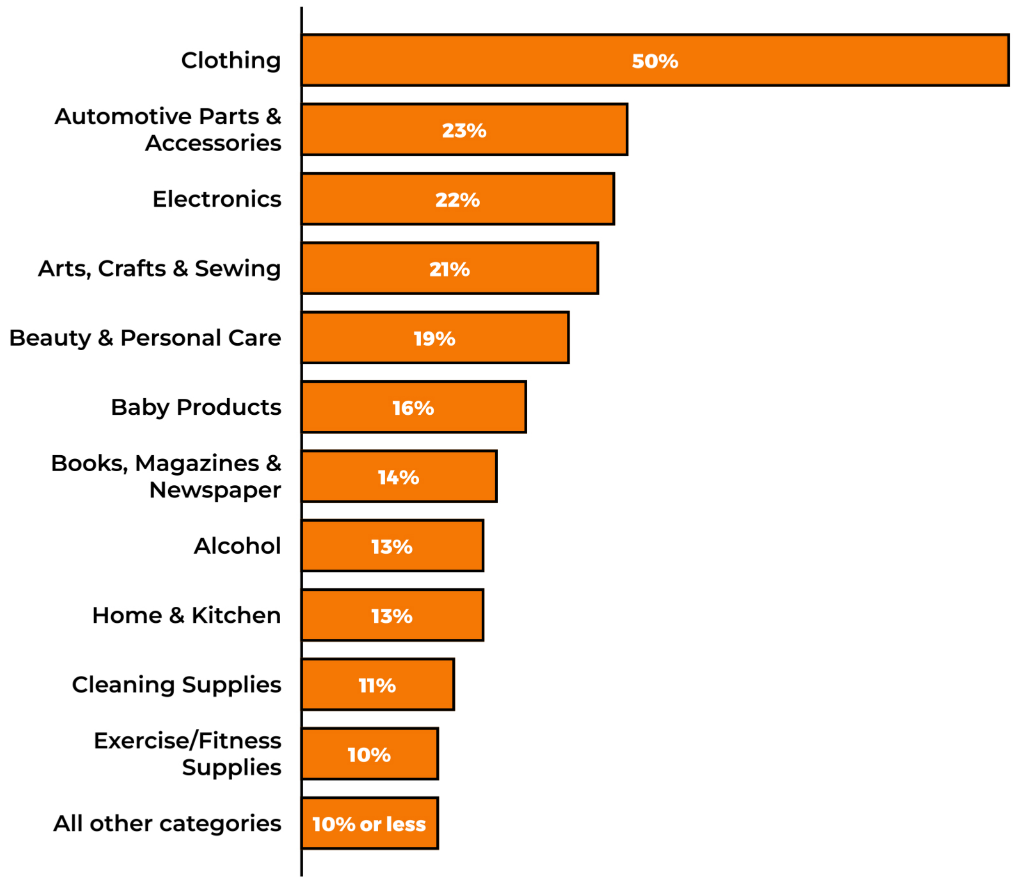
Trends in online returns

As an increasing number of major ecommerce retailers implement stricter return policies — and in some cases have started (or reverted to) passing return shipping costs to consumers — our Q2 survey results offer insight into how these policies might impact the minority of shoppers who frequently return products purchased online. Generally, men and women responded similarly across the board to questions about their online return habits and preferences.

How frequently consumers return products purchased online



Product categories most likely to be returned*

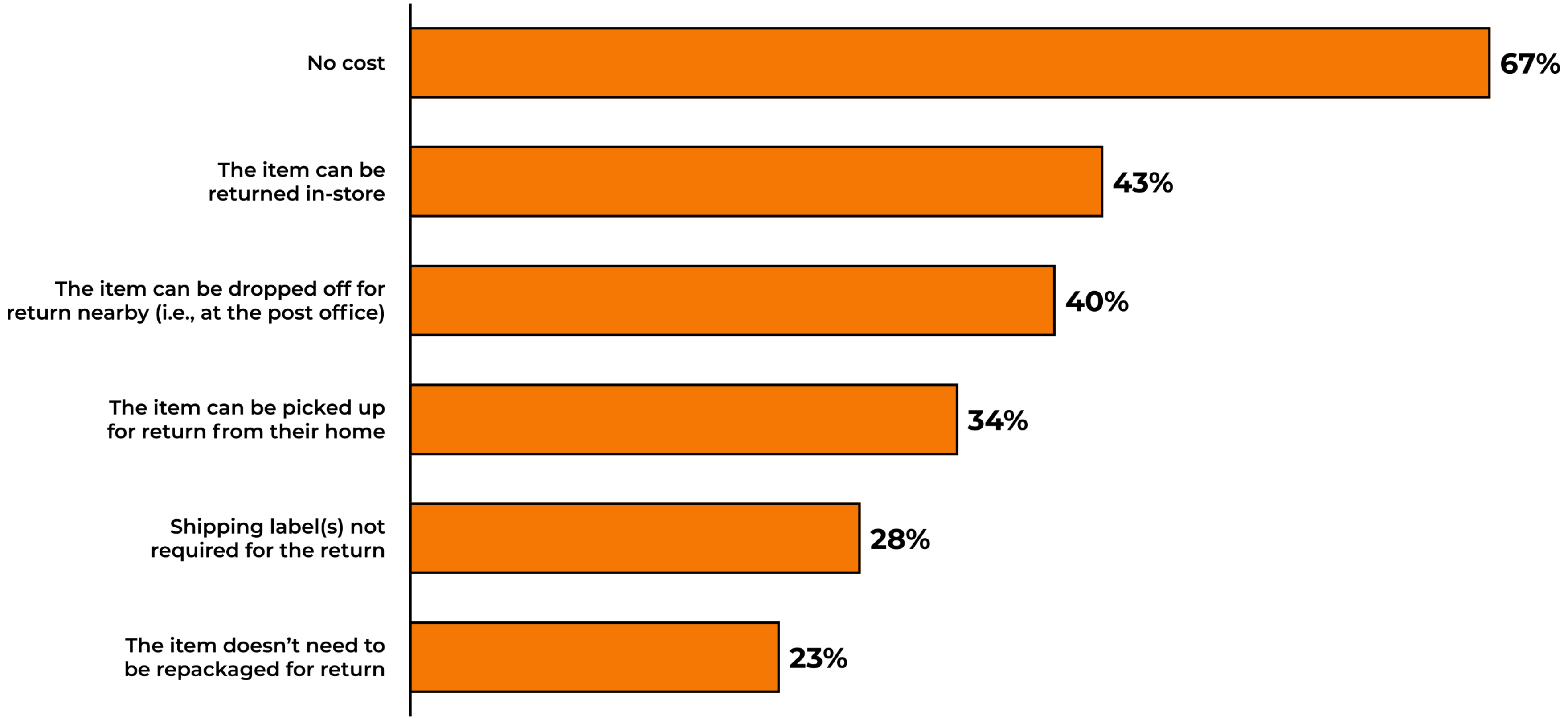


Totals do not equal 100% as respondents could select more than one option.

Most favored return conditions

When asked which policies and/or methods would make a consumer more likely to return something they purchased online, the process being free came out on top; two out of three consumers said they're more likely to complete a return if they don't have to pay to do it.

Percentage of consumers more likely to return an online purchase if...*



Totals do not equal 100% as respondents could select more than one option.

Chapter 4

About the Report

Methodology

Jungle Scout conducted an anonymous survey between May 8 and May 9, 2023, among 1,000 U.S. consumers about their buying preferences and behaviors. Respondents represented all 50 U.S. states, all genders, and ages 18 to 75+, as well as various employment types and income levels.

Respondents represented all 50 U.S. states, men and women, and ages 18-75+, as well as various employment types and income levels. Gender-segmented survey data excludes a portion of nonbinary respondents not large enough to offer fair representation for analysis.

Using the data

We invite you to explore Jungle Scout's **Q2 2023 Consumer Trends Report**, and to share, reference, and publish the findings with attribution to "Jungle Scout" and a link to this page.

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

About Jungle Scout

Jungle Scout is the leading all-in-one platform for ecommerce sellers, supporting more than $50 billion in annual Amazon revenue. Founded in 2015 as the first Amazon product research tool, Jungle Scout today features a full suite of best-in-class business management solutions and powerful market intelligence resources to help entrepreneurs and brands manage their ecommerce businesses. Jungle Scout is headquartered in Austin and supports 10 global Amazon marketplaces.

Demographics

Gender

Male	48%
Female	50%
Non binary	1%
Prefer not to say	1%

Age

18 - 26	13%
27 - 42	35%
43 - 58	21%
59 - 77	29%
78 +	2%

Region

Midwest	16%
Northeast	21%
West	29%
South	36%

Household income

Less than $25,000	27%
$25,000 to $34,999	14%
$35,000 to $49,999	14%
$50,000 to $74,999	17%
$75,000 to $99,999	10%
$100,000 to $124,999	7%
$125,000 to $149,999	4%
$150,000 or more	9%

Employment status

Employed (total)	**53%**
Employed (full-time or part-time) and leaving my home for work	43%
Employed (full-time or part-time) and currently working at home	10%

Unemployed	**47%**
Unemployed (looking for work)	8%
Unemployed (not looking for work)	4%
Student	3%
Homemaker	5%
Retired	22%
Disabled/unable to work	5%