

Did You Know?

Consumers navigate rising costs with focused spending – as distinct consumer profiles emerge

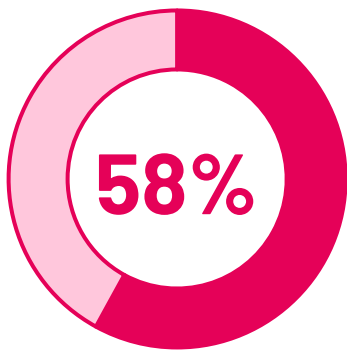
Insights based on Global Country Average across 15 countries where the Essentials survey is conducted.

March 2025



Even prior to tariffs taking hold, consumers were feeling the pangs of overspending; food and fashion are top offenders

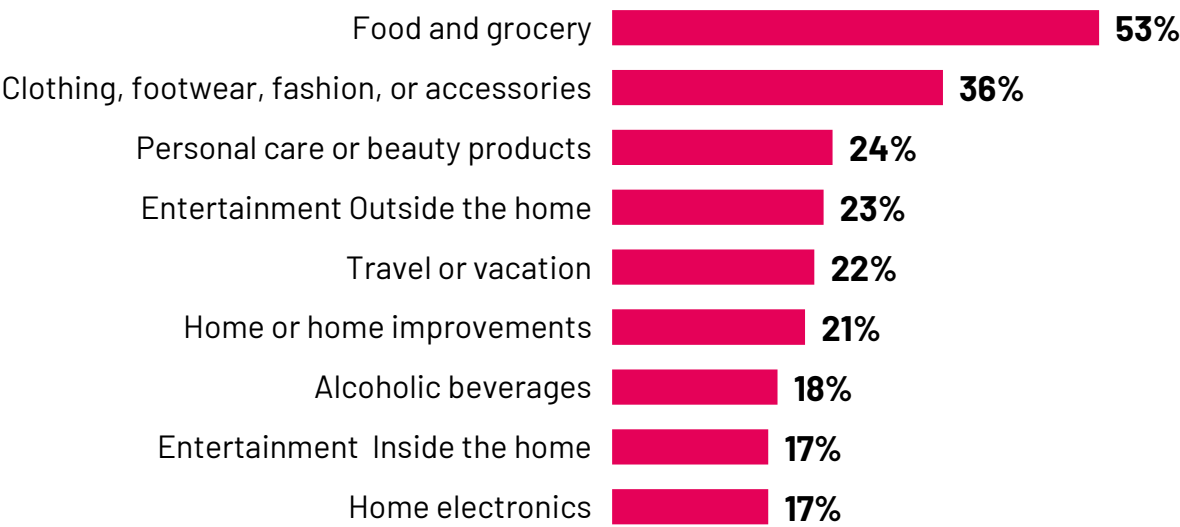
Finance Outlook | Top-2 Box Agreement



Feel they have spent more than they should have recently

Top-2 Box Agreement

Areas Spent Too Much Recently



Distinct consumer profiles emerge, balancing tensions between material desires and financial realities

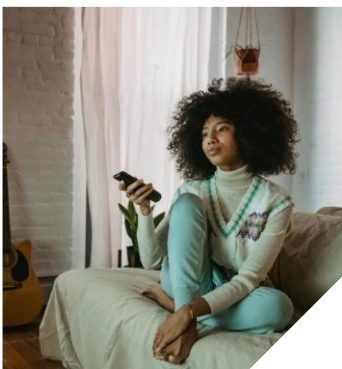
Introducing Ipsos' Consumer Mindset Matrix



Getting through life with the minimum

Strugglers

33%



Keep calm and get yourself a snack

Escapists

18%



Important things in life are not for sale

Content

27%



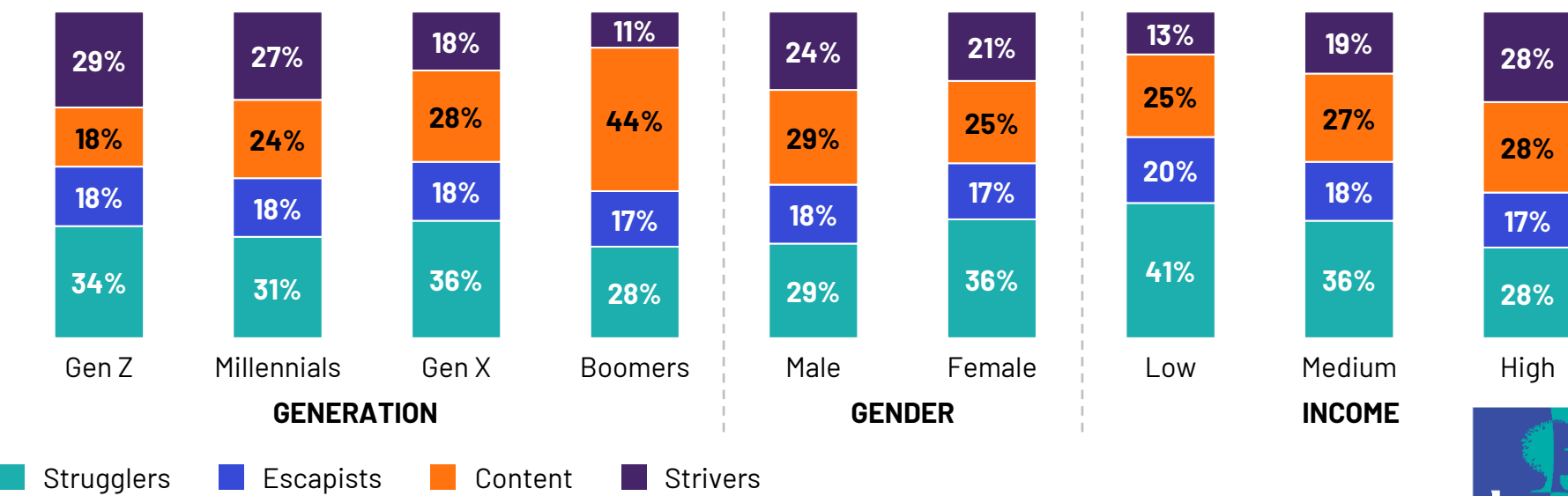
What you have defines who you are

Strivers

23%

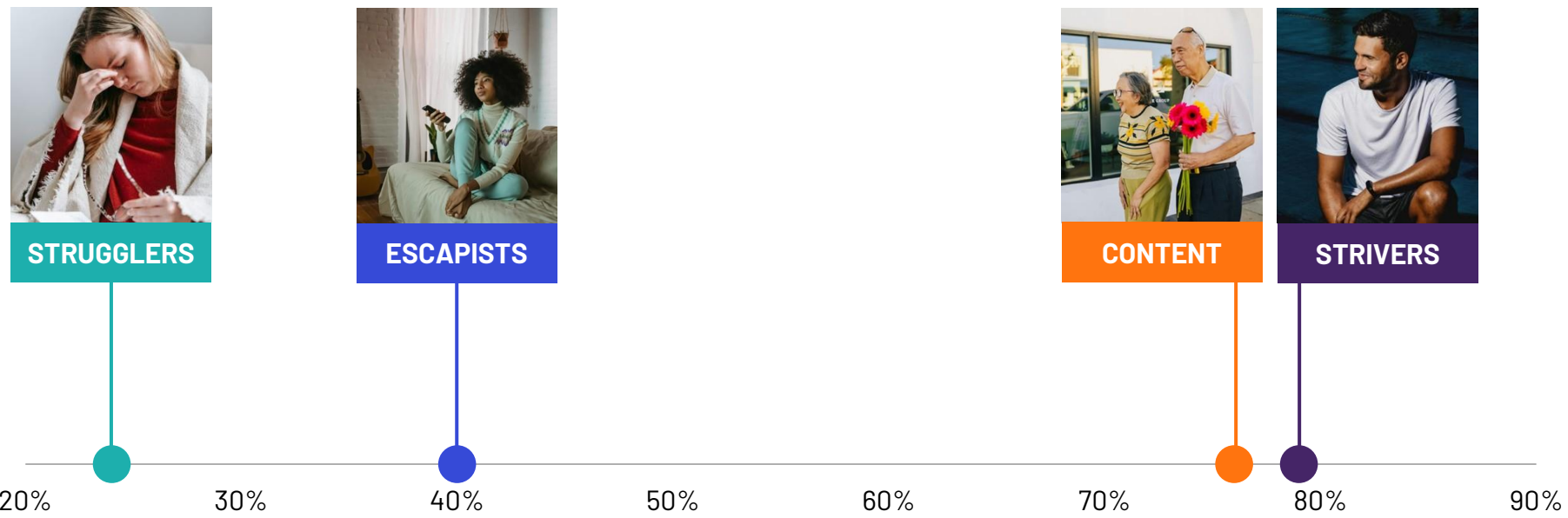
Boomers are more likely to fall into the Content Segment; higher income individuals are more likely to be Strivers

Demographics of Consumer Mindset Matrix | Top-2 Box Agreement



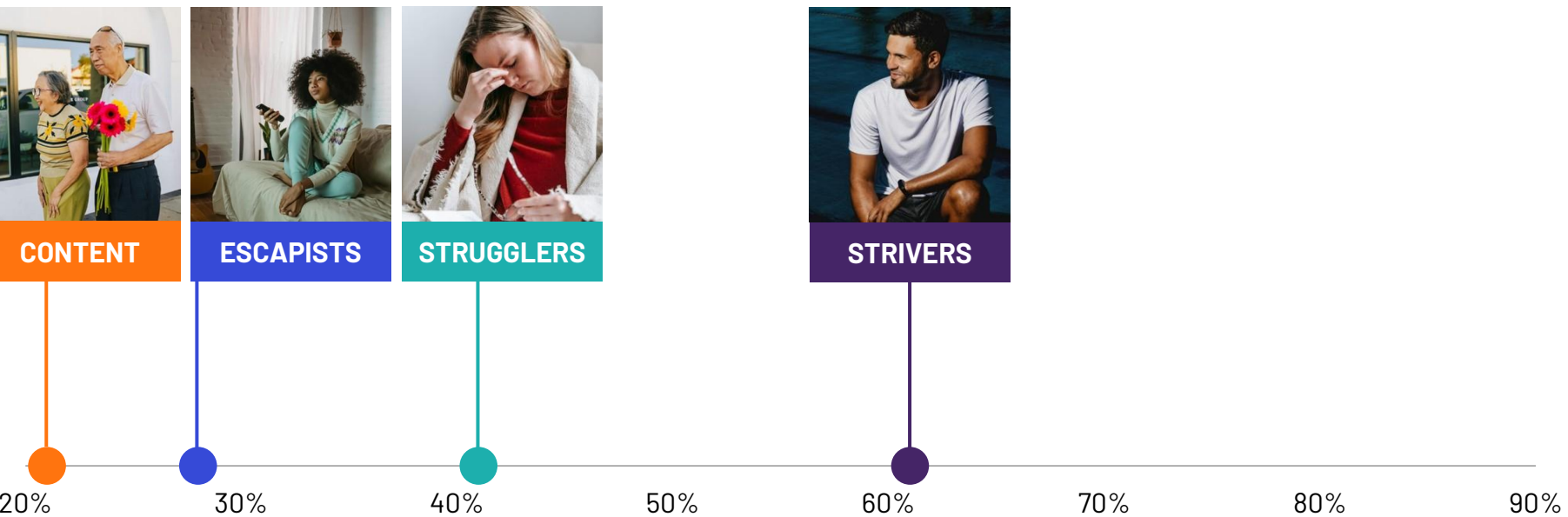
Strivers and those in the Content segment are most likely to feel good, both physically and mentally; Strugglers, not so much

"I feel good, both physically and mentally" | Top-2 Box Agreement



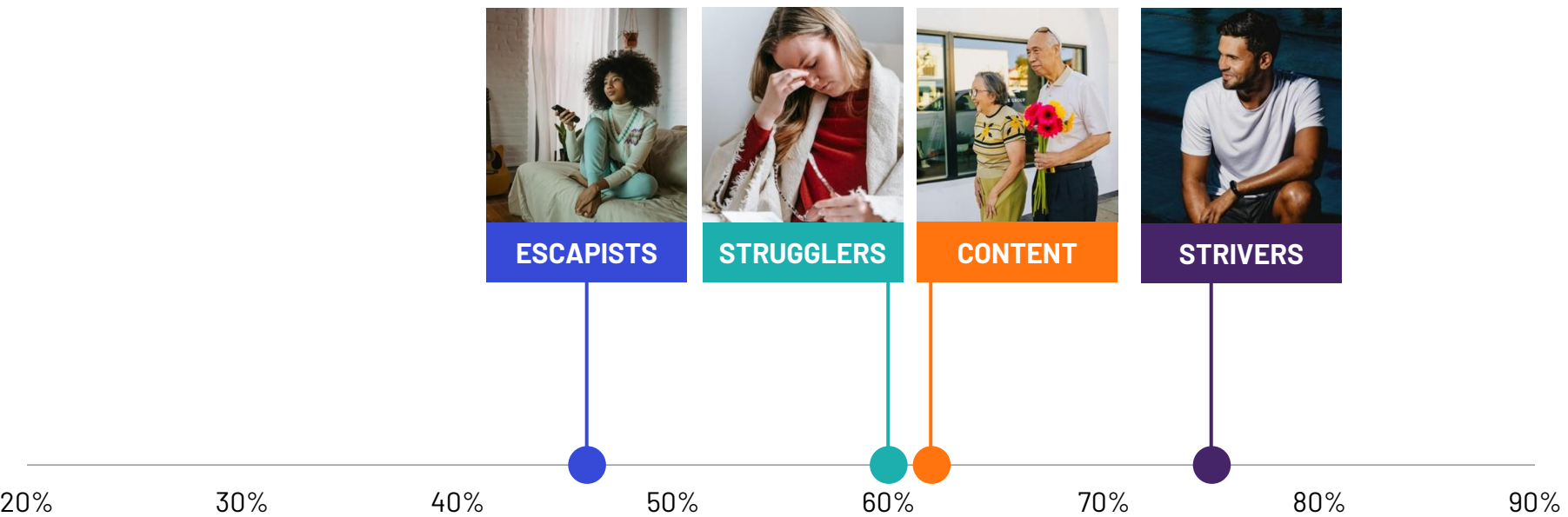
Strugglers may admire those with expensive lifestyles, but seek happiness outside of material items

"I admire people who own expensive homes, cars, and clothes" | Top-2 Box Agreement



Appearance matters to Strivers; they are most likely to feel they need to look their best when they go in public

"I feel a need to look my best when I go out in public" | Top-2 Box Agreement



For more insights, country detail, or subscription information, contact essentials@ipsos.com

Ipsos Essentials monitors how people across the globe navigate the new rules of engagement and the resulting impact on our state of mind, state of wallet, and future intentions. Each month Ipsos surveys consumers in 15 countries, including: Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, Mexico, South Africa, South Korea, Spain, the UK and the US.

