

What matters to today's consumer 2026

How AI is transforming value perception

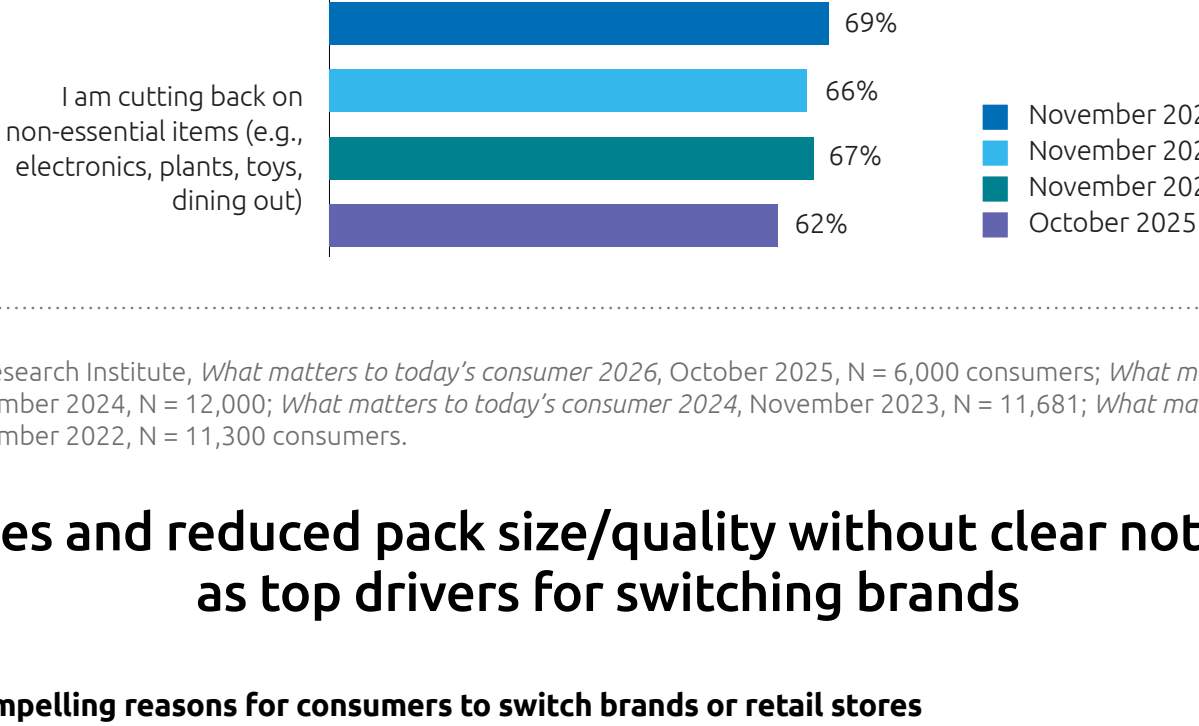
Make it real.

Value redefined: where fairness and quality intersect

Inflation fatigue fuels the quest for fair value

Most consumers continue to look for the best deals and cut back on non-essentials

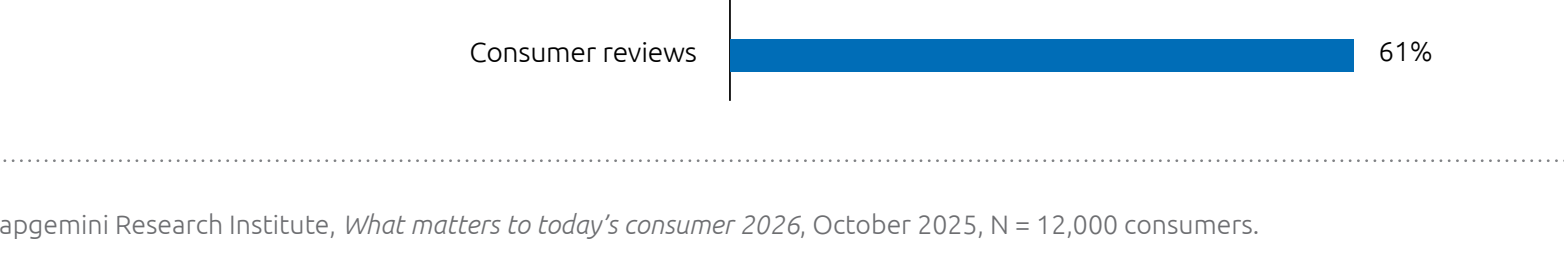
% of respondents who agree with the following statements



Source: Capgemini Research Institute, *What matters to today's consumer 2026*, October 2025, N = 6,000 consumers; *What matters to today's consumer 2025*, November 2024, N = 12,000; *What matters to today's consumer 2024*, November 2023, N = 11,681; *What matters to today's consumer 2023*, November 2022, N = 11,300 consumers.

Lower prices and reduced pack size/quality without clear notice emerge as top drivers for switching brands

Most compelling reasons for consumers to switch brands or retail stores

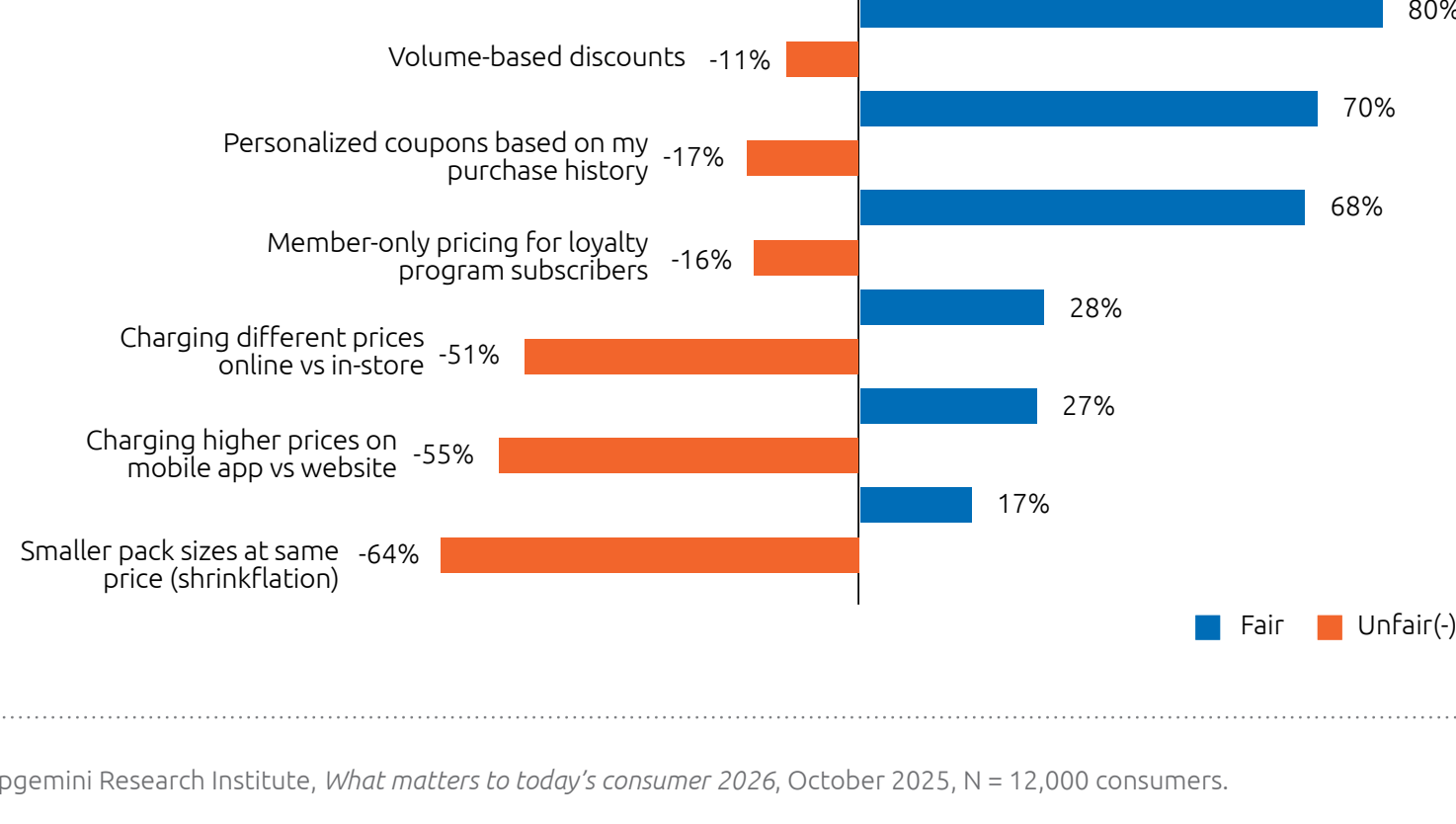


Source: Capgemini Research Institute, *What matters to today's consumer 2026*, October 2025, N = 12,000 consumers.

Fair pricing builds brand credibility

64% of the consumers consider shrinkflation an unfair practice

% of consumers who found following practices fair or unfair



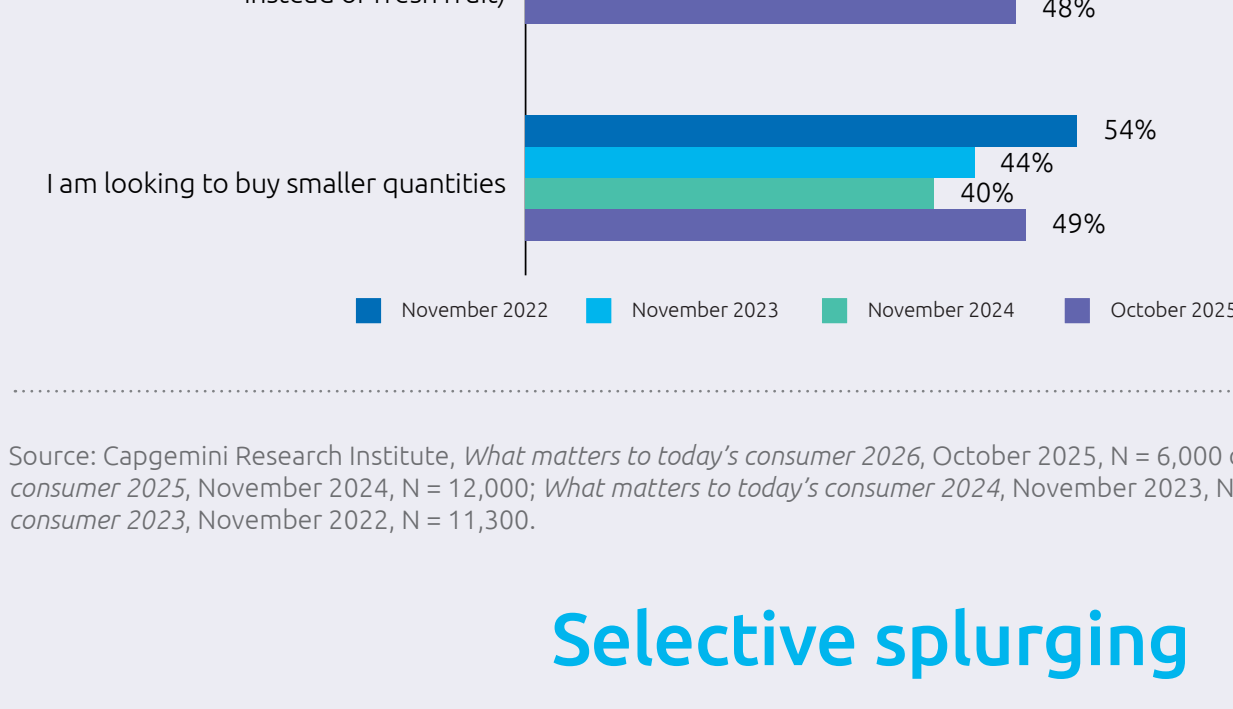
Source: Capgemini Research Institute, *What matters to today's consumer 2026*, October 2025, N = 12,000 consumers.

Careful spending meets intentional indulgence

Strategic saving

Around two in five consumers are opting for cheaper options over name brands

How have your shopping behaviors changed in response to price increases over the past year?

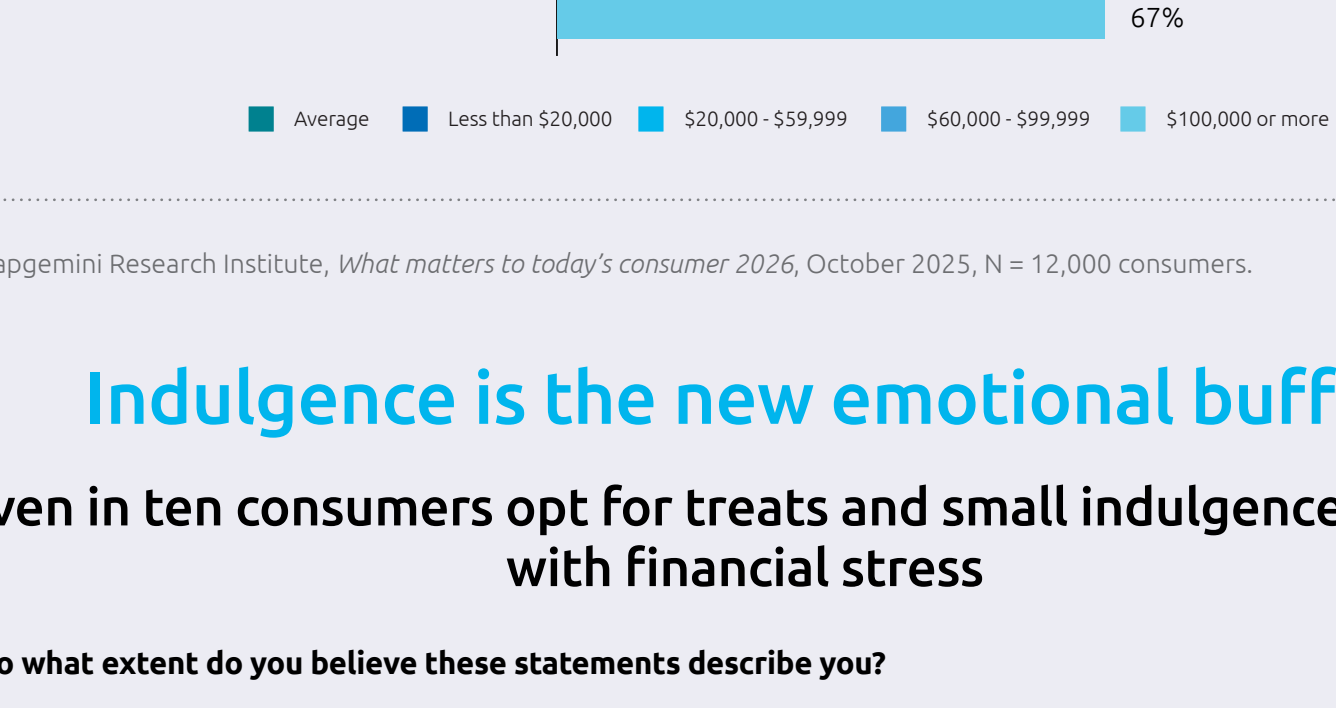


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Selective splurging

Nearly four in five consumers avoid private labels for performance-critical products

% of consumers agreeing that they exhibit the below behaviors, by annual household incomes

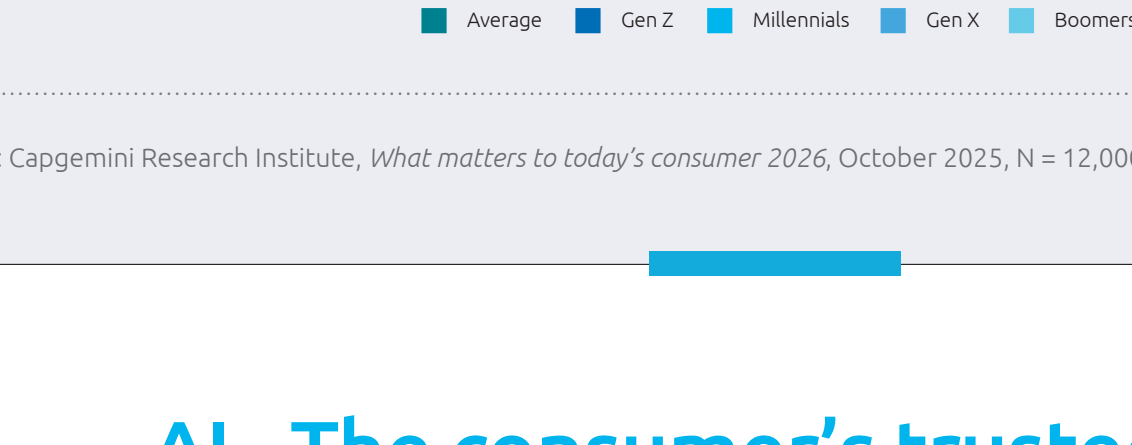


Source: Capgemini Research Institute, *What matters to today's consumer 2026*, October 2025, N = 12,000 consumers.

Indulgence is the new emotional buffer

Seven in ten consumers opt for treats and small indulgences to cope with financial stress

To what extent do you believe these statements describe you?

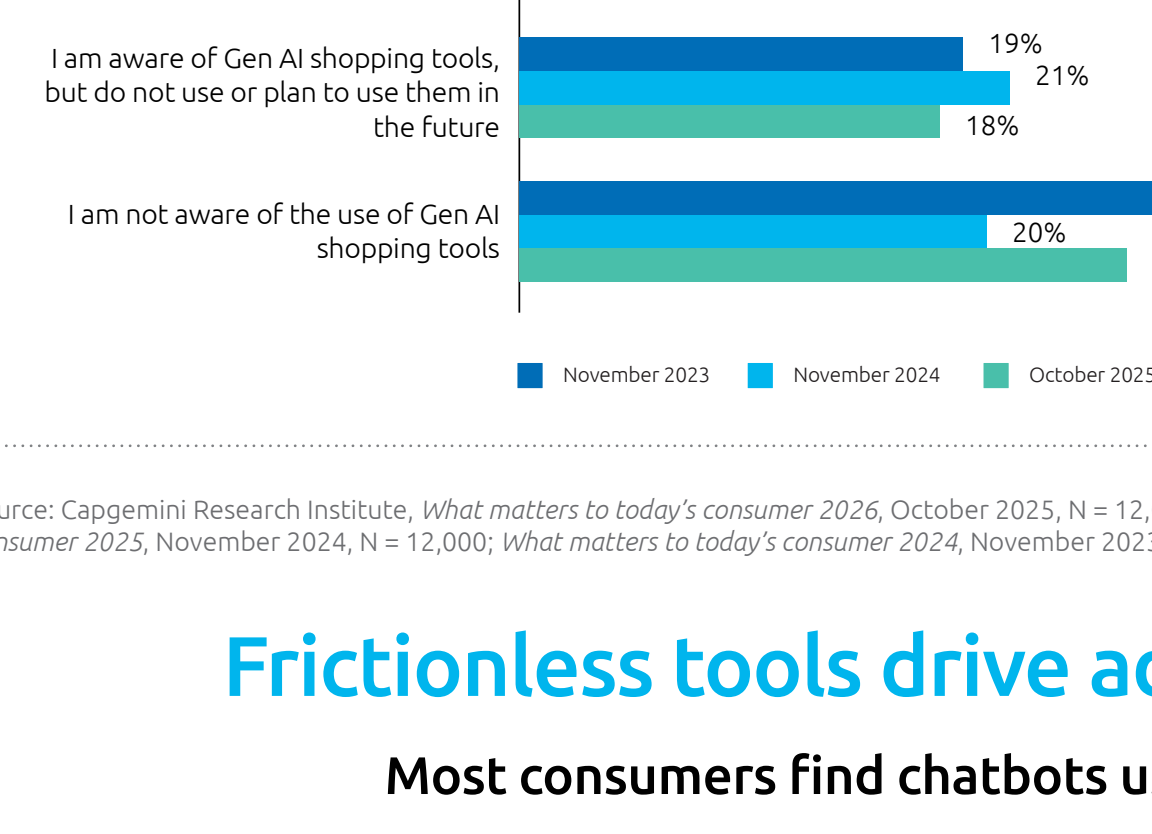


Source: Capgemini Research Institute, *What matters to today's consumer 2026*, October 2025, N = 12,000 consumers.

AI - The consumer's trusted guide

One in four consumers has used Gen AI shopping tools in 2025

% of consumers who agree with the following statements

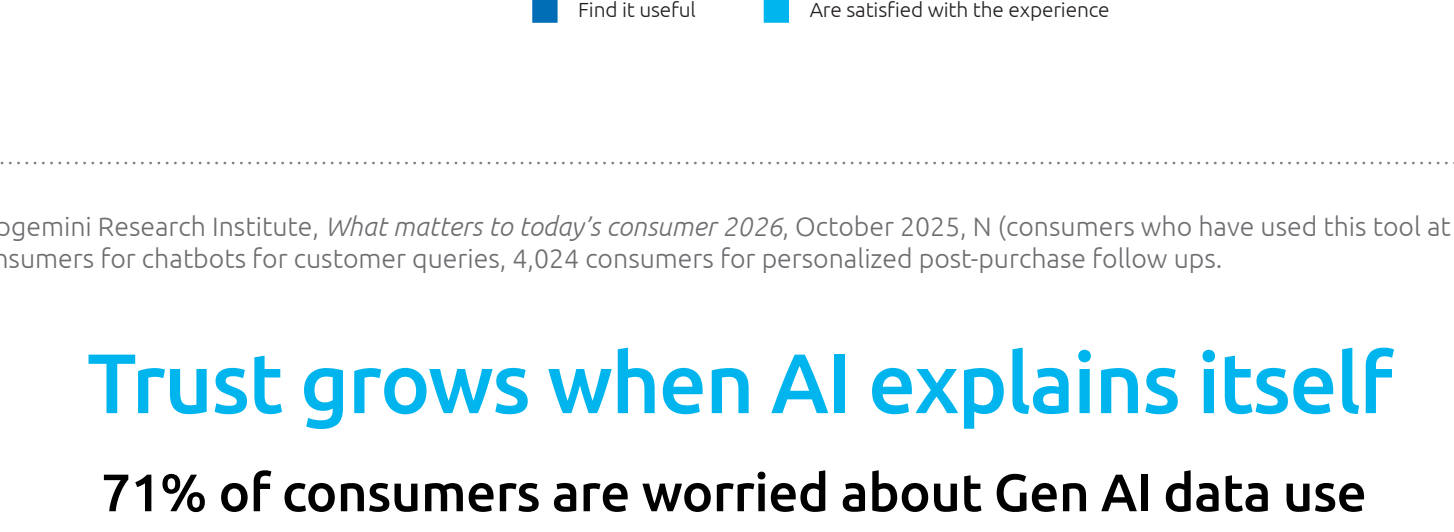


Source: Capgemini Research Institute, *What matters to today's consumer 2026*, October 2025, N = 12,000 consumers; *What matters to today's consumer 2025*, November 2024, N = 12,000; *What matters to today's consumer 2024*, November 2023, N = 11,681 consumers.

Frictionless tools drive adoption

Most consumers find chatbots useful

% of consumers who mentioned the following



Source: Capgemini Research Institute, *What matters to today's consumer 2026*, October 2025, N (consumers who have used this tool at least once) = 3,949 consumers for chatbots for customer queries, 4,024 consumers for personalized post-purchase follow-ups.

Trust grows when AI explains itself

71% of consumers are worried about Gen AI data use

% of consumers who agree with the following statements

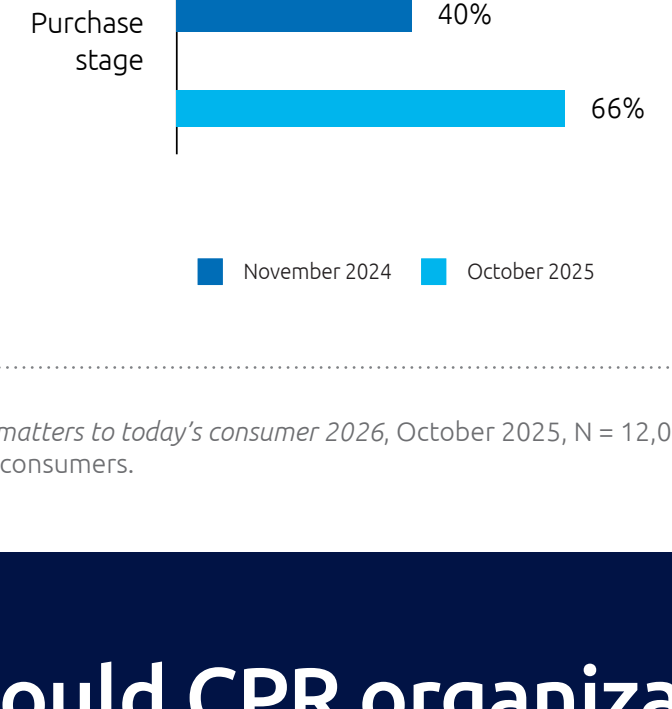


Source: Capgemini Research Institute, *What matters to today's consumer 2026*, October 2025, N = 12,000 for "Lack of clarity around consent and transparency in how Gen AI collects and uses my personal data, such as browsing history or shopping habits," N = 2,003 for "Brands should clearly inform when they show AI-generated ads."

Human moments matter more than ever

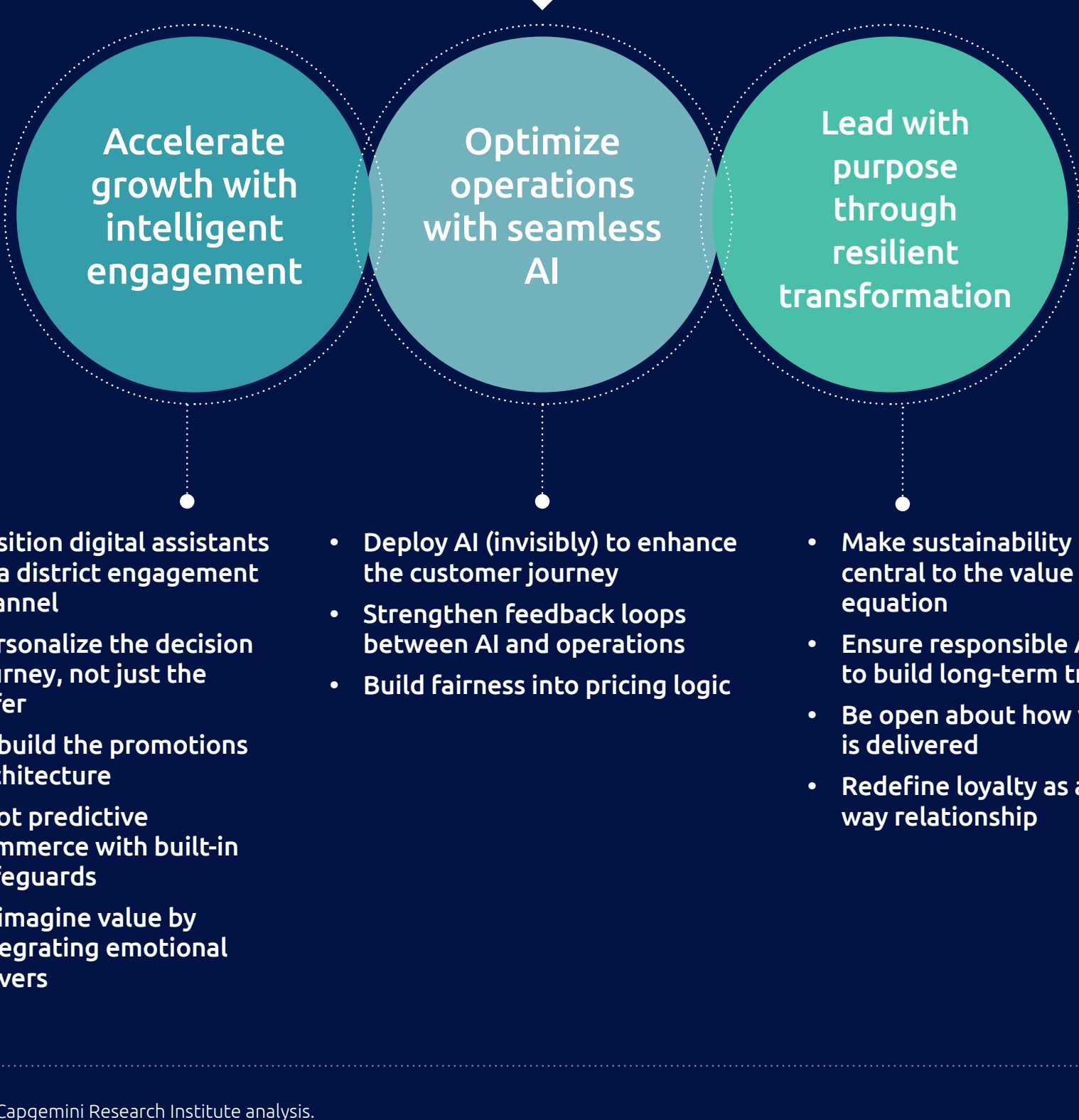
More than seven in ten consumers value human interaction during in-store shopping

% of consumers who said human interaction increases loyalty in the following stages of in-store shopping



Source: Capgemini Research Institute, *What matters to today's consumer 2026*, October 2025, N = 12,000 consumers; *What matters to today's consumer 2025*, November 2024, N = 12,000 consumers.

What should CPR organizations do differently?



Source: Capgemini Research Institute analysis.

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