



Mood of the World

NIQ Consumer Life Roper Reports® Global

July 2026



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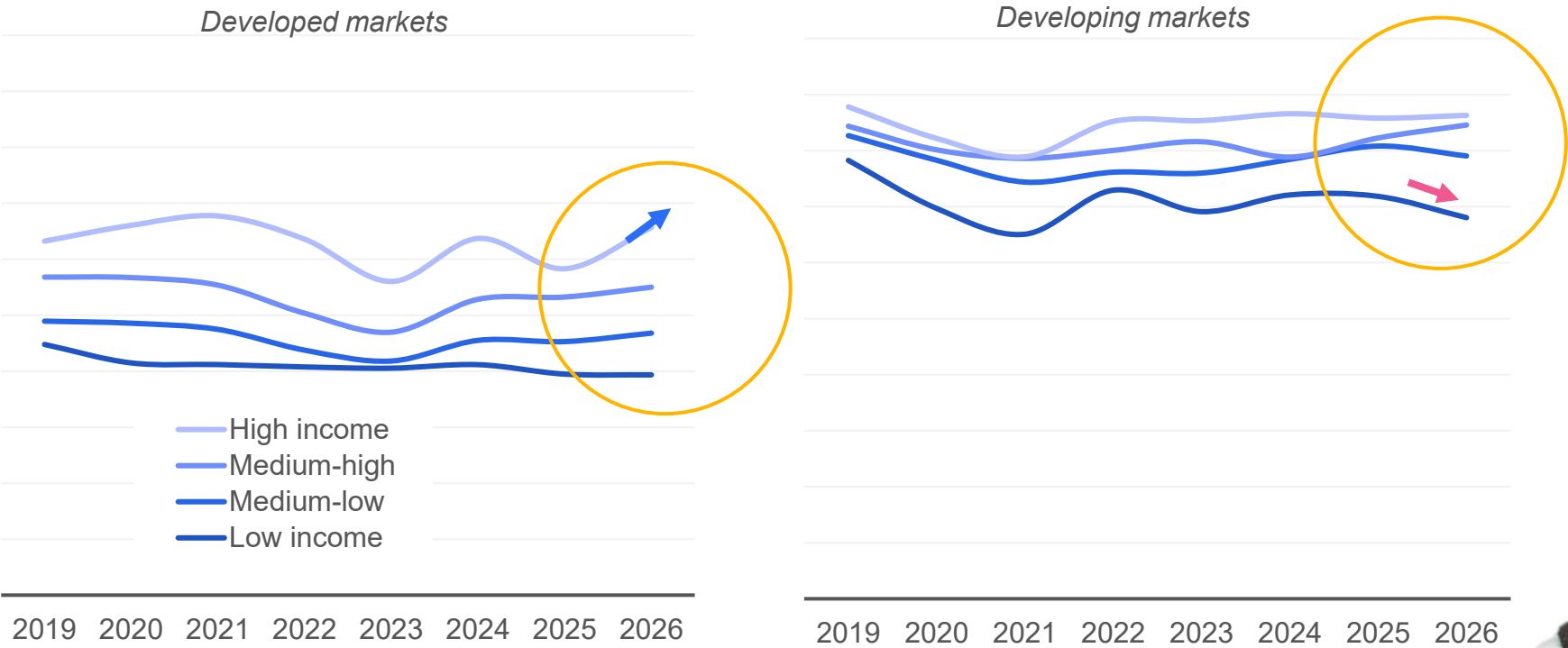
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Underneath the surface, diverging confidence in both developed and emerging markets

Confidence rebounded among high-income consumers in developed markets, while declining among low-income ones in developing regions

Economic confidence is often higher in emerging markets than in developed economies, but this does not necessarily mean consumers are better off. Rather, elevated optimism is driven by two factors. First, emerging markets tend to experience faster economic growth, creating greater opportunities for income gains and upward mobility. Second, many emerging markets have younger populations, who tend to be more optimistic about their future earning potential and opportunities for advancement.

% who are very confident/more confident than not that they will be personally better off in 12 months, 2012-2026, by household income*

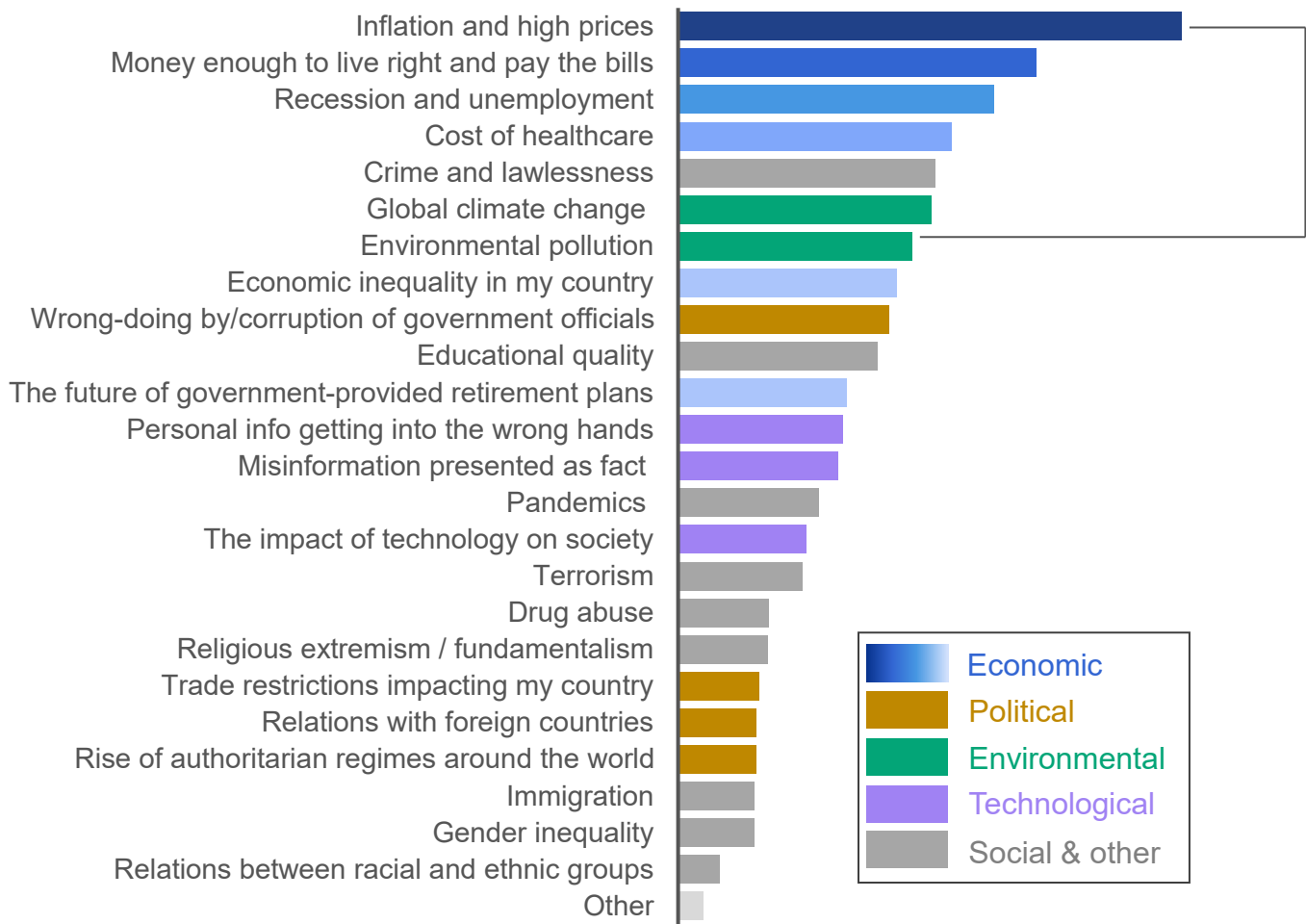


NIQ Consumer Life Global 2026, A1 (global = 18 core countries); *quartile income
Developed regions = North America, Western Europe, and Developed Asia; Developing regions = Latin America, Central/Eastern Europe, Middle East/Africa, and Developing Asia

Behind muted confidence: economic concerns remain top of mind in 2026

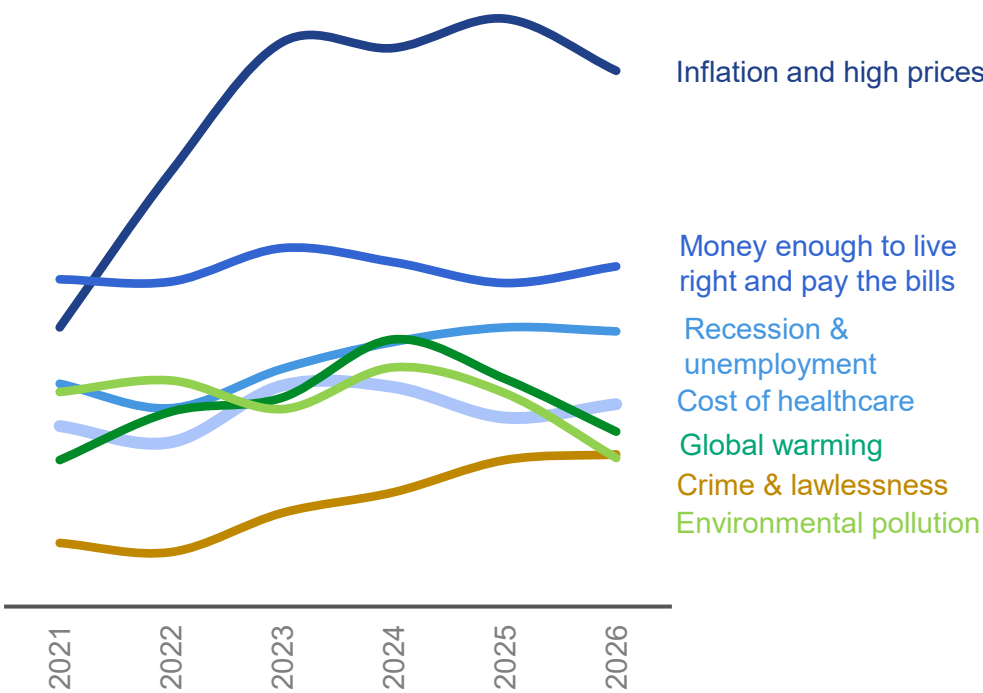
Four out of the top five concerns globally are economic in nature

% of global consumers citing the following as top personal concerns, 2026



Inflation & high prices, money enough to live right/pay bills, and recession have been among the top five concerns globally since 2021

% citing the following as top personal concerns, 2021-2026, top seven concerns in 2026

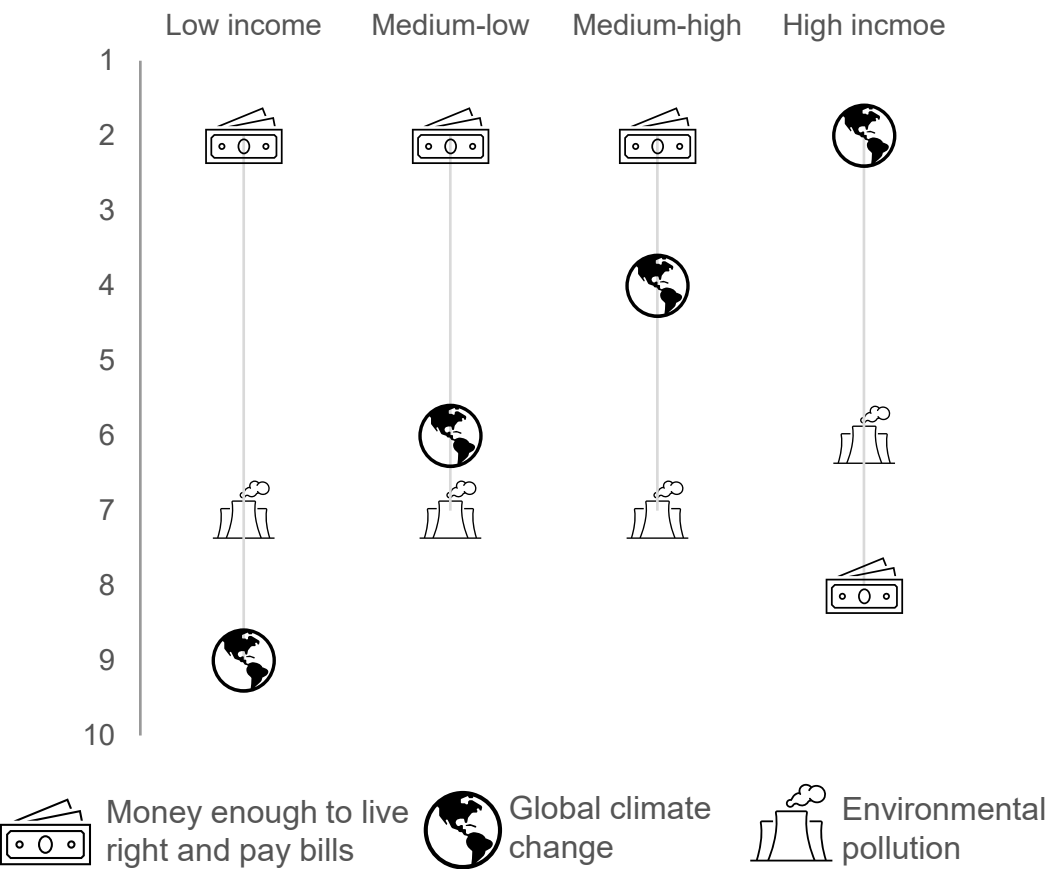


NIQ Consumer Life Global 2021-2026 A2 (global=39 countries for the chart on the left, global = core 18 countries for trended data on the right)

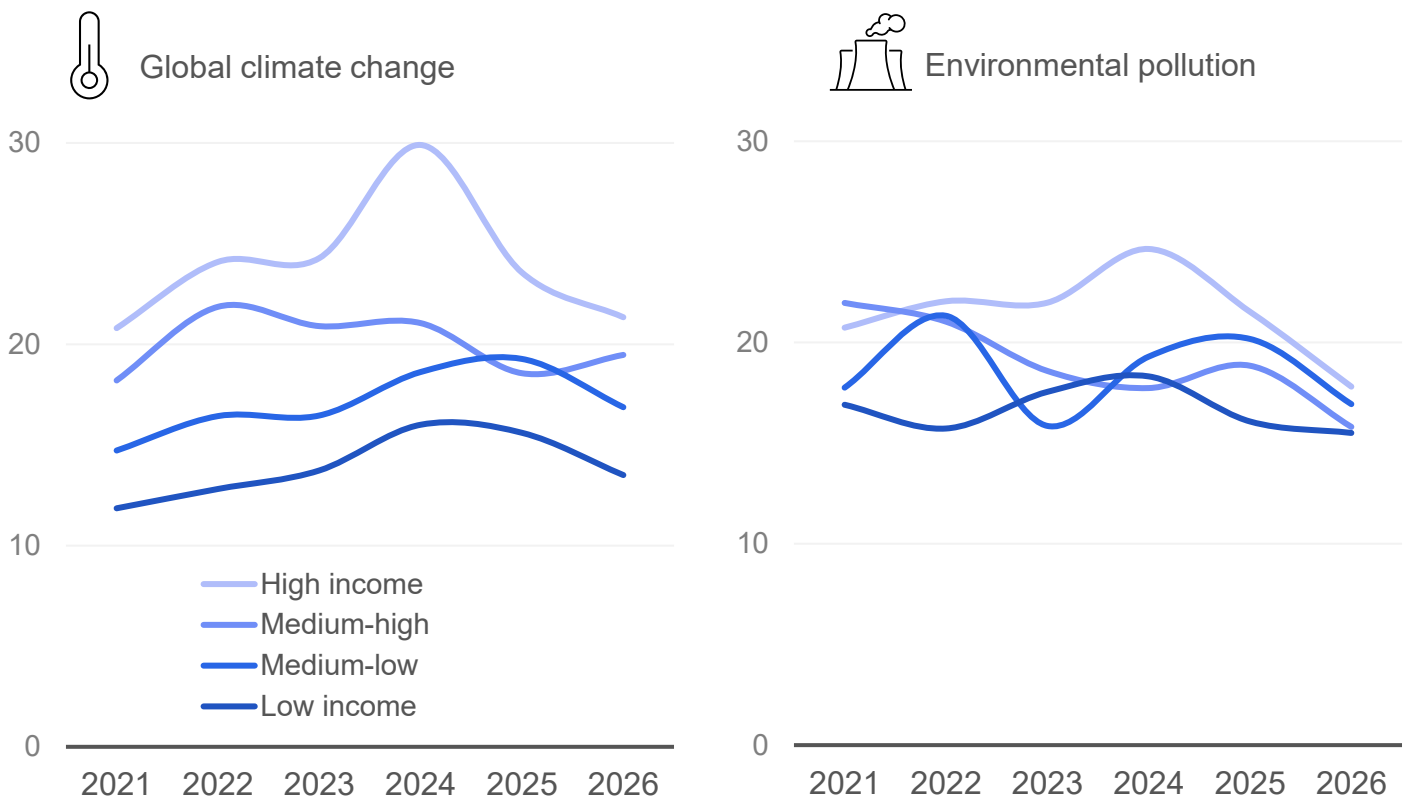
High-income consumers tend to be more concerned about the environment

Yet the income gap has narrowed as environmental concerns fell more among the higher-income over the past couple of years

Ranks of personal concerns by income on a list of 24 measured, global, 2026



% citing the following as a top personal concern, by household income*, 2021-2026

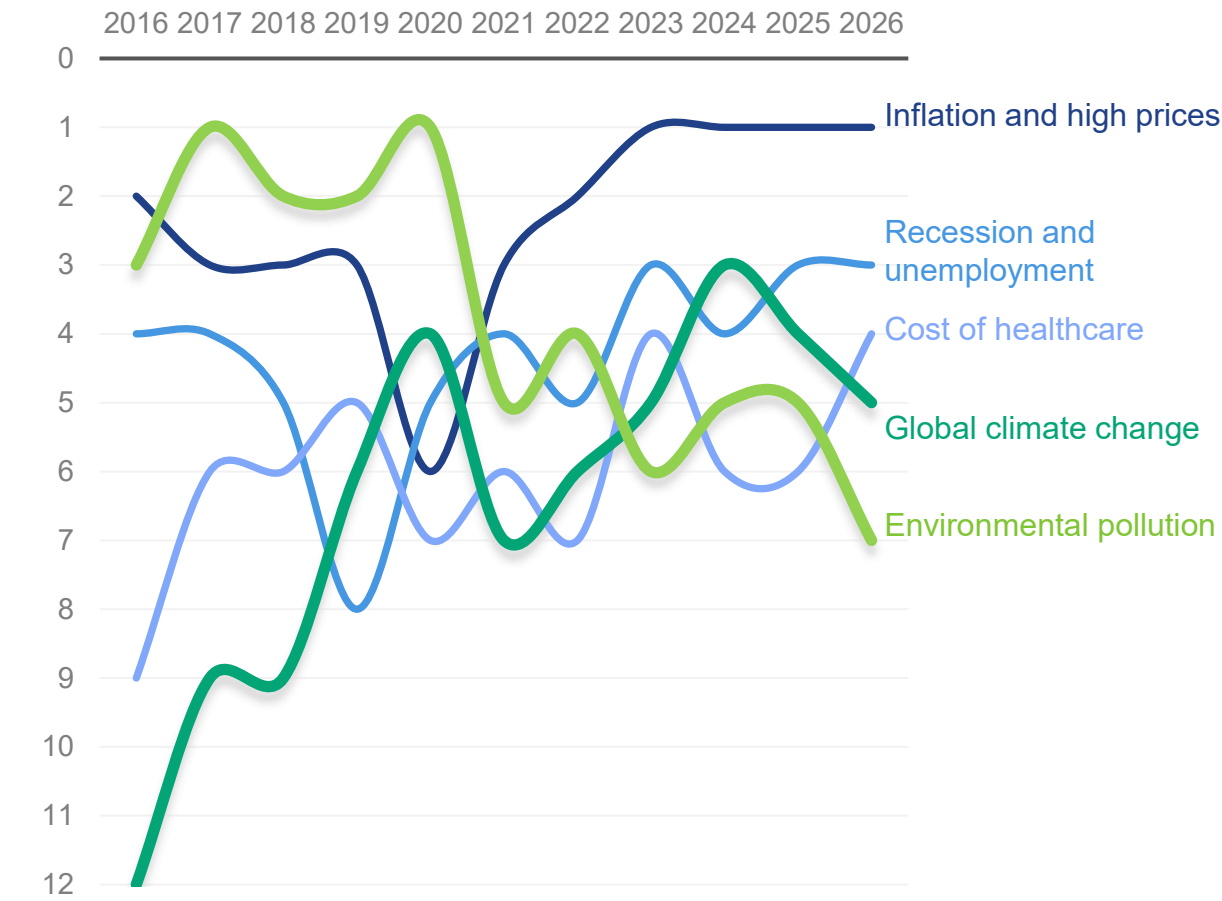


NIQ Consumer Life Global 2026 A2 (global=39 countries for chart on the left, global = core 18 consistently measured countries for trended data on the right), *quartile income

Long view: concerns about climate change soared over the past decade as pollution declined

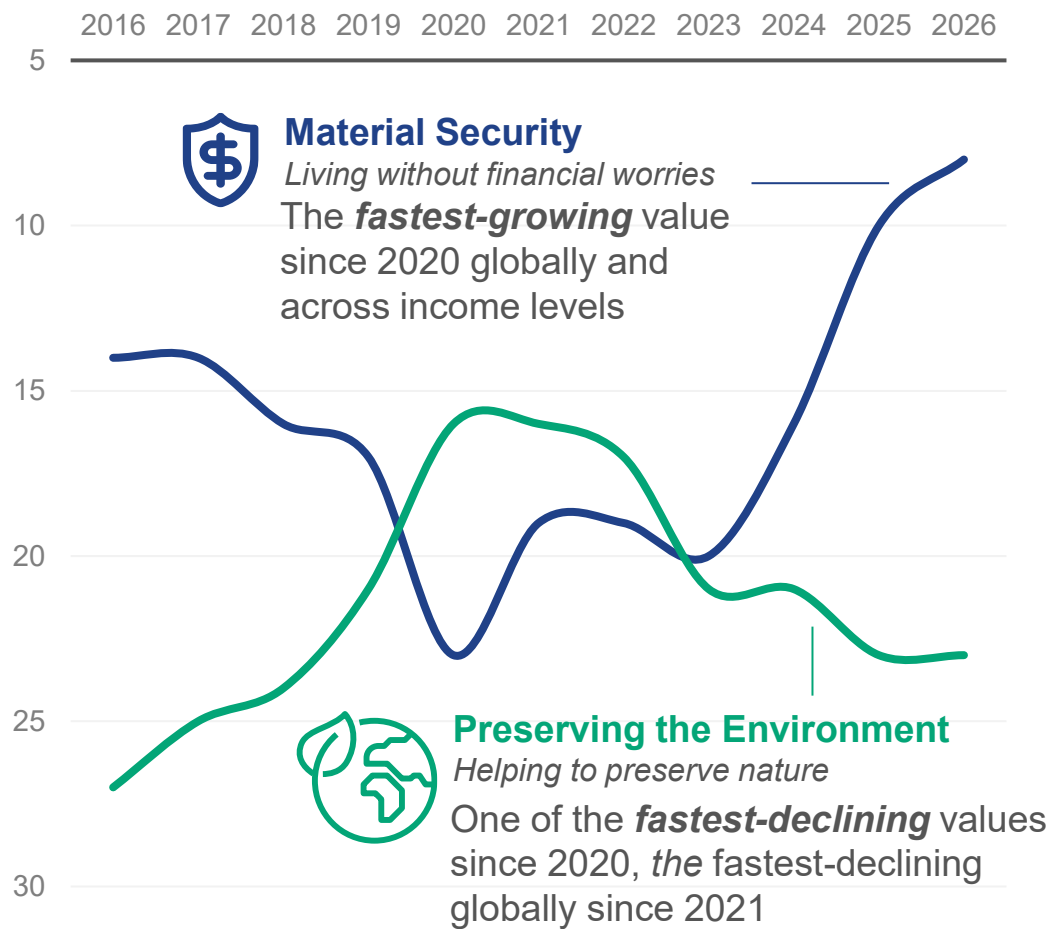
Mid-term view: Post-COVID economic pressures have tempered environmental priorities

Ranks of personal concerns on a list of 19 consistently measured, global, 2016-2026



NIQ Consumer Life Global 2016-2026 A1, C1 (global = core 18 countries)

Ranks of personal values on a list of 57 consistently measured, global, 2016-2026



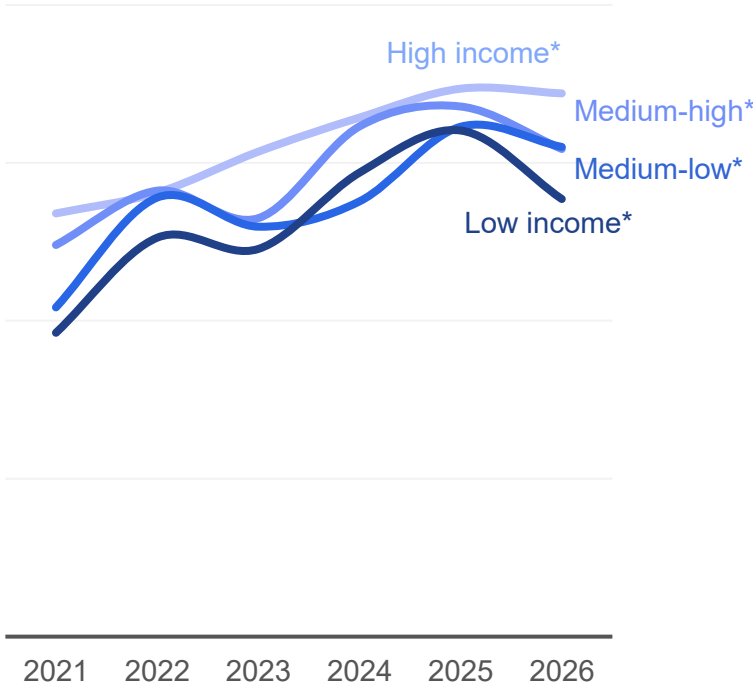
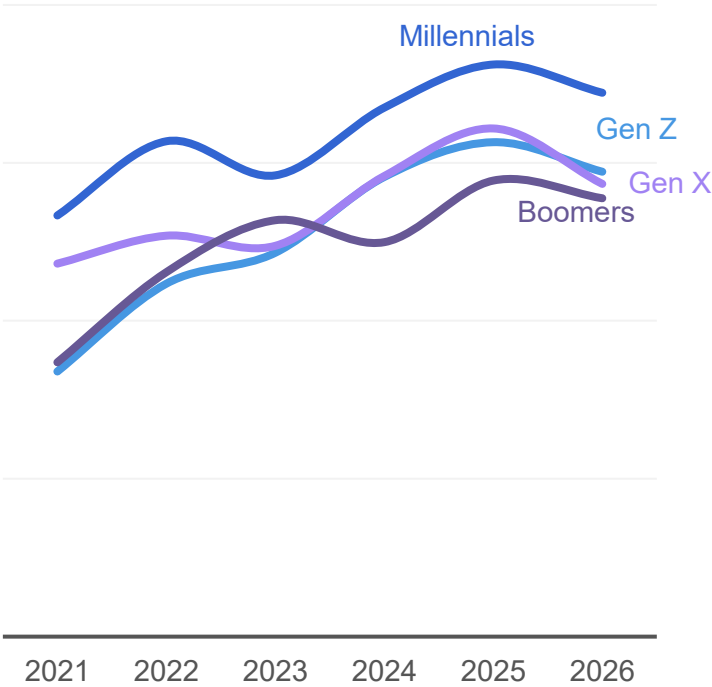
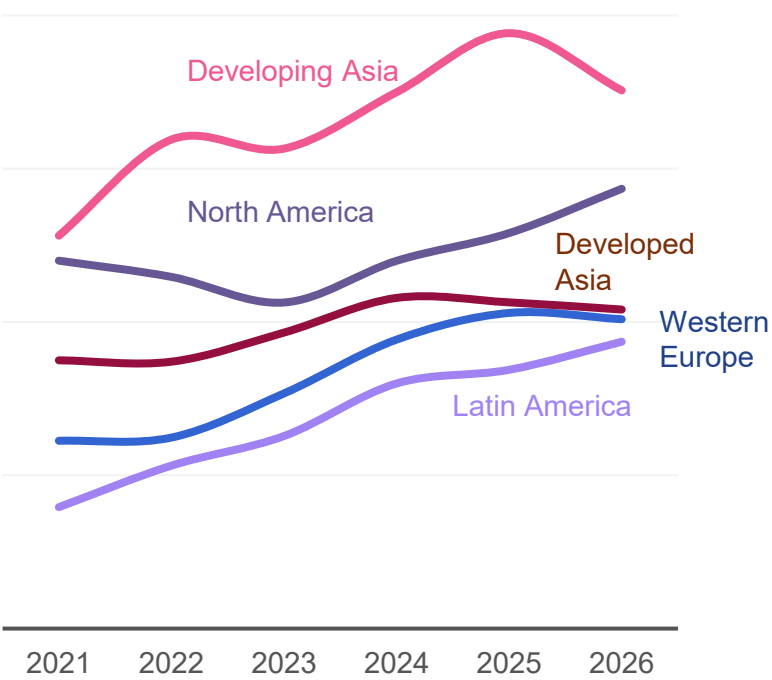
A growing consensus: economic wellbeing takes priority over environmental issues

A sentiment led by Millennials, high-income consumers, and those in Developing Asia

XX% of global consumers

agree “**First comes economic security and wellbeing, then we can worry about environmental problems**”

↑**9 pts** from 2021

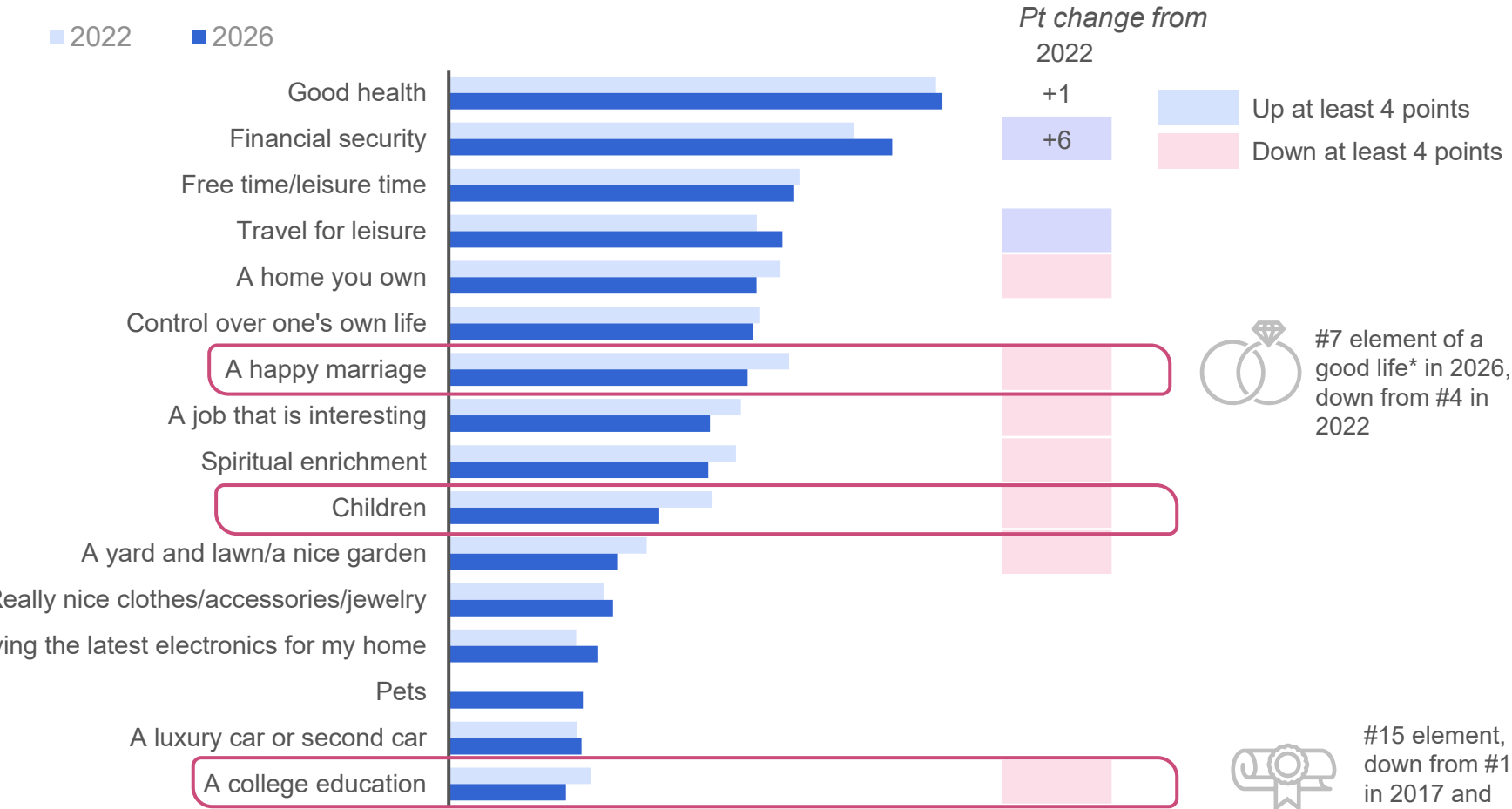


NIQ Consumer Life Global 2021-2026 GG3 (global = core 18 countries), *quartile income

Financial security has become more central to an ideal life

Marriage and children saw the sharpest declines as hallmarks of a “good life” as consumers scale back their aspirations

% of global consumers who consider each of the following a part of the “good life”



Fewer people are getting married or having children

Global fertility rate falls to 2.3, the lowest in recorded history and less than half its 1950 level, as nations across the globe report historic low births.

From the US to EU to China, marriage rates are also on the decline as people delay or even forego marriage.

Changing social norms, more time spent on higher-education, tech-induced social isolation, and the affordability crisis all play a role. In fact, in some of the richer countries, higher-income individuals are now more likely to marry and have children than their less affluent peers. Heightened economic and social uncertainty may also be suppressing childbearing.



Raising children is an inherently forward-looking project...increasing exposure to a volatile global economy and accelerating technological change make it hard for young people to project a path forward with even a modest degree of confidence.

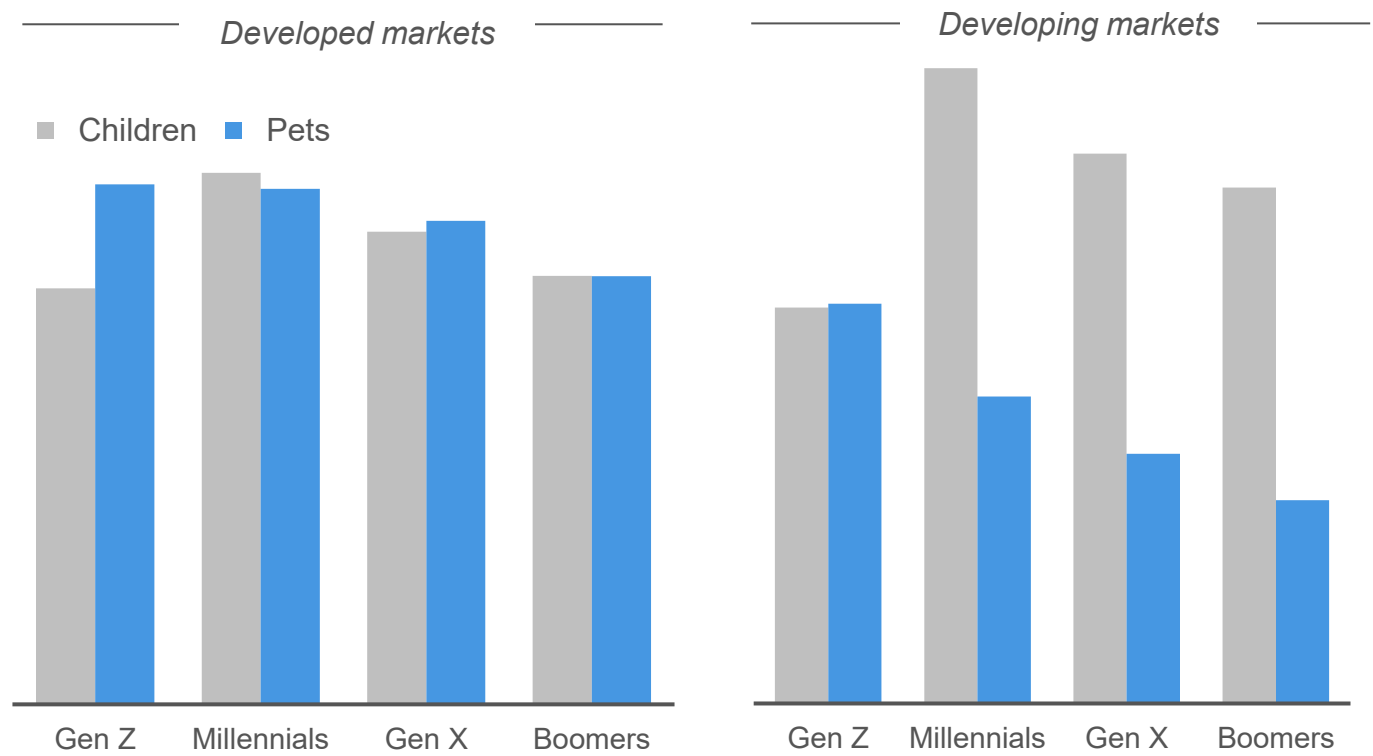
—New York Times, May 2026

NIQ Consumer Life Global 2018, 2022, and 2026 I1 (global = core 18 countries), *rank numbers are based on a list of 15 consistently measured elements, [Falling fertility rates spark warnings of population decline/ Why So Few Babies? The Working-Class Marriage Decline. More Babies For the Rich? The Relationship Between Status and Children Is Changing. The Great Depopulation - The Atlantic.](#) US fertility rate dropped to another record low in 2025, Eurostat: Since 1964, marriage rate in EU has more than halved, divorce rate has doubled, China's marriages drop to decade low, Japan births, fertility rate at record lows in 2025, EU fertility rate at 1.34 live births per woman in 2024, China's birth rate hits record low as population continues to shrink

Pets over kids for Gen Z

While Gen Z in developed markets lean more towards pets, the generational shift is more pronounced in emerging markets

% of global consumers who consider each of the following a part of the “good life”



Babies out, fur babies in: Why young people in China are choosing pets over parenthood

According to Goldman Sachs, the number of pets in China already exceeds the number of children 4 and under. By 2030, it said, the country will have almost twice as many pets as toddlers: more than 70 million compared with about 40 million.

—NBC News, Jan. 2026

Kids or pets? 40% of Americans would pick fur babies

Among Gen Z and millennials, that number grew to 55% when asked if they've considered building a life around pets only.

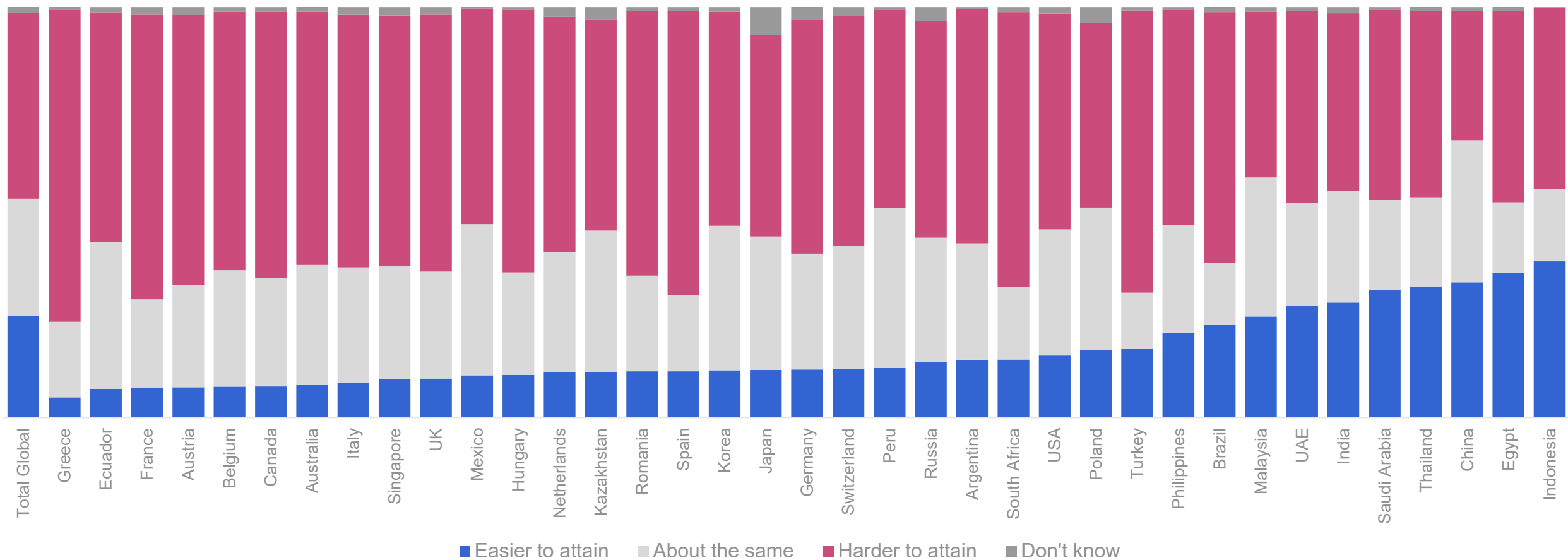
—USA Today, Jul. 2026

Even a downsized version of the “good life” is harder to attain

Consumers in many western developed markets are the most likely to consider it harder today than a decade ago to realize their vision of a “good life”

In nearly all markets, more consumers say it’s harder today to achieve the “good life” than it is easier. China is the sole exception, where slightly more consumers believe it has become easier to attain.

Compared with the past, say 10 years ago, do you feel “the good life” is easier or harder to attain today? (%)

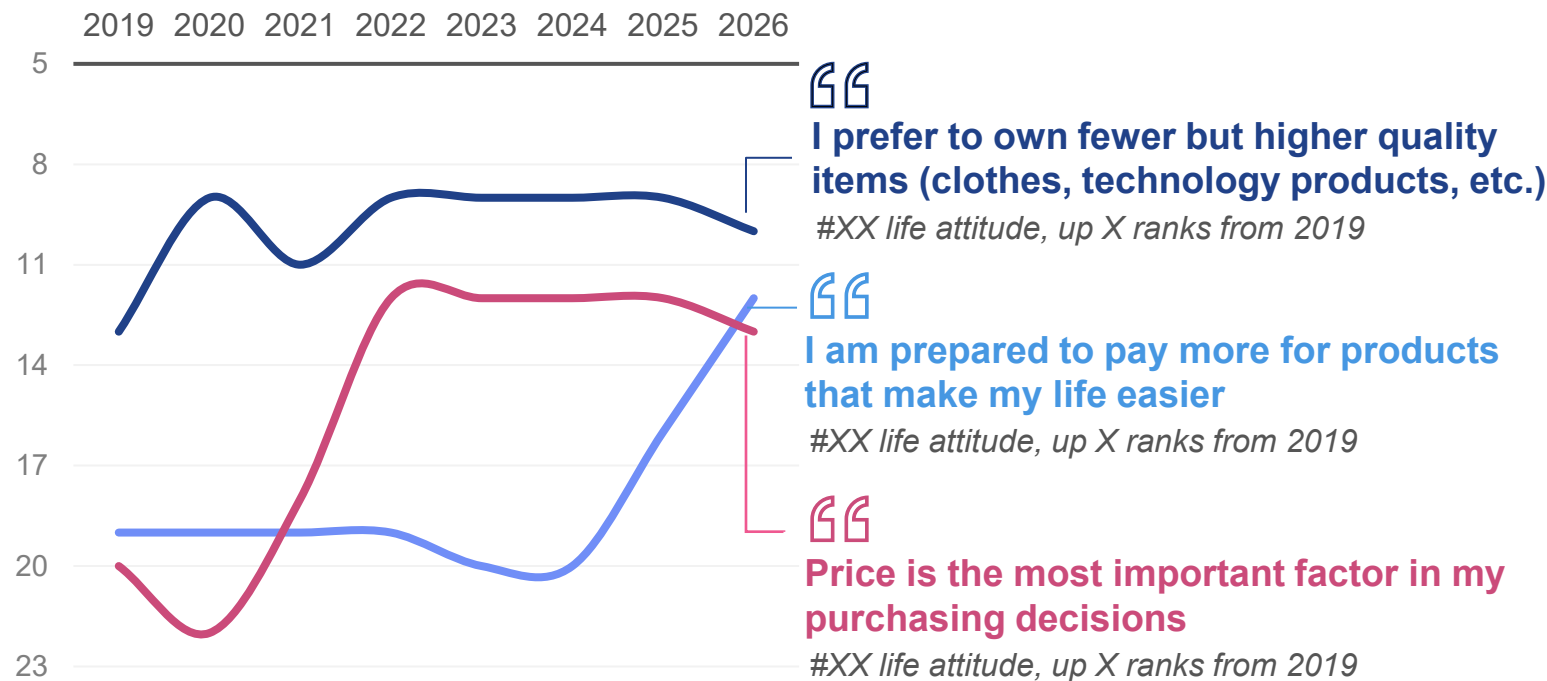


NIQ Consumer Life 2026 Global B49 (global = 39 countries)

Price-sensitivity remains elevated

However, consumers continue to favor quality over quantity and are increasingly willing to pay for convenience

Ranks of the attitudes on a list of 41 attitudes consistently measured since 2019, global



NIQ Consumer Life Global 2019-2026 (global = core 18 countries)



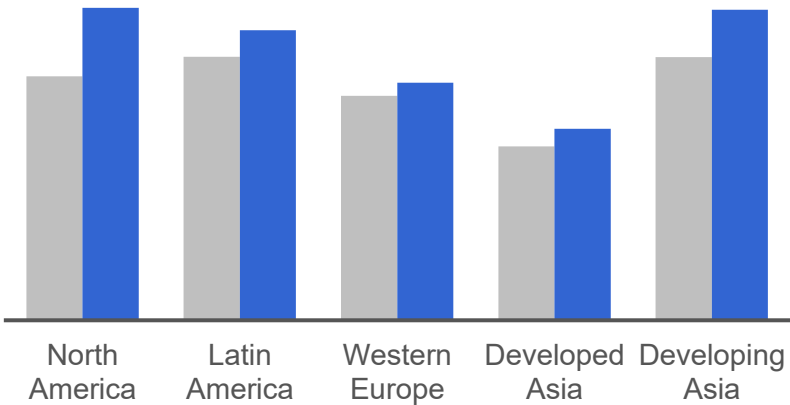
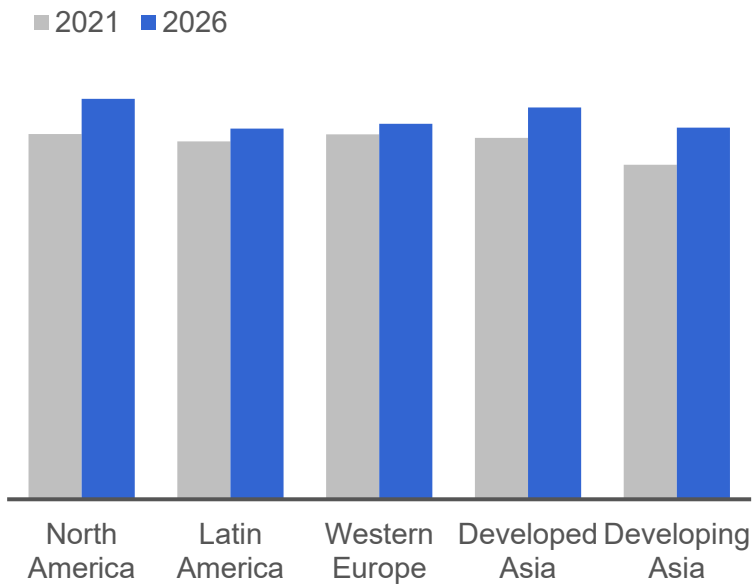
Sustainability matters, value wins

Nearly half of consumers consider environmental impact, but cost and performance drive choice

XX% of global consumers take environmental protection into consideration when making purchase decisions, on par with 2025 and -XX pt from 2021

XX% of global consumers agree “The environmentally friendly alternatives for many of the products I use are **too expensive**,” +XX pts from 2021

XX% of global consumers agree “The environmentally friendly alternatives for many of the products I use and need just **don't work as well**,” +XX pts from 2021

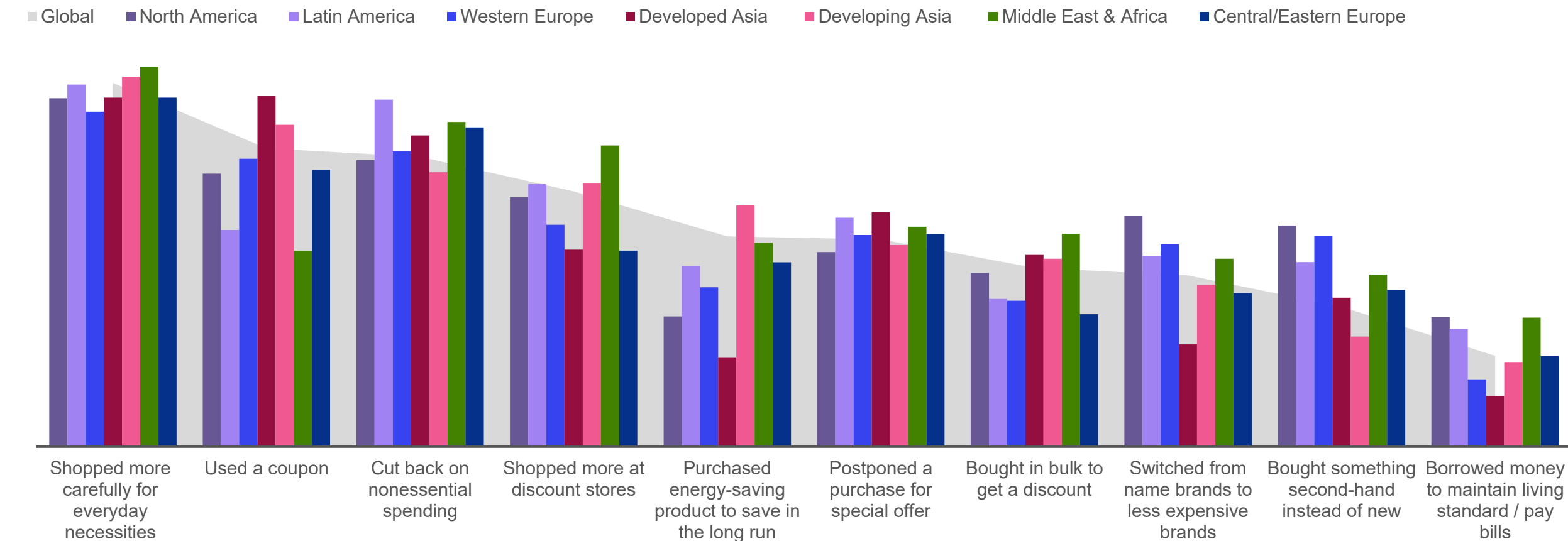


NIQ Consumer Life Global 2021, 2025, and 2026 GG_2, GG_3 (global = core 18 countries)

Across the globe, the majority of consumers are scrutinizing everyday purchases

Coupons are a top shopping strategy in Asia, relying more on discounters is led by those in the Middle East and Africa, while trading down and buying second-hand is more popular in the west, especially North America

% of global consumers who did the following in the past 12 months, sorted by Global



NIQ Consumer Life Global 2026 B38, ATL (global = 39 countries)

Those who shop more tend to be more strategic shoppers

Primary shoppers lead on the use of shopping tactics

% of global consumers who did the following in the past 12 months

■ Primary shoppers ■ Rest of the population



Primary shoppers are defined as the 49% of global consumers who do all of the everyday shopping for the household. They tend to be **Gen X and Millennial women** in the **full-nest life-stage**, often juggling **work** and **family responsibilities**.

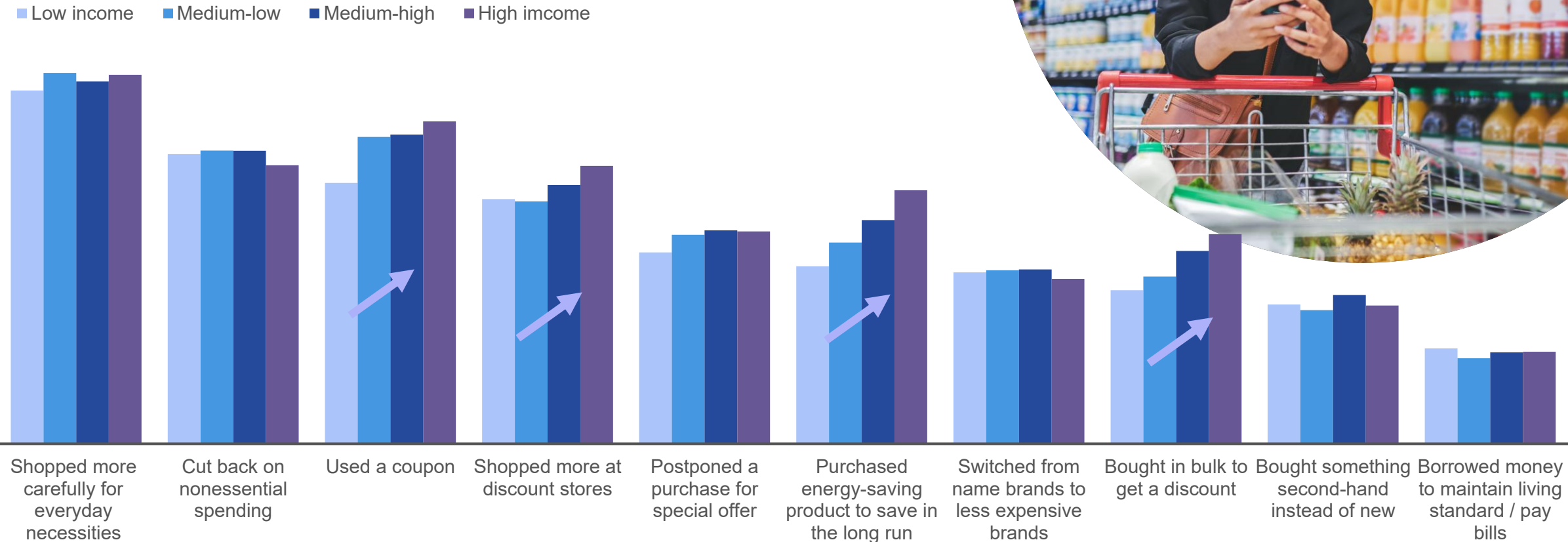
	Total	Primary shoppers
Gender		
Male	50%	44%
Female	50	56
Generation		
Gen Z		
Millennials		
Gen X		
Baby Boom		
Life-stage		
Married		
Parent		
Parent with children under 18 in the household		
Employment		
Employed		
Employed full-time		

At least 4 pts higher than Total

High-income consumers shop smart

Couponing, shopping more at discounters, buying in bulk, and adopting energy-efficient products for long-term savings are led by more affluent shoppers

% of global consumers who did the following in the past 12 months, by income*, sorted by low-income shoppers



NIQ Consumer Life Global 2026 B38, ATL (global = 39 countries)

Scrutinizing purchases coincides with indulgence

Millennials and high-income consumers lead on luxury purchases; those who trade down also tend to indulge in luxury buys

XX% of global consumers bought any type of luxury products or services* in the past 12 months

Led by:
XX% Gen Z and Millennials
XX% of high-income consumers

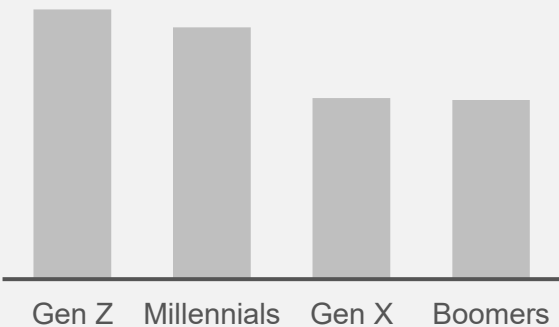


Buying secondhand helps many, especially younger generations, afford luxury

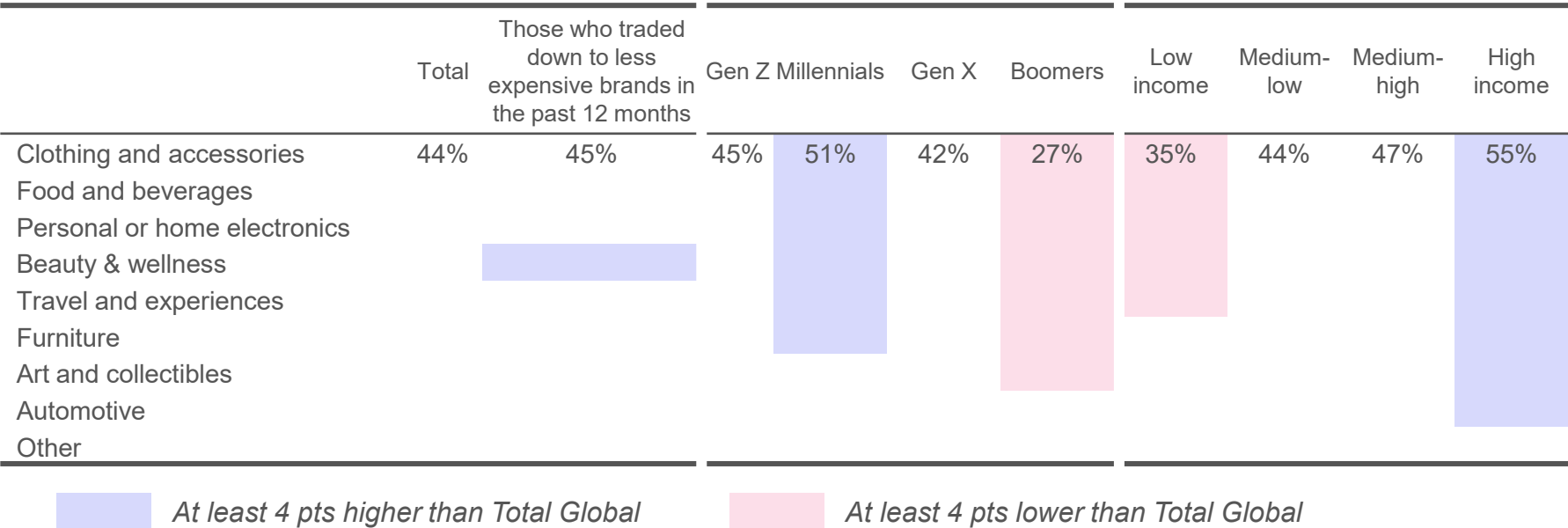
Last year, the value of the luxury resale market hit 50 billion euros for the first time, based on estimates from Bain & Co. The resale business is growing faster than the primary market and is now the same size as all of the trade that luxury brands do through off-price outlets—their third-largest channel by sales after brand’s own stores and online channels.

Research shows that young consumers aren’t just buying used clothing, they’re also selling in this space as a way to pick up some extra income.

% of global consumers who bought second-hand products in the past 12 months



% who bought the following types of luxury products or services in the past 12 months



NIQ Consumer Life Global 2026 R13, B38 (global = 39 countries), *any of the following categories, [The Luxury Resale Market Is Booming](#), [Luxury resale market tops \\$59 billion driven by side hustles](#)