

resonate

# STATE OF THE CONSUMER **2022**

Overwhelmed, Influenced & Values-Driven: Critical  
Insights on Current Consumer Sentiment

AI-Powered Insights to Enrich Your Understanding & Ignite Growth



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# UNDERSTANDING THE STATE OF THE CONSUMER

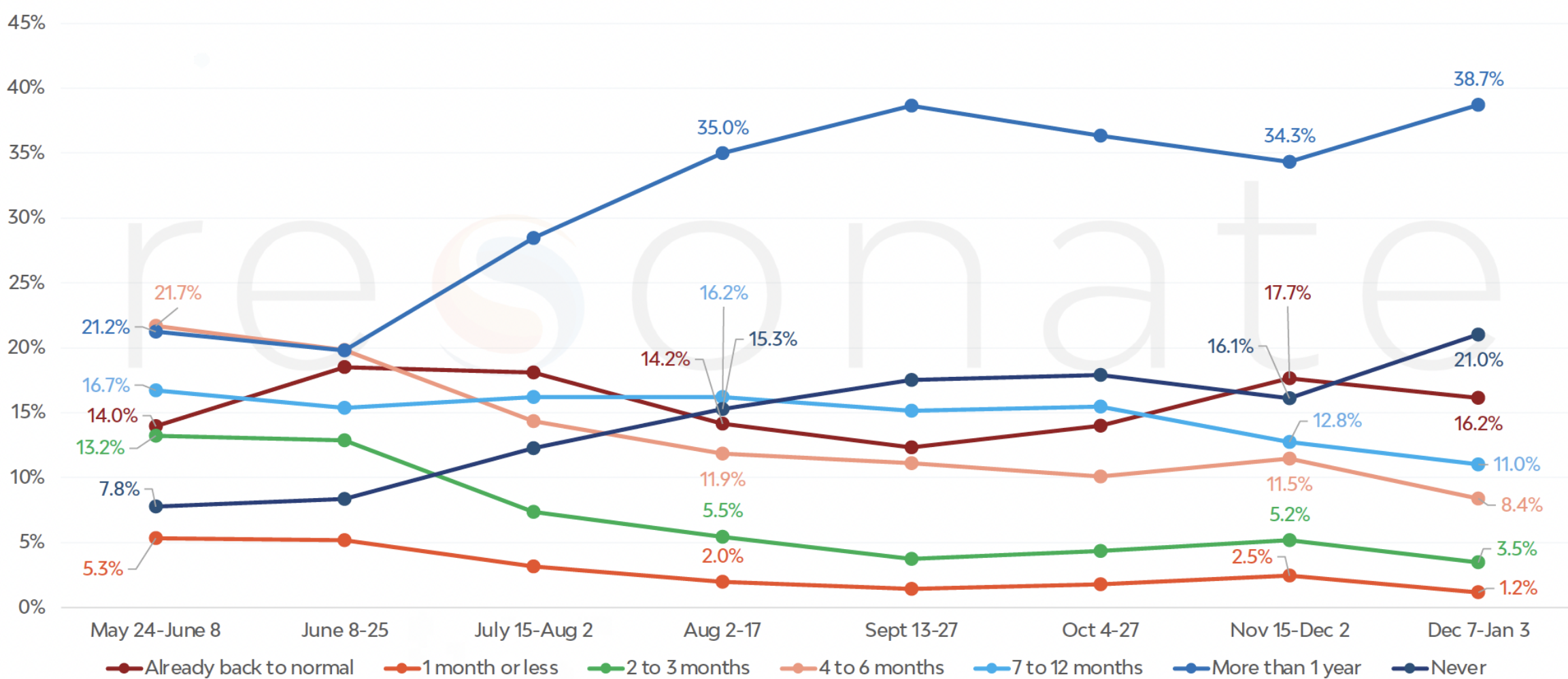
Last year, the State of the Consumer report explored the phenomenon of the "Disrupted Consumer," a person whose world had been turned upside down. A person who was still navigating intermittent closures, mandatory masking, and work-from-home.

This year, we thought things would be back to normal. **Newsflash: they're not.**

We're all trying continuously to adapt to a life where uncertainty is the only guarantee. And we've learned there isn't one right way to respond to this constant state of uncertainty.

## 21% Believe Life Will Never Return to Normal

*Thinking about the coronavirus situation, how soon do you believe that your life will largely return to normal?*



There isn't just one current "state" of the consumer and targeting these consumers through human-driven, AI-powered segments has never been more important.

Here's the issue: To acquire and retain customers, you need to know them. And one single marketer can't know 230 million individuals. Luckily, Resonate can. Resonate has the rich, robust, privacy-safe consumer data you can use to **enrich your understanding** of your customers and prospective customers.



# THE SENTIMENT OF THE CONSUMER

Tapping into the Resonate Ignite AI-powered consumer intelligence platform, we analyzed the full consumer landscape and distilled three powerful emotions that are impacting the consumer, revealing the insights you need to know to engage and grow your customer base. You likely recognize these sentiments. In fact, your life might be colored by one or more of these lenses on a daily basis.



**THE OVERWHELMED  
CONSUMER**



**THE INFLUENCED  
CONSUMER**



**THE ACTIVIST  
CONSUMER**

With 14,000+ privacy-safe data points updated nightly and scaled to over 230 million U.S. adult consumers, the **Resonate Ignite Platform™** is uniquely positioned to track shifting consumer sentiment and provide comprehensive, actionable insights. Resonate makes it easy to enrich your first-party data and expand your knowledge to include your customers' values, motivations, behaviors, purchasing patterns and plans, and why they choose to buy, advocate for, or abandon a brand.

**Your ability to understand the State of the Consumer and leverage these rich, relevant insights and to successfully segment, target, and message to these customers is critical to driving revenue in 2022.**

In this year's State of the Consumer, we'll explore three key customer personas that you need to know to achieve your marketing goals in 2022. We'll also explore how access to a comprehensive, privacy-safe AI-powered data set, available exclusively in the Resonate Ignite Platform,™ can enrich the customer data you already have, making it more powerful and actionable.



# THE "STATES" OF TODAY'S CONSUMER

When you hear Overwhelmed Consumer, Influenced Consumer, and Activist Consumer, what do you think? Are there specific people in your life that come to mind? We took a deeper look at the demographics, values, behaviors, and preferences that distinguish these consumer sentiment segments and found out how they're different, how they're the same, and how they may not look exactly like the descriptions that immediately come to mind when you first hear, "overwhelmed," "influenced," or "activist."



## THE OVERWHELMED CONSUMER

This AI-powered audience includes consumers who are managing both careers and children, who may be in and out of daycare and school; they are overwhelmed by the day-in-day-out challenge of balancing work life and children



## THE INFLUENCED CONSUMER

This AI-powered audience includes consumers who consider social ads and influencers across platforms from Instagram to TikTok influential in the buying process, particularly around clothes and cosmetics



## THE ACTIVIST CONSUMER

This AI-powered audience includes consumers who prioritize corporate responsibility and are willing to pay more based on issues, including donating to charities, treating employees fairly, and/or reducing energy use



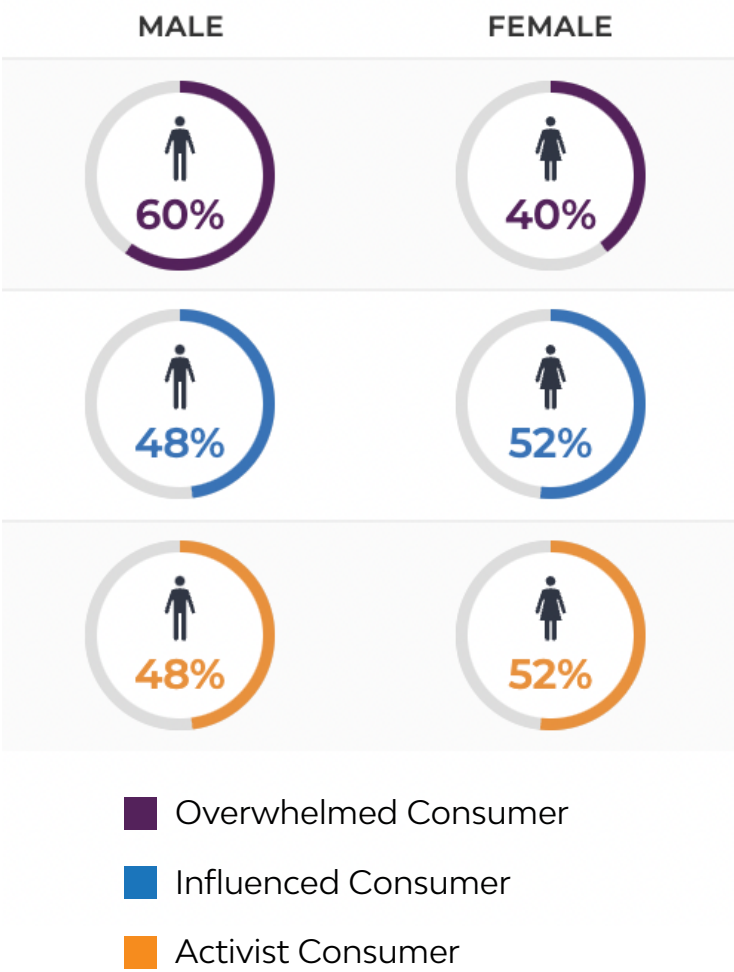
# THE DEMOGRAPHICS

Do you see anything in the data that surprises you? Most of us expected the Influenced Consumer to skew towards the younger set, yet, they're actually evenly distributed across Millennial and Gen X segments. Additionally, nearly 1 in 5 Activist Consumers is over 55 years of age. It's important to have the data to truly know your audience, in order to drive better marketing performance.

## AUDIENCE DEMOGRAPHICS

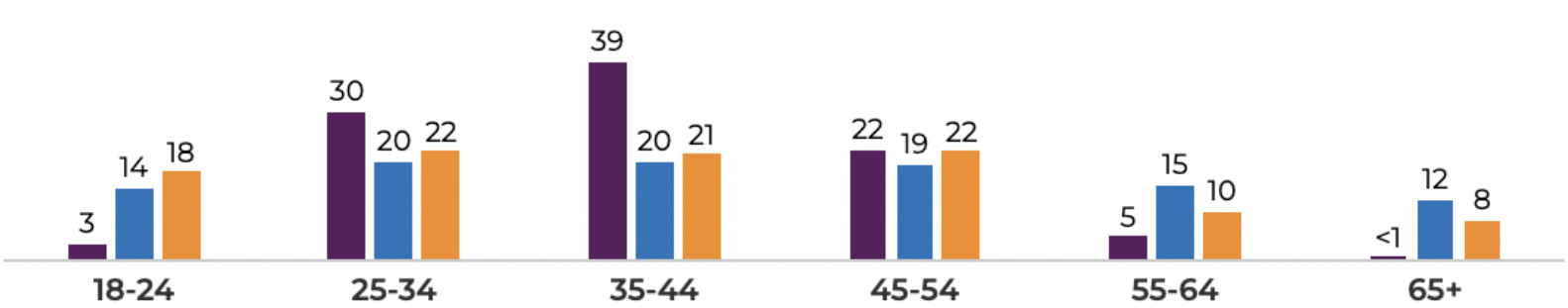
### Gender

% COMPOSITION



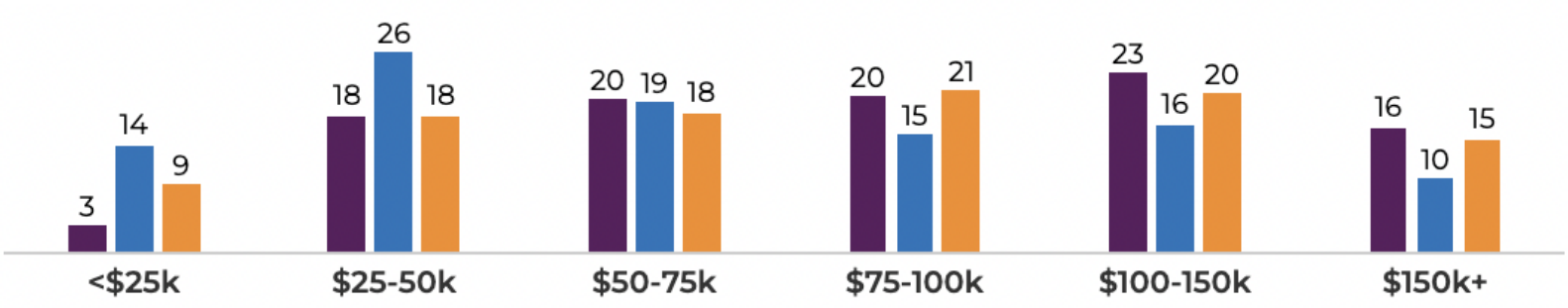
### Age Group

% COMPOSITION



### Household Income

% COMPOSITION



If you are an activist-focused brand who is exclusively targeting Gen Z and Millennials, you may be missing out on older customers with money to spend.

CHILDREN UNDER 18	100% OVERWHELMED CONSUMERS	40% INFLUENCED CONSUMERS	43% ACTIVIST CONSUMERS
EMPLOYMENT	FULL TIME OVERWHELMED CONSUMERS 100%	UNEMPLOYED INFLUENCED CONSUMERS 10%	STUDENT ACTIVIST CONSUMERS 10%
EDUCATION	POST GRAD DEGREE OVERWHELMED CONSUMERS 21%	SOME COLLEGE INFLUENCED CONSUMERS 34%	COLLEGE DEGREE ACTIVIST CONSUMERS 31%
MARITAL STATUS	MARRIED OVERWHELMED CONSUMERS 76%	MARRIED INFLUENCED CONSUMERS 51%	SINGLE ACTIVIST CONSUMERS 37%



# THE VALUES THAT DRIVE THEM

Knowing the demographics is critical — but it's not enough. For true brand-consumer connection, you need to go deeper. Don't rely exclusively on the who and the what — get to know the why behind your customers.

## OVERWHELMED CONSUMER AI-DRIVEN AUDIENCE:



AUTHORITYACHIEVEMENTINFLUENCE

## INFLUENCED CONSUMER AI-DRIVEN AUDIENCE:



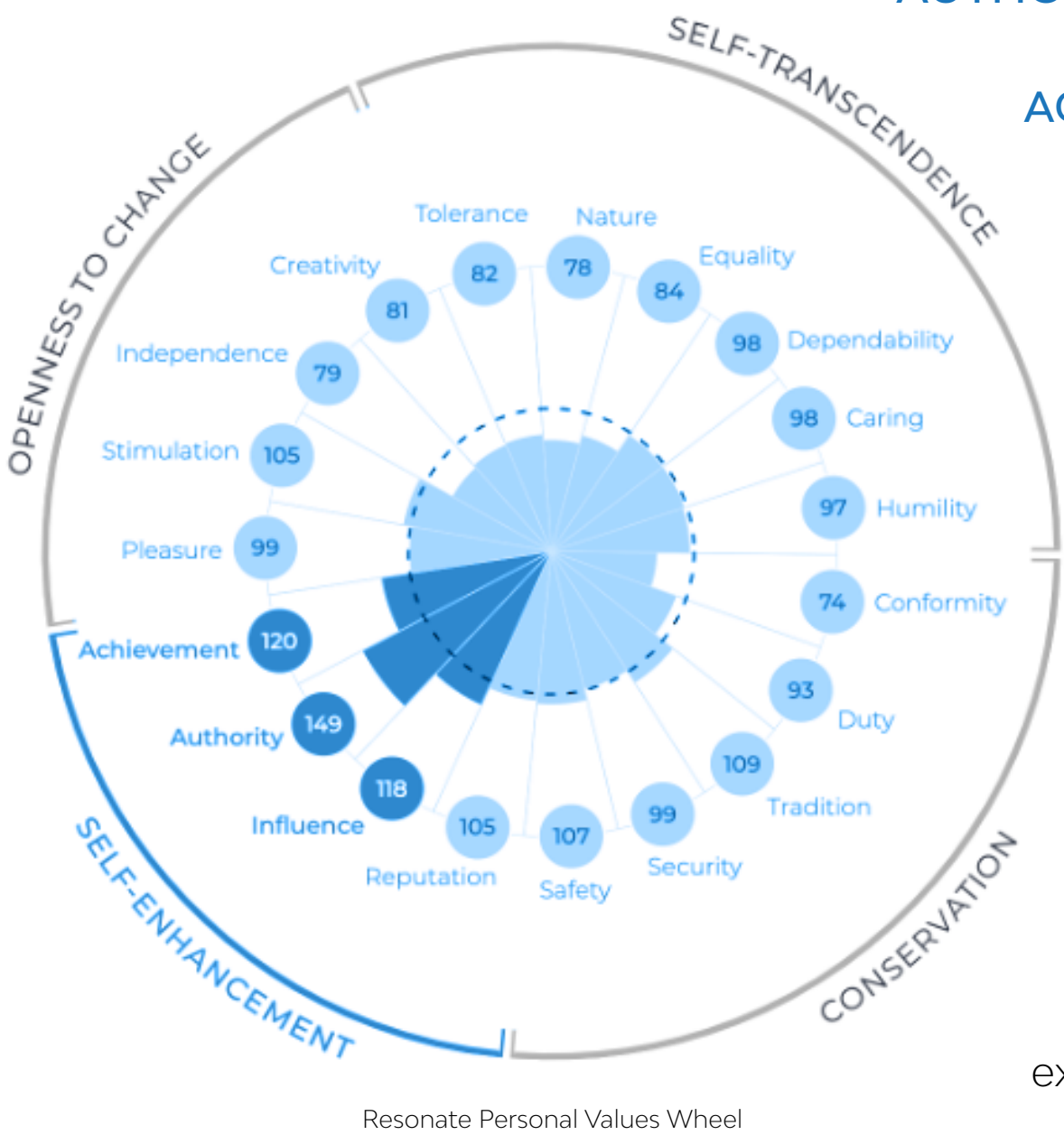
CONFORMITYREPUTATIONSTIMULATION

## ACTIVIST CONSUMER AI-DRIVEN AUDIENCE:



ACHIEVEMENTCREATIVITYSTIMULATION

What do these mean for your marketing? You can use personal values attributes to inform your offers, messaging, creative, even the way you craft customer experiences.



Resonate Personal Values Wheel

**AUTHORITY:** Use themes of being assertive, commanding, and confident.

**ACHIEVEMENT:** Use themes of being admired, appreciated, successful, and acknowledged in your creative and messaging.

**INFLUENCE:** Use themes of prestige, importance, prosperity and power attained by accumulating wealth in your creative and messaging.

**CONFORMITY:** Use themes of harmony, compromise, respect towards others, honoring parents and understanding in your creative and messaging.

**REPUTATION:** Use themes of strong values and being a good citizen in your creative and messaging.

**STIMULATION:** Use themes of adventure, inventiveness, excitement and variety in life in your creative and messaging.

**CREATIVITY:** Use themes of innovation, originality, and cleverness in your creative and messaging

Next, let's take our understanding of these consumers to the next level. We're going to dive deep into what's on each consumer's shopping list, what drives them to buy, and how you can bring this all together to reach these hyper-targeted segments.



# STATE OF THE OVERWHELMED CONSUMER

These consumers are weary. They're *still* navigating virtual school and long WFH hours. They're super-busy and always on. It's important to know they'll open their wallets for the brands that offer a helping hand.

Meet Lauren and Todd. They're elder millennials, both working from home and navigating childcare for their 3-year-old, while taking turns making sure their 6-year-old is tuning into his on-again, off-again virtual first-grade class.

Resonate data shows us these consumers are more likely to be experiencing the following: **making major home renovations, being promoted, buying or leasing a car, refinancing a mortgage.**



*"In 2022, consumers will turn to uplifting, pleasing products and experiences that offer reprieve from the fatigue of ongoing uncertainty"*

– Forrester<sup>1</sup>



## WHAT'S NEXT ON THEIR SHOPPING LIST



HOME IMPROVEMENT ITEMS



MAJOR APPLIANCES



TOYS AND GAMES



CRAFT SUPPLIES



SPORTS AND FITNESS EQUIPMENT

They're 158% more likely than the average consumer to indicate they're planning on buying a bar cabinet. They're also 45% more likely to buy alcohol online and 57% more likely to say drinking at home increased during the pandemic.


1. Lai, Anjali. 'Predictions 2022: Weary Consumers Seek Immediate Happiness And Comfort,' Forrester, October 27, 2021. [www.forrester.com/blogs/predictions-2022-consumer-behavior/](https://www.forrester.com/blogs/predictions-2022-consumer-behavior/).



# WHAT DRIVES THEM TO BUY

The Overwhelmed Consumer is more likely to purchase products that are **FAMILY-FRIENDLY, FUN and EXCITING, or INNOVATIVE**. They care less about whether the purchase is cost-effective or practical. For consumers who’ve been hit hard by the doldrums of 2020 and 2021, this all ties back to the Forrester prediction that consumers will look for uplifting products to offer a break from the pandemic’s uncertainty.

Make shopping convenient



44%

more likely

to buy online but return in store



22%

download a retailer’s app



14%

follow a brand on social media

Build connection and generate loyalty by being present in the palm of their hand



## 3 WAYS TO REACH THE OVERWHELMED CONSUMER

TOP STREAMING	TOP NETWORKS	TOP SOCIAL CHANNELS
<div></div>	<div></div>	<div></div>

The Overwhelmed Consumer is busy — like really busy. But they are still finding time for media consumption. They spend 20-40 hours a week online, they’re more likely to follow brands on social media than the average consumer, and they binge-watch TV often. Hey, when you need to unplug, that doesn’t mean unplug the media, right? And that gives you the opportunity to get in front of these consumers with a highly targeted social or **CTV** message that helps alleviate their day-to-day stress, offers an escape, and builds your brand connection.

| State of the Consumer 2022

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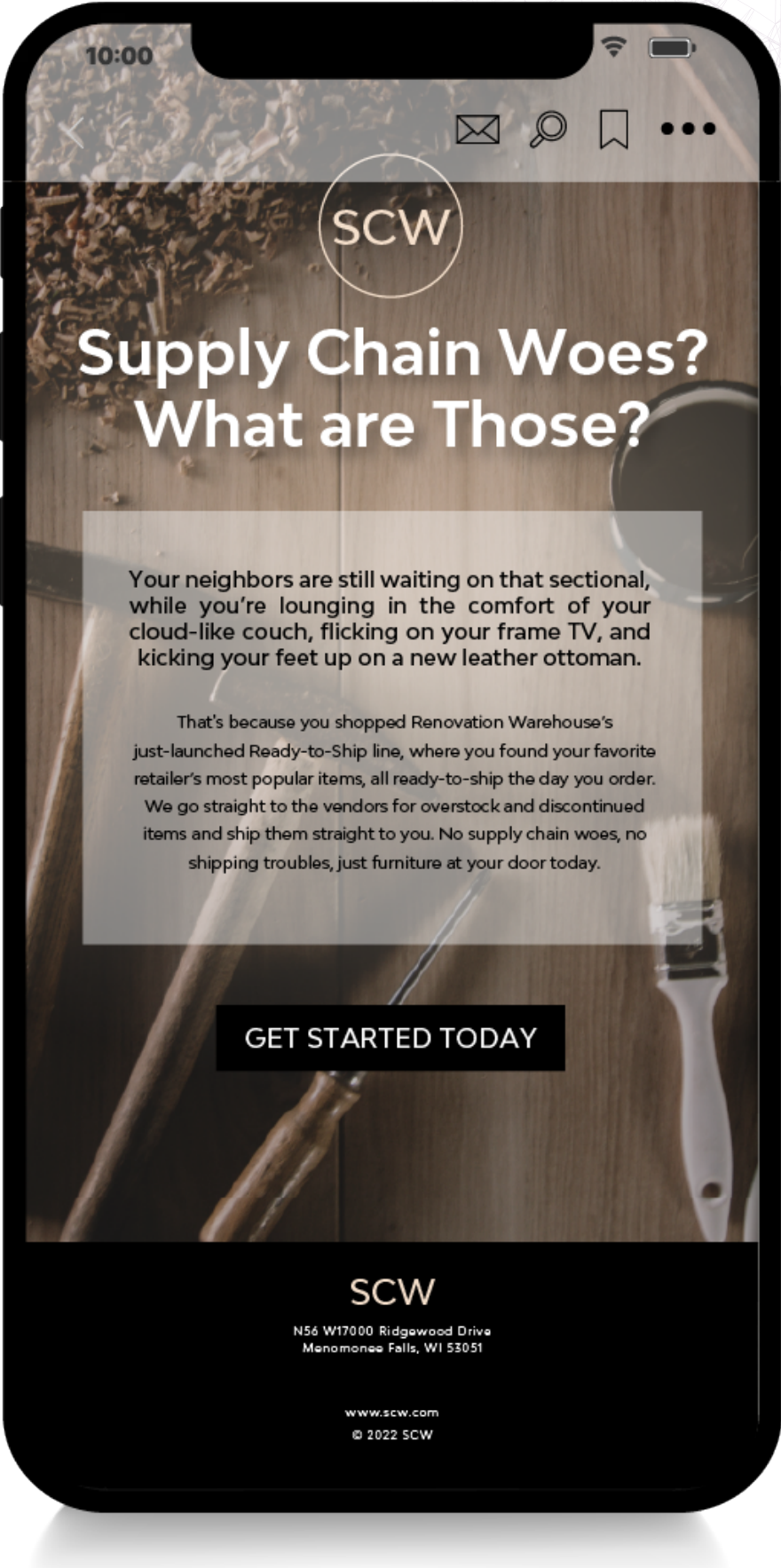
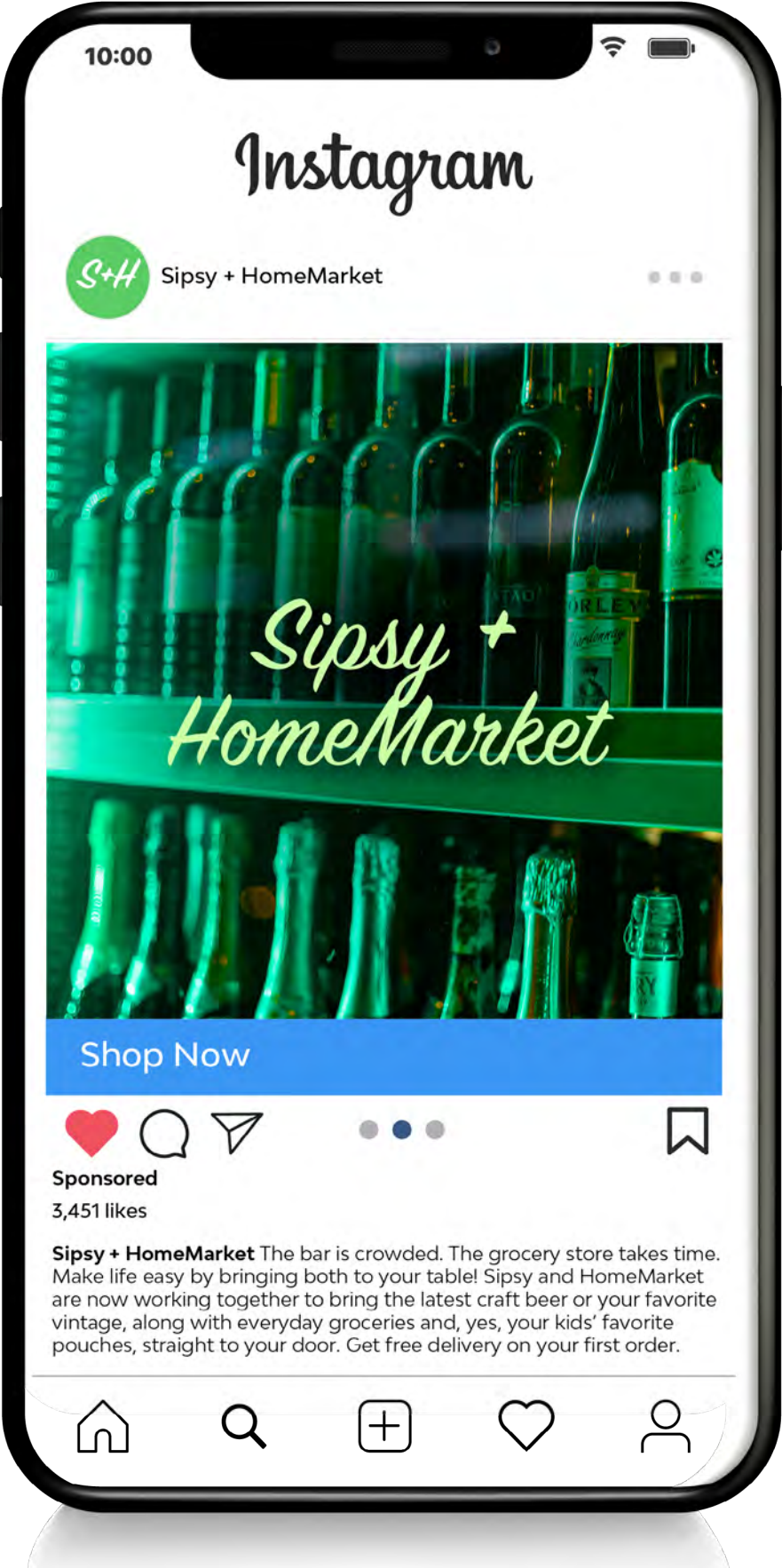
# OVERWHELMED CONSUMER DATA INTO ACTION

## INSTAGRAM EXAMPLE

A targeted ad for an alcohol delivery and grocery delivery partnership is a home run with this audience, who is 45% more likely to buy alcohol online and 28% more likely to have purchased groceries online in the past 3 months. This taps into their need for convenience, also appeals to their love of innovation.

## EMAIL MARKETING EXAMPLE

This segment is eager to renovate their homes — likely to make room for working from home and their growing family. They want things that are convenient, so touching on the long lead times that are holding back the industry will definitely catch their eye. Add in a nod to their value of achievement and influence with a keeping up with the Joneses touch.



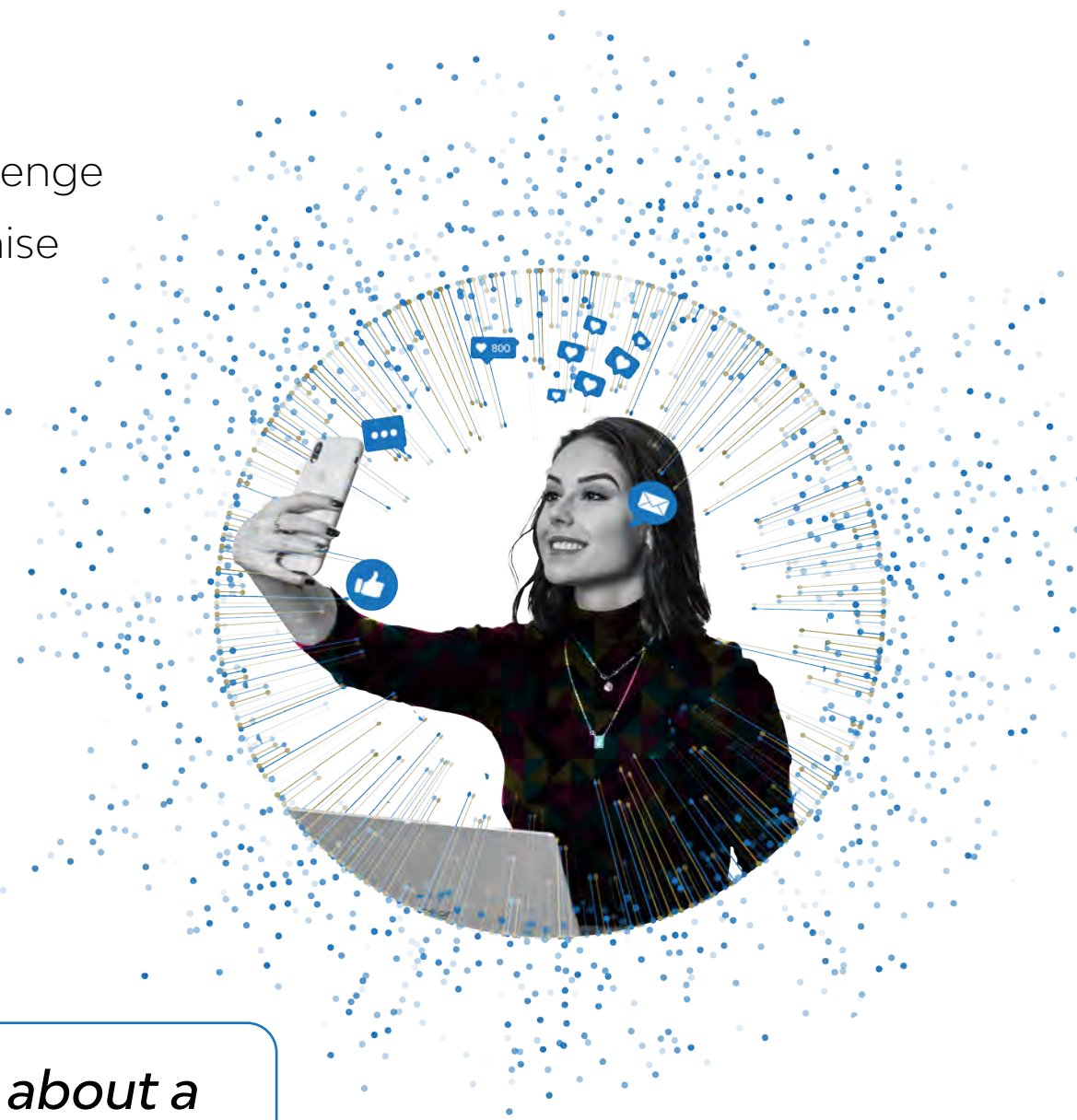


# STATE OF THE INFLUENCED CONSUMER

Long nights at home lead to hours of scrolling and pandemic revenge buying. That kaftan for a Caribbean vacay? They'll hit "buy" for the promise of a post-pandemic vacation.

Meet Angie. She's a 34-year-old living in an urban area. She dove headfirst into plant parenthood during the pandemic and has a bevy of TikTok accounts that influence her daily decisions.

Resonate data shows us that these consumers are more likely to be experiencing the following: **having a child or getting married**, **obtaining a master's degree online**, **moving a family member to a retirement community**.



*"Nearly 60% of Millennials prefer to see all of the details about a new product or brand in an ad, and don't want to have to go to a company's website to learn more."*

- Sticher Ads<sup>2</sup>



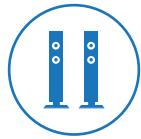
## WHAT'S NEXT ON THEIR SHOPPING LIST



SPORTS AND FITNESS EQUIPMENT



WATCHES AND JEWELRY



HOME AUDIO SYSTEM



KITCHEN FURNITURE



HOME IMPROVEMENT

They're 50% more likely to have accent chairs on their wish list, and 70% more likely to have their eyes on ottomans. Home goods companies, turn your eyes towards influencer marketing.

2. 'Study: Nearly 60% of Gen Zs And Millennials Have Bought a Product on Social Media Using 'Buy Now, Pay Later,' SticherAds, September 29, 2021. <https://sticherads.com/resources/press-release-study-nearly-60-of-gen-zs-and-millennials-have-bought-a-product-on-social-media-using-buy-now-pay-later/>

# WHAT DRIVES THEM TO BUY

The Influenced Consumer is more likely to purchase products that are **TIME-SAVING, POPULAR, and BEST LOOKING**. They care less about whether the purchase is easy-to-use or luxurious. These consumers are often stopped in their tracks while scrolling, inspired to buy by an influencer’s recommendation, so it’s no surprise they’re tempted by the siren consumer calls of popular, attractive, and convenient products.

**59% more likely** to consider social media influencers an influential source of information in their apparel purchases





Don’t discount the power of getting your clothing into an Instagrammer’s haul!

**34%** of this group has discretionary income under \$20,000 and nearly 4 out of 5 cite best prices as their number one retailer selection trait

While they have a long list of wish list items, they need to keep it budget friendly, which attributes this group being 13% more likely to use coupons

## 3 WAYS TO REACH THE INFLUENCED CONSUMER

TOP STREAMING	TOP NETWORKS	TOP SOCIAL CHANNELS
<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>

55% of the Influenced Consumers spend over 20 hours a week online, and they prefer to watch their favorite streaming networks on their phone. These consumers are connected — you just have to know the right channels to reach them and with Resonate, you can directly activate this audience across all channels without creating proxies. Need to reach them via email? Simply onboard your CRM file and segment your prospect list.



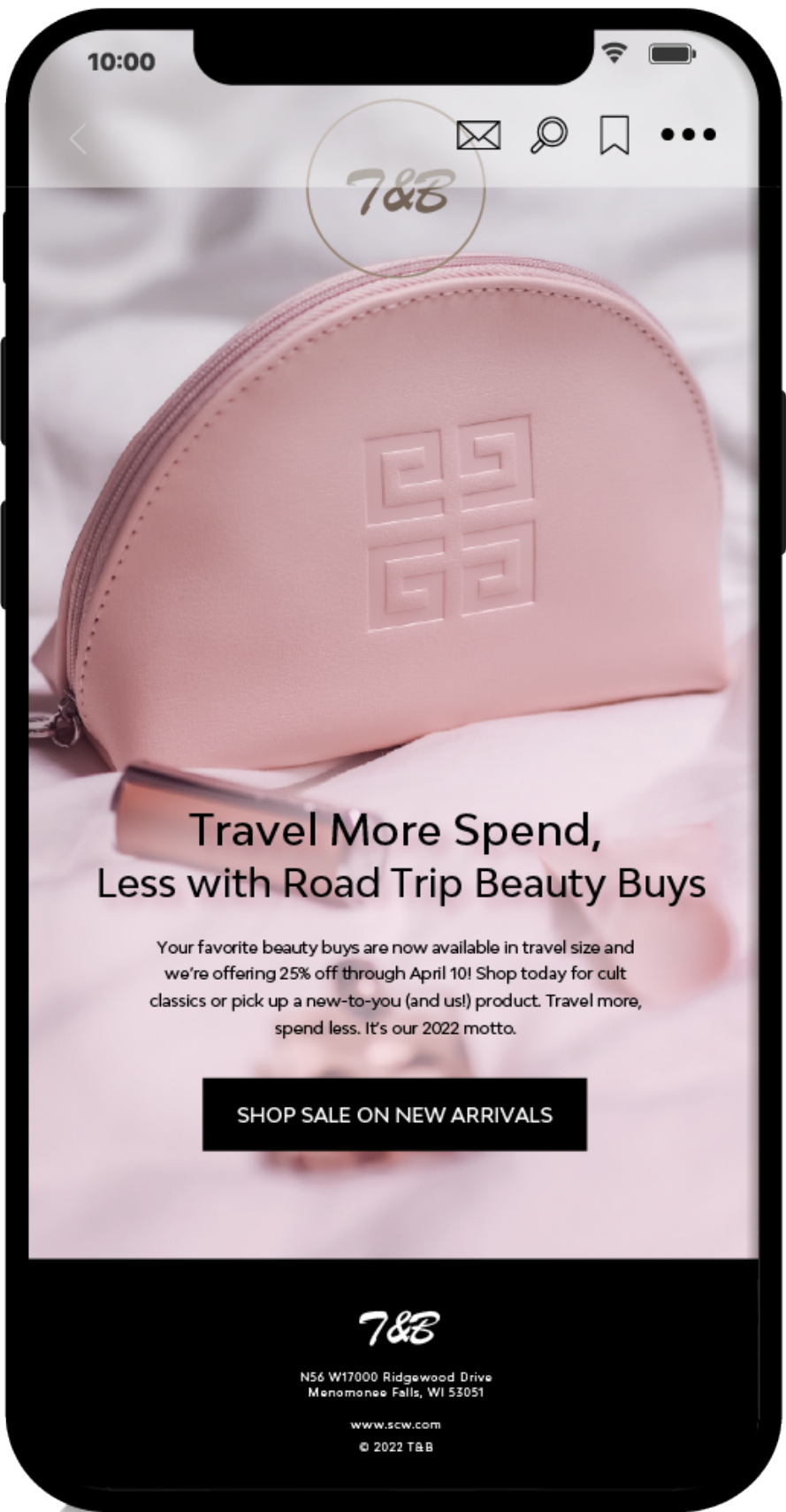
# INFLUENCED CONSUMER DATA INTO ACTION

## EMAIL MARKETING EXAMPLE

The Influenced Consumer is 13% more likely to shop at Sephora, and they're looking to influencers on social media for their purchasing direction. Plus, their likelihood to travel during the pandemic actually increased — possibly the result of their cost-conscious purchasing and all of the deals to be found during the slow pandemic months.

## TIKTOK EXAMPLE

These consumers want to appear trendy and look for a fun online shopping experience. Blogger recommendations are likely to drive purchases, and they look for popular products, which aligns with their value of conformity. Bringing all of that together in a TikTok ad will drive them from swiping their screen to swiping their credit card.





# STATE OF THE ACTIVIST CONSUMER

Brand boycotts and paying more to associate their dollars with a company that stands for something. This customer isn't just buying a box of tissues; they're buying into brand values that align to theirs.

**Meet Kate. She's of the generation that's been through it all. She came of age in the aftermath of 9/11, was early in her career during the recession, and, now, her life-building years are defined by the pandemic. She's committed to leaving the world a better place than she inherited.**

Resonate data shows us that these consumers are more likely to be experiencing the following: **looking for a new job, adopting a pet, starting a small business, having a new teen driver at home.**



*"Consumers increasingly factor sustainability into their online and offline purchasing decisions. They're paying attention to the sellers' ethical practices, whether products or their components are sustainably sourced, and if they have eco-friendly product packaging and delivery."*

- eMarketer<sup>3</sup>



## WHAT'S NEXT ON THEIR SHOPPING LIST



HOME IMPROVEMENT ITEMS



BED AND BATH ITEMS



MUSIC, MOVIES, AND BOOKS



PERSONAL AUDIO DEVICES



KITCHEN APPLIANCES

Their focus on corporate responsibility doesn't mean they're abandoning corporations. The Activist Consumer is more likely than other consumers to have an Amazon Prime membership, Costco membership, Instacart, and others.

3. Goldman, Jeremy and von Abrams, Karin. 'Consumers to make sustainability a business imperative in 2022,' eMarketer, December 20, 2021. <https://www.emarketer.com/content/consumers-make-sustainability-business-imperative-2022>.



# WHAT DRIVES THEM TO BUY

The Activist Consumer is more likely to purchase products that are **PRODUCED SUSTAINABLY, INNOVATIVE, and ENERGY EFFICIENT**. They care less about whether the purchase is cost-effective or easy-to-use. These consumers are 105% more likely to purchase from a brand that supports Black Lives Matter and 164% more likely to stand with companies that reduce energy use. They care about the world around them — and they want their purchases to do the same.

  
**80% more likely**  
to shop from DTC brands  
that ship directly to them

Given their propensity for supporting equality and social justice, the Activist Consumer is  
  
**151% more likely**  
to prefer to shop at retailers that are  
woman or minority-owned

## 3 WAYS TO REACH THE ACTIVIST CONSUMER

TOP STREAMING	TOP NETWORKS	TOP SOCIAL CHANNELS
  	  	  

Activist Consumers often bring to mind protest-ready college students, but this group has significant representation among Gen X and Baby Boomer consumers. 35% of them have a household income over \$100K, and 18% have discretionary spending over \$100K. Don't bypass this high-value audience. With Resonate, you can directly activate this audience and engage them on the channels where they are most likely to consume media.

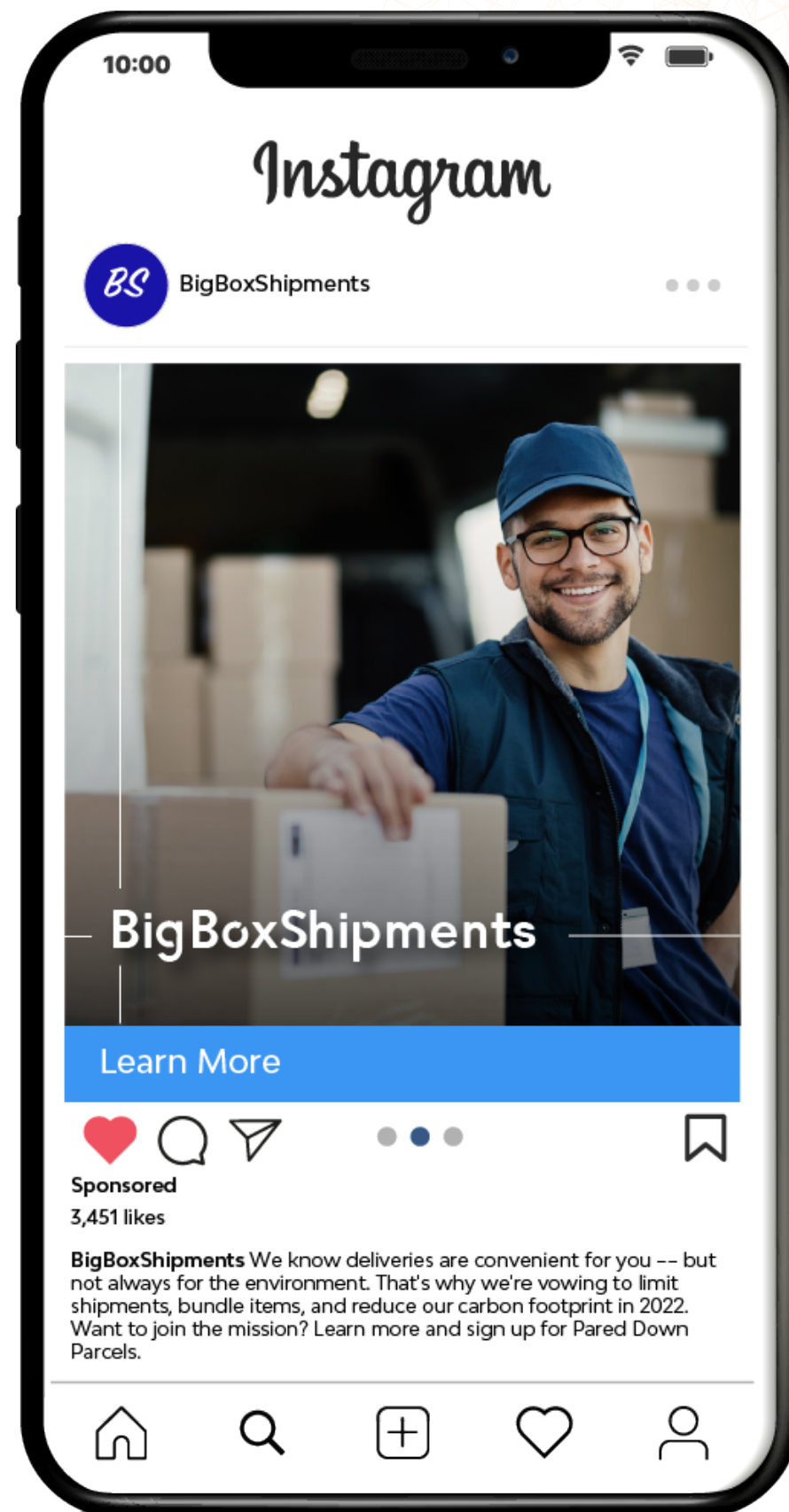
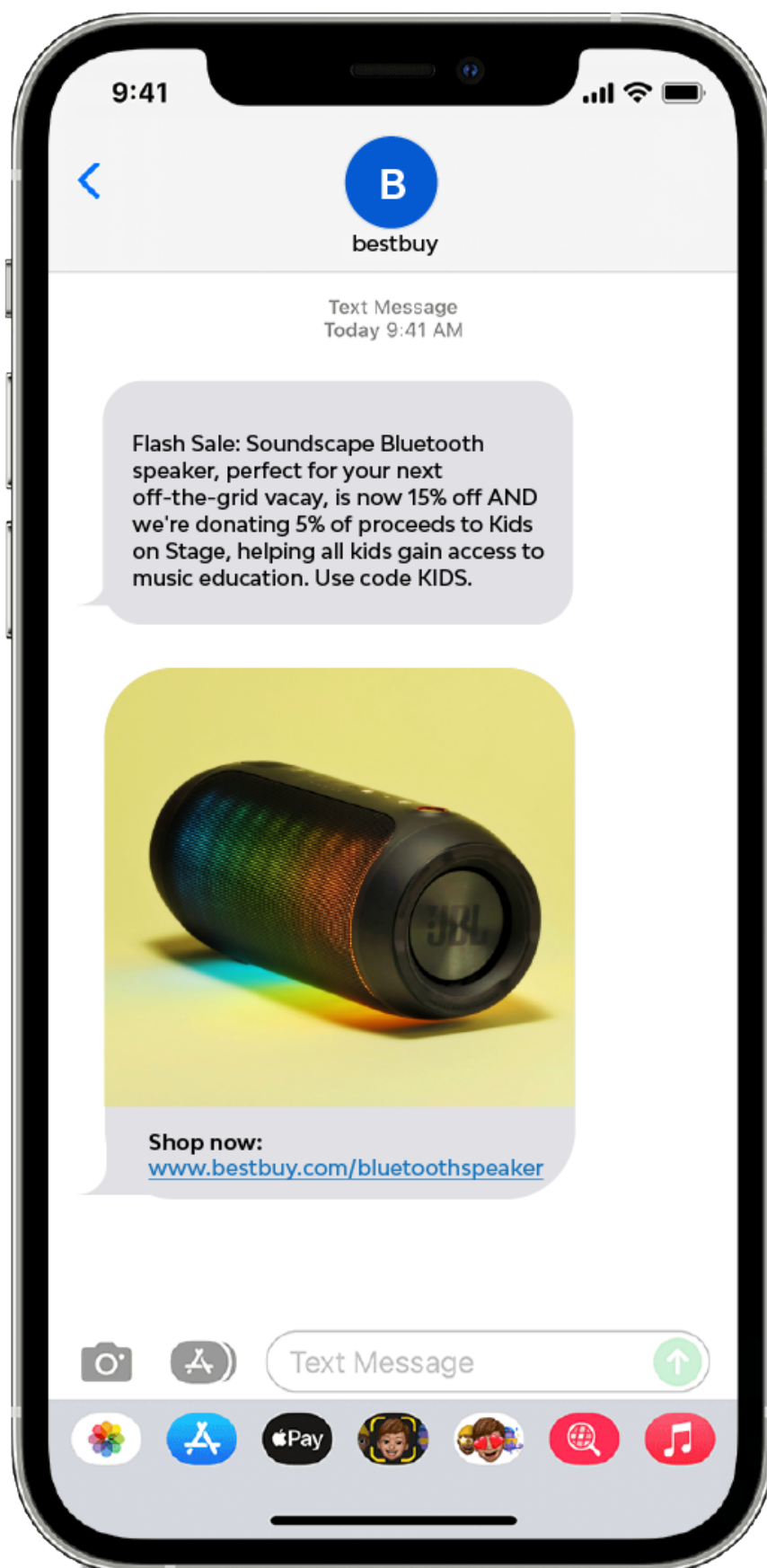
# ACTIVIST CONSUMER DATA INTO ACTION

## SMS ADVERTISING EXAMPLE

We know that the Activist Consumer considers travel and active vacations two of their top hobbies, and personal audio devices are on their list of items to buy. They're more likely to care about supporting at-risk youth, so add in a cause-based effort, and this partnership will strike the right chord.

## INSTAGRAM EXAMPLE

As we saw just a few pages ago, while these consumers prioritize corporate responsibility, they're also more likely to shop with the big names. Amazon or Costco could solidify their brand loyalty with a promise to do better by their employees and their environment.





# WHAT'S THE REAL STORY BEHIND BRAND LOYALTY?

The decline of brand loyalty has been a continuous theme throughout the pandemic. As the story goes, let's say a consumer, we'll call him Brad, used to reach for the same Old Spice body wash every time he went to the grocery store, the supply chain woes had other plans — the shelves were empty and he adapted. Now he's willing to try everything from new drugstore brands to direct-to-consumer options.

The hypothesis: The ability to discover new brands online, and the necessity to reach for whatever's available has chipped away at brand loyalty — and it may not return.

*Roughly 75 percent of consumers tried a new shopping behavior in the last 18 months, and more than 80 percent of those intend to continue with new behaviors.*

- McKinsey<sup>4</sup>



## BUT HOW DOES IT *REALLY* PLAY OUT WITH THESE GROUPS?

When asked whether they were loyal to brands 12 months ago and have since abandoned that loyalty, this is what they said.

Less likely to be brand curious in 2022: **Overwhelmed** and **Activist Consumers**  
More likely to be brand curious in 2022: **Influenced Consumers**

This makes sense, right? Those who are just trying to get through the day aren't worried about trying new brands; they want something reliable. And those who are concerned about using their dollars for good want to find the best brands and stick with them. Meanwhile, those who are easily influenced are willing to try new things.



Now it's up to you — powered by the fresh insights we've shared on the previous pages — to put personalized marketing into action and connect on a deeper level that inspires — or sways loyalty.

4. 'US consumer sentiment and behaviors during the coronavirus crisis,' McKinsey, December 14, 2021. <https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/survey-us-consumer-sentiment-during-the-coronavirus-crisis>.

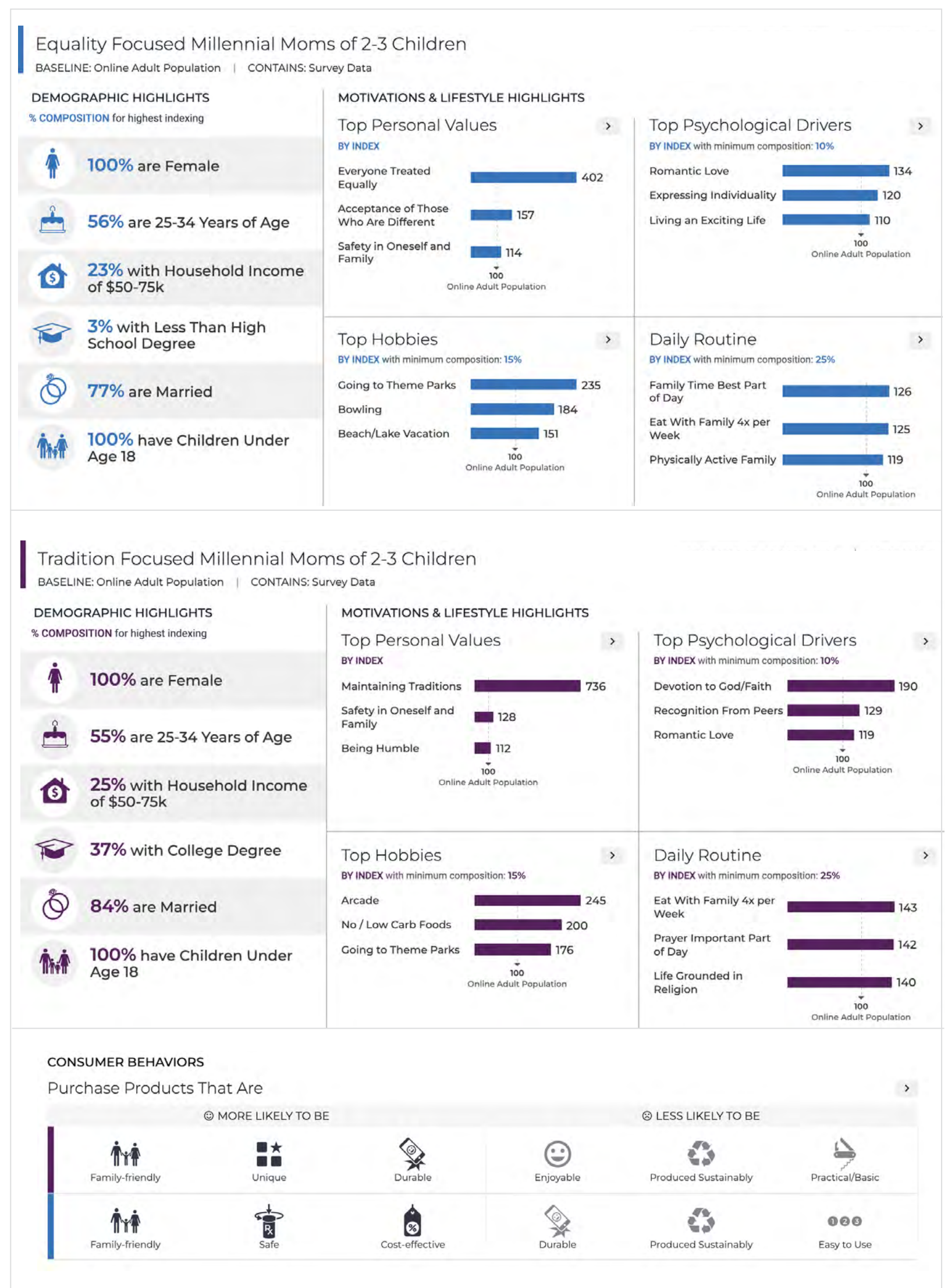


# GET TO KNOW THE HUMAN ELEMENT

Unlike traditional research and data providers, Resonate AI-powered data is continuously updated and includes relevant insights that provide a rich, comprehensive understanding of an individual. It's a real-time finger on the pulse of the consumer that syndicated data companies can only dream of.

A key differentiator for Resonate is our ability to deliver a complete, 360-degree view of a consumer. We combine consumers' core personal values with their demographics and psychographics to create a holistic profile of the individual humans behind the data. Basic data may show your customer as a millennial mom of two who works full-time and shops via Amazon prime but, when you enrich it with the Resonate Human Element, we reveal the true motivations behind her decision-making. She values tradition, family, has an optimistic outlook on life, and purchases based on product innovation. We help you better understand how to appeal to this customer, and reveal which products, offers and messages would best compel her to become and stay your customer. Because this data resides in the Resonate Ignite Platform, you're able to see this data at scale and create segments that are directly actionable for hyper-personalized marketing across any channel.

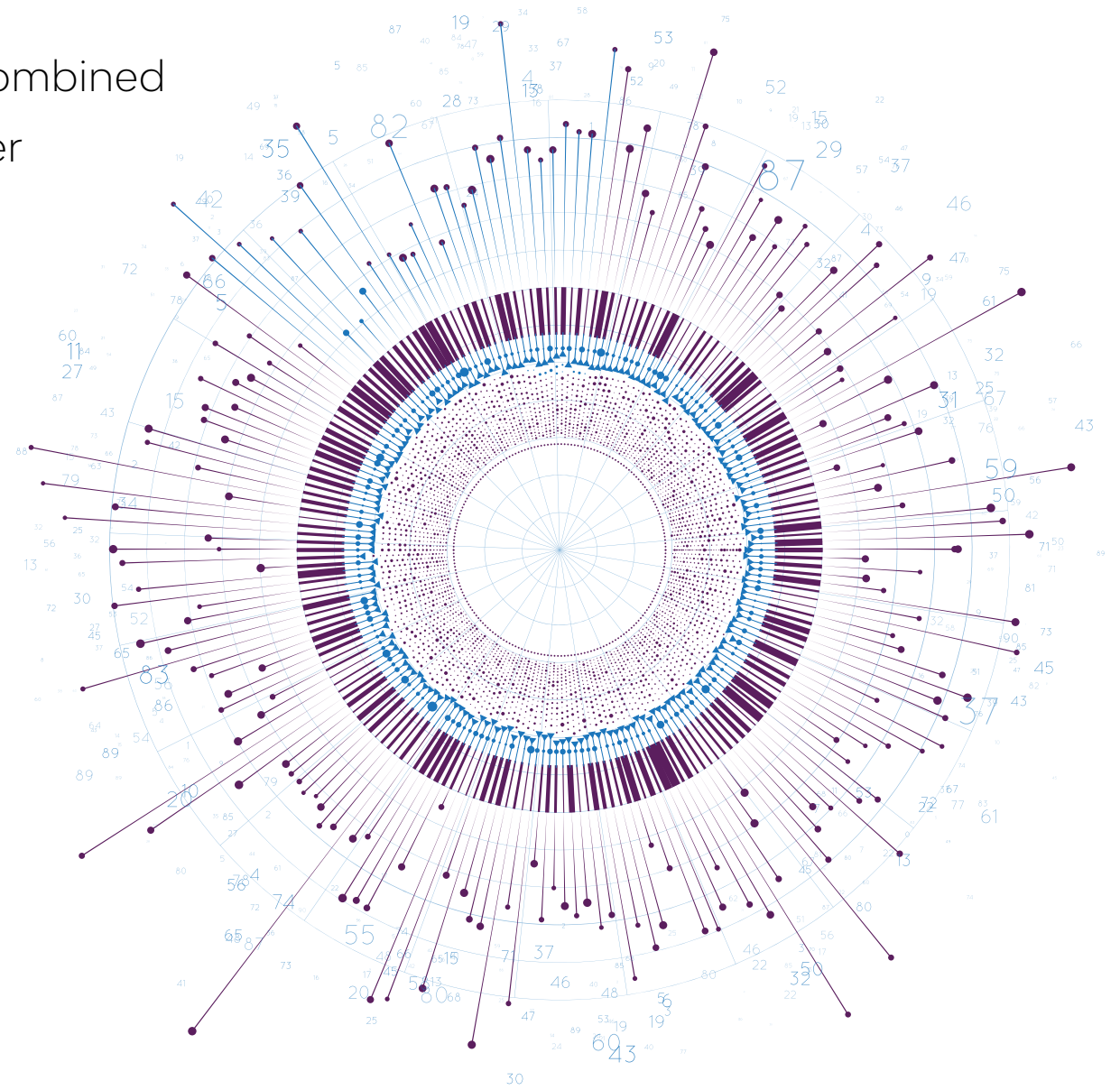
The Human Element helps you build stronger, longer-lasting customer relationships and increase customer lifetime value, while sparking true love of brand. ❤️





# PRIVACY-SAFE, ENRICHED FIRST-PARTY DATA & PERSONALIZATION WILL LEAD THE WAY IN 2022

In 2022, decreased brand loyalty and increased choice, combined with decreased switching costs, have amplified consumer expectations for personalized products, services, and experiences. Brands are challenged to respond effectively without hyper-recent, hyper-relevant, privacy-safe consumer data to guide strategic decisions and marketing actions. Resonate is the only consumer intelligence company that dynamically creates comprehensive, privacy-safe consumer data and puts it at the fingertips of marketers for instant action at scale. Let's get started.



## HERE'S WHAT YOU CAN EXPECT FROM US NEXT

Over the course of the next year, we will continue to track these three consumer personas and update you on the latest trends and how those impact messaging, strategy, offers, and more. Follow us on social and sign up for email updates to stay connected to the latest videos, infographics, and blog posts exploring the continued evolution of the State of the Consumer 2022.

We also want to address the elephant in the room: Google cookies. The demise of cookies is coming, and Resonate data is privacy-safe and future-proof. [Follow our privacy news page](#) to stay updated on the latest in our solutions and plans for a cookieless world.

## ABOUT RESONATE

Resonate is a pioneer in A.I.-driven consumer data and intelligence, delivering deep, dynamic insights, activation, and analysis in an easy-to-use SaaS platform. The Resonate proprietary, privacy-safe data set includes more than 14,000 fresh, relevant data points that describe more than 230 million individual U.S. consumers. Hundreds of companies use Resonate to drive better marketing strategy and execution fueled by a better, more comprehensive understanding of their customers and prospects that extends beyond traditional demographics, psychographics, and behavioral data to uncover why consumers choose, buy, or support certain brands, products, or causes. Empowered with unparalleled technology to drive insight into action, leading brands, agencies, and organizations use Resonate to identify, engage, and analyze these audiences, driving growth and increasing customer lifetime value.

Headquartered in Reston, Virginia, Resonate is privately held and backed by Argentum Capital Partners, Revolution Growth, Greycroft Partners and iNovia Capital. For more information, please visit [www.resonate.com](http://www.resonate.com).

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