



# Consumer Outlook

## Guide to 2027

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## Perpetual volatility sparks permanent change

Decision horizons have shortened, as consumers adapt to a seemingly constant state of socio-economic disruption.



## Consumption at extremes

Systemic polarization of global consumer spending drives a stark divide into two spending mindsets: constraint vs. upgrade.



## A new world of worth

Value is increasingly linked to a clear justification of purchase decisions. Price is now weighed against a prioritized set of situational factors.



## Self-directed wellness

Pragmatic, function-focused consumers are taking the reins when it comes to active and individualized management of their health & wellness needs.



## Agent-led discovery

Consumers are being fed AI-directed options, limiting and redefining the ways that brands must compete for share of mind and wallets.



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# Guide to 2027: Your strategic roadmap through disruption

Building roots in uncharted territory

Consumers are no longer responding to disruption as a ‘temporary’ condition.

The next 12-18 months could see **a global lift in the prolonged holding pattern** many households have found themselves in after consecutive periods of disruption.

**NIQ’s *Consumer Outlook: Guide to 2027*** will explore this anticipated **shift from experimentation to adaptive commitment in consumer decisioning**. Marrying rich analytical purchase insights with global consumer sentiment data, we will highlight the new driving forces of consumer behavior—influenced by **digital acceleration, value-seeking, flexible living, and AI-assisted decision-making.**

In the year ahead, volatility will not disappear—it becomes embedded into consumers’ real-time optimizations: intentionality, trading breadth for focus, and calibrating to minimize excess.



**Decode the past**



**Lead the present**



**Create the future**




**Lauren Fernandes**

*Global Author*

Vice President
Global Content



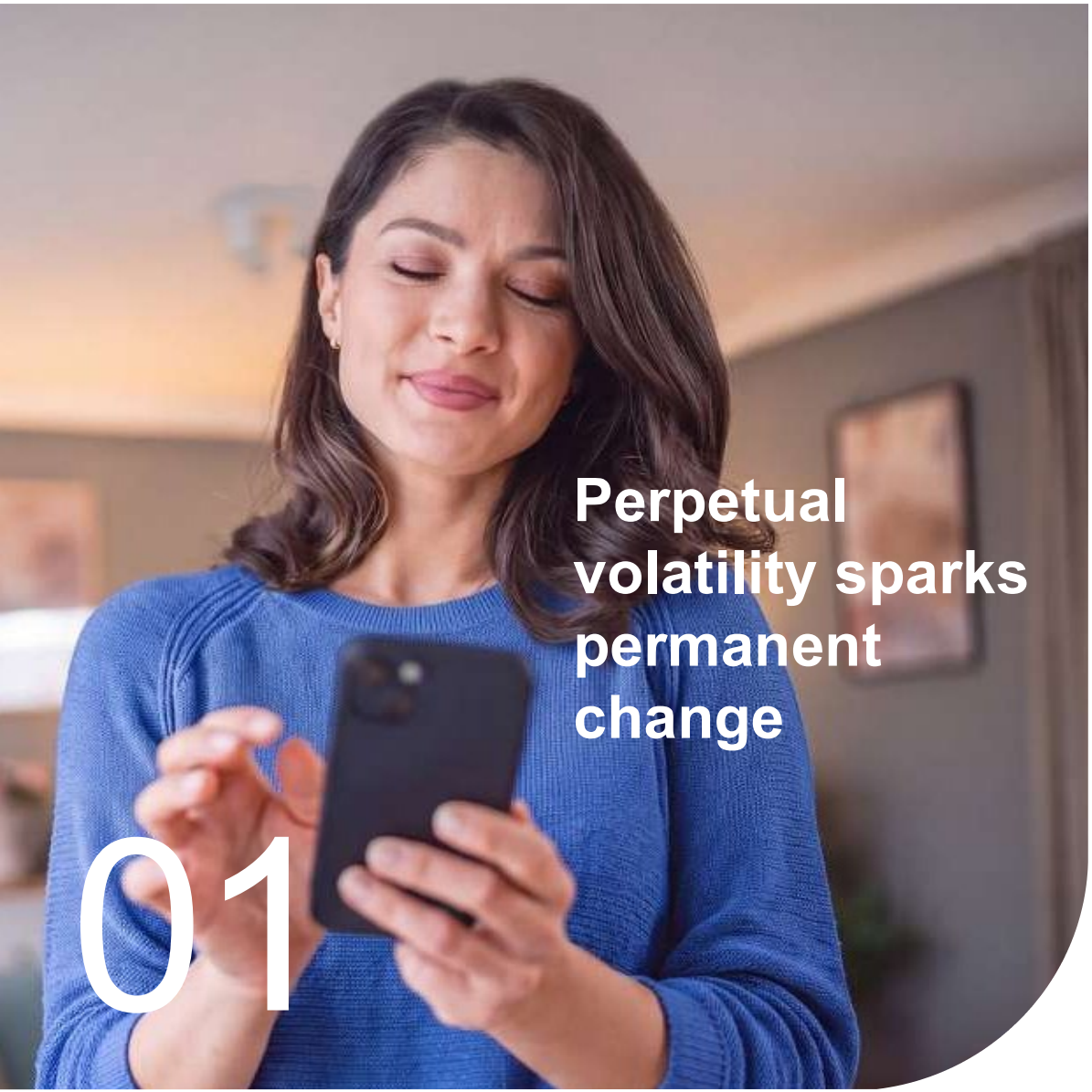
**Ljubica Atanasovska**

*EE Thought Leadership Lead*

Customer Success Consultant



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# Perpetual volatility sparks permanent change

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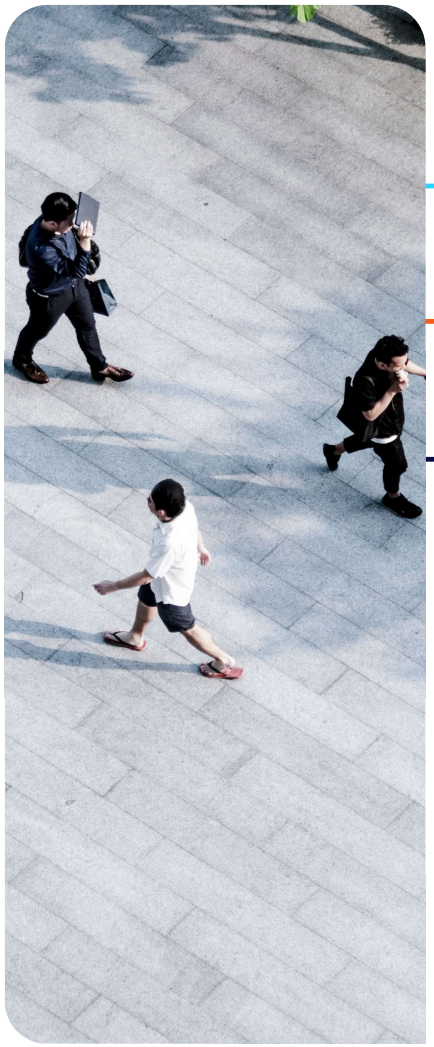
EE

## Key Insights

- **Financial optimism improves slightly,** with **44%** of consumers feeling worse off (-1.7pp vs. YA)
- **CPG price growth has moderated from recent peaks, but cost impacts continue to compound** with EE CPG price growth of **+2.5%**; **$100** spent in 2024 **would equate $106** in 2026
- **Food prices** remain the **top consumer concern**, cited by **34%** of consumers

While **price growth has moderated** across Eastern Europe, **the cumulative impact of higher costs continues to pressure household budgets.** As financial confidence softens, consumers are becoming more deliberate in their spending and increasingly focused on affordability and value.

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## Heading into 2027

The global state of consumers is **recalibrating**.

*craving* **Clarity**

*seeking* **Simplicity**

*prioritizing* **Purpose**

> **Consumers are reaching a tipping point** after years of socioeconomic and technological disruption.
>
> Consumers are no longer responding to disruption as a 'temporary' condition. In the next 12-18 months, we could see **a global lift in the prolonged holding pattern** many households have found themselves in."



**Laura McCullough**
President,
Global Customer Organization

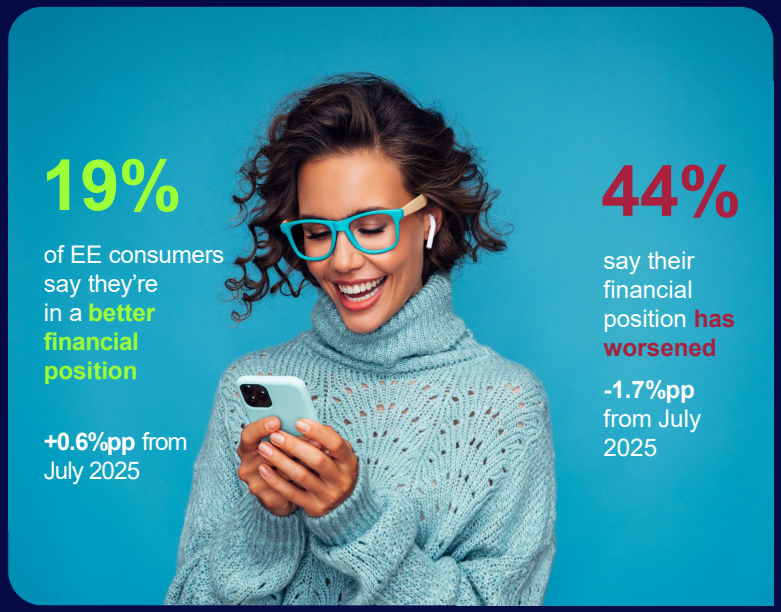


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## Consumer financial position

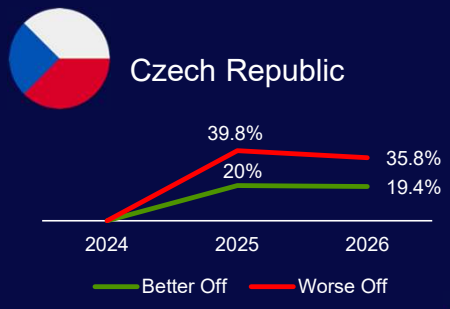
# Financial sentiment remains challenged despite modest improvements

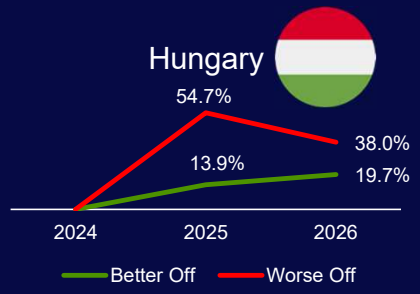
EE




## Financial confidence continues to be tested

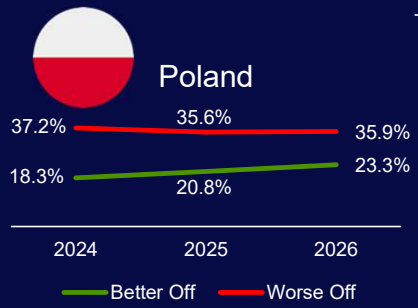
*Eastern Europe consumer sentiment year over year (% respondents)*

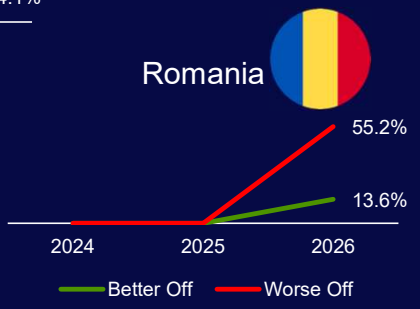









Source: NIQ 2026 Consumer Outlook, EE, vs. previous studies. Q: Compared to a year ago, is your household better off or worse off financially? Note: In China, verbiage reflects change in "management of spending."



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Causes of worsening financial position

# Costs of living remains a limiting factor for most consumers

**Increased costs of living**

**77%**

vs. 73% in 2025

**Economic slowdown**

**42%**

vs. 39% in 2025

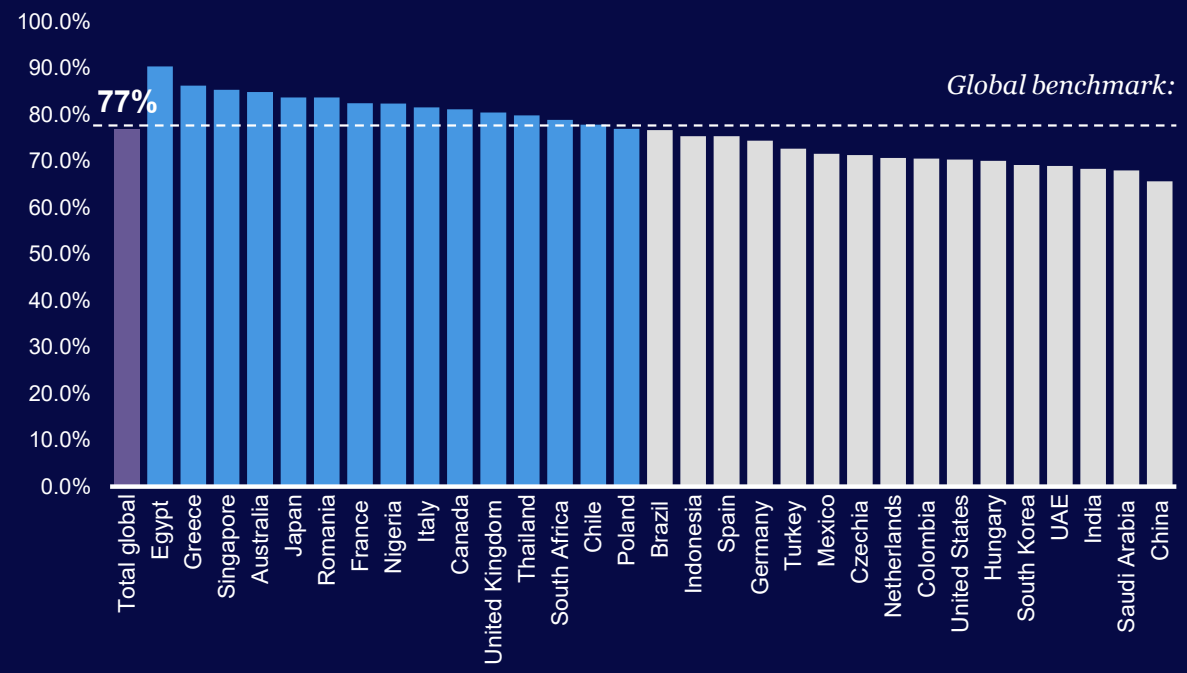
**Job insecurity / loss**

**33%**

vs. 30% in 2025

## Increased costs of living as the source for financial hardship

*Global consumer sentiment across markets (% respondents)*




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



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# Economic pressures are reshaping how Eastern Europeans work and build wealth

EE



## The Growing Impact of Workplace Stress

- Employees across Eastern Europe are increasingly affected by work-related stress and mental strain.
- Organisations face growing pressure to improve wellbeing, flexibility and retention strategies.

**39%**

of surveyed respondents in EE report experiencing work-related stress on a regular basis.[1]

**Read more >>>**



## The Delayed Path to Homeownership

- Rising housing costs are pushing first-time purchases later in life.
- Many buyers are entering the market only after years of saving and financial planning.

**31.9 years**

Is the average age of first-time home buyers across Eastern Europe.[2]

**Read more >>>**

Sources:1) Gallup: State of the Global Workforce Report 2) Euro news: What's the average age of first-time homebuyers across Europe?

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# Choosing stability over “stretch”

## People are becoming more cautious about taking on more

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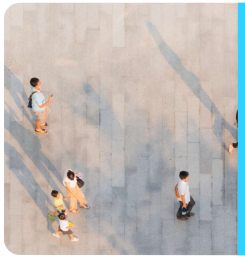
### Slowing surge in side hustles

Fewer people are actively seeking additional income streams than two years ago. Could this indicate a potential slowdown in the side hustle boom?



### Less job hopping, whether by choice or not

People are less likely to switch jobs to avoid potential layoff. This could indicate an overall shift in the priority of job security over the opportunity of change.



### More resistance to taking on debt

Consumers are less likely to take on debt to maintain their current lifestyles. It’s a sign of the times, people are opting for financial caution, controlling what aspects of their futures they can.

### % of respondents who are likely to do the following

*EE consumer sentiment vs. two years ago*

**57%** *vs 55% in 2025*

say their likely to **actively seek additional income streams** beyond their primary job

| Greece | Hungary | Czech Republic | Poland | Romania |
|---|---|---|---|---|
| 62% | 55% | 51% | 54% | 65% |

**27%** *vs 32% in 2025*

say they’re likely to **switch employment** to avoid **layoff or job elimination**

| Greece | Hungary | Czech Republic | Poland | Romania |
|---|---|---|---|---|
| 26% | 21% | 23% | 25% | 31% |

**17%** *vs 20% in 2025*

say their likely to **increase their personal debt level** to afford their current lifestyle

| Greece | Hungary | Czech Republic | Poland | Romania |
|---|---|---|---|---|
| 21% | 9% | 15% | 14% | 13% |

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

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# Top concerns setting the spending tone for 2027

EE

| | | July 2026 | % point change vs. year ago | | | | | |
|---|---|---|---|---|---|---|---|---|
| 1 | Increasing food prices | 34% | -0.7 | 32% | 44% | 31% | 31% | 38% |
| 2 | ⬆ Increasing utility bills *(was #3 in 2025)* | 22% | 3.2 | 24% | 25% | 19% | 25% | 35% |
| 3 | ⬇ Global conflict/Escalation of crisis / War *(was #2 in 2025)* | 18% | -6.4 | 25% | 17% | 10% | 24% | 15% |
| 4 | Economic downturn | 16% | 1.0 | 8% | 16% | 8% | 4% | 21% |
| 5 | ⬆ Self/Family welfare/happiness *(was #7 in 2025)* | 14% | 1.9 | 9% | 10% | 32% | 9% | 13% |
| 6 | ⬇ Political unrest (*was #5 in 2025*) | 13% | -2.3 | 11% | 5% | 10% | 18% | 10% |
| 7 | ⬇ *Increased housing costs (was #6 in 2025)* | 13% | 0.2 | 19% | 14% | 11% | 16% | 8% |
| 8 | ⬆ Increasing fuel / transport prices *(was #11 in 2025)* | 12% | 5.0 | 9% | 19% | 6% | 16% | 15% |
| 9 | ⬆ Job security *(was #10 in 2025)* | 10% | 1.2 | 14% | 8% | 16% | 10% | 8% |
| 10 | ⬇ Ability to provide basics (food/shelter) for myself/family *(was #8 in 2025)* | 9% | -0.8 | 8% | 8% | 12% | 7% | 8% |

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

**>>>Everyday living costs remain the primary concern for Eastern Europe households**



***Food affordability remains at the center of consumer concerns across EE.*** *Although broader inflation pressures have eased, households continue to feel the impact of elevated prices for everyday essentials. At the same time, growing concern around utility costs suggests that budget management remains a key priority heading into 2027.*

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# Rising food prices: a top global concern with unique local realities

Concerns are most concentrated within Japan, Greece and Canada



**“Increased food prices” as a top concern**

*Consumer sentiment across markets (% respondents)*




Source: NIQ 2026 Consumer Outlook

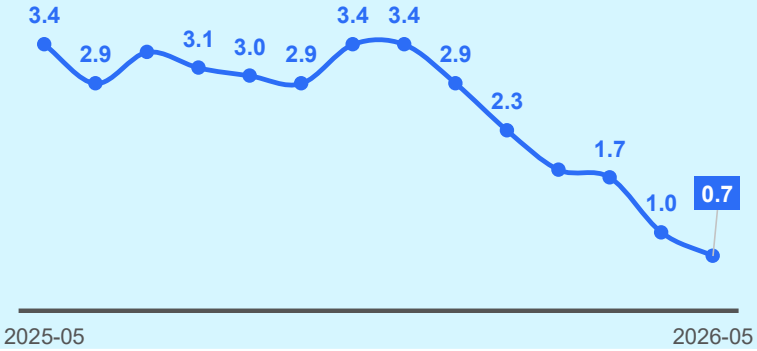
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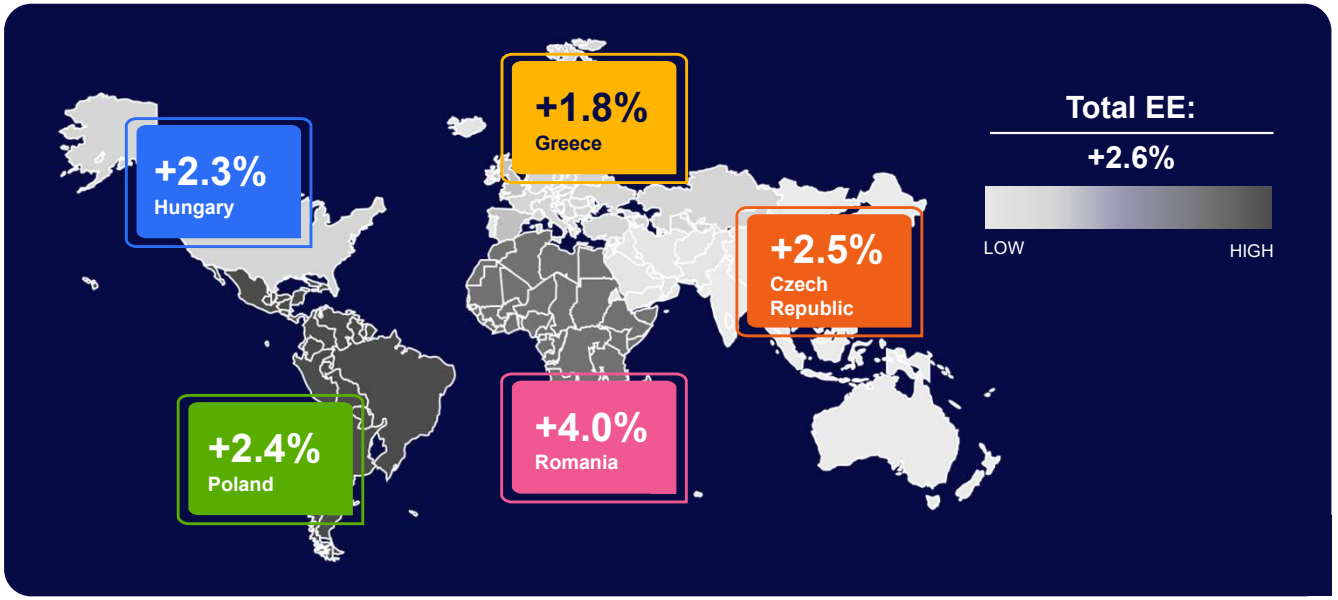
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# **EE CPG price growth remains moderate,** *but the cumulative impact of higher prices continues to shape consumer behaviour in EE*




**EE % change in average CPG price:**




Source: NIQ Global Inflation Tracker, Eq Vol Price % Change, Monthly measure of May 2026 vs. previous year. CPG total measured

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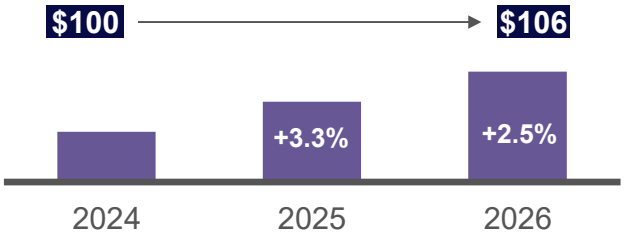
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# Inflation’s lingering legacy

The cumulative impact of higher prices continues to affect household budgets



*Annual EE % price increase (in USD)*




EE

**$100**

*spent from 2024,*
**would currently equate to…**

**$102**
**Greece**

**$108**
**Hungary**

**$106**
**Poland**

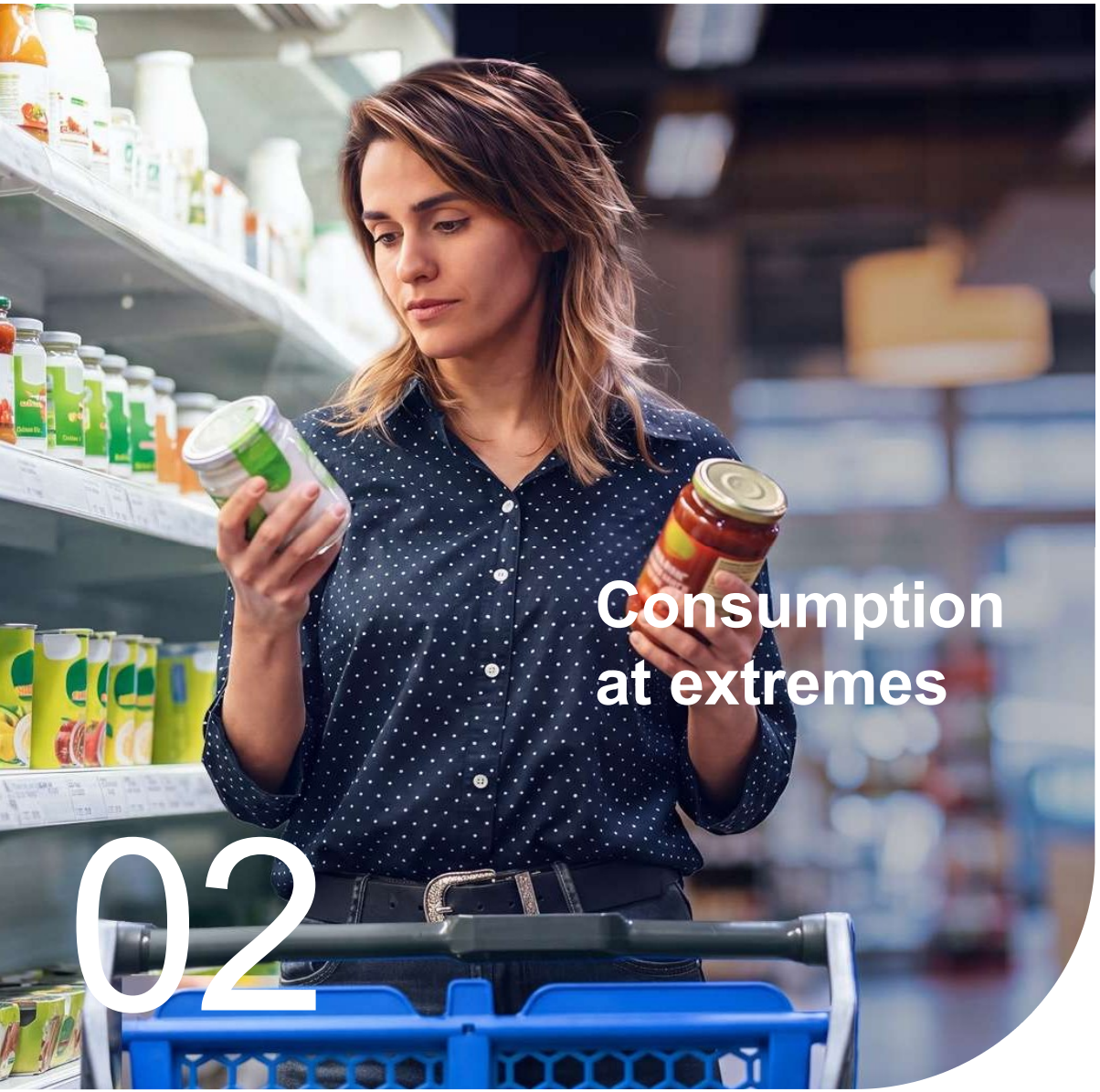
**$109**
**Romania**

**$105**
**Czech Republic**

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.

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# Consumption at extremes

02

EE

## Key Insights

- Economic disparities remain pronounced across EE, with **20%** of consumers belonging to the **"Strugglers"** segment.
- Polarization pushes growth to the extremes. **$0.69B in CPG value sales has shifted away from mainstream-priced** products toward value and premium tiers.
- **EE markets span multiple archetypes** within NIQ's **6-market framework,** reflecting different stages of **value-seeking and polarization.**

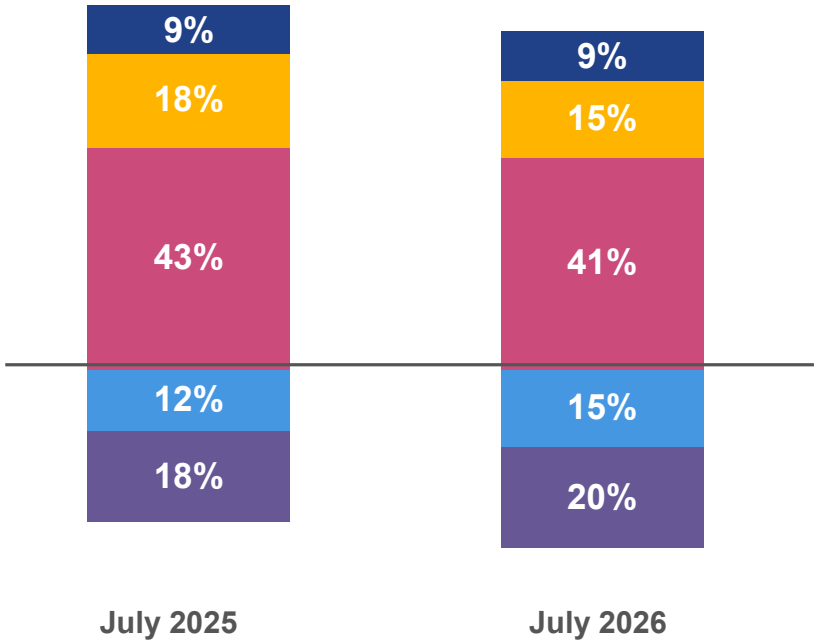
**The economic divide continues to widen** across EE, pushing growth toward value and premium tiers. As a result, **early signs of market polarization are emerging** across the region.

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# The 2026 economic divide

More consumers shift into financial insecurity compared to a year ago, ‘Thrivers’ hold their ground

EE




**Thrivers**
Saved money and feel more financially secure.

**Unchanged**
Not impacted and continue to spend the same.

**Cautious**
Not impacted financially but are cautious with spending.

**Rebounders**
Experienced income or job loss but now feel they are back on track.

**Strugglers**
Have suffered financial insecurity and continue to do so today.

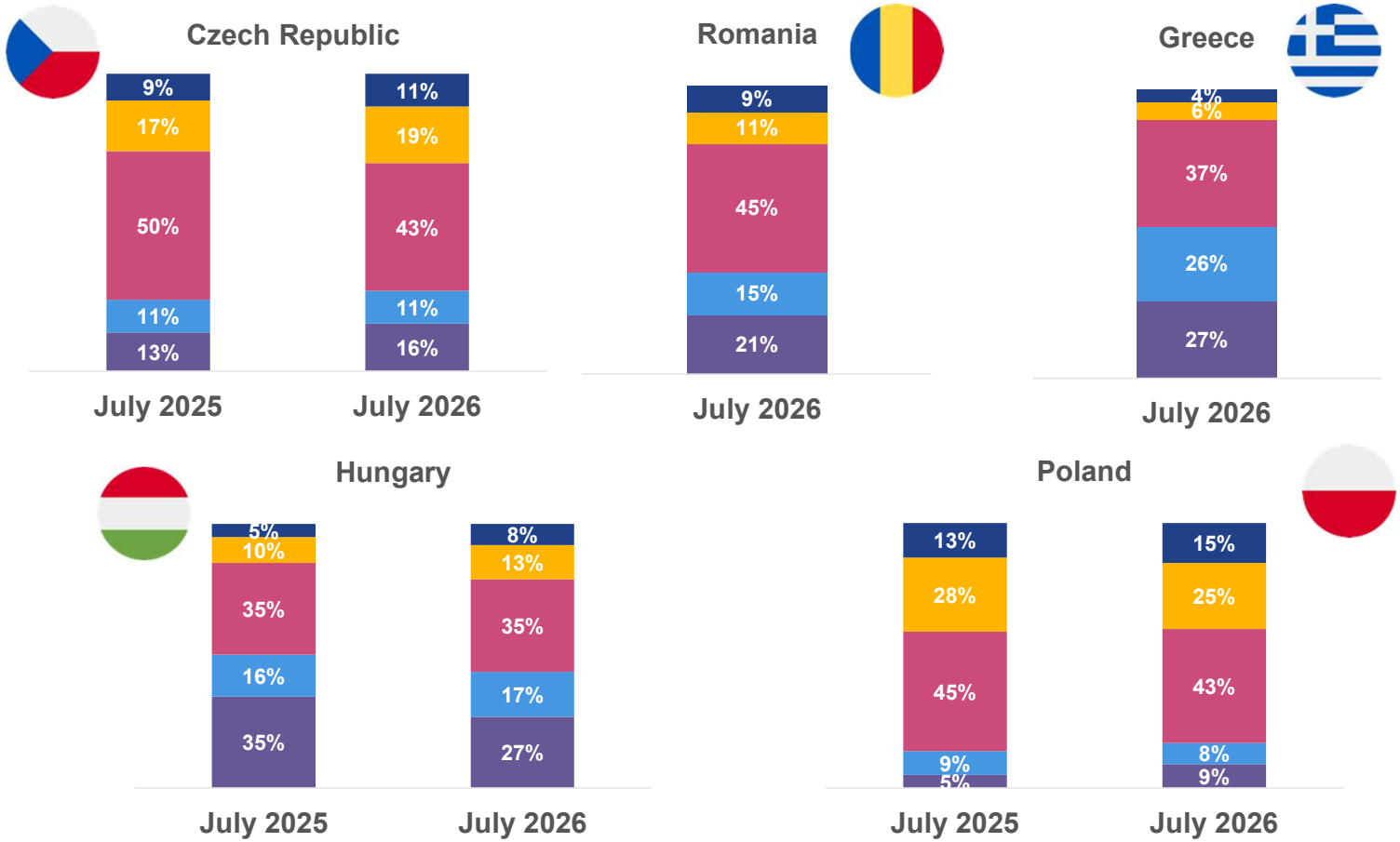
Source: NIQ 2026 Consumer Outlook, EE vs. previous studies. Q: Which of the following best describes how current events* of the last few years have impacted your overall household financial situation?
*Note: Question phrased more specifically to COVID-19 impact in 2022.

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# Financial resilience varies across EE markets

Consumer segments are evolving differently across markets, reflecting varying levels of economic pressure




**Thrivers**
Saved money and feel more financially secure.

**Unchanged**
Not impacted and continue to spend the same.

**Cautious**
Not impacted financially but are cautious with spending.

**Rebounders**
Experienced income or job loss but now feel they are back on track.

**Strugglers**
Have suffered financial insecurity and continue to do so today.

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

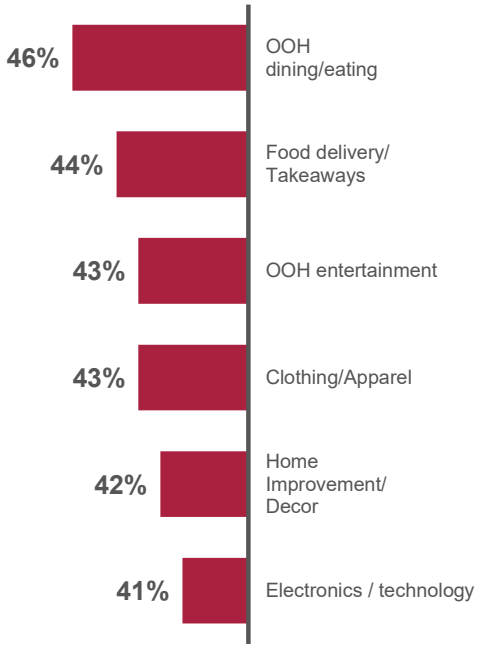

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# Consumers adapt to a higher-cost world: essentials are protected, discretionary is pressured

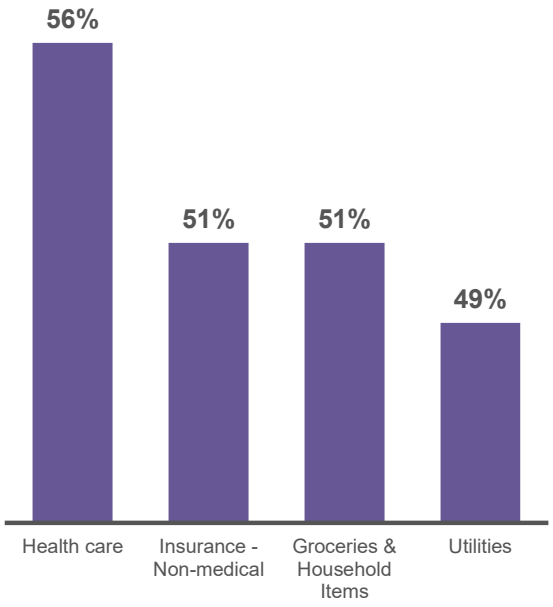
## Spending intentions for the next 12 months

EE

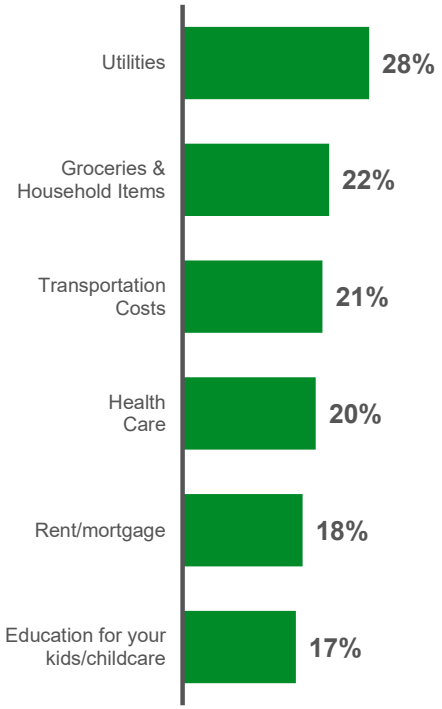
### Spending less




### Same as before




### Spending more






Source: NIQ 2026 Consumer Outlook, EE

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# How financial security is shaping the *2027 spending agenda*

Financial circumstances are emerging as one of the strongest determinants of future spending priorities

EE

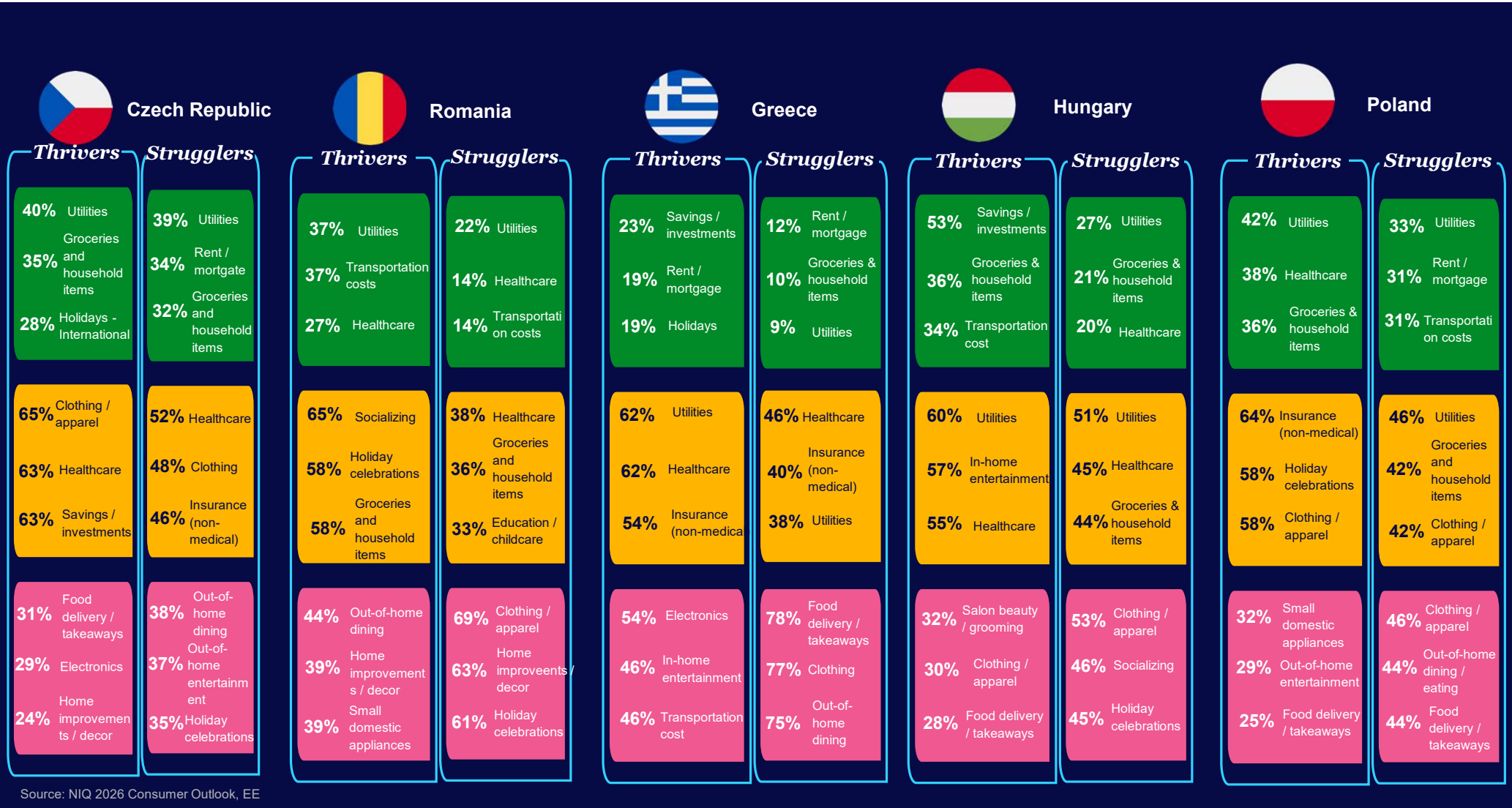
| | Thrivers | Strugglers |
|---|---|---|
| *% who plan to Spend more:* | 31% Utilities<br>29% Groceries and household items<br>29% Savings / investments | 23% Utilities<br>18% Rent / mortgage<br>17% Groceries and household items |
| *% who plan to Spend same as before:* | 58% Holiday celebrations<br>56% Healthcare<br>55% Socializing | 43% Healthcare<br>42% Utilities<br>40% Groceries and household items |
| *% who plan to Spend less:* | 31% Out-of-home dining / eating<br>30% Food delivery / takeaways<br>29% Out-of-home entertainment | 61% Clothing / apparel<br>55% Out-of-home dining / eating<br>54% Food delivery / takeaways |



Source: NIQ 2026 Consumer Outlook, EE

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Source: NIQ 2026 Consumer Outlook, EE

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*% who plan to Spend more*

*% who plan to Spend same as before*

*% who plan to Spend less*

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The rise of constraint & upgrade

# Consumers want a clear reason to spend

Highlighting why ‘the middle’ is losing its relevance




## “Constraint” mindset

**62%** of surveyed global consumers say that **if a product isn’t clearly better, they would rather save money**

VS.

## “Upgrade” mindset

**50%** of surveyed global consumers say that **if they’re going to spend more, they’d prefer to choose something that’s clearly a premium offering**

## Middle ground

**49%** of surveyed global consumers say that mid-range options need a clear reason for them to be chosen over cheaper or premium alternatives

Source: NIQ 2026 Consumer Outlook, EE



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# *Share gains at both ends of the market are hollowing out 'the middle'*

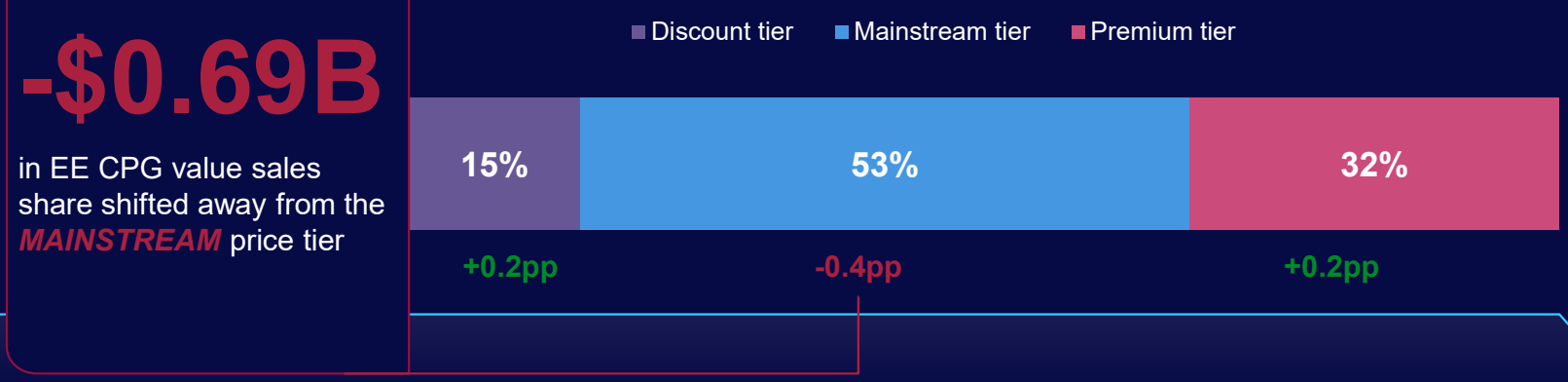
As consumer polarization deepens, growth is increasingly concentrated at the value and premium product tiers

EE

**-$0.69B**

in EE CPG value sales share shifted away from the ***MAINSTREAM*** price tier

***Eastern Europe CPG value share by price tier and change vs. year ago***




## *Consumers are choosing the extremes*

Value and premium offerings are gaining momentum as the mainstream tier loses relevance. Brands positioned in the middle face increasing pressure to clearly justify their value proposition.

Source: NIQ EE Retail Measurement, otal CPG/FMCG. Latest 52 weeks ended Jun. 14, 2026 vs. previous year

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Emerging framework

# NIQ's spectrum of recalibrated spending extremes

## 6 different manifestations of the same global evolution

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

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Leading examples of consumption at extremes

# The “Barbell Effect” in Action

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Eastern European markets demonstrate varying stages of polarization, from value-led to early-polarization market structures.

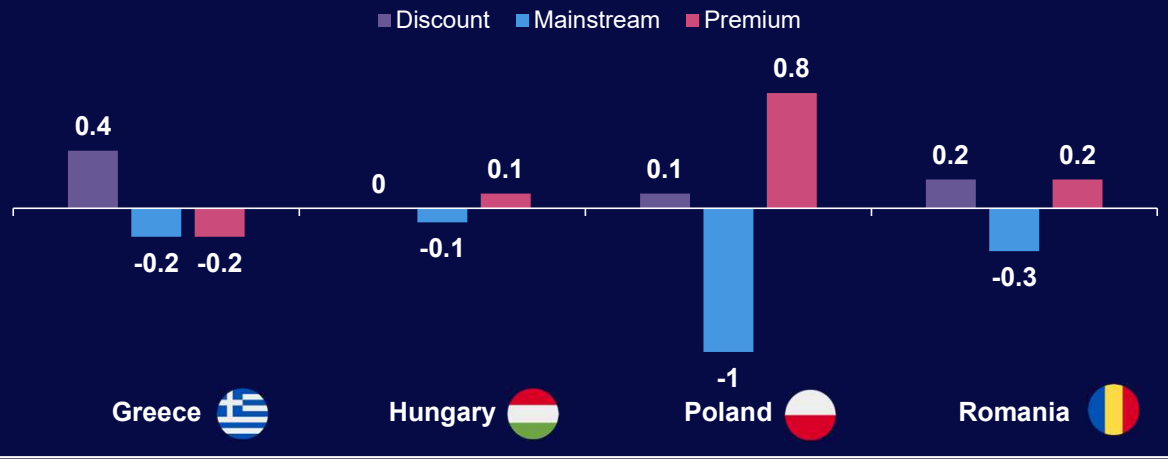
**6 Global market archetypes**

- *Premiumization markets*
- *Polarized markets*
- *Early polarization markets*
- *Stable structure markets*
- *Mainstream momentum markets*
- *Value-led markets*

↓↓ Mainstream

**Today’s prevailing trend:** EE shows early signs of market polarization (led by **Poland and Romania**) - mainstream is hollowing out while both value and premium gain share.

***Growth in CPG value share by price tier vs. year ago***




Source: NIQ EE Retail Measurement; Total CPG/FMCG. Latest 52 weeks ended Jun. 14, 2026 vs. previous year

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Strategic playbook

# *Acting on* NIQ's spectrum of recalibrated spending extremes

*So, what? Now, what?*

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

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# A new world of worth

03





## Key Insights

- **The shift from cost to worth:** While price remains the top determinant of purchase worth, quality and performance are close behind, influencing nearly one-third of consumers (37% vs. 28%)
- **The rise of value engineering:** Nearly every saving strategy is gaining traction as consumers stack savings, working harder stretch budgets
- **Erosion of demand: From losing pace, to losing potential**, EE consumers are increasingly scaling back consumption, with many believing they do not need to spend as much to be happy (34%) and others opting out of certain categories to prioritize essentials (32%).

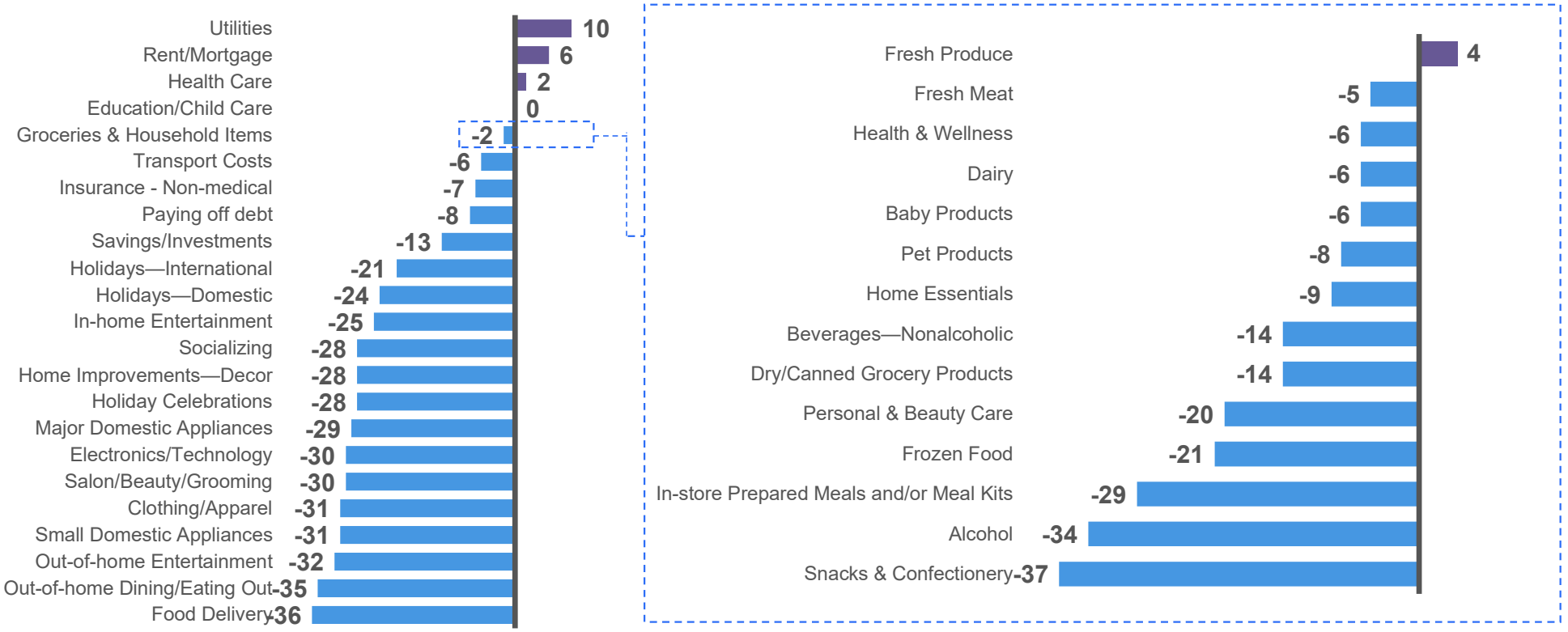
A **new world of worth** is emerging: consumers are balancing between **quality** and **price**, engineering greater value from every dollar, and **walking away from purchases that fail to justify** their place

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# Expect a new world of worth in 2027: consumers protect essentials, increasingly selective elsewhere

## Utilities, housing and healthcare lead EE spending priorities amid widespread cutbacks

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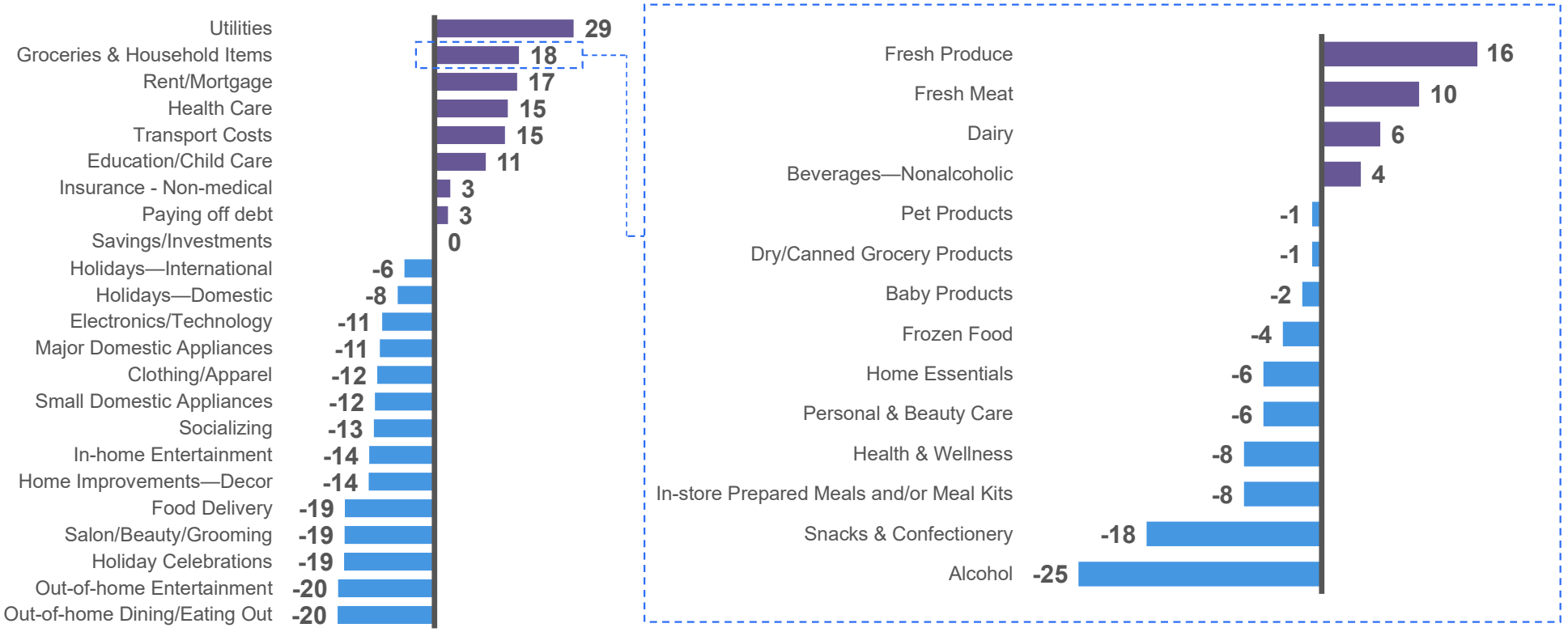

Source: NIQ 2026 Consumer Outlook, Global. Change in spending calculated by subtracting % of respondents who are spending less from % of respondents who are spending more.



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# Czech consumers prioritize essentials and fresh foods while pulling back elsewhere

## Household necessities and fresh foods remain spending priorities

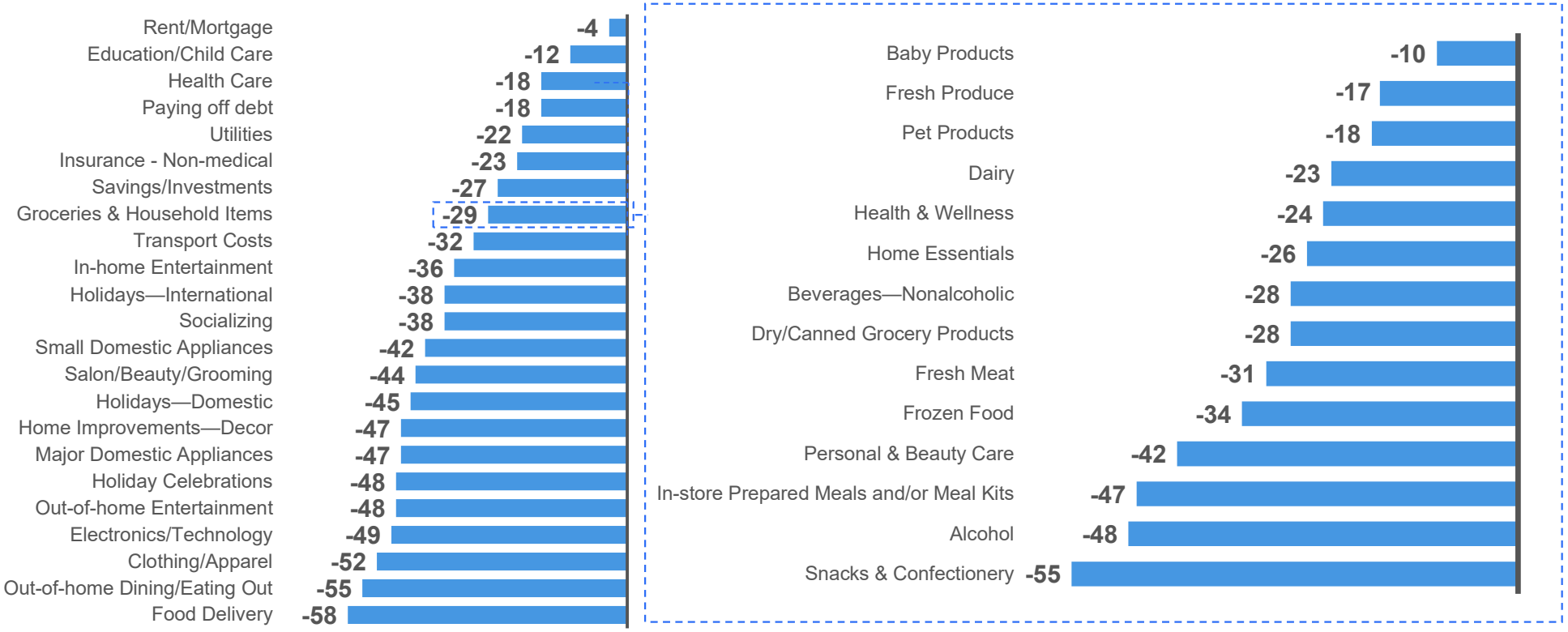



Source: NIQ 2026 Consumer Outlook, Global. Change in spending calculated by subtracting % of respondents who are spending less from % of respondents who are spending more.

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# Greek consumers are planning spending reductions across most categories

Food delivery, dining out, snacks & confectionery, and apparel face the sharpest planned cutbacks

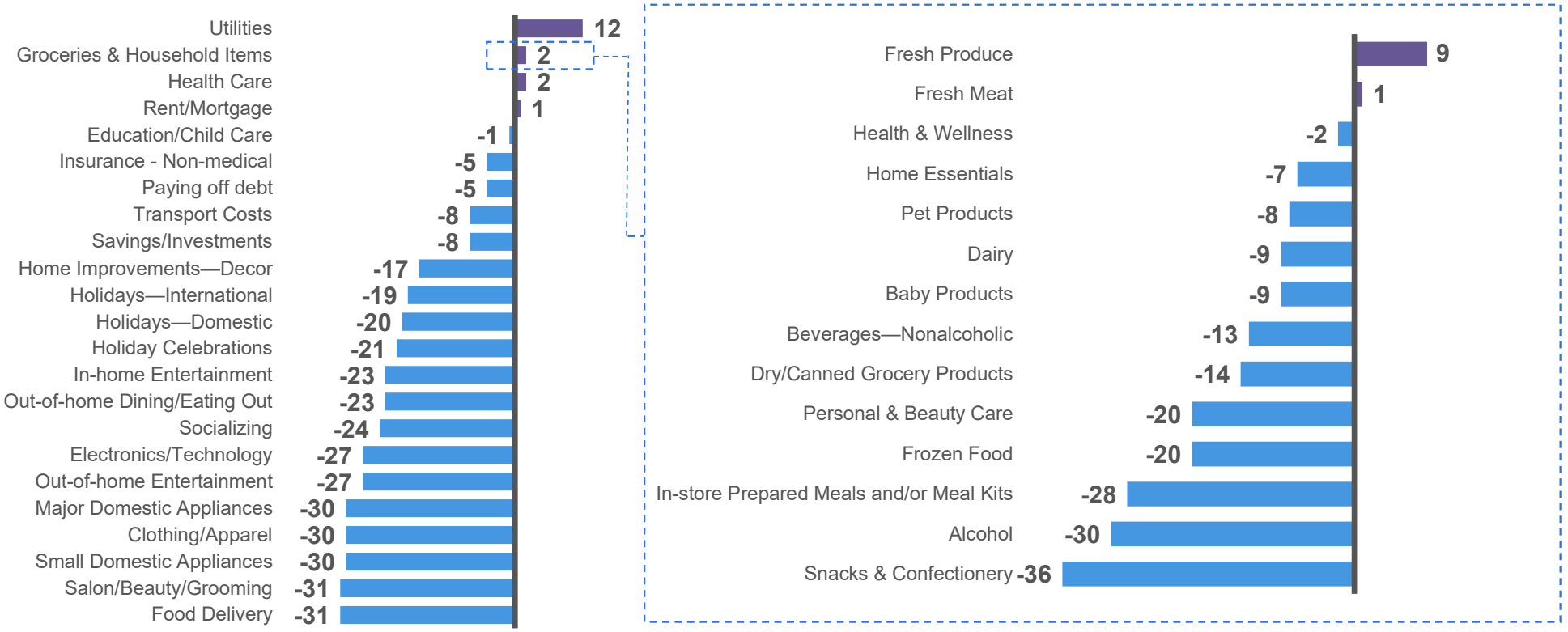



Source: NIQ 2026 Consumer Outlook, Global. Change in spending calculated by subtracting % of respondents who are spending less from % of respondents who are spending more.

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# Hungarian consumers prioritize essentials while cutting back on discretionary spending

Utilities, groceries and healthcare lead spending priorities, as well as fresh foods

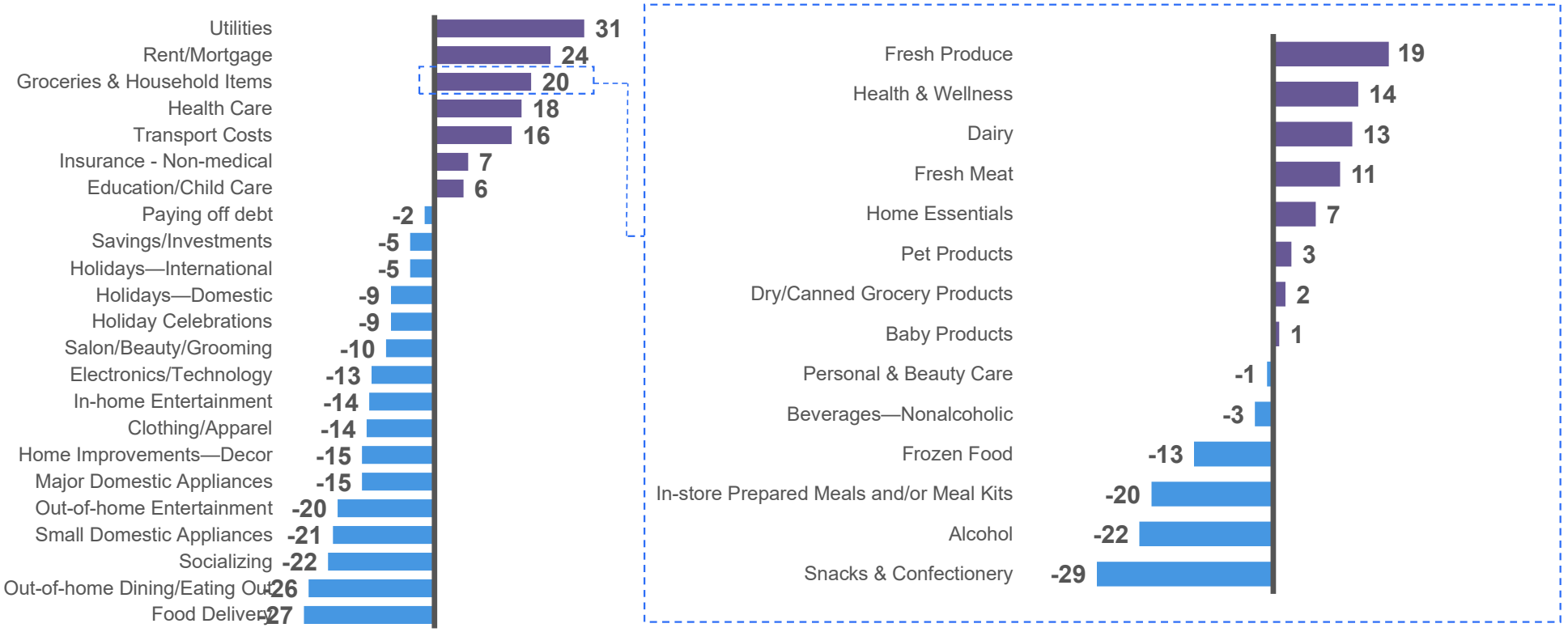



Source: NIQ 2026 Consumer Outlook, Global. Change in spending calculated by subtracting % of respondents who are spending less from % of respondents who are spending more.

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# Polish consumers focus on necessities and wellbeing in 2027

Spending increases are expected across utilities, housing and fresh food, while indulgence categories see the sharpest reductions



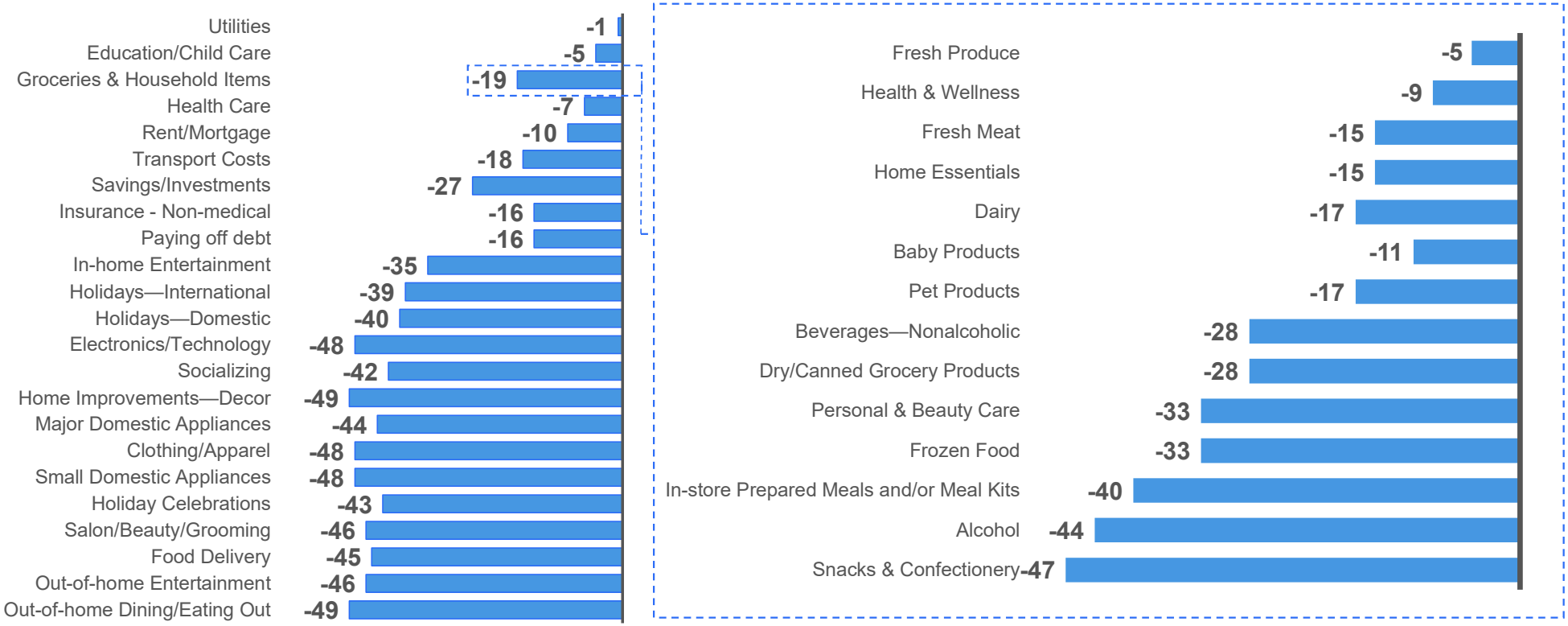

Source: NIQ 2026 Consumer Outlook, Global. Change in spending calculated by subtracting % of respondents who are spending less from % of respondents who are spending more.

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# Romanian consumers cut back across nearly all spending categories

Utilities show relative resilience, while discretionary spending and grocery categories face widespread reductions

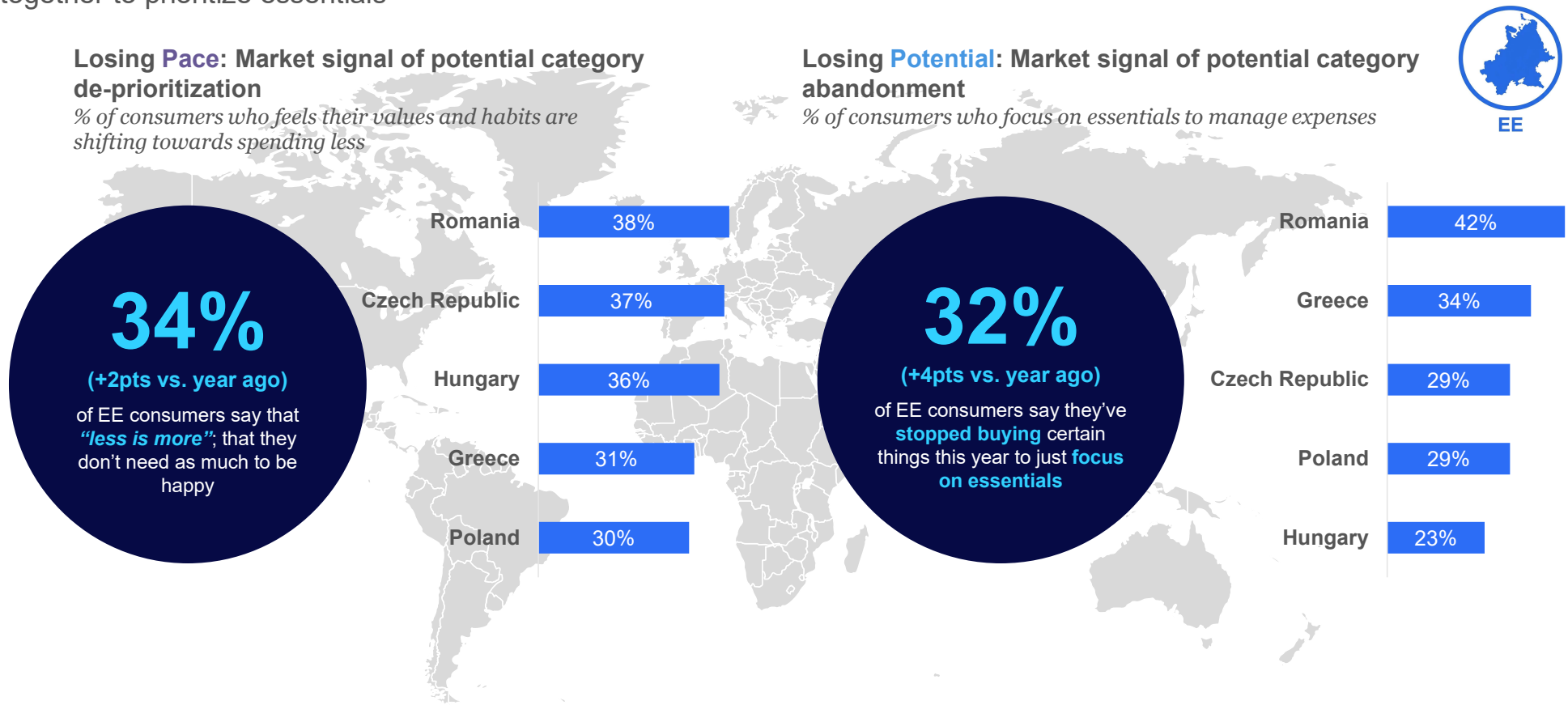



Source: NIQ 2026 Consumer Outlook, Global. Change in spending calculated by subtracting % of respondents who are spending less from % of respondents who are spending more.

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# Many consumers feel they do not need to spend as much to be happy

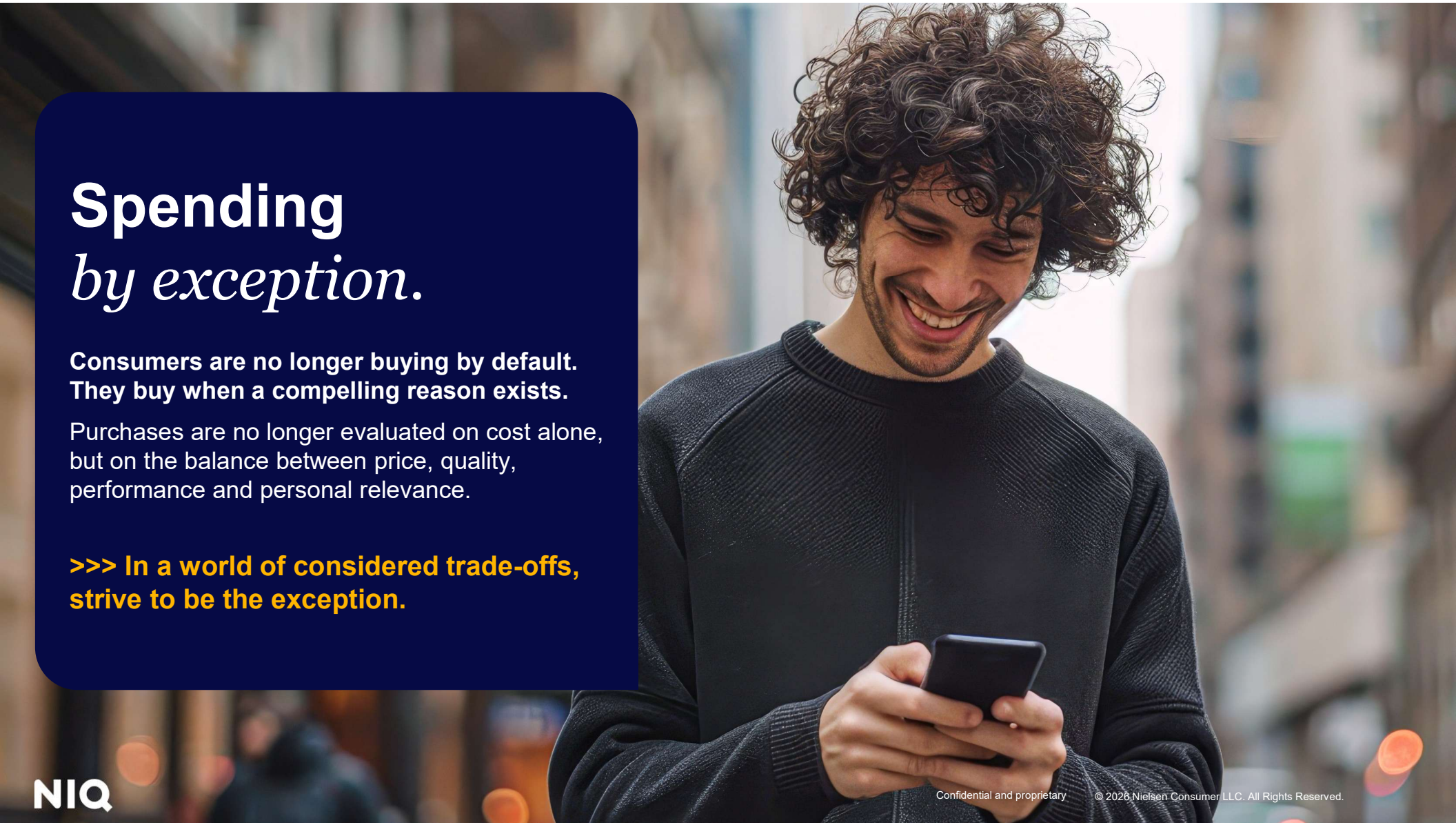
Romania stands out as the most financially cautious market, with 38% spending less by choice and 42% dropping categories altogether to prioritize essentials




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

NIQ

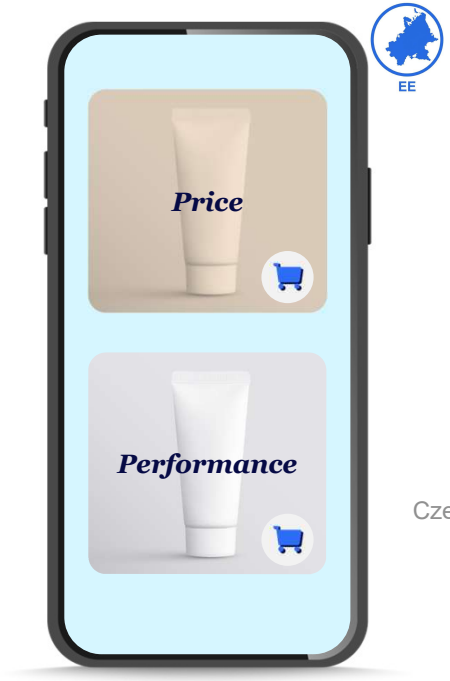
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Spending
by exception.
Consumers are no longer buying by default. They buy when a compelling reason exists.
Purchases are no longer evaluated on cost alone, but on the balance between price, quality, performance and personal relevance.
>>> In a world of considered trade-offs, strive to be the exception.
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# The shift from “cost” to “worth”

## *Consumers are redefining value beyond affordability alone*

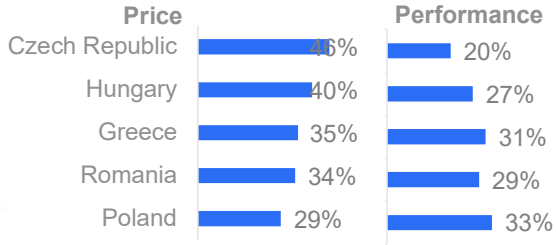
**Which ranks supreme in the eyes of consumers? >>>**




EE

**37%**
of surveyed EE consumers say that ***affordable pricing is most important*** to determining if a household or grocery **purchase is worth it**

**28%**
of surveyed EE consumers say that ***quality / performance is most important*** to determining if a household or grocery **purchase is worth it**




Source: NIQ 2026 Consumer Outlook, Global

NIQ

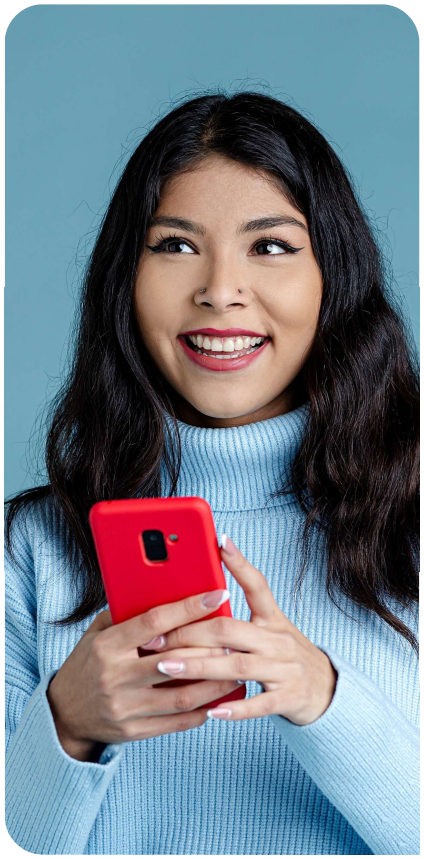


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# What feels “worth” paying more for?

While some factors feel consistently “worth it” across generations, others have a definite skews towards key cohorts

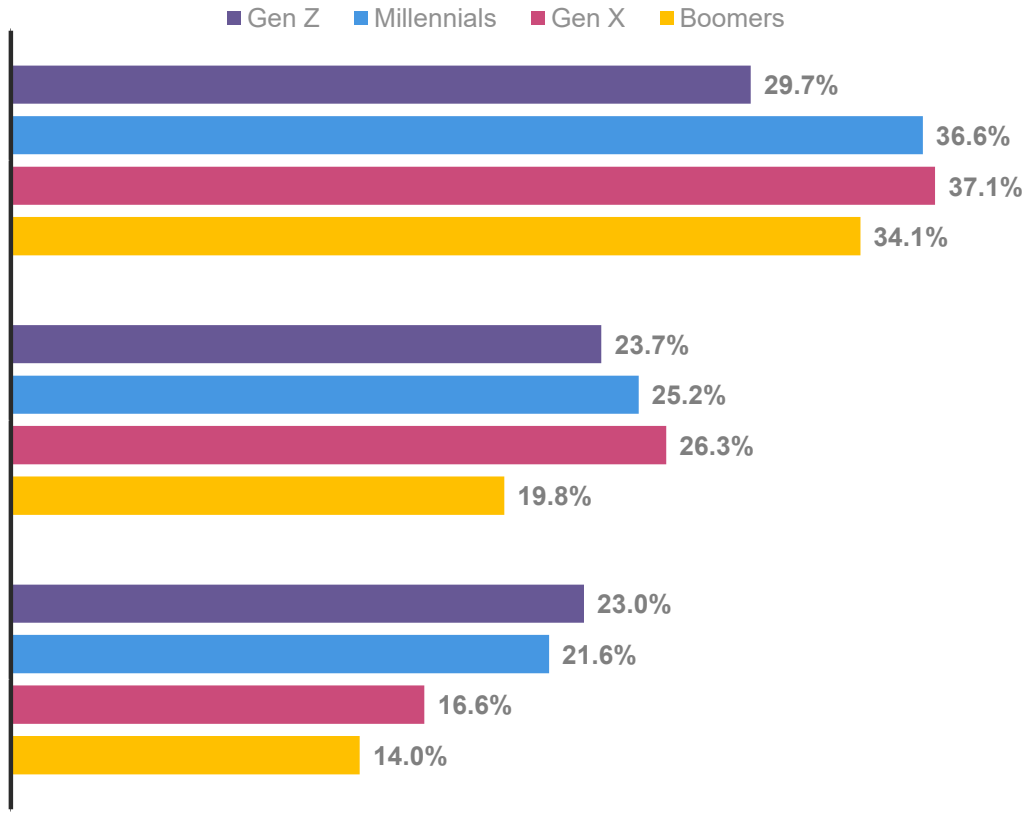
EE



**35%** say it’s products that **offer better value for amount of product received** (i.e. economy size)

**24%** say it’s products that **saved time / made life easier**

**19%** say it’s products that **delivered a better experience / more enjoyment**



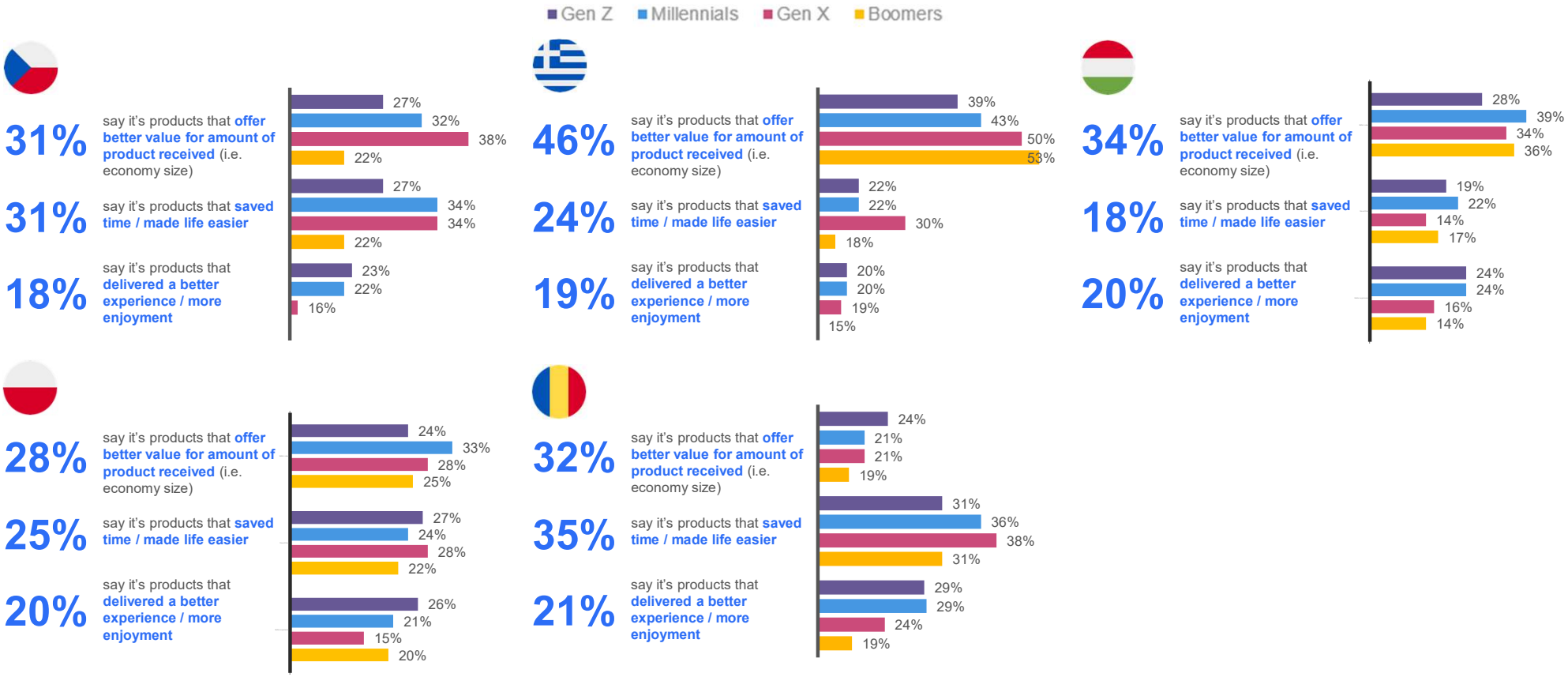

Source: NIQ 2026 Consumer Outlook, Global



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# Worth is shaped by value, convenience and experience

The factors consumers deem worth paying more for differ notably across generational cohorts



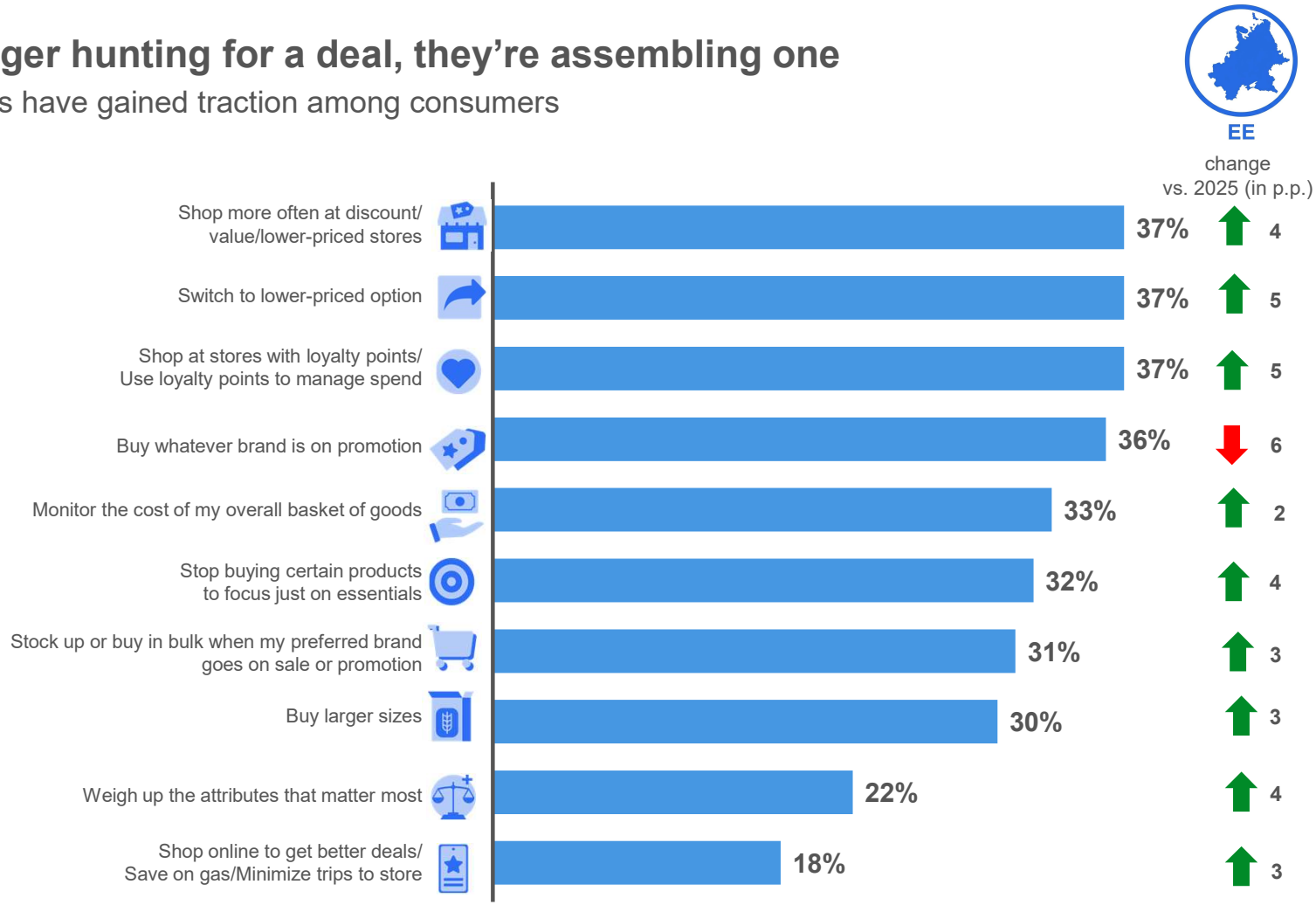

Source: NIQ 2026 Consumer Outlook, Global

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# Consumers are no longer hunting for a deal, they're assembling one

Nearly all top saving strategies have gained traction among consumers

***Top 10 EE consumer saving strategies for CPG***



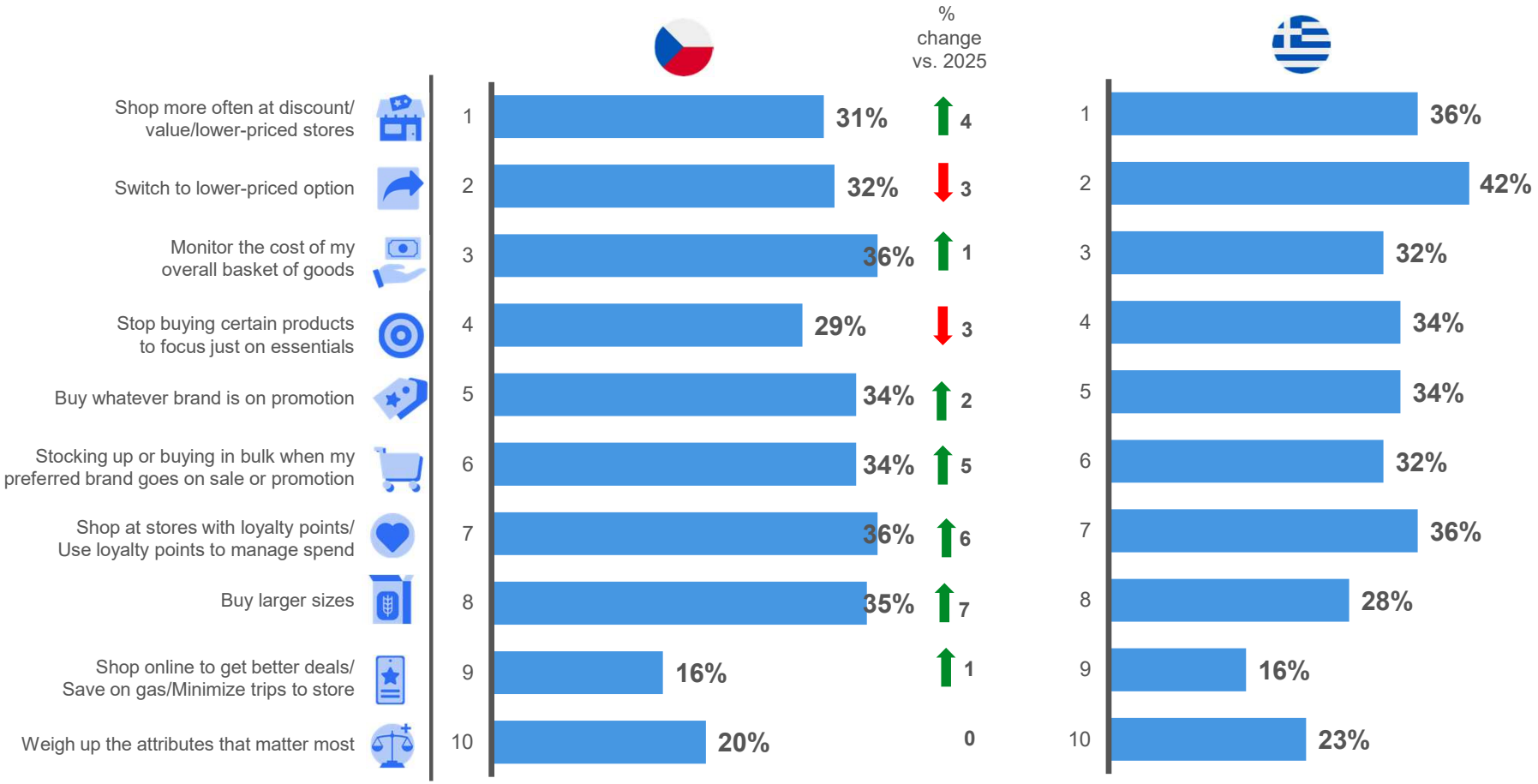

Source: NIQ 2026 Consumer Outlook, Global, vs. previous study.

NIQ

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# Czech and Greek consumers are expanding how they save

## Shoppers are relying on a broad mix of tactics to manage spending and maximize value

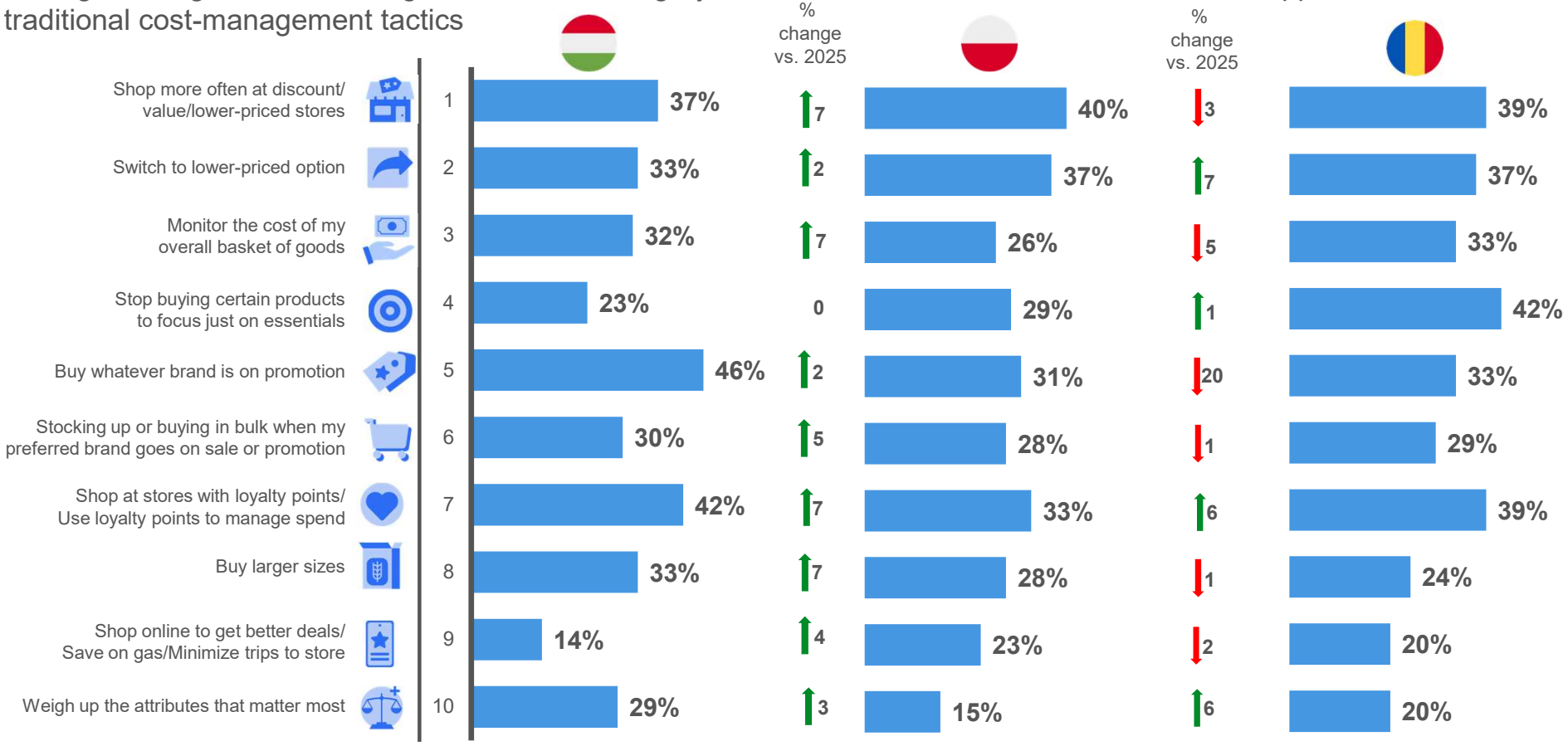



Source: NIQ 2026 Consumer Outlook, Global, vs. previous study.

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# Consumers remain focused on value, but markets are moving at different speeds

Savings strategies continue to gain traction in Hungary and Romania, whereas Polish consumers appear less reliant on some traditional cost-management tactics




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

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# Value “Engineering”: The rise of Savings Stacking

Consumers are increasingly combining discounts, rewards, payment system benefits, memberships and more, to engineer the lowest possible ***net price***

*Layering value to **justify** worthwhile spending*



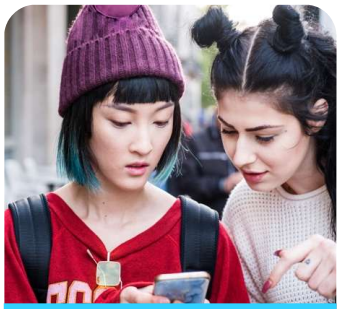
**Net price over advertised price.**

*Consumers are likely to judge ‘value’ based upon the final price paid after every possible savings method has been applied.*



**Loyalty unlocks preferential pricing.**

*Membership exclusive pricing and personalized offers are becoming like currencies relied upon to secure highly valued purchases.*



**Payment methods shape purchase price.**

*The path to value is increasingly shaped around how consumers choose to transact.*



**Value is ‘engineered’, not found.**

*Consumers aren't just using savings to buy cheaper products; they're using savings to afford better ones.*



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# 04

# Self-directed wellness





## Key Insights

- **Rising health-first value equation:** Affordability remains the top driver, but **healthy/natural benefits** are increasingly competing for consumers' attention
- **Freshness ranks highest among health attributes:** 55% of East European consumers would pay more for fresh products without preservatives.
- **New care pathways open doors to GLP-1 users:** Thrivers are as likely as Strugglers to be using GLP-1s **(9% of Strugglers vs. 9% of Thrivers)**

*Health is now a **core driver of consumer choice**, but the future of wellness will be shaped by who can **access, afford, and leverage** the next generation of **health innovation and technology**.*

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# Health is no longer a “trade off”; wellbeing won’t be compromised in the year ahead

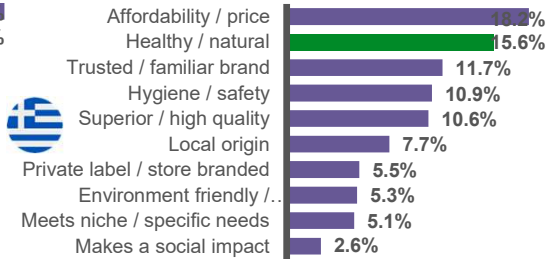
## Ranking factors of ‘most importance’ when choosing what to buy

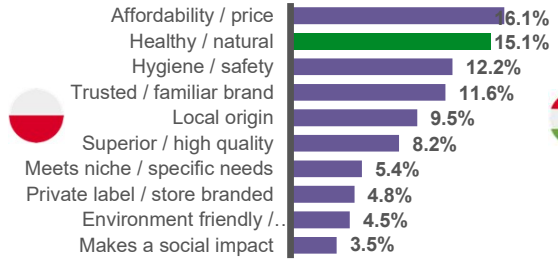
*EE consumer sentiment, % respondents who said each factor was “most important”*

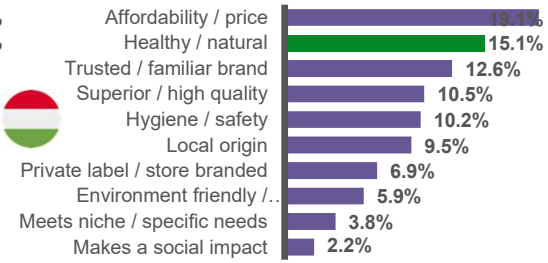


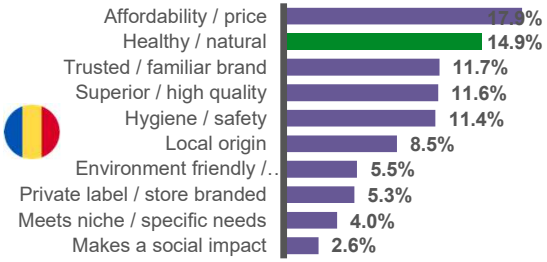







***The Rise of a Health-First value equation:*** *according to consumers, “Health” joins “Price” at the top of the consumer decision tree*



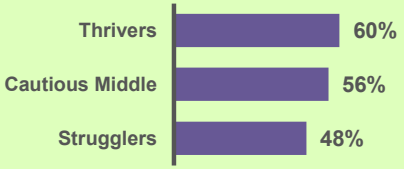
Source: NIQ 2026 Consumer Outlook, Global

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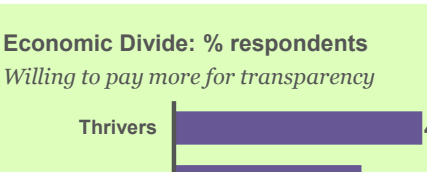
# The growing health gap: Health priorities are shared, but spending power on them is not



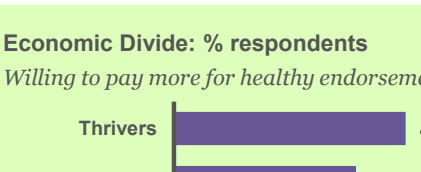

**55%**
would pay more for **fresh products without preservatives**




**34%**
would pay more for **products with ingredient / supply chain transparency**




**33%**
would pay more for **products endorsed as healthy by someone or an organization**





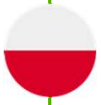

| 48% | 27% | 29% |
|---|---|---|
| would pay more for fresh products without preservatives | would pay more for products with ingredient transparency | would pay more for products endorsed as healthy |



| 53% | 35% | 38% |
|---|---|---|
| would pay more for fresh products without preservatives | would pay more for products with ingredient transparency | would pay more for products endorsed as healthy |



| 52% | 31% | 25% |
|---|---|---|
| would pay more for fresh products without preservatives | would pay more for products with ingredient transparency | would pay more for products endorsed as healthy |



| 61% | 37% | 39% |
|---|---|---|
| would pay more for fresh products without preservatives | would pay more for products with ingredient transparency | would pay more for products endorsed as healthy |



| 63% | 43% | 37% |
|---|---|---|
| would pay more for fresh products without preservatives | would pay more for products with ingredient transparency | would pay more for products endorsed as healthy |

Source: NIQ 2026 Consumer Outlook, Global

NIQ

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# Health divide evolves: GLP-1s become a little more accessible as new care pathways emerge

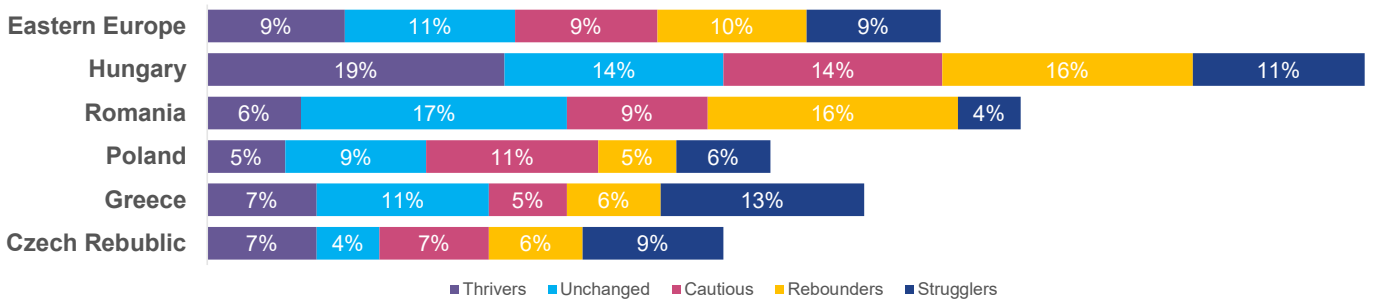
Technology, retail innovation and new care models are expanding pathways to treatment across the economic spectrum



**9%**

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

14% 10% 9% 8% 7%




***Broadening GLP-1 access***

Strugglers are just as likely as Thrivers to be using GLP-1s in EE.

**01**

**Democratizing access**

While access varies across markets, increasing awareness of obesity-related health risks is driving discussions around broader reimbursement and adoption of GLP-1 therapies across CEE.

**02**

**Preventive health**

Weight management is increasingly viewed as part of a broader health strategy rather than a cosmetic goal alone. Rising concerns around obesity, diabetes and cardiovascular health are encouraging consumers to seek long-term solutions and professional support.

**03**

**Digitizing management**

Consumers are increasingly using digital tools to manage their health and wellness goals. Health apps, wearables and online communities are helping individuals track progress, access information and stay engaged throughout their weight-management journey.

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.*

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# GLP-1 adoption is gaining momentum across global markets

India reports the highest level of GLP-1 usage among markets surveyed

**"Currently using GLP-1 medications"**

*Consumer sentiment across markets (% respondents)*

***India***

reports the highest GLP-1 adoption among markets surveyed (22%), potentially reflecting the combination of high metabolic-health need, expanding treatment access, and growing consumer awareness.

**01**

**Larger underlying need**

India has one of the world's largest populations living with diabetes and obesity-related conditions, making it a global focal point for metabolic health needs.

**02**

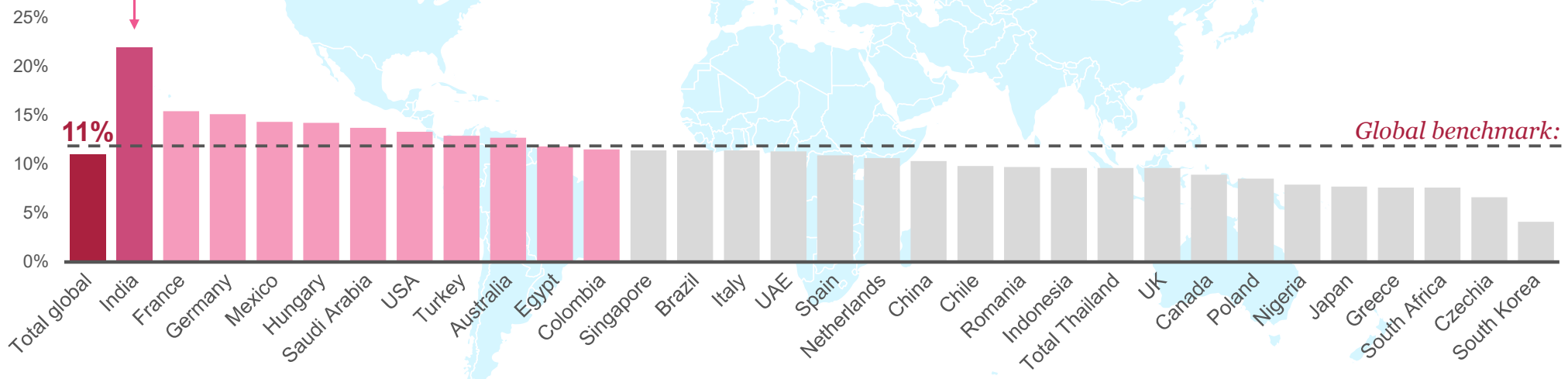
**Rapid expansion of access**

With the 2026 expiry of Semaglutide patent in India, cost barriers are lifting as generic versions could accelerate market growth and access. Uptake may take time to follow.

**03**

**Strong local awareness**

Increased media coverage, weight-management discourse and telehealth expansion are fueling local momentum. Awareness is rising, but in some cases, consumer acceptance remains mixed.




Source: NIQ 2026 Consumer Outlook

*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.*

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# The GLP-1 Ripple Effect beyond weight loss: Rewired wellness priorities

Emerging health solutions are expected to play a growing role in purchase decisions

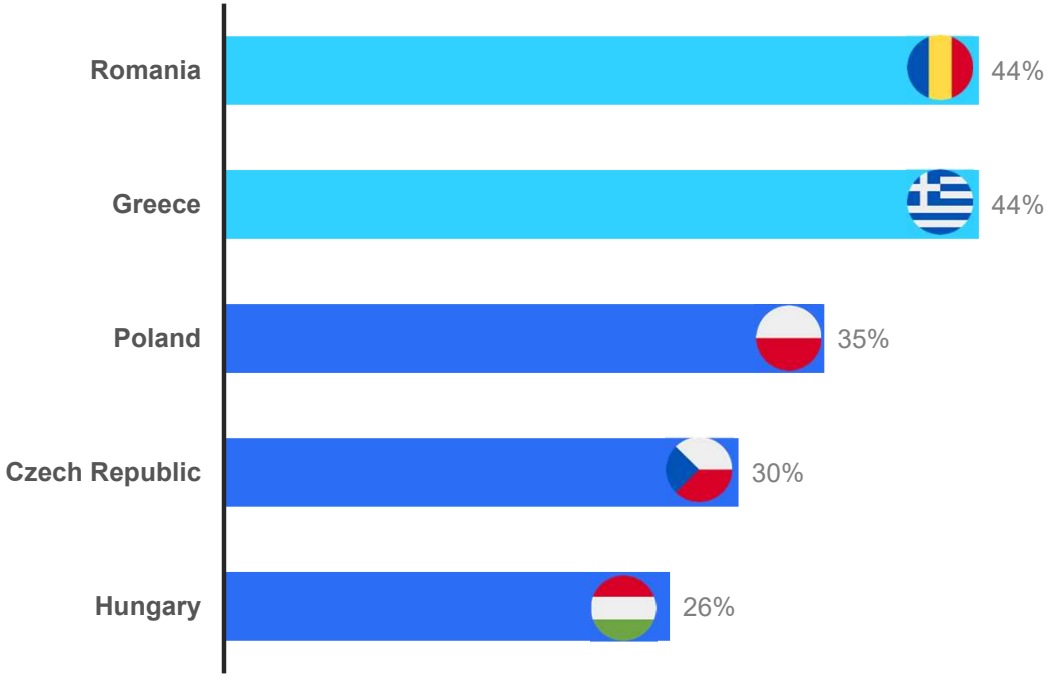


**36%**

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

**Expected Impact of GLP-1 Medications on Future Food, Beverage & Health Product Purchases**

*% respondents expecting an impact*




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.

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# Health technology is becoming an integral part of consumers' wellness journeys

Health technology is evolving beyond functionality, becoming a tool consumers use to optimize wellbeing, build healthier routines, and achieve long-term wellness goals

*Consumer confidence in health technology*

**41%**

of consumers agree that **health-focused technology products are effective** in helping improve their health and wellness

*Interest in personalized health monitoring*

**43%**

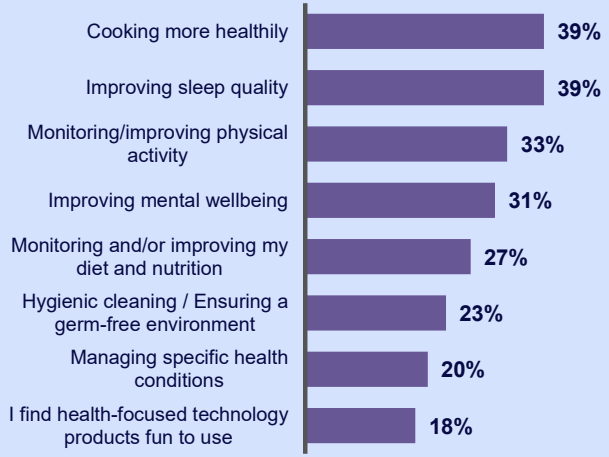
**would use a device or app** that automatically monitors daily health and provides personalized recommendations

*Willingness to invest in health-focused technology*

**45%**

of consumers would pay **up to 10% more** for products with health-focused features

***What motivates consumers to invest in health-focused technology products***




* % of respondents (Poland & Czech Republic average)

Source: NIQ Consumer Tech & Durables Consumer Survey 2026, Poland & Czech Republic

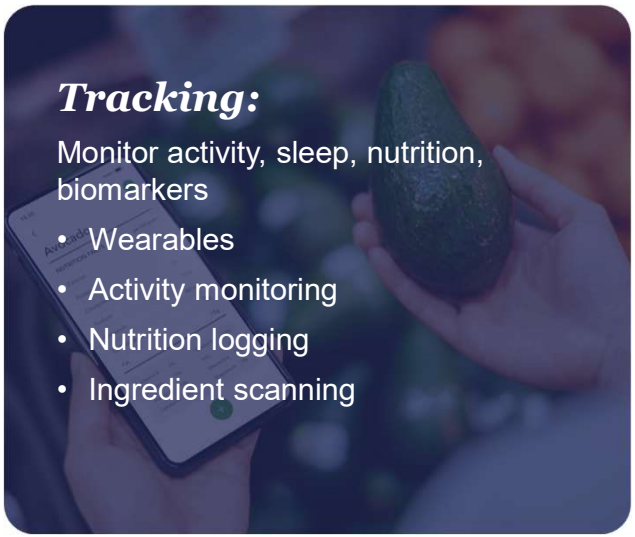
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## Health technology is shifting from insight generation to outcome enablement

**From data collection to personalized action:**

### Then



***Tracking:***

Monitor activity, sleep, nutrition, biomarkers

- Wearables
- Activity monitoring
- Nutrition logging
- Ingredient scanning

### Now



***Guiding:***

Connect multiple data sources and provide recommendations

- AI health assistants
- Personalized nutrition
- Connected biomarker insights
- Behavioral nudges

### Next



***Orchestrating:***

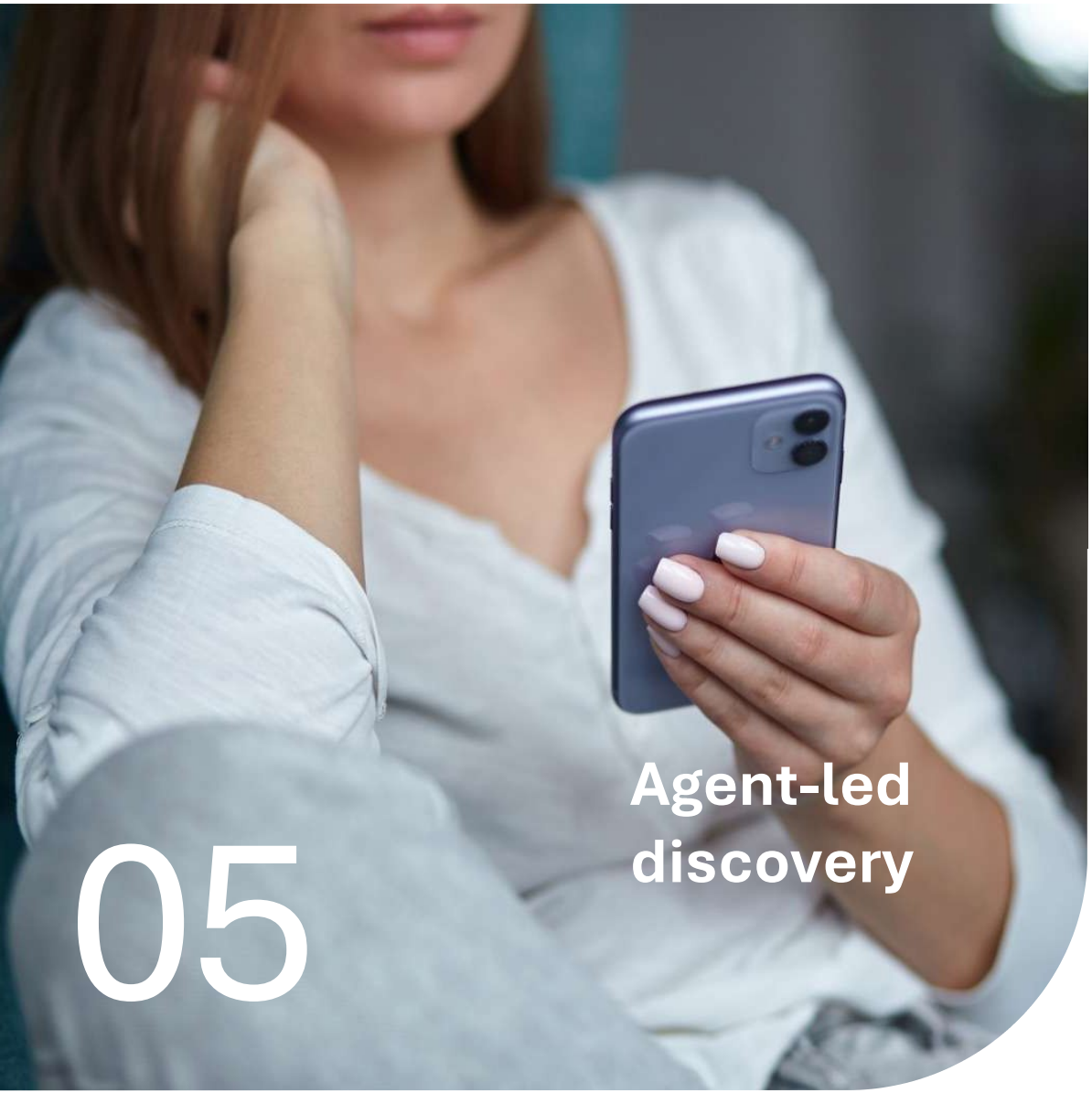
Coordinate personalized health decisions across products, services and care ecosystems

- Predictive health recommendations
- Autonomous replenishment
- Integrated wellness ecosystems
- Digital health companions

**Technology is evolving from measuring health to actively shaping health outcomes.**

NIQ

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# 05 Agent-led discovery

## Key Insights

- **AI is becoming a new discovery layer:**
  48% of EE consumers have been influenced by AI recommendations for CPG purchases, and 23% say they already use AI to help decide what to buy
- **Products may win or lose consideration before consumers even see them:**
  As commerce evolves from physical stores to AI agents, 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.*

# Navigating a rapidly evolving new architecture of “choice” and “influence”

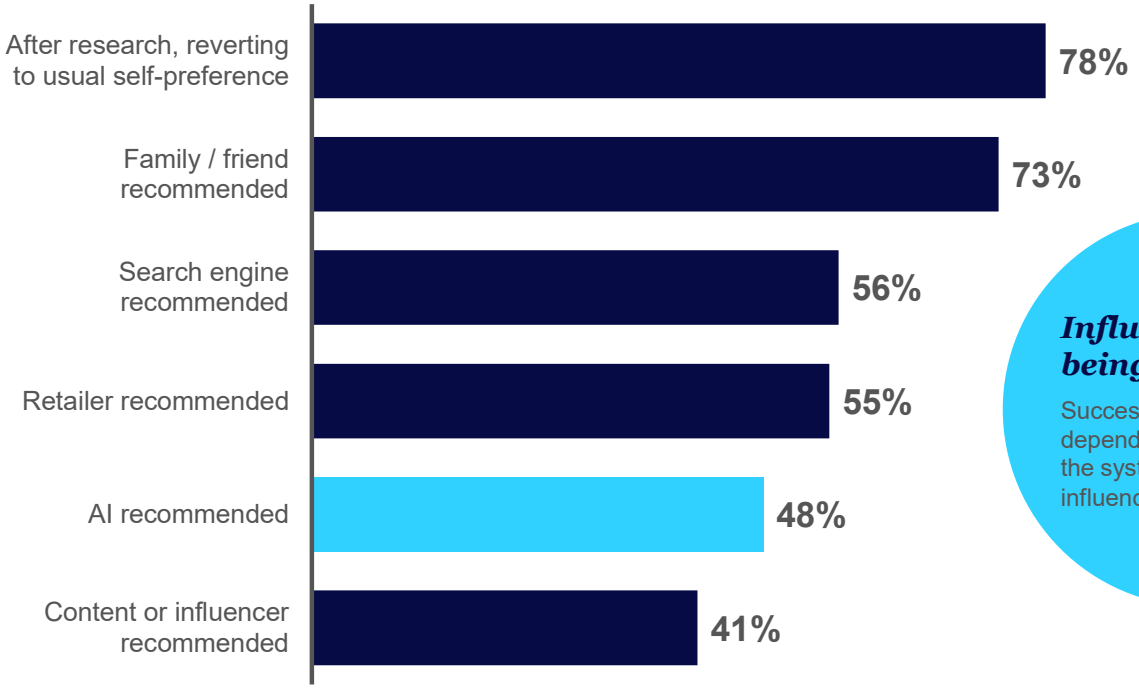
EE



***The foundations of discovery are beginning to shift >>>***

## Sources of influence for CPG product discovery

*% respondents, Sometimes / Often / Always influenced to purchase by*




***Influence is being rewritten***

Success increasingly depends on influencing the systems that influence consumers.

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

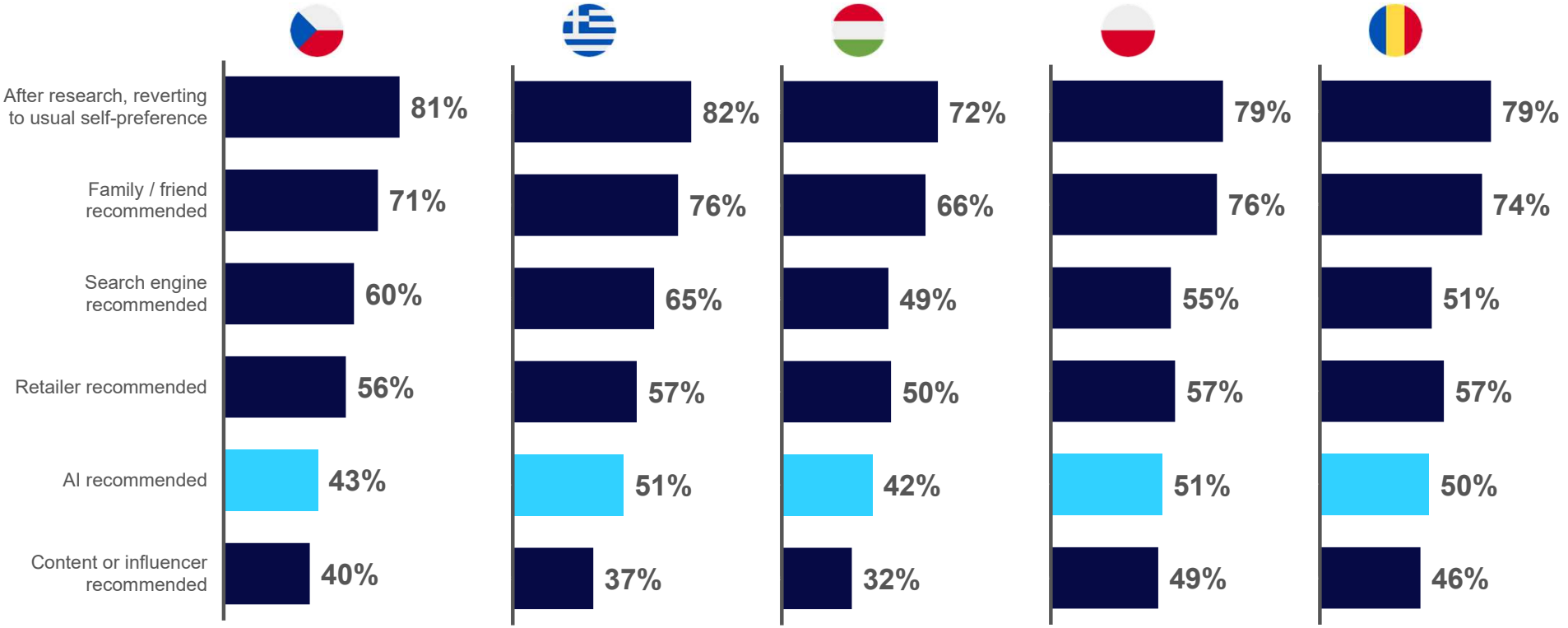


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# Navigating a rapidly evolving new architecture of “choice” and “influence”

## Sources of influence for CPG product discovery

*% respondents, Sometimes / Often / Always influenced to purchase by*




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



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*The shift ahead*

# Agentic commerce is reshaping the shopping experience

*Today*

### 10 minutes in the aisle

A shopper travels to the snack aisle in-store: they scan labels, compares options, and make choices based on what they recognize, what is promoted, and an overall “gut feel” for what seems worth it to them.

*Tomorrow*

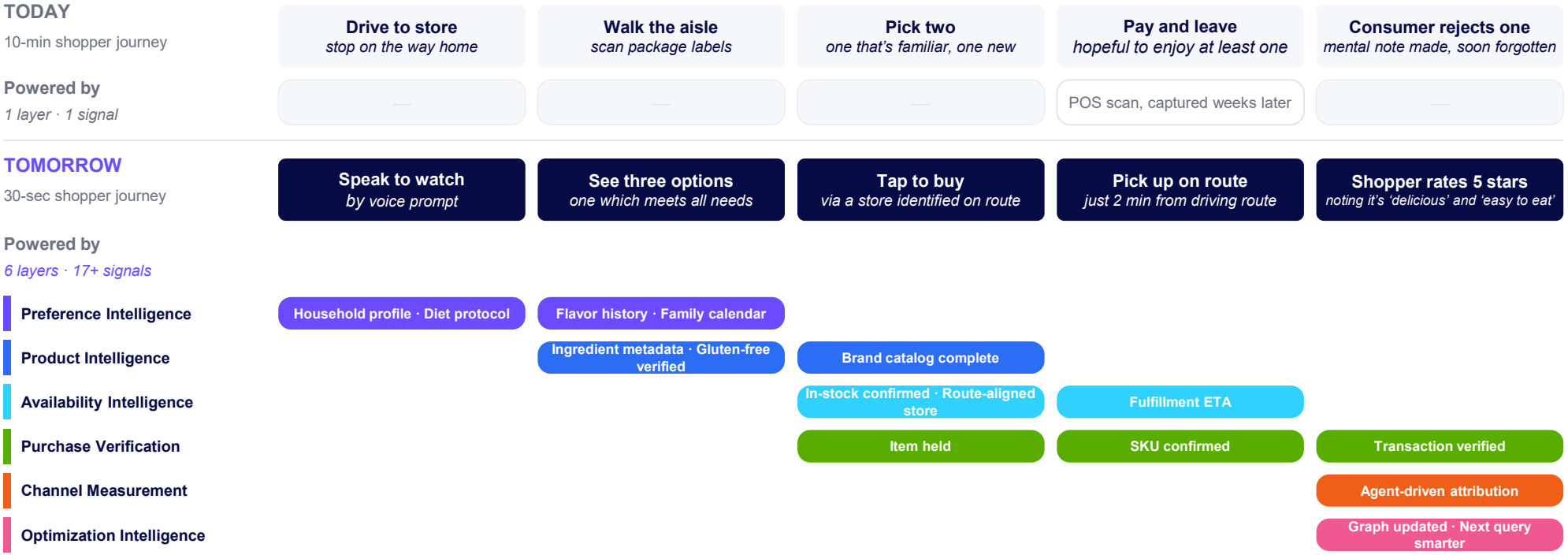
### A voice prompt to an AI agent in 30 seconds

The agent queries structured product data, cross-references household history, checks fulfillment, and recommends three ranked options with reasonings to guide selection. The resulting purchase process: tap, confirm, drive.

SHOPPER JOURNEY BEHIND THE SCENES

# Same purchase. Very different infrastructure.

What shoppers experience may look the same. But the intelligence, signals, and decisions powering each interaction are fundamentally transformed.




**The experience feels effortless to the shopper. NIQ powers the intelligence behind it.**

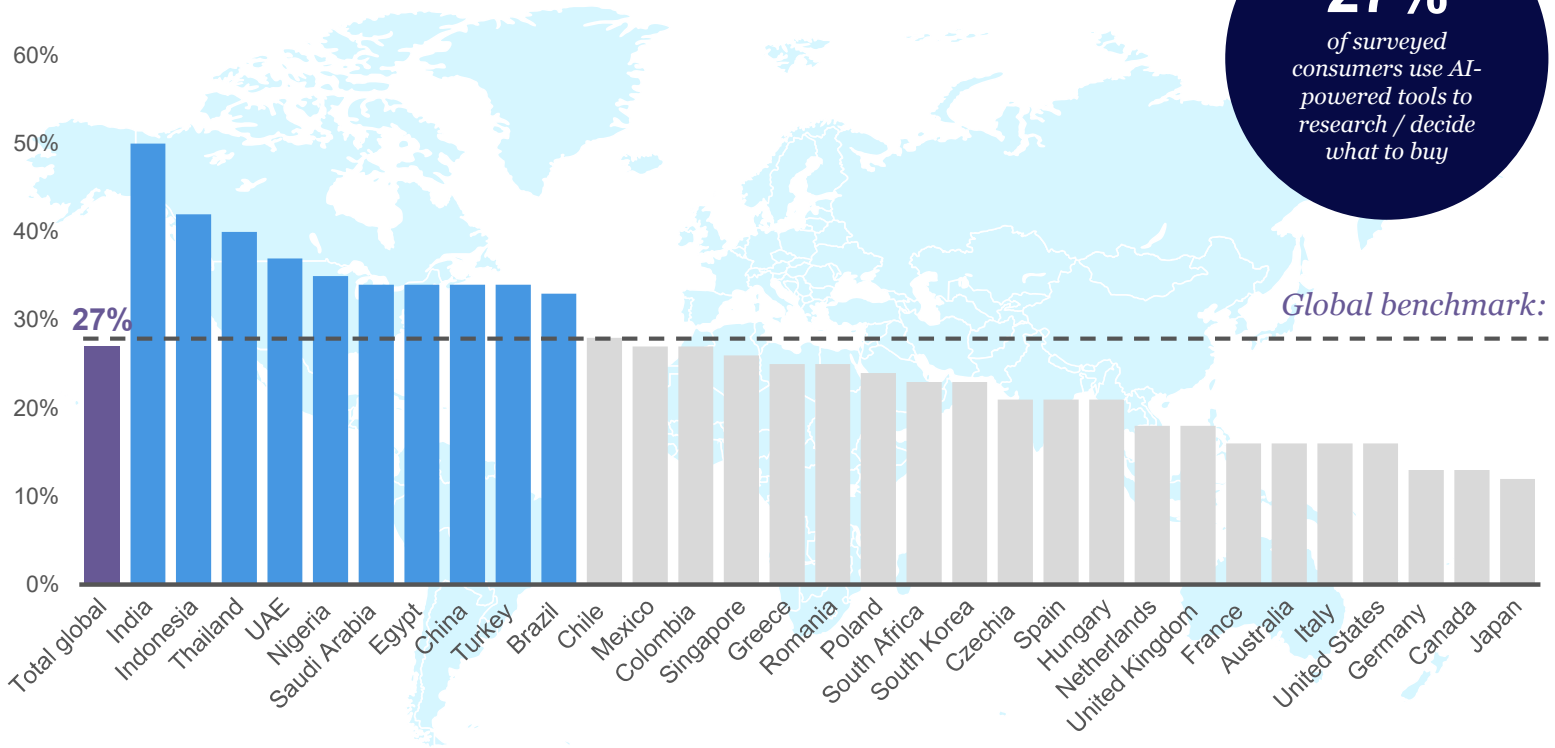
## Nearly 3 in 10 consumers globally already use AI-powered tools to help research and decide what to buy

India, Indonesia and Thailand lead other markets in terms of consumer adoption of AI-mediated discovery



### Varying levels of AI-influenced research and decision-making among consumers

*Consumer sentiment across markets (% respondents)*




Source: NIQ 2026 Consumer Outlook,

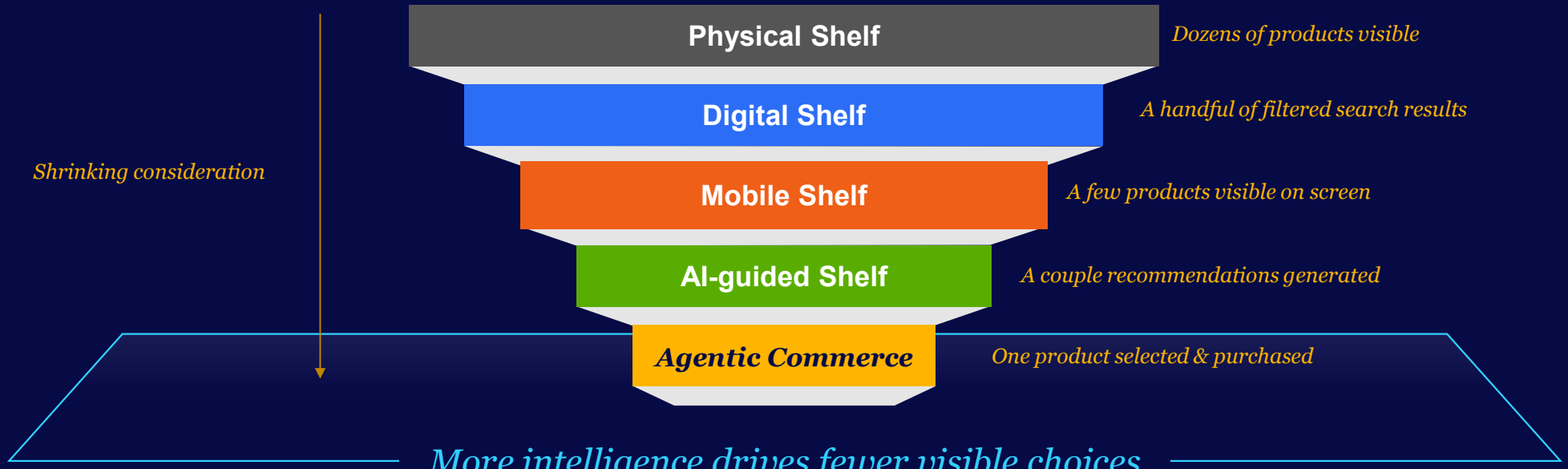
*Note: These survey insights reflect self-reported use of AI-powered tools or assistants to help research or decide on what to buy. Estimates may differ from other studies due to differences in respondent universe, methodology and questionnaire design.*

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*The new digital shelf*

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




*More intelligence drives fewer visible choices*

As commerce evolves from physical stores to AI agents, the number of products considered by shoppers continues to narrow.

Source: NIQ Digital Shelf

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*For brands & retailers*

# The goals are the same.
# The opportunity has skyrocketed.

### Drive revenue
Accelerate decisions, grow faster

### Create efficiency
Shorten cycles, expand capacity

### Transform
Relevant workflows and value

## $3-5T

in **global revenue from agentic commerce projected** by 2030 (with up to $1T in US alone).

## 10-20%

of U.S. e-commerce **market share** could be driven **by agentic shopper spending** by 2030.

## 4.4x

Higher **conversion of AI search visitors** vs. traditional search, making them **4.4x as valuable.** 25% of referral traffic for some retailers is already being driven by AI.

Source: 1) McKinsey, 2) Morgan Stanley, 3) NIQ NexIQ custom-built language model, 3) Semrush average LLM vs. organic search visitors, Bain x Similarweb

*Why data fidelity matters*

# Even small intelligence advantages can compound into 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%

*NIQ Enablement*

# Turning trusted intelligence into competitive advantage

## Everyday insights
Right insight, right moment

- Optiq
- Optiq Bridge

## Growth Strategy
Accessible, dynamic, engaging

- AI Chat for Segmentation
- Panel Survey Modernization

## Brand & Media
Smarter audiences, breakthrough content, faster pivots

- Automated MMM
- Audience & Personalization

## Price & Promotion
Sharper pricing, real-time promotion

- Price & Promo Optimizer
- Shelf Architect + Precision Areas

## Digital Shelf
No purchase missed on digital platforms

- Search Optimizer
- Content Advisor

## Innovation & Renovation
More winning innovations, faster to market

- AI Screener
- AI Product Developer

**The question is no longer what's changing.**
*It's what comes next.*




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What this means for 2027

# Forces shaping the consumer landscape in 2027

Foresight to guide strategic actions in the next 12-18 months

## Recalibrating for a new reality

**2027 Outlook:**
**Adaptation becomes the new baseline.**

Consumers are no longer waiting for conditions to improve. They are making long-term decisions around a future where volatility remains part of everyday life.

## Consumption at extremes

**2027 Outlook:**
**Polarization reshapes the path to growth.**

As consumer realities diverge, so do opportunities for growth. Success will increasingly depend on identifying where demand is concentrating and aligning portfolios to win across a more polarized marketplace.

## A new world of worth

**2027 Outlook:**
**Every purchase must justify itself.**

spending by default. Every purchase must earn its place as households increasingly evaluate purchases based on outcomes, relevance, and personal value.

## Self-directed wellness

**2027 Outlook:**
**Health management moves into consumers' hands.**

As barriers to information, treatment, and care continue to fall, consumers are taking greater ownership of their wellbeing and influencing demand far beyond traditional health categories.

## Agent-led discovery

**2027 Outlook:**
**Visibility becomes the new availability.**

Consumers may never see every option. Products that are visible, trusted, and understood by AI systems will have a growing advantage as recommendation-led commerce evolves.

## Consumer Outlook *bottom line:*

**The organizations that win in 2027 will be those that adapt as quickly as consumers do, responding to growing polarization, rising expectations of worth, more self-directed approaches to health, and increasingly AI-mediated consumer journeys.**

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So, what? Now, what?

# Your 2027 strategic roadmap



## *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 solutions



## *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, embedding wellbeing into products, services, and everyday 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

## From insight *to action:*



**Success in 2027 won't come from reacting to change. It will come from anticipating where consumers are headed, identifying the consumers and categories driving growth, and creating the conditions for brands to remain relevant, discoverable, and indispensable.**

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# Thank you!

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