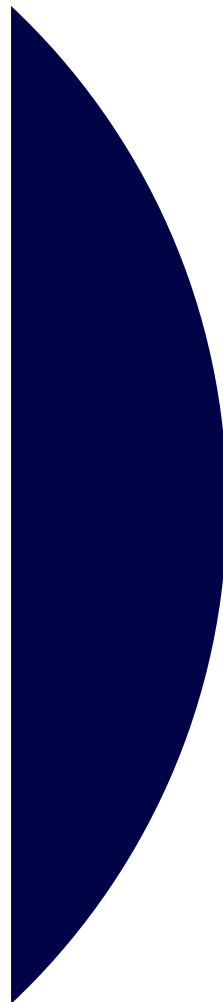
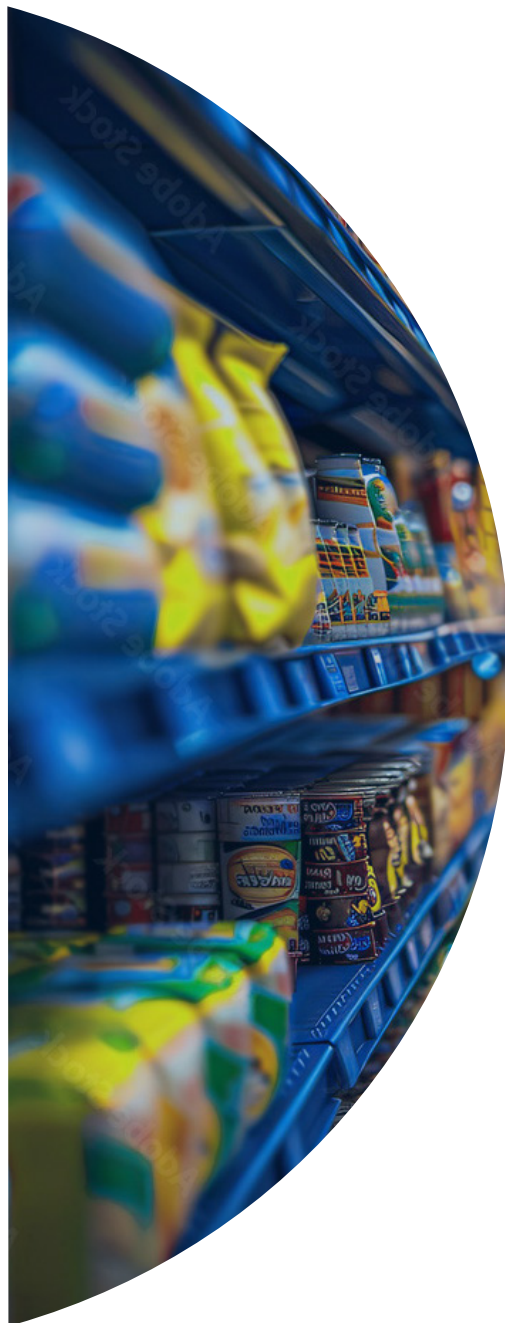


Consumer Outlook

Guide to 2027 →



Building roots in uncharted territory

Welcome to your 2027 strategic guide

Decode the past. Lead the present. Create the future.

For much of the last decade, consumers have navigated a near-constant stream of disruption. From the pandemic and inflation to housing affordability challenges, workplace transformation, technological acceleration, and geopolitical uncertainty, change has become a defining feature of everyday life. What makes this moment different is not the presence of disruption itself, but how consumers are responding to it.

Increasingly, consumers are no longer treating uncertainty as a temporary condition. Instead, they are adjusting their expectations, priorities, and purchasing decisions around the assumption that volatility will remain part of the environment for the foreseeable future. In many ways, the next 12 to 18 months may mark a shift from adaptation to commitment, as households make consequential decisions about how they will live, work, learn, save, and spend in a fundamentally different world.

The global state of consumers is recalibrating. *Simplicity* has become increasingly valuable. *Clarity* is sought after. *Purpose* is emerging as a critical filter for decision-making. At the same time, advances in artificial intelligence are beginning to reshape how consumers discover products, manage their wellbeing, build careers, and evaluate opportunities. Together, these forces are creating new patterns of consumer behavior that extend far beyond traditional measures of confidence or affordability.

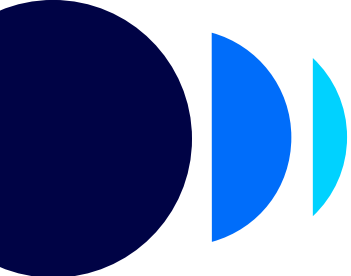
Drawing on consumer sentiment from more than 21,000 respondents across 31 countries, alongside NIQ's extensive measurement of real-world purchasing behavior, this report provides a roadmap for understanding not only what consumers are doing today, but why they are doing it and what it means for growth tomorrow.

The year ahead will be shaped by consumers who are learning to thrive within uncertainty, focus resources more deliberately, and make increasingly intentional decisions about what deserves their time, attention, and money.



Lauren Fernandes

Vice President, Global Content



Executive Summary

What you need to know for 2027

Perpetual volatility sparks permanent change

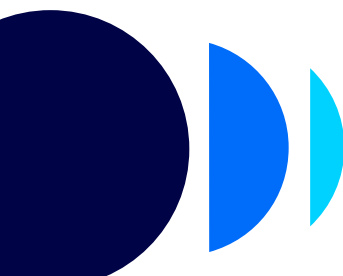
- **34%** of global consumers say they are financially worse off than a year ago, **up nearly two percentage points** versus 2025.
- Rising costs of living remain the dominant source of financial strain, cited by **77%** of financially challenged consumers
- **Rising food prices remain the leading consumer concern** globally, signaling a shift from inflation anxiety toward affordability anxiety.
- **Consumers are moving from adaptation to commitment** as they navigate prolonged **cost of living** pressures; redesigning decisions around how they live, learn, work, and spend in a world where volatility remains the norm.

Consumption at extremes

- The global economic divide continues to deepen, with nearly **one in five consumers identifying as financially insecure (19% fall within the “Strugglers” segment)**.
- The **rise of “constraint” and “upgrade” spending mindsets** is accelerating pressure on mainstream offerings.
- More than **23B USD** in value share has shifted **away from mainstream-priced CPG** products toward value and premium alternatives.
- **Market polarization is emerging** as a defining characteristic of growth, creating increasingly different pathways to success across markets.

A new world of worth

- **Quality and performance now outrank affordability** as the leading determinants of whether a purchase feels worthwhile (**34% vs. 31%**).
- **Spending by exception** is becoming the new norm, with consumers demanding stronger justification for every purchase decision.
- Consumers are becoming more selective across categories, with **signs of declining purchase rates and shrinking buyer pools** emerging in some instances around the world.
- The **rise of value engineering** is accelerating as shoppers combine promotions, loyalty programs, rewards, and savings strategies to maximize purchasing power.



Executive Summary

What you need to know for 2027

Self-directed wellness

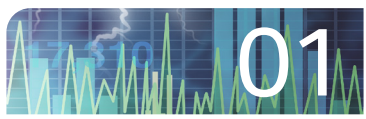
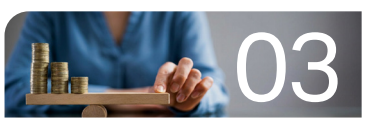
- **Healthy and natural attributes now rival affordability** as one of the most important factors shaping purchase decisions (15.1% vs. 15.3%)
- **A health-first value equation is emerging** as consumers increasingly evaluate purchases through the dual lens of price and wellbeing.
- Wellness product sales growth is becoming increasingly concentrated among affluent consumers, creating a **widening health divide**.
- Technology, GLP-1 adoption, and new care pathways are enabling consumers to take **greater ownership of their health**, with **11%** of global consumers already reporting GLP-1 usage.

Agent-led discovery

- AI is becoming a new discovery layer, with **55%** of global consumers reporting they have been influenced by AI recommendations for CPG purchases, and **27%** say they already use AI-powered tools to help decide what to buy. This signals the continued rise of **AI shopping** behaviors.
- **Products may win or lose consideration before consumers even see them.** As commerce evolves, the number of products considered by shoppers continues to narrow.
- Agentic commerce is redefining pathways to success: Data used to report who won. Now, **data determines who wins**.
- The competitive battleground is shifting **from influencing shoppers to influencing the AI systems** that increasingly shape what shoppers see, consider, and buy.



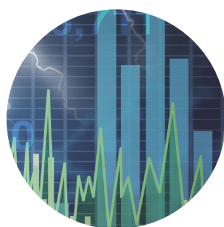
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01

Perpetual volatility sparks permanent change



Consumers are shifting expectations and adapting to permanent volatility amid growing cost of living pressures and ongoing challenges around key issues like housing affordability. This chapter explores these realities: how households are reshaping decisions around spending, saving and planning for the future. Understanding these shifts is critical for interpreting broader consumer sentiment and identifying forces likely to shape markets through 2027.

The era of recalibration

Seeking simplicity.

Craving clarity.

Prioritizing purpose.



For several years, consumers have operated within a prolonged state of uncertainty. Economic volatility, housing affordability challenges, technological disruption, changing employment expectations, and rising living costs have collectively reshaped expectations about the future.

Today, consumers appear to be reaching a tipping point. Increasingly, households recognize that uncertainty may persist, prompting a shift from postponement toward adaptation. Homeownership, retirement, education, career progression, and household spending are all being re-evaluated through a more pragmatic lens.



As Laura McCullough,

President, Global Customer Organization, explains:

"Consumers are no longer responding to disruption as a temporary condition. The next 12 to 18 months could see a global lift in the prolonged holding pattern many households have found themselves in after consecutive periods of disruption."



Waiting has become a cost in an era of economic uncertainty

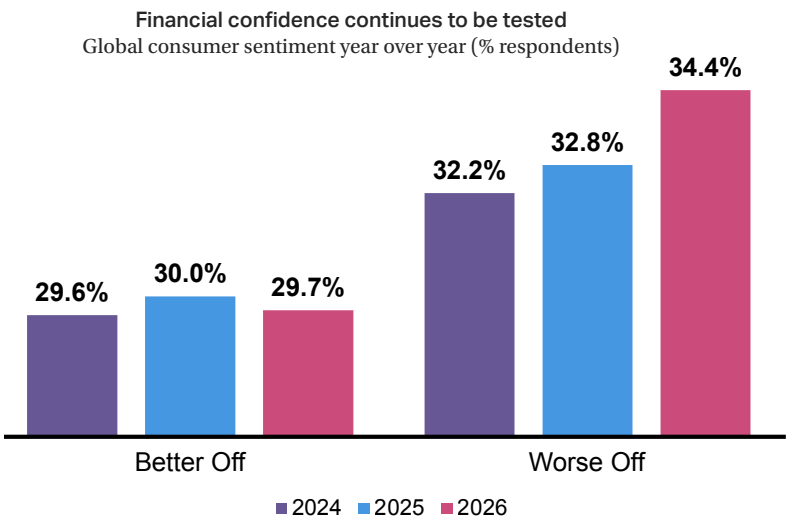
Historically, consumers often responded to uncertainty by delaying major decisions until conditions improved. Increasingly, many appear less convinced that waiting will necessarily lead to better outcomes.

Whether related to homeownership, retirement, education, family planning, or career progression, consumers are beginning to weigh the costs of inaction alongside the risks of moving forward. Missed opportunities, delayed experiences, and postponed wealth accumulation are increasingly viewed as consequences of waiting.

As a result, many households are shifting toward adaptive commitment, making important decisions despite continued uncertainty.

Consumer financial confidence remains under pressure

Figure 1.1 Financial optimism softens; more are feeling worse off



Source: NIQ 2026 Consumer Outlook, Global, vs. previous studies.
Q: Compared to a year ago, is your household better off or worse off financially? Note: In China, verbiage reflects change in "management of spending."

Globally, 30% of consumers say their household is in a better financial position than one year ago. However, 34% report that their financial position has worsened. While the proportion of consumers feeling financially better off has remained relatively stable, the percentage feeling worse off has increased compared with the previous year, suggesting that financial progress remains difficult to sustain for many households.

Importantly, these figures should not be interpreted solely as evidence of economic hardship. They also reflect a broader reassessment of financial expectations. Consumers are increasingly restructuring their priorities, redefining what financial success looks like, and adjusting spending and savings behaviors around a different set of realities than those that existed prior to the pandemic and inflationary surge.

Key takeaway

Consumers are increasingly choosing adaptation over postponement, making long-term decisions despite continued uncertainty.



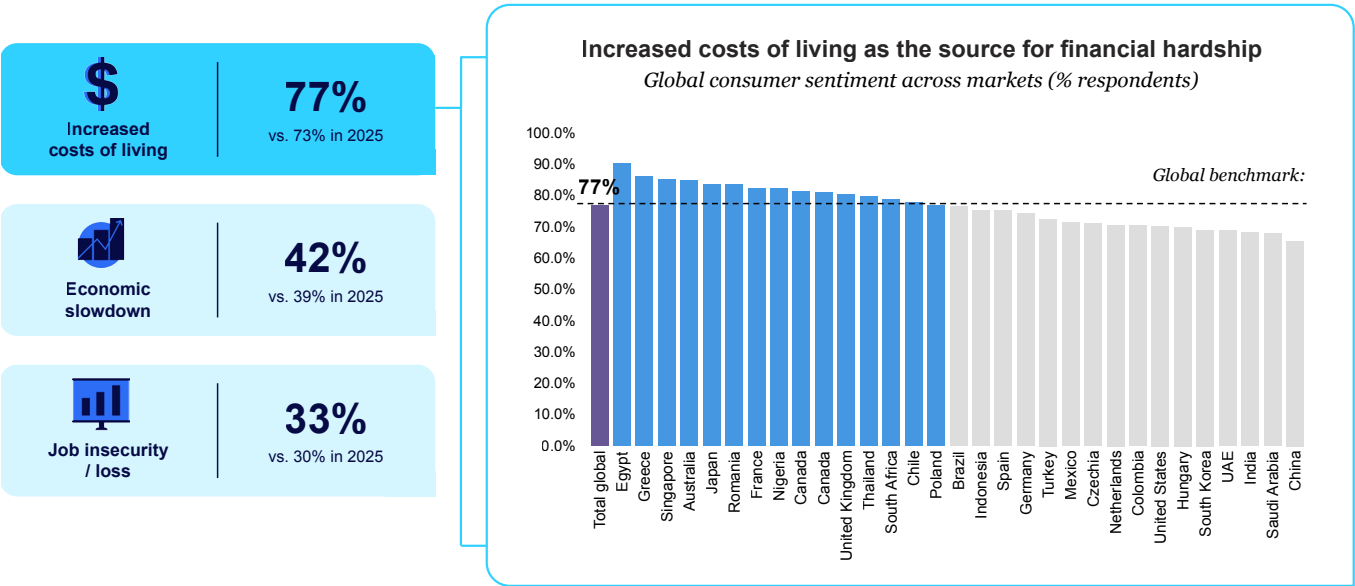
34%

of global consumers say their household is financially worse off than a year ago, up nearly two percentage points versus 2025.

For businesses, this means understanding that improving economic indicators alone may not immediately restore consumer confidence. Recovery is increasingly psychological as well as financial.

Affordability continues to shape financial reality

Figure 1.2 Costs of living remain a limiting factor for most consumers



Source: NIQ 2026 Consumer Outlook, Global, vs. previous study.

Among consumers who report feeling more financial strain, rising costs of living remain the dominant source of hardship.

More than three-quarters of financially challenged consumers (77%) cite increased living costs as a key contributor to their situation, ahead of economic slowdown and job insecurity. This underscores the lasting impact of the global cost of living crisis. Compared with a year ago, the influence of cost-of-living pressures has become even more pronounced, reinforcing affordability as the defining challenge facing many households.

The intensity of these pressures varies considerably across markets. Consumers in Egypt, Greece, and Singapore are particularly likely to attribute worsening financial circumstances to rising costs of living, while respondents in China, Saudi Arabia, and India are comparatively less likely to cite affordability pressures as a primary source of hardship.

These differences illustrate an important reality: while affordability is a global concern, its impact remains highly local. Understanding how financial pressures manifest by market will be critical for organizations seeking to remain aligned with consumer realities in the year ahead.

Key takeaway

Affordability remains the defining consumer challenge, even as inflationary growth continues to moderate.

Adjusting how we live, learn, and earn

Affordability pressures are reshaping more than household budgets. They are also influencing how consumers think about work, housing, education, and long-term planning.

More flexible career trajectories, including career pauses, sabbaticals, and micro-retirements, are challenging traditional assumptions about work and retirement. Housing affordability pressures are prompting some consumers to delay homeownership, remain in their first homes longer, or embrace renting as a longer-term reality. At the same time, advances in AI are accelerating a shift from credential accumulation toward continuous skills development.

These changing priorities are also influencing everyday shopping behavior. Across several European markets, stock-up trips are gradually giving way to more targeted, mission-based shopping occasions, reflecting a growing desire for flexibility, immediacy, and greater control over spending. Together, these shifts suggest consumers are redesigning how they live, learn, earn, and consume around a more adaptive vision of long-term wellbeing.

Key takeaway

Consumers are shifting expectations around housing, work, education and retirement as they adapt to a future where volatility remains a persistent reality.

Stability becomes a priority

Economic uncertainty appears to be driving a subtle but important behavioral shift. Compared with two years ago, fewer consumers say they intend to seek additional income streams, switch jobs to avoid layoffs, or take on additional debt, as concerns around job security evolve.

61%

likely to actively seek additional income streams (vs. **64%** in 2024)

33%

likely to switch employment to avoid layoffs (vs. **38%** in 2024)

21%

likely to increase personal debt levels (vs. **28%** in 2024)

Source: NIQ 2026 Consumer Outlook, Global vs. previous studies

Key takeaway

More consumers are prioritizing stability over stretch, emphasizing predictability and control over additional financial risk.

These changes suggest growing interest in stability, simplicity, and control. Rather than continually pursuing expansion, many households appear increasingly focused on protecting what they already have and managing risk more carefully.



Top concerns setting the spending tone for 2027

Figure 1.3 Top concerns driving consumer decisioning

		July 2026	% point change vs. year ago
1	Increasing food prices	31%	1.5
2	↑ Increasing utility bills (was #4 in 2025)	20%	3.3
3	Economic downturn	17%	-2.3
4	↓ Global conflict/Escalation of crisis/War (was #2 in 2025)	16%	-6.9
5	↑ Increasing fuel/transport prices (was #11 in 2025)	14%	5.8
6	Self/Family welfare/happiness	12%	-0.1
7	Job security	11%	0.3
8	Increased housing costs	11%	0.8
9	↓ Political unrest (was #7 in 2025)	10%	-0.3
10	Global warming/Climate change/Environment	10%	0.3

Source: NIQ 2026 Consumer Outlook, Global, vs. previous study

Despite moderating inflation, concerns around affordability continue to dominate the consumer mindset.

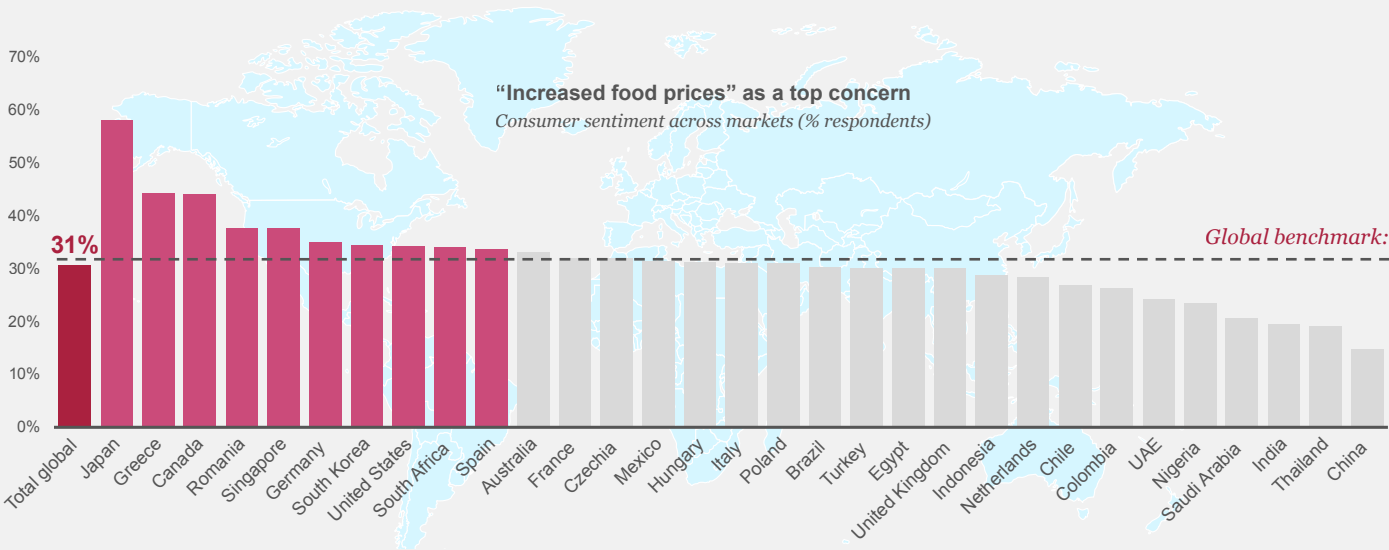
Food prices rank as the leading concern globally, highlighting the ongoing impact of food inflation, followed by economic downturn, global conflict, and increasing utility bills. Notably, rising food costs have strengthened their position relative to a year ago, reinforcing the importance of grocery spending within household budgets.

While inflation rates themselves have cooled, consumers remain acutely aware of the cumulative impact of several years of elevated prices. As a result, the global conversation is increasingly shifting from inflation anxiety toward affordability anxiety. Consumers are less concerned about how quickly prices are rising and more concerned about the higher price levels that have become permanently embedded within everyday life.



Rising food prices, food inflation and the cost of living crisis: global concerns with local realities

Figure 1.4 Concern for rising food prices by market



Concern surrounding grocery prices spans every region of the world, but the intensity of that concern varies significantly.

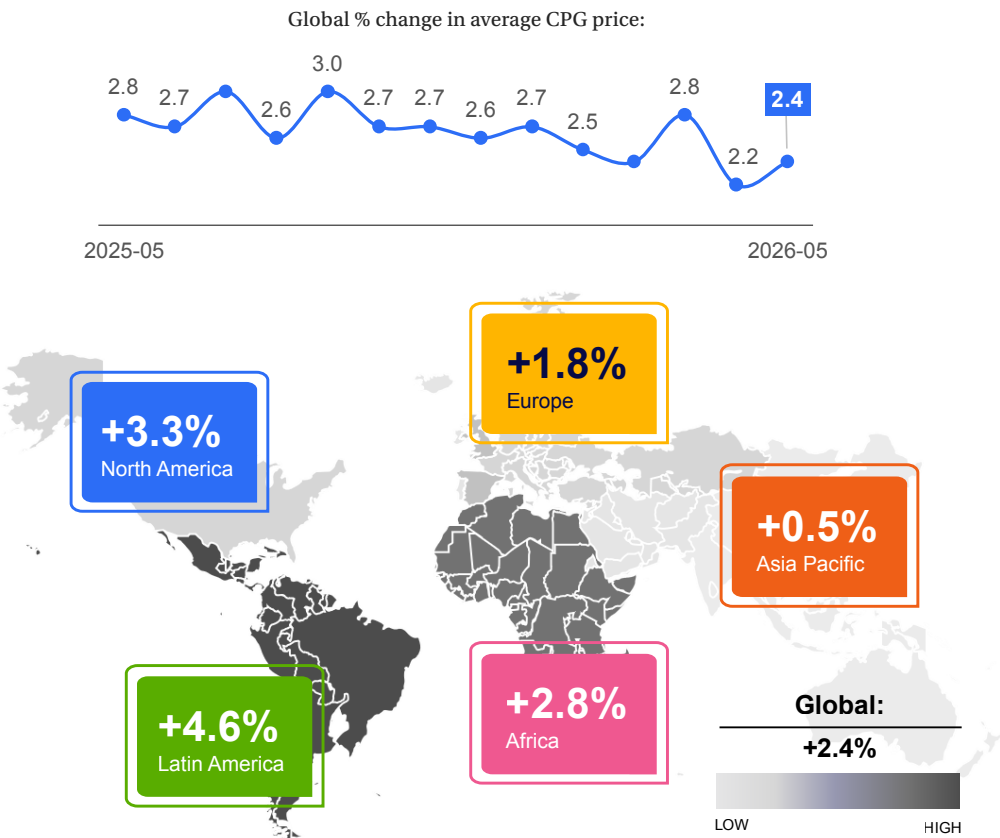
Consumers in Japan, Greece, and Canada report some of the highest levels of concern regarding grocery affordability. In these markets, food costs have become an especially visible source of financial pressure, continuing to shape perceptions of personal wellbeing despite broader economic improvements. By comparison, consumers in India, Thailand, and China report relatively lower concern levels.

The result is a highly localized affordability story. While global inflation may be slowing, many consumers continue to feel the cumulative impact of elevated food prices on their household budget each time they enter a grocery store.



Inflation growth is moderate, but prices remain high

Figure 1.5 Global CPG price growth over time

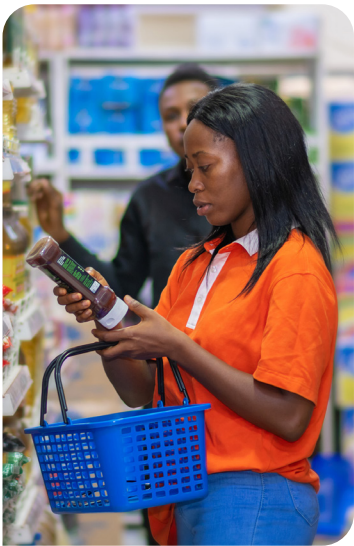


Source: NIQ Global Inflation Tracker, Eq Vol Price % Change, Monthly measure of May 2026 vs. previous year. CPG total measured across a closed group of 225 consistent categories, 58 countries, Reflected in U.S. dollars

The pace of global inflation continues to moderate.

Across measured CPG categories, global prices increased 2.4% year over year, reflecting substantially lower inflation than many markets experienced during recent peaks. Regional inflation rates vary considerably, ranging from +0.5% in Asia Pacific to +4.6% in Latin America.

Yet moderation should not be confused with decline. Consumers may be experiencing slower price growth, but they continue operating within a higher-cost environment shaped by several years of cumulative increases.



The compounding cost of everyday living

Figure 1.6 Inflation's lingering legacy



Source: NIQ Global Retail Measurement, 59 markets, Eq Vol Price % Change, Latest 52 weeks ended Jun. 14, 2026, vs. previous periods. Reflected in US dollars.

Consumers continue to feel the lingering effects of inflation, even as annual price growth rates normalize.

For instance, a basket of consumer packaged goods that cost 100 USD in 2024 now costs approximately 105 USD globally. In some regions, cumulative increases have pushed costs even higher than that.

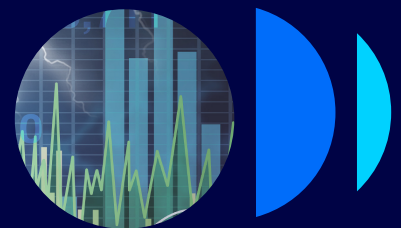
This compounding effect helps explain why consumer sentiment remains restrained despite improving economic indicators. Affordability challenges are increasingly driven by the elevated price base consumers must manage every day.

What this means for 2027

Consumers are no longer waiting for conditions to improve.

Increasingly, they are accepting that many of the forces shaping their lives today may persist and are adapting accordingly. Across spending, housing, work, education, and everyday decision-making, adaptation is becoming the new baseline.

Whether through changes to spending habits, lifestyle choices, housing decisions, or long-term aspirations, households are building new routines around a different operating environment. Understanding those shifts will be critical for organizations seeking to anticipate demand and remain aligned to the realities shaping consumer decision-making in 2027.





Consumption at extremes

02



In this chapter, we review how the economic divide continues to widen, creating a K-shaped consumer economy in some parts of the world and pushing growth toward the value and premium ends of the market.

Consumers are entering 2027 with increasingly different financial realities

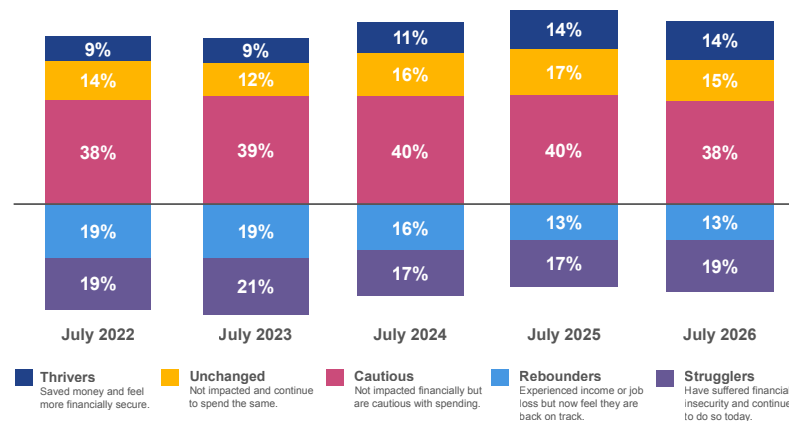
While many households continue to struggle with higher costs of living, others are being shaped by income inequality and the growing economic divide: having accumulated wealth, increased spending power, or found new sources of financial resilience. Increasingly, these different financial realities are reshaping how consumers think, spend, prioritize, and define value.

Across markets, spending is becoming more polarized, creating growth opportunities at opposite ends of the spectrum while increasing pressure on the middle of the market. Understanding where consumers sit along the spectrum of financial security, and where markets sit along the spectrum of spending polarization, will be increasingly important heading into 2027.



The growing economic divide

Figure 2.1 The 2026 economic divide



Source: NIQ 2026 Consumer Outlook, Global, vs. previous studies, excludes China.

Q: Which of the following best describes how current events* of the last few years have impacted your overall household financial situation? *Note: Question phrased more specifically to COVID-19 impact in 2022.

NIQ's *Economic Divide* framework serves as a powerful tool for modern consumer segmentation. It tracks consumers across a spectrum of financial security and insecurity. After several years of disruption, the distance between financially secure and financially challenged households continues to widen.

The percentage of consumers classified as "Strugglers", those who have experienced financial insecurity and continue to feel its effects, has increased compared with a year ago and now represents nearly one in five consumers globally. At the same time, the financially secure end of the spectrum remains elevated, with the proportion of "Thrivers" holding steady at levels well above where they stood only a few years ago.

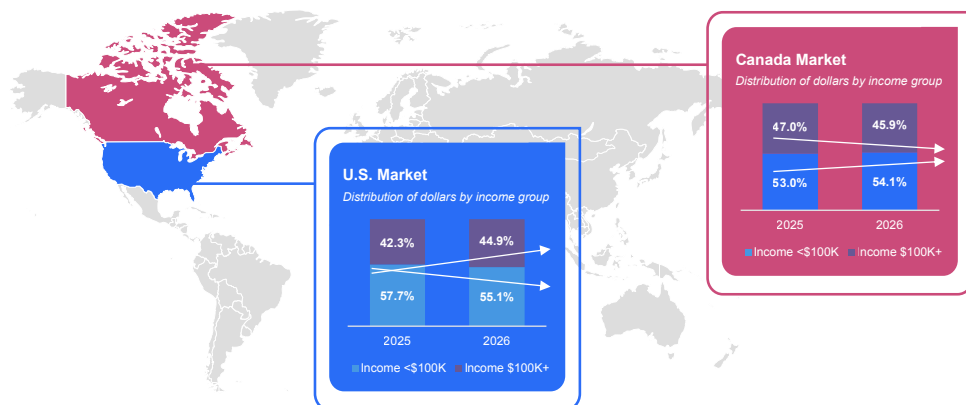
Together, these shifts point to the emergence of a more polarized consumer landscape. While many households have adapted successfully to recent economic conditions, a sizeable portion continues to face meaningful financial pressure. Increasingly, the middle ground is being squeezed.

Key takeaway

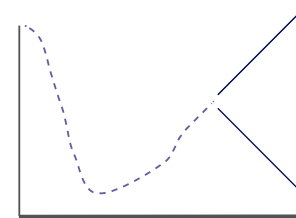
The future consumer landscape will be shaped less by the average consumer and more by an increasingly divided spectrum of financial realities.

Where the K-shaped consumer economy takes shape

Figure 2.2 Economic polarization is reshaping growth



Source: NIQ Omnishopper Panel, Total CPG/FMCG distribution of dollars by income group, Total US Latest 52 weeks ended Jul. 11, 2026 vs. previous year, Total Canada Latest 52 weeks ended Jul. 11 2026 vs. previous year



Illustrative visual/concept

The K-shaped consumer economy takes shape, but each market is following its own path

The concept of a K-shaped economy reflects a simple reality: some consumers continue moving upward financially while others face increasing pressure and constrained purchasing power.

This divergence is increasingly visible within measured patterns of spending behavior across countries. In the United States, spending continues shifting toward higher-income households, reinforcing the growing influence of affluent consumers on market growth. Canada presents a more nuanced picture, where signs of polarization remain visible but some higher-income households appear to be adopting a more cautious spending posture.



Upgrade Mindset

Vs.

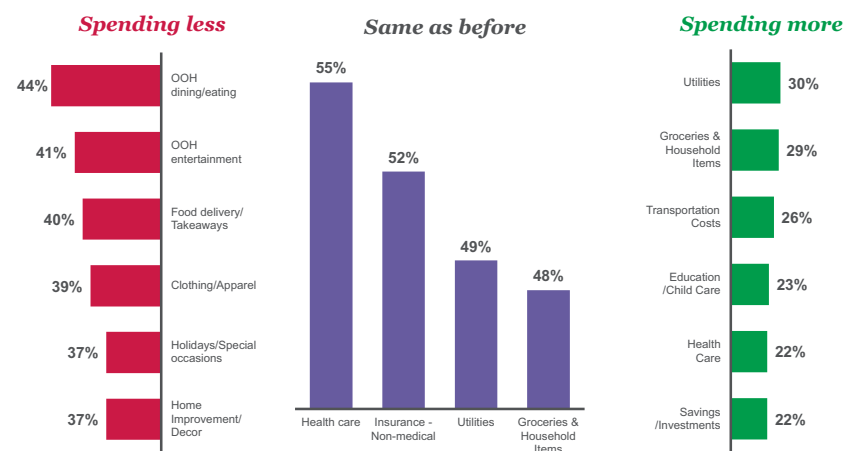


Constrained Mindset

The implication is clear: polarization may be a global phenomenon, but its manifestation remains highly market-specific.

Essentials are protected—discretionary spending faces pressure

Figure 2.3 Consumers adapt to a higher-cost world



Source: NIQ 2026 Consumer Outlook, Global

Key takeaway

Consumers are becoming increasingly selective about what deserves incremental spending, protecting essentials while scrutinizing everything else.

We asked consumers how they expect to allocate spending during the next 12 months. The results reveal a consistent theme: protection of essentials and heightened scrutiny of discretionary spending.

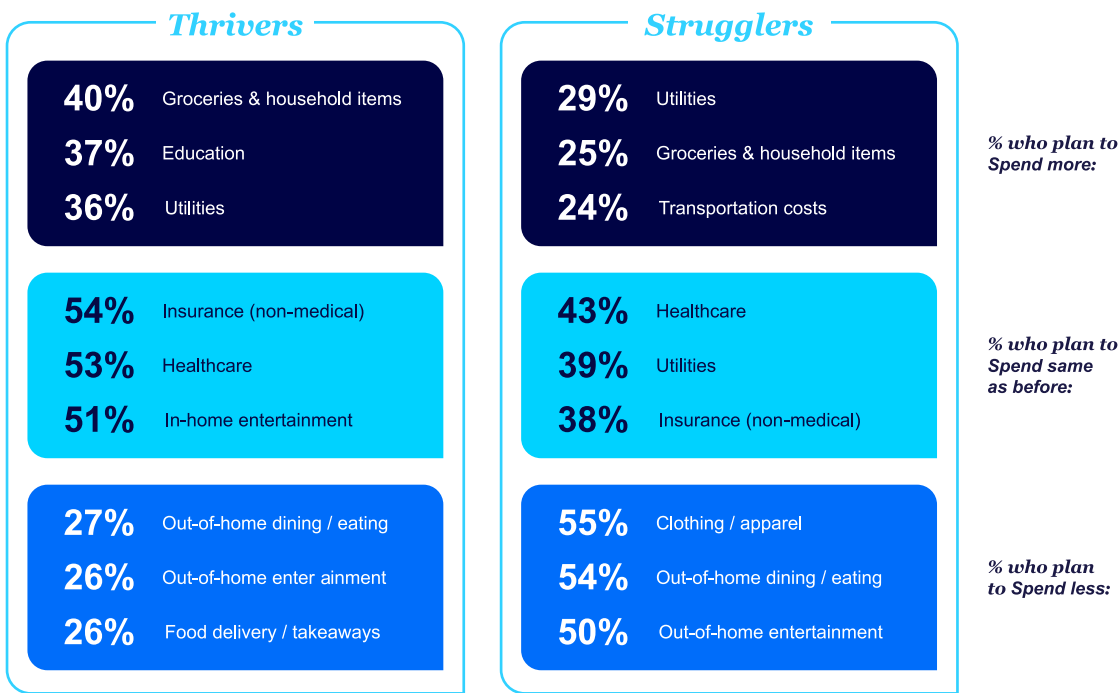
Categories tied directly to everyday life, including utilities, groceries, healthcare, transportation, and education, continue to receive consumers' intended spending support. By contrast, categories such as dining out, entertainment, food delivery, travel, and home décor face growing pressure.

Importantly, this does not necessarily signal reduced interest in these categories. Rather, it reflects the reality that consumers are increasingly prioritizing spending based on perceived necessity. In an environment characterized by higher living costs and financial uncertainty, discretionary categories must increasingly justify their place within household budgets.



Financial security is becoming a powerful spending filter

Figure 2.4 How financial security is shaping the 2027 spending agenda

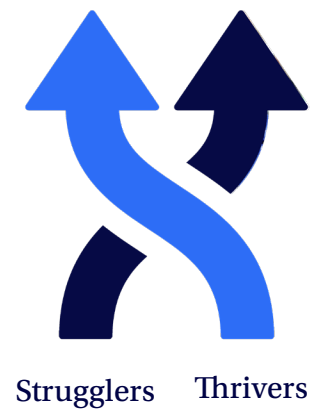


Source: NIQ 2026 Consumer Outlook, Global

While all consumers are becoming more intentional about spending, financial circumstances increasingly determine where trade-offs occur.

Financially secure consumers remain better positioned to invest in future-oriented categories such as education, personal development, and wellbeing. Meanwhile, financially insecure consumers are concentrating resources on immediate necessities and reducing spend across a broader range of discretionary categories.

This divergence is particularly visible within categories such as apparel, dining out, and entertainment, where a much higher incidence of financially insecure households (“Strugglers”) are cutting back compared to that of financially secure households (“Thrivers”). This reflects more than a difference in spending power. It reflects a widening gap in priorities, aspirations, and future spending intentions.



The rise of *constraint* and *upgrade* spending mindsets

Figure 2.5 Consumers want a clear reason to spend

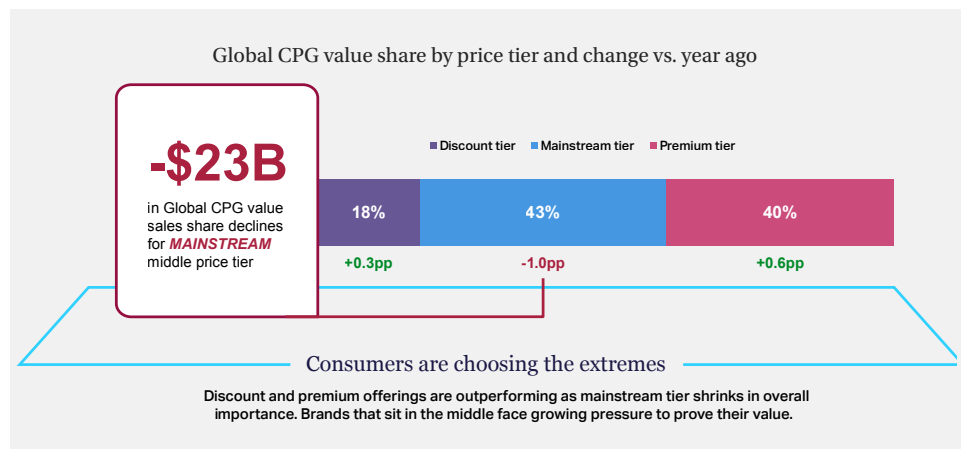


Source: NIQ 2026 Consumer Outlook, Global

The widening economic divide is creating two increasingly distinct spending mindsets. The first is constraint. Consumers operating in this mode are highly focused on maximizing value and are increasingly likely to choose lower-priced options when meaningful differentiation is absent. The second is upgrade. Consumers in this frame of mind remain willing to spend more on premium products, but only when those products offer clear improvements in quality, performance, experience, status, or functionality. What is increasingly disappearing is the appeal of the middle ground. Products positioned between these extremes face growing pressure to clearly justify why they deserve consideration.

The middle of the market is under pressure

Figure 2.6 Share gains at both ends of the market are hollowing out the middle



Source: NIQ Global Retail Measurement, 26 markets; Total CPG/FMCG. Latest 52 weeks ended Jun. 14, 2026 vs. previous year, Reflected in U.S. dollars.

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Key takeaway

The future belongs less to products that are simply “good enough” and more to products that clearly justify either their cost-savings or their premium qualities.

Behavioral shifts are increasingly visible within actual measured product sales performance. Across measured markets, discount and premium price tiers continue gaining share while mainstream-priced products lose relevance.

Consumers are demonstrating exactly the behavior described by the *Constraint* and *Upgrade* mindsets outlined previously. When they choose to save, they seek meaningful savings. When they choose to spend more, they expect meaningful added value. The result is growing pressure on mainstream propositions. In fact, more than 23B USD in value sales share has shifted away from mainstream-priced CPG products as growth increasingly concentrates at the extremes.



Understanding NIQ's spectrum of spending extremes

Figure 2.7 NIQ's spectrum of recalibrated spending extremes

6 Global market archetypes	Marker	State of spending
● <i>Premiumization markets</i>	↑ Premium	Consumers are increasingly trading up, with premium products driving disproportionate growth.
● <i>Polarized markets</i>	↓↓ Mainstream	Today's prevailing global trend: mainstream is hollowing out while both value and premium gain share.
● <i>Early polarization markets</i>	↓ Mainstream	The middle is beginning to weaken as consumers gradually shift toward value and/or premium.
● <i>Stable structure markets</i>	≈ Flat	Limited meaningful change in the relative roles of value, mainstream, and premium.
● <i>Mainstream momentum markets</i>	↑ Mainstream	The middle tier remains relevant and continues to gain share.
● <i>Value-led markets</i>	↑ Discount	Discount propositions are driving growth and taking share from both mainstream and premium.



Recognizing that not all markets evolve in the same way, NIQ has developed a framework consisting of six market archetypes that describe how spending structures are changing around the world.

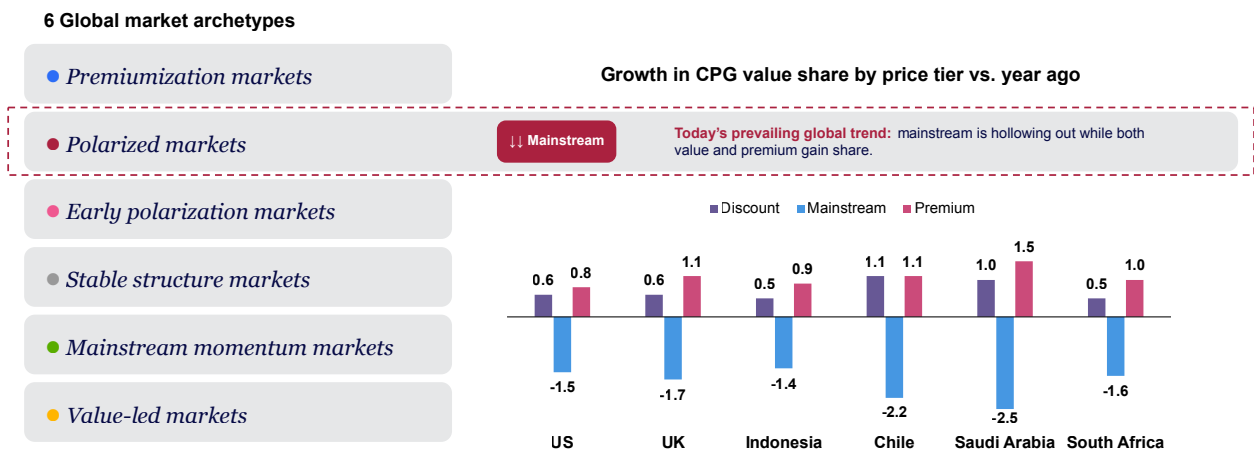
Drawing on a multi-market analysis led by Lauren Fernandes, the framework reveals that markets are following different pathways through the same broader evolution in consumer spending. These pathways range from *Value-Led Markets* and *Mainstream Momentum Markets* through *Stable Structure Markets*, *Early Polarization Markets*, *Polarized Markets*, and ultimately *Premiumization Markets*.

Together, the archetypes provide a lens through which retailers and manufacturers can understand both where individual markets sit today and where they may be heading in the future. Importantly, while each archetype reflects a unique manifestation of consumer behavior, the prevailing global direction increasingly points toward polarization.



The barbell effect in action

Figure 2.8 Countries that exemplify the 'Polarized' market archetype



Source: NIQ Global Retail Measurement; Total CPG/FMCG. Latest 52 weeks ended Jun. 14, 2026 vs. previous year, Reflected in U.S. dollars.

Across the United States, United Kingdom, Indonesia, Chile, Saudi Arabia, and South Africa, mainstream offerings continue losing share while both value and premium segments gain ground.

While the magnitude varies by market, the pattern remains remarkably consistent. These examples demonstrate that polarization is not limited to a single region or economy, but is increasingly emerging as a defining structural feature shaping global consumption.

Acting on shifting market structure opportunities

Figure 2.9 Key actions to manage the spectrum of recalibrated spending

6 Global market archetypes	Key action	What this means
● <i>Premiumization markets</i>	Accelerate trade-up	Prioritize innovation, superiority, and trade-up opportunities to maximize premium growth.
● <i>Polarized markets</i>	Play both ends	Capture growth at the extremes by actively managing premium and value portfolios while rationalizing mainstream exposure.
● <i>Early polarization markets</i>	Prepare for polarization	Begin strengthening both value and premium offerings as the middle starts to soften.
● <i>Stable structure markets</i>	Defend the core	Protect share across tiers while monitoring for early signs of market migration.
● <i>Mainstream momentum markets</i>	Accelerate mainstream	Invest in core brands and propositions where meeting consumers within the middle of their list of demands remains the growth engine.
● <i>Value-led markets</i>	Lead with value	Win on affordability, pack-price architecture, and value credentials.

The strategic implications of polarization depend on where a market sits along NIQ's spectrum of spending extremes.

Value-Led Markets require a focus on affordability and accessibility. Mainstream Momentum Markets reward strong core propositions. Stable Structure Markets require defense of existing positions. As markets move toward polarization, organizations increasingly need to strengthen value and premium capabilities simultaneously. This framework helps organizations identify how growth opportunities evolve as market structures and consumer priorities continue to diverge.

What this means for 2027

The economic divide continues to widen, but the most important implication is not inequality itself. It is the increasingly different ways consumers are navigating financial realities and the impact those differences are reshaping market structures.

Across countries, spending is becoming more polarized, priorities are becoming more differentiated, and the notion of an average consumer is becoming less useful as a planning tool.

As spending becomes more polarized and the middle continues to lose relevance, organizations will need a more precise understanding of where demand is concentrating. Success will increasingly depend on recognizing that consumers are not evolving uniformly, and neither are markets. Understanding both the consumer economic divide and shifts across value, mainstream, and premium segments will become a critical advantage as polarization reshapes the path to growth in 2027.





A New World of Worth

03



Consumers increasingly purchase by justification rather than habit. This chapter reviews how the concept of value is increasingly linked to a clear intent behind every purchase decision. Price is now weighed against a broader set of situational, functional, and personal considerations.

As economic realities continue to evolve, so too does the way consumers define value for money.

For several years, affordability has dominated discussions about household spending. Yet affordability alone no longer explains how people make purchasing decisions. Increasingly, consumers are asking a different question: not whether they can afford a purchase, but whether it is worth it.

This distinction matters.

Across categories, households are becoming more intentional about where they spend, what they prioritize, and what they choose to leave behind. Essential needs continue to receive support, while discretionary purchases face increasing scrutiny. At the same time, consumers are working harder to maximize the value of every dollar spent, combining savings strategies, rewards programs, promotions, and purchasing tactics to optimize outcomes.

The result is a new world of worth, one where products, services, and experiences are increasingly evaluated based on their ability to justify their place within increasingly selective consumer priorities.

Spending by exception

For much of the past decade, many categories benefited from habitual purchasing behavior. Products were purchased because they always had been, spending occurred because it was routine, and discretionary income was used because it was available.

That dynamic is changing.

Consumers are increasingly making purchasing decisions through a more selective lens. Every purchase is weighed against competing priorities and alternative uses of household resources. Categories no longer compete solely against direct substitutes. Increasingly, they compete against entirely different uses of money.

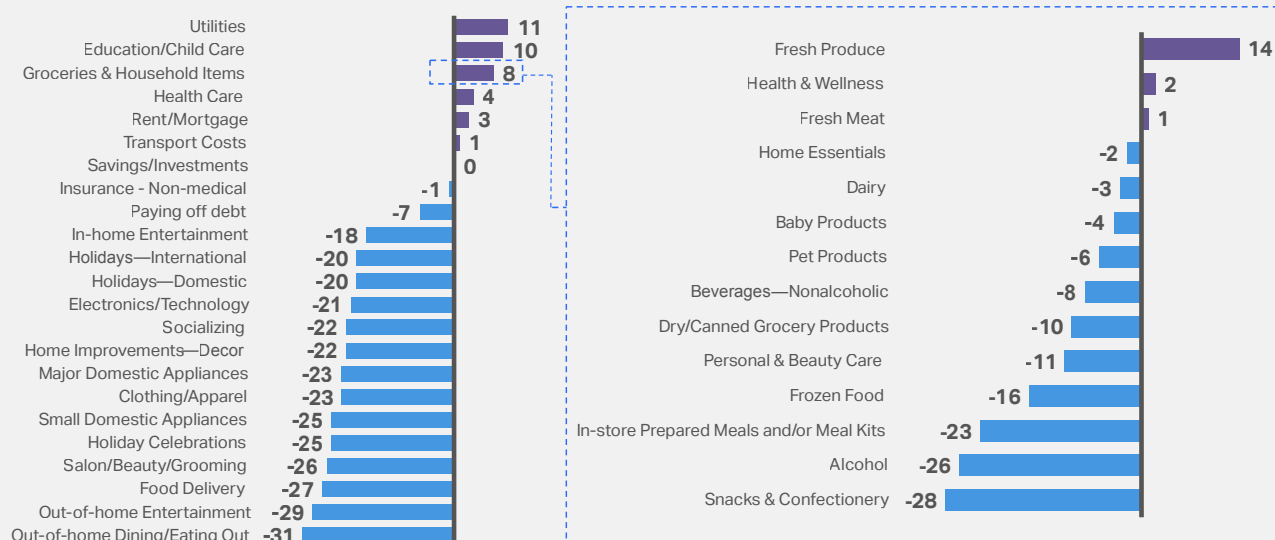
Spending has not disappeared, but it increasingly needs to be earned. Products that demonstrate clear utility, deliver meaningful outcomes, solve problems, save time, improve wellbeing, or create memorable experiences continue to attract investment. Products that fail to establish a compelling reason for purchase may struggle to maintain relevance.



Essentials remain protected while discretionary spending faces greater scrutiny

Figure 3.1 Expect a new world of worth in 2027

Spending will be guided by justification rather than habit, raising the bar for every purchase decision



Source: NIQ 2026 Consumer Outlook, Global. Change in spending calculated by subtracting % of respondents who are spending less from % of respondents who are spending more.

When evaluating spending intentions heading into 2027, a clear hierarchy begins to emerge. Consumers continue to prioritize core areas of spending tied directly to everyday life, including utilities, education, groceries, healthcare, transportation, and housing. These categories represent the foundation of household wellbeing and remain relatively protected despite ongoing financial pressures.

Beyond these areas, however, spending intentions soften considerably. Categories including dining out, entertainment, travel, home décor, electronics, social activities, beauty services, and food delivery all face increasing scrutiny as consumers reassess where discretionary spending belongs.

Importantly, this does not necessarily indicate waning interest. Rather, consumers are concentrating spending on areas perceived to deliver the greatest value and becoming more selective about participation elsewhere.



Key takeaway

Consumers appear increasingly willing to protect what they consider essential while demanding stronger justification from everything else.

Warning signs of changing category priorities emerge

Figure 3.2 Losing pace: market signals of potential category de-prioritization

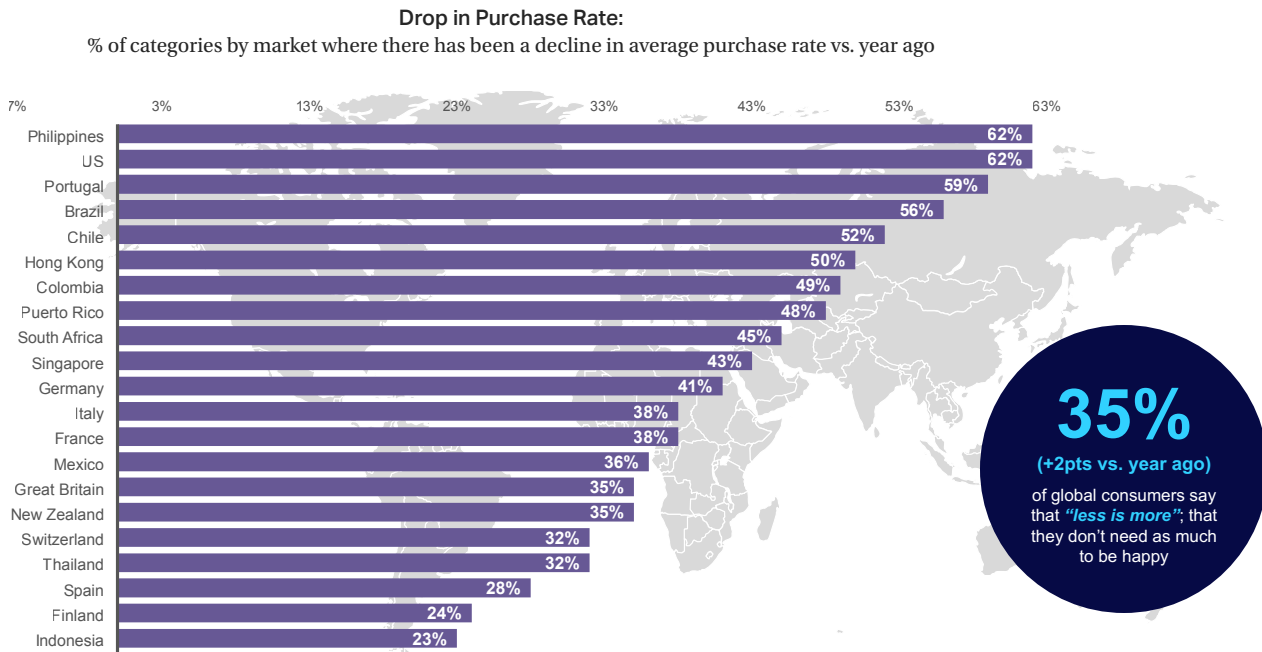
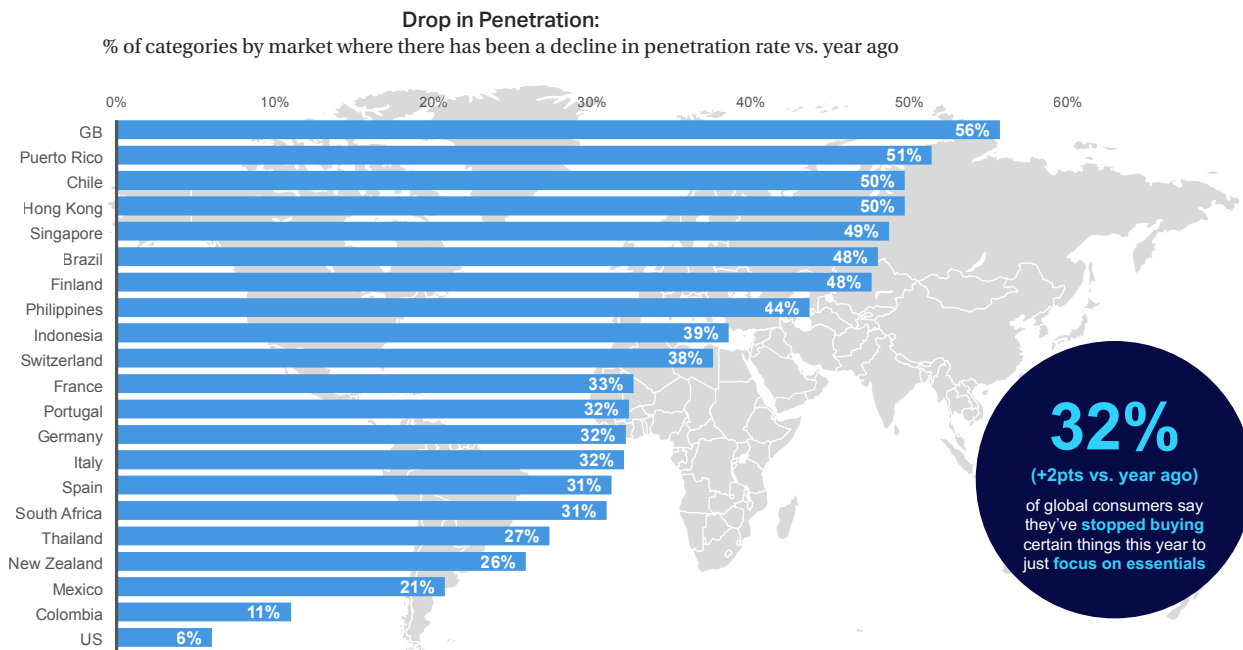


Figure 3.3 Losing potential: hotspots of category abandonment



Source: NIQ Global Shopper Panel, 52 weeks ended Jun. 13, 2026, NIQ Omnishopper Panel, 52 weeks ended Jun. 13, 2026, Purchase rate drop=variation below -1%, Penetration drop=change below -0.5pp, NIQ 2026 Consumer Outlook, Global.

Changes in purchase behavior can often be observed long before categories experience meaningful declines in sales.

To better understand how consumers are reevaluating priorities, NIQ examined two leading indicators: changes in purchase rates and changes in penetration. Purchase-rate declines indicate consumers are still participating in categories, but are purchasing less frequently or allocating less spending within them. Penetration declines suggest a more meaningful shift, where categories begin losing buyers altogether. Viewed together, these measures provide an early warning system for changing consumer priorities.

Markets including the Philippines, the United States, and Portugal show elevated concentrations of categories experiencing declining purchase rates, indicating growing selectivity in how consumers allocate spending.

Meanwhile, markets such as Great Britain, Puerto Rico, and Chile are experiencing higher concentrations of penetration decline, suggesting that some categories may be losing relevance entirely among portions of these consumer populations.

Worth noting, a reduction in purchase frequency may be recoverable through stronger relevance, innovation, promotion, or occasion building. Declining penetration, on the other hand, often indicates a more structural challenge, requiring brands and categories to re-establish their role within consumers' lives.

Key takeaway

Consumers are becoming more selective across categories, and in some cases, increasingly willing to eliminate purchases altogether in order to focus on higher-priority needs.

Value is increasingly measured by outcomes, not affordability

Figure 3.4 The shift from cost to worth



Source: NIQ 2026 Consumer Outlook, Global



Price remains important. However, it is no longer the sole, or even primary, determinant of perceived value. When consumers were asked which factor most influences whether a household or grocery purchase feels worthwhile, quality and performance emerged ahead of affordability (34% versus 31%). This finding signals an important evolution in consumer decision-making. As spending comes under increased scrutiny, consumers appear less focused on finding the lowest price and more focused on ensuring purchases deliver meaningful outcomes.

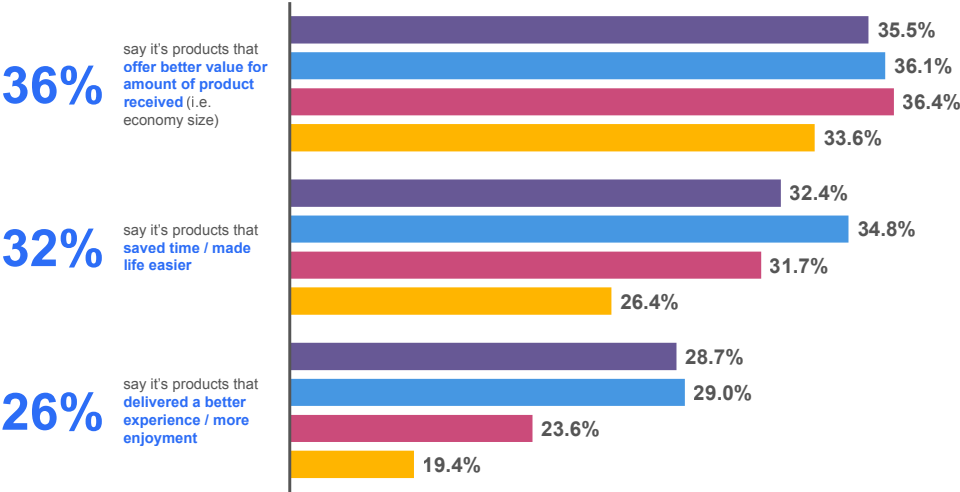
The value equation that resonates today increasingly includes functionality, convenience, reliability, durability, effectiveness, and relevance. In other words, consumers are shifting from asking: “Can I afford this?” to: “Is this worth it?”

Key takeaway

The future of value is not simply lower cost. It is demonstrable worth.

The definition of worth varies by consumer

Figure 3.5 What feels worth paying more for?



Source: NIQ 2026 Consumer Outlook, Global



Although consumers increasingly share a common desire for value, what constitutes that perception of value is not universal. Across generations, one factor stood out as important to all: obtaining more for the money spent. Products that deliver larger quantities, higher yields, greater longevity, or improved overall sense of value remain appealing regardless of age. Beyond this common foundation, priorities begin to diverge.

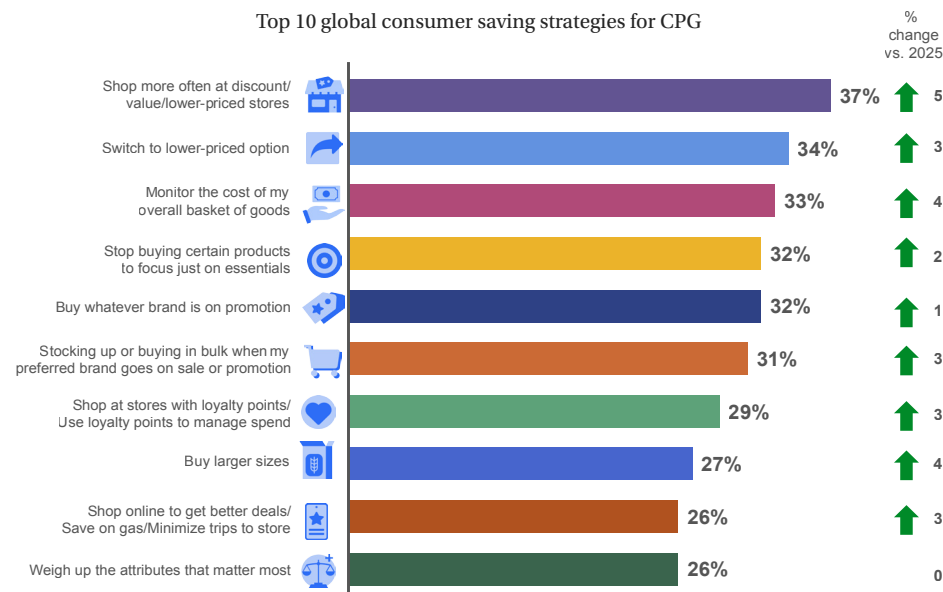
Millennials place particularly high value on products that save time or simplify daily life, reflecting the competing demands many face across work, family, and personal responsibilities. Younger generations, including both Millennials and Gen Z, are also more likely to value experiences, enjoyment, and emotional returns, demonstrating greater willingness to pay for products that enhance quality of life. Older consumers, meanwhile, tend to place greater emphasis on practical outcomes and functional performance. These nuances reinforce the importance of understanding not only what products consumers purchase, but why they view those purchases as worthwhile.

Key takeaway

Value may be universal, but the drivers of worth differ significantly across consumer groups.

Consumers are becoming active value optimizers

Figure 3.6 Consumers are no longer hunting for a deal, they’re assembling one



Source : NIQ 2026 Consumer Outlook, Global, vs. previous study.

Consumers are treating savings as an active discipline rather than a reactive behavior. In fact, according to consumers, nearly every major savings strategy gained traction during the past year, indicating that people are becoming increasingly savvy in how they manage spending.

Shopping more frequently at value retailers, switching to lower-priced alternatives including private label products, monitoring basket costs, using promotions more aggressively, purchasing larger pack sizes, and leveraging loyalty programs all continue to gain momentum.

With the careful balance of deploying all of these saving strategies, the objective is not simply spending less. The objective is spending smarter.

Value engineering and the rise of savings stacking

One of the most important manifestations of this new value mindset is the rise of consumer value engineering. Consumers are not evaluating products based solely on their sticker price. They are evaluating purchases based on the final price ultimately paid after every possible savings mechanism has been applied.

Membership programs, cashback platforms, loyalty points, digital coupons (and coupon stacking behaviors), retailer rewards, bundled offers, payment-linked benefits, and exclusive member pricing are increasingly being combined to create a personalized value ecosystem, and each play an increasingly important role in maintaining aspects of brand loyalty.

For many consumers, value no longer resides solely in the product itself. It resides in how the transaction is executed. This dynamic explains why some consumers remain willing to purchase higher-quality or even premium offerings while simultaneously exhibiting highly value-conscious behavior elsewhere. Savings are not necessarily being used to buy cheaper products. They are being used to afford *better* ones.

This shift creates an important challenge for companies. For brands and retailers, winning depends not only on price itself, but on how effectively they can participate in consumers' broader savings ecosystem.



Key takeaway

Consumers are becoming highly sophisticated value optimizers, managing spending strategically so they can reserve investment for purchases that truly earn it.

What this means for 2027

Every purchase increasingly needs to justify its place. The next phase of consumer value creation will be shaped less by affordability alone and more by demonstrable worth.

Across categories, consumers are concentrating spending on products, services, and experiences that deliver meaningful outcomes while reducing participation in areas that fail to establish relevance. This shift raises the bar for brands.

As consumers continue to operate within a world of competing priorities, the brands most likely to succeed will be those that clearly communicate why a product deserves consideration, how it improves consumers' lives, and what value it delivers relative to alternative uses of money.





04

Self-directed wellness



This chapter highlights how health has joined price at the top of the consumer decision tree. Health is no longer a niche priority or conditional purchase driver. It is becoming a core component of how consumers define value.

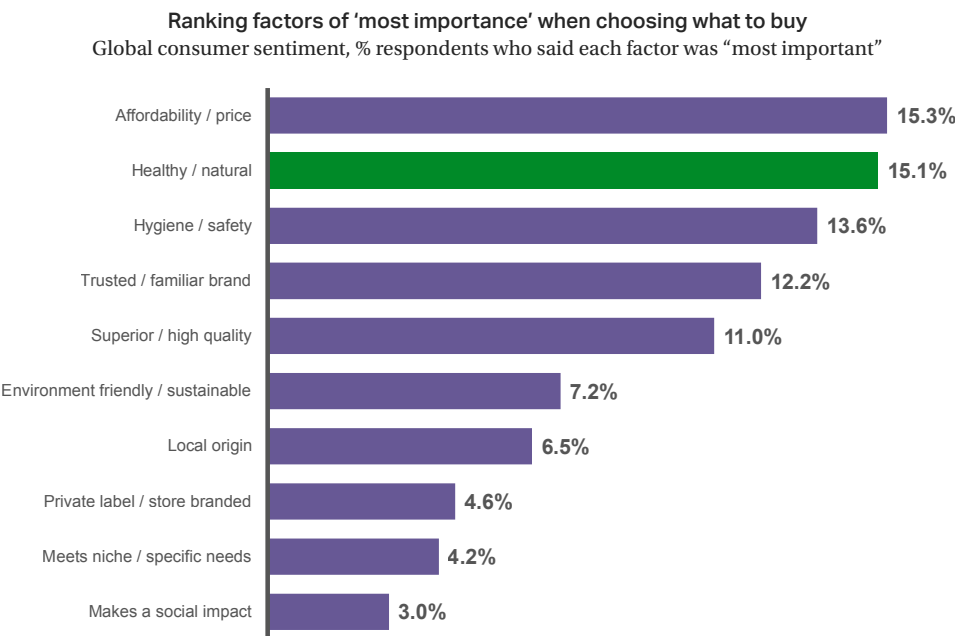
For years, health and wellness were important considerations, but affordability often remained the dominant factor shaping purchase decisions. That balance is shifting.

Today, consumers are evaluating purchases through both a financial and wellbeing lens. At the same time, new technologies, evolving care pathways, and changing expectations are giving consumers greater influence over how they manage their own health.

The result is a more self-directed approach to wellness and preventative health, one that is influencing purchase decisions far beyond traditional health categories.

Health is becoming part of the value equation

Figure 4.1 Health is no longer a trade-off



Source: NIQ 2026 Consumer Outlook, Global.

When consumers were asked which factor is most important when deciding what to buy, healthy and natural attributes ranked nearly equal to affordability and price (~15% of respondents in each case).

This signals an important shift in how value is defined. Health is no longer viewed as a desirable extra. Increasingly, it is becoming part of the value equation. For brands, the opportunity lies in demonstrating how wellbeing and value can be delivered simultaneously.

The challenge is not choosing between health messaging and value messaging. It is demonstrating how the two reinforce one another. Success lies in connecting these priorities in ways that align with the health and wellness trends increasingly influencing purchase decisions.

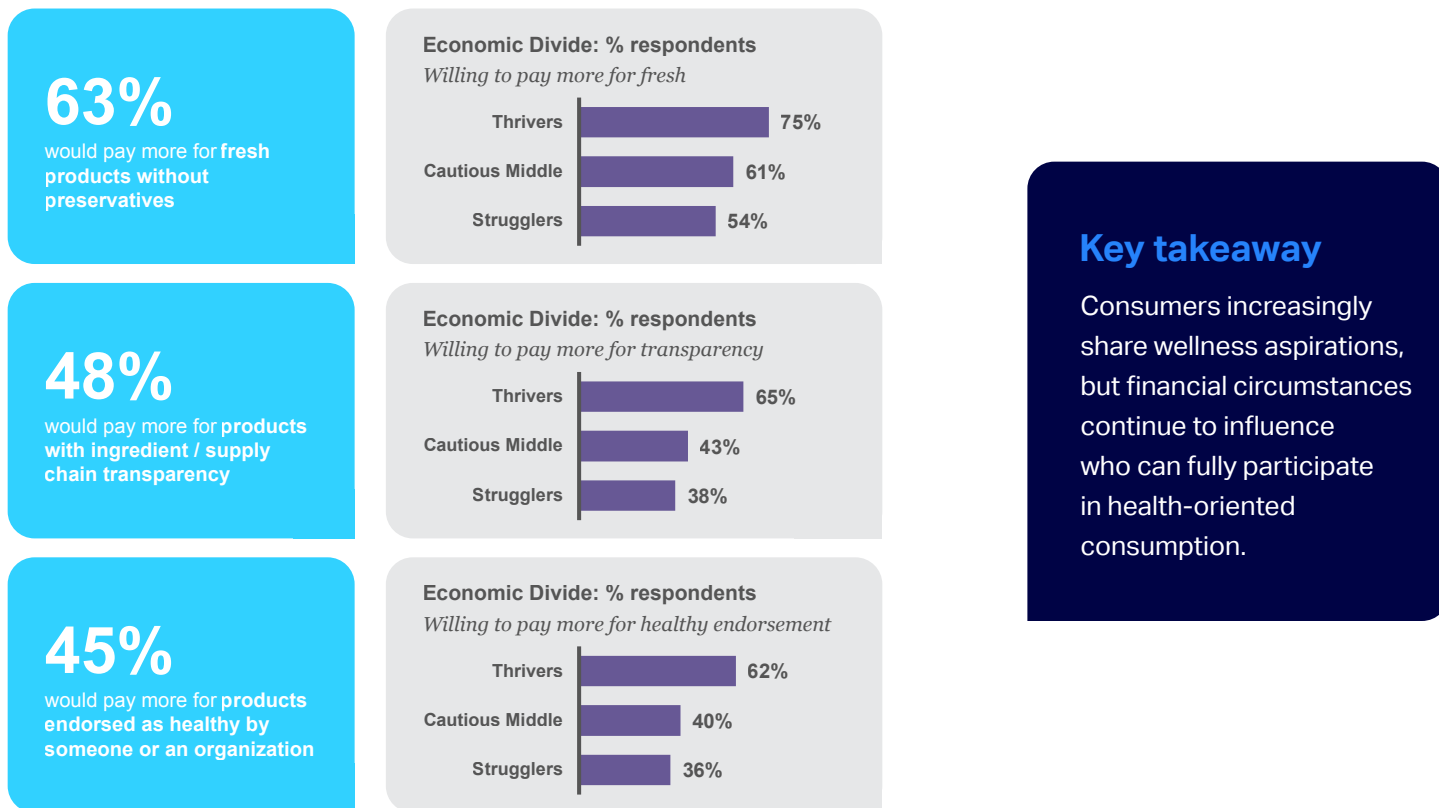


Key takeaway

Health is increasingly becoming a core component of perceived value, placing wellbeing alongside affordability as a primary purchase consideration.

Shared priorities, unequal access and health equity

Figure 4.2 The growing health gap



Source: NIQ 2026 Consumer Outlook, Global.

Although consumers increasingly share similar wellness goals, their ability to act on those goals remains uneven. Globally, a sizable share of consumers (45-63%) indicate willingness to pay more for fresh products, ingredient transparency, supply-chain visibility, and products endorsed by trusted health experts or organizations. However, willingness to pay differs dramatically depending on financial circumstances.

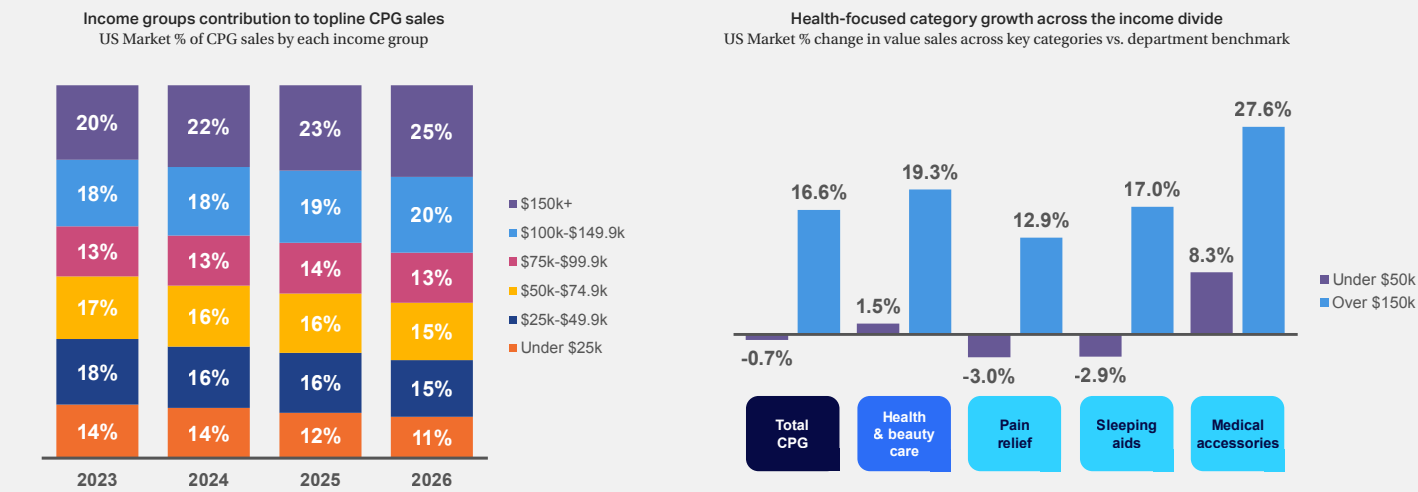
Consumers who describe themselves as financially secure consistently demonstrate greater willingness to invest in these health-oriented benefits. Those facing financial pressure remain significantly more constrained by affordability considerations, even though they place similar value on wellness outcomes. This dynamic highlights the emergence of a growing health divide.

Consumers increasingly agree on what constitutes healthier choices. What differs is their ability to access and afford those choices consistently. For manufacturers and retailers, this creates both opportunity and responsibility. The challenge is no longer convincing consumers that health matters. Increasingly, it is helping more consumers participate in health-oriented consumption.



Wellness growth is increasingly concentrated among affluent households

Figure 4.3 Affluent households drive a greater share of growth over time



Source: NIQ Omnishopper Panel, Total US, % sales share of Total CPG/FMCG by income group, Latest 52 weeks ended Jun. 13, 2026 vs. previous 3 years | % change in value sales by income group, Total CPG/FMCG, Total health & beauty care, Pain relief, Sleeping aids & Medical accessories, Latest 52 weeks ended Jul. 11, 2026 vs. year ago.

The relationship between income and wellness spending is becoming increasingly visible within measured consumer purchase behavior. Over the past several years, higher-income households have steadily increased their contribution to total consumer packaged goods spending. At the same time, lower-income households have seen their relative contribution decline, reflecting a widening spending divide.

This divergence appears particularly pronounced within wellness-oriented categories. In the United States, NIQ measures of wellness product sales grew approximately 19% among higher-income households compared with just 1.5% among lower-income households. From the broad lens of health & beauty care as a department, to categories such as pain relief, sleeping aids, and medical accessories, much of the recent growth has been driven by higher-income consumers. These households continue demonstrating strong willingness to invest in proactive health management, self-care, and long-term wellbeing.

The long-term implication may be that health innovation increasingly develops around the consumers most capable of funding it, unless businesses actively seek ways to broaden accessibility.

New care pathways are changing access to wellness

Figure 4.4 Health divide evolves: GLP-1s become more accessible



Broadening GLP-1 access
Strugglers are just as likely as Thrivers to be using GLP-1s.

01

Democratizing access

Retailers like Costco are creating lower-cost GLP-1 pathways for cash-pay consumers, while public programs such as the UK's NHS are expanding access through funded weight management services.

02

Decentralizing care

Telehealth platforms like Found and Amazon One Medical, are reshaping weight-management care, reducing geographic and provider-access barriers while accelerating pathways to GLP-1 treatment.

03

Digitizing management

Digital health tracking, via companies such as Mochi Health and LifeMD, are pairing GLP-1 treatment with 'always-on' virtual support, extending care beyond the clinic. U.S. GLP-1 households also over-index on wearable adoption (1.6x vs. the general population).



11%

of surveyed global consumers say they're currently taking a GLP-1 medication.

Source: NIQ 2026 Consumer Outlook, Global, U.S. wearables statistic via NIQ Bases Quick Question omnibus survey, fielded in December 2025.
Note: GLP-1 survey insight based on self-reported responses to "I'm currently using these medications." Results may differ from other studies due to differences in respondent universe, methodology and questionnaire design.

Few developments have attracted as much attention in recent years as GLP-1 medications and other emerging weight loss drugs. While initially limited by cost and access barriers, GLP-1 adoption is becoming increasingly distributed across consumer groups.

Alternative retail models, telehealth services, digital-health platforms, and new care pathways are helping expand access beyond traditional healthcare systems. As these barriers continue to lift, the question may increasingly shift from who can access treatment to how consumers integrate treatment into broader health-management behaviors.

Adoption patterns also suggest that access is expanding globally. While usage varies significantly by market, countries such as India are already reporting notably elevated levels of GLP-1 adoption, underscoring the GLP-1 impact on food industry purchasing patterns as health needs, expanding treatment access, and growing consumer awareness can accelerate participation in emerging wellness ecosystems.



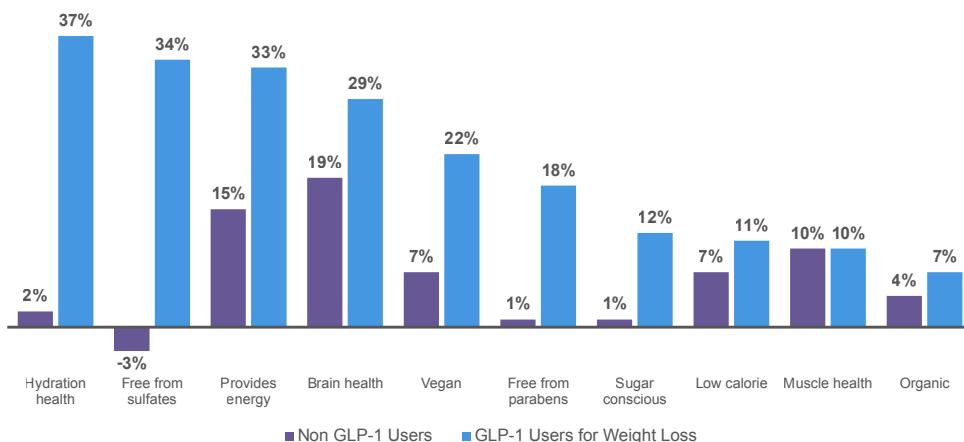
Key takeaway

New care models are broadening access to wellness innovations, creating opportunities for more consumers to participate in emerging health ecosystems.

Health priorities extend beyond treatment

Figure 4.5 The GLP-1 ripple effect beyond weight loss

Comparing purchase shifts among GLP-1 users (for weight loss) vs. Non-users
US Market % Unit Growth vs. year ago of key attributes measured across total store



Source: NIQ 2026 Consumer Outlook, Global, NIQ Homescan x GLP-1 Panel Survey fielded between Jan. – Feb. 2026, Total US, Total Outlets, Total Food & Beverage, with NIQ Product Insight stated claims on package, Unit % Change, 52 weeks ended Feb. 21, 2026 vs. previous year.

One of the most important lessons emerging from GLP-1 adoption is that consumers rarely change a single behavior in isolation. As wellness priorities evolve, consumers often reallocate spending toward products and solutions that support broader health goals. In the case of GLP-1 users, growth is increasingly visible across categories connected to hydration, energy, cognitive performance, nutrition, and other wellness-supporting attributes. This suggests the impact of wellness innovation extends far beyond a single product category.

For businesses, understanding these interconnected behaviors may become increasingly important as consumers continue to build more intentional and proactive approaches to personal wellbeing.



48%

of surveyed global consumers expect that GLP-1 medications will impact the way they shop for food, beverages & health products

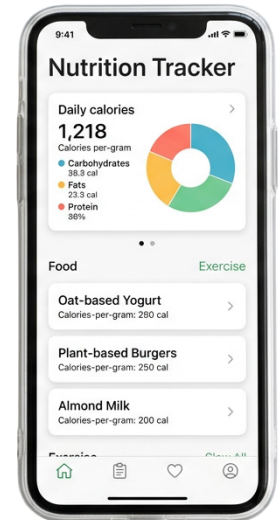
Key takeaway

Wellness innovations often influence broader lifestyle behaviors, creating ripple effects that extend far beyond their original purpose.

Wellness technology becomes a wellness partner

Technology is playing a growing role in helping consumers navigate health decisions. Ingredient-scanning apps, personalized nutrition platforms, AI assistants, connected wellness ecosystems, and wearable health technology are increasingly helping consumers evaluate products, validate choices, and identify actions that support personal wellbeing.

In many ways, wellness technology is evolving from observer to participant, helping consumers move from tracking behaviors toward achieving outcomes.



What this means for 2027

Health is becoming part of the value equation.

Consumers are evaluating purchases through a dual lens of affordability and wellbeing, extending the influence of health far beyond traditional wellness categories. Greater access to information, evolving care pathways, and new technologies are also enabling consumers to take a more active role in directing their own health journeys.

As health management moves further into consumers' hands, success will depend on recognizing the rise of a health-first value equation and integrating wellbeing into products, services, and everyday consumer experiences.



Agent-led discovery

05



AI-mediated discovery and agentic commerce are reshaping visibility and choice. This chapter dissects how consumers are increasingly discovering, evaluating, and selecting products through systems that help shape choice, often before a purchase decision is ever made.

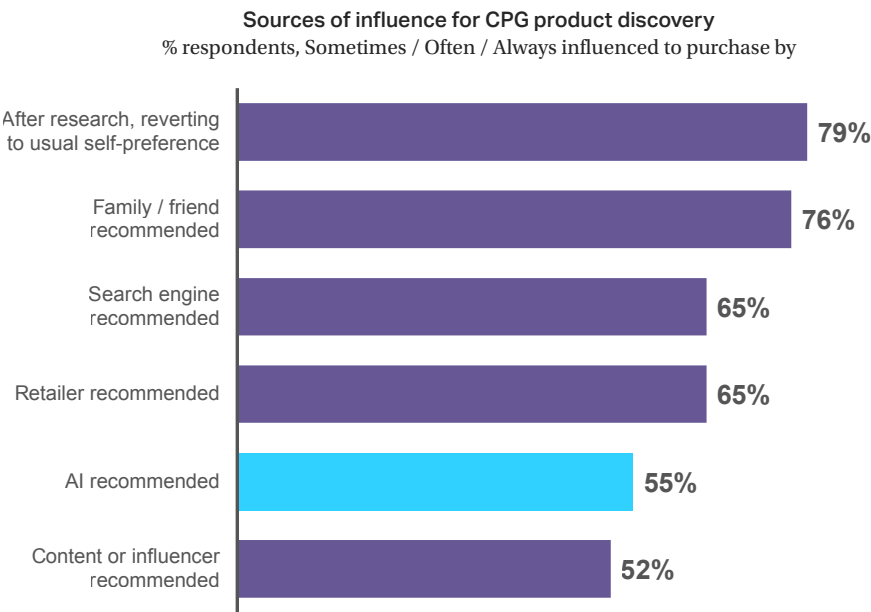
For decades, brands competed to influence consumers directly. Success depended on earning awareness, building preference, and showing up wherever shoppers discovered, evaluated, and purchased products. That model is beginning to evolve.

Artificial intelligence and agentic commerce are shaping a new layer of discovery, recommendation, and evaluation. This influence across AI in retail is transforming how consumers encounter brands and make decisions. As AI becomes more integrated into everyday life, brands are increasingly competing not only for consumer attention, but also for visibility within the systems helping shape consumer choice.

The result is a new competitive reality, one where discoverability and recommendation relevance may become as important as traditional measures of visibility.

The foundations of influence are evolving

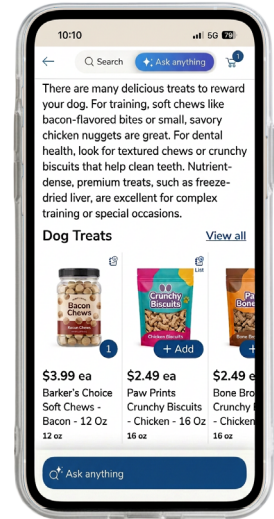
Figure 5.1 Navigating a rapidly evolving architecture of choice and influence



Source: NIQ 2026 Consumer Outlook, Global, Q. How often do these sources influence your household and grocery purchases?

Product discovery has never relied on a single source of influence. Consumers continue to draw upon family recommendations, search engines, retailer guidance, reviews, social content, and previous experience when making purchase decisions. Familiarity remains a powerful force, with most consumers continuing to gravitate toward brands they already know and trust.

Yet beneath those familiar behaviors, a new shift is beginning to emerge: AI product discovery is gaining momentum as tools, assistants, and recommendation systems become part of the purchase journey for a sizable segment of consumers. In fact, 55% of global consumers say they have been influenced by AI recommendations for CPG purchases.



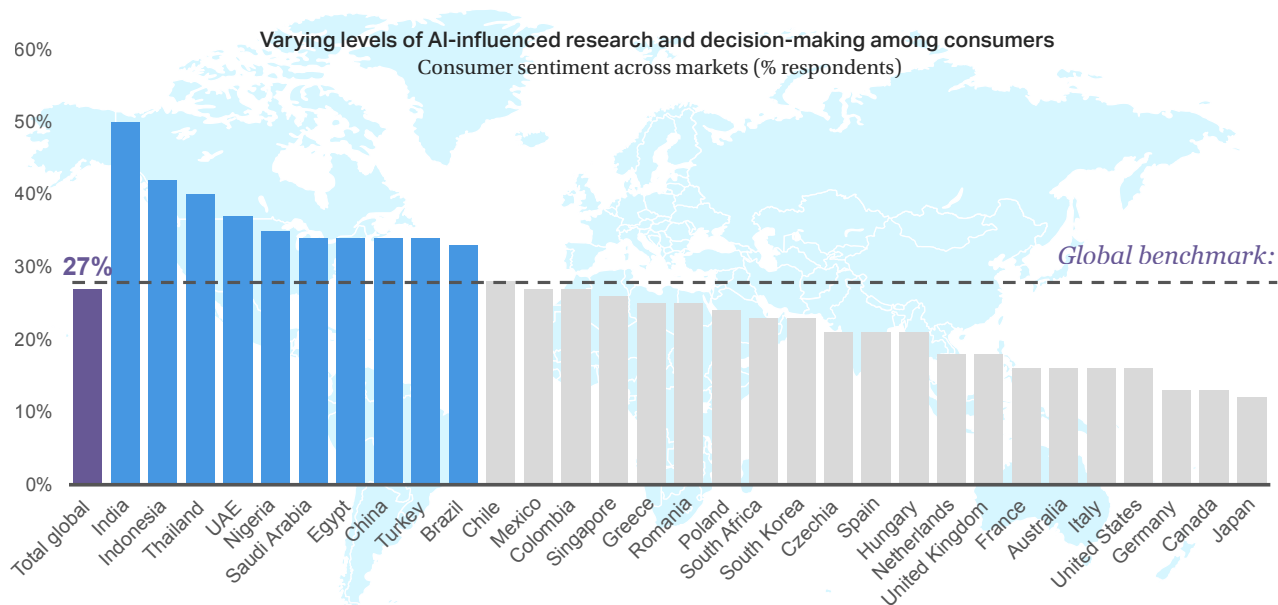
Influence is being rewritten

Success increasingly depends on influencing the systems that influence consumers

As recommendation systems become more prominent, brands may need to think differently about discoverability and digital shelf optimization. Success may increasingly depend on how well they appear within the systems shaping consumer consideration as much as within traditional marketing channels.

Many have already adopted AI-powered tools to help decide what to buy

Figure 5.2 AI-influenced research and decision-making by market



Source: NIQ 2026 Consumer Outlook. Note: These survey insights reflect self-reported use of AI-powered tools or assistants to help research or decide on what to buy. Estimates may differ from other studies due to differences in respondent universe, methodology and questionnaire design.

AI-mediated discovery is no longer a future concept. More than one-quarter of surveyed global consumers already report using AI shopping assistants and other AI-powered tools to help research or decide what to buy, with adoption particularly elevated in markets such as India, Indonesia, Thailand, and several Middle Eastern countries.

While adoption levels vary considerably today, the broader direction is clear. As AI becomes more integrated into search, commerce, and everyday digital experiences, its influence is expected to expand.

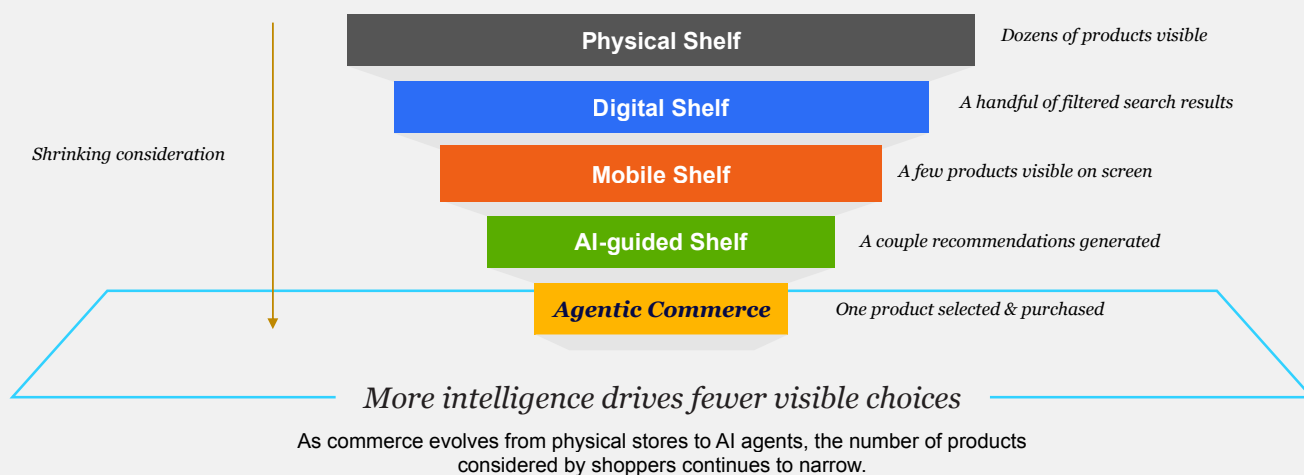
For many organizations, the challenge is no longer whether AI will influence discovery. The challenge is determining how quickly those impacts will arrive within individual categories and markets.

Key takeaway

AI-mediated discovery is rising in consumer adoption and influence, creating new requirements for digital visibility and data readiness.

Products may win or lose consideration before consumers even see them.

Figure 5.3 From infinite choice to curated recommendation



Source: NIQ Digital Shelf

One of the most profound implications of AI-assisted commerce is the continued narrowing of consumer consideration sets. In fact, the history of commerce can largely be viewed as a story of narrowing choice.

Physical shelves exposed consumers to dozens of alternatives. Digital shelves increased assortment dramatically but narrowed discovery through search and ranking systems. Mobile interfaces reduced visible options further through screen constraints and algorithmic curation. Agentic systems may accelerate this trend again.

Rather than providing consumers with dozens of alternatives, future recommendation systems and emerging conversational commerce platforms may present only a small handful of choices, or in some cases, a single recommended option.

As consideration sets continue to shrink, competitive dynamics inevitably change. Historically, availability was a key determinant of growth. Looking ahead, visibility may become equally important. Products that are understood, trusted, and surfaced by recommendation systems may enjoy disproportionate advantages relative to those that are not.



Key takeaway

As recommendation systems narrow consideration sets, visibility may become as important as availability.

Agentic commerce changes how shopping works

What appears to consumers as a simple purchase increasingly relies on a much larger intelligence ecosystem operating behind the scenes. Preference data, product information, availability signals, fulfillment networks, transaction validation, and optimization systems increasingly work together to support decision-making.

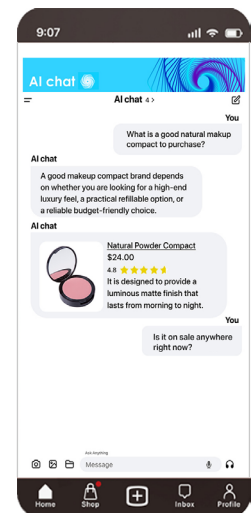
As AI progresses from recommendation tool to purchase assistant, intelligent systems can increasingly evaluate preferences, identify relevant products, assess availability, and simplify transaction decisions. For consumers, the process becomes faster and more convenient. Behind the scenes, however, considerably more intelligence is required.

What shoppers experience may appear seamless, but increasingly those experiences rely on interconnected layers of consumer preference intelligence, product intelligence, availability data, fulfillment information, transaction verification, and ongoing optimization. For manufacturers and retailers, this evolution creates a new requirement: products must not only be discovered by consumers, but also understood by the systems acting on their behalf.



Key takeaway

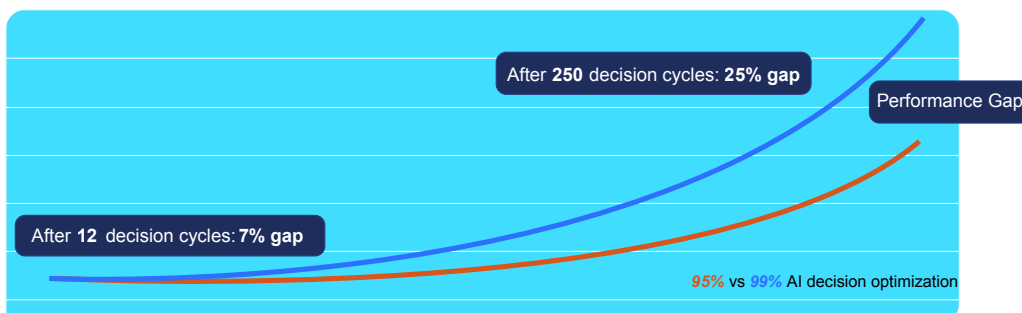
The future of commerce depends on creating the intelligence foundations necessary to support AI-guided decisions.



Why data fidelity matters

Figure 5.4 Even small intelligence advantages can compound significant market opportunity

Illustrative example showing the impact of decision fidelity over repeated optimization cycles:



Source: NIQ. Illustrative scenario assuming \$1M trade investment at NIQ-aligned optimal CPG ROI of 30%, where AI decisions are optimized at 95% vs. 99%

As commerce becomes increasingly AI-mediated, intelligence quality becomes a competitive advantage.

In traditional commerce environments, small differences in information quality often had limited impact. Within AI-driven environments, however, even modest differences in data fidelity can compound significantly over time.

Recommendation systems continuously learn, evaluate outcomes, and optimize future decisions. As a result, small improvements in data completeness, structure, and accuracy can create increasingly meaningful competitive advantages.

AI may become the engine powering future commerce. Trusted intelligence then becomes the fuel.

Key takeaway

Small differences in intelligence quality can compound into significant performance advantages over time.



What this means for 2027

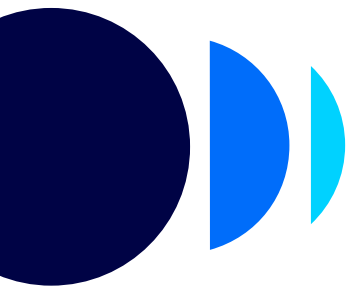
Visibility is becoming the new availability.

Consumers are increasingly relying on systems that simplify discovery, evaluate alternatives, and reduce complexity. Recommendation systems are narrowing consideration sets and influencing which products are surfaced before consumers actively begin comparing alternatives.

For manufacturers and retailers, the implication extends beyond technology adoption. Success will increasingly depend on ensuring products are visible, trusted, understood, and recommendation-ready within the systems shaping consumer choice before consumers ever reach the shelf.

Organizations that invest in trusted intelligence, high-quality product content, and stronger recommendation readiness will be best positioned to compete as AI-mediated discovery continues to evolve.





Your 2027 Strategic Roadmap →

So what? Now what?

The future forces explored throughout this report point toward a common conclusion: consumers are adapting to a world that is becoming increasingly complex, polarized, intentional, health-conscious, and AI-mediated.

For manufacturers and retailers, the challenge is not simply understanding these shifts. It is determining how to respond.

The following priorities provide a strategic roadmap for translating foresight into action over the next 12 to 18 months.

Anticipate shifting consumer priorities

Monitor how changing expectations around spending, work, health, and everyday life are reshaping future demand.

How NIQ can help:

Global market measurement

Prioritize the right growth plays

Identify where demand is concentrating as consumers shift spending across value, mainstream, and premium segments.

How NIQ can help:

Analytics & activation solutions

Prove your value proposition

Demonstrate why products deserve consideration by clearly communicating outcomes, relevance, and worth.

How NIQ can help:

Consumer behavior & insights solutions

Enable healthier consumer choices

Respond to the rise of a health-first value equation by integrating wellbeing into products, services, and everyday consumer experiences.

How NIQ can help:

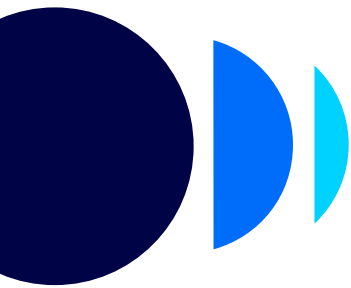
Product insight & innovation solutions

Optimize for AI-mediated discovery

Strengthen product visibility and recommendation readiness as AI increasingly shapes discovery and choice.

How NIQ can help:

AI solutions, insights & strategy

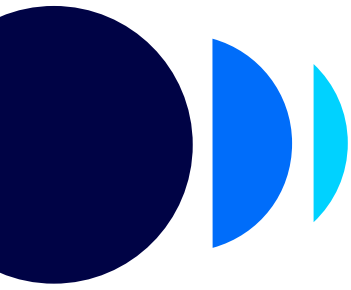


The opportunity ahead

The forces highlighted throughout this report are already reshaping consumer behavior. Organizations that act early will be better positioned to identify emerging opportunities, strengthen relevance, and build competitive advantage as these shifts continue to unfold.

The opportunity lies not in reacting to change, but in using consumer foresight to guide investment decisions, shape innovation priorities, and position brands for the realities taking shape across markets worldwide.





Conclusion

Heading into 2027, growth will increasingly belong to organizations that recognize the realities shaping consumer behavior.

Persistent volatility is reshaping priorities. Economic polarization is widening the gap between consumer realities. Consumers are demanding stronger justification for every purchase, taking greater ownership of their wellbeing, and increasingly relying on AI-powered systems to help navigate an expanding universe of choices.

Together, these factors point toward a consumer who is arguably more intentional, more selective, and more adaptive than at any point in recent years. The next 12 to 18 months are unlikely to be defined by a return to pre-disruption norms. Instead, they will be characterized by consumers building new routines, expectations, and decision-making frameworks around permanent change.

The future consumer is not waiting for disruption to end. They are learning how to live, spend, and thrive within it. The organizations that do the same will be best positioned to lead what comes next.



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Fuel your path forward with NIQ.



About NIQ

NielsenIQ (NYSE: NIQ) is a leading consumer intelligence company, delivering the most complete and trusted understanding of consumer buying behavior and revealing new pathways to growth. By combining an unmatched global data footprint and granular consumer and retail measurement with decades of AI modeling expertise, NIQ builds decision systems that help companies turn complex data into confident action.

With operations in more than 90 countries, NIQ covers approximately 82% of the world's population and more than \$7.4 trillion in global consumer spend. Through cloud-based platforms, advanced analytics and AI-driven insights, NIQ delivers The Full View™—helping brands and retailers understand what consumers buy, why they buy it, and what to do next.

Forward looking statements

This report may contain forward-looking statements regarding anticipated consumer behaviors, market trends, and industry developments through 2027 and beyond. These statements reflect current expectations and projections based on available survey data, NIQ's proprietary market measurement data, historical patterns, and various assumptions. Words such as "expects," "anticipates," "projects," "believes," "forecasts," "will," "may," and similar expressions are intended to identify such forward-looking statements. These statements are not guarantees of future outcomes and are subject to inherent uncertainties, including changes in consumer preferences, economic conditions, technological advancements, competitive dynamics, regulatory developments, and evolving health and wellness practices. Actual results may differ materially from those expressed or implied in these statements. While we strive to base our insights on reliable data and sound methodologies, we undertake no obligation to update any forward-looking statements to reflect future events or circumstances, except to the extent required by applicable law. This report is provided for general informational purposes only and does not constitute investment, financial, medical, or legal advice.

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