BCG

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A Seismic Shift in Consumer Behavior

My wife and I exchange presents on our anniversary less often than we used to, but for our 35th this year I thought I should do something. I started a conversation with my favorite LLM and learned that coral and jade are traditional gifts for 35th anniversaries. Then we discussed the types of jewelry she likes to wear and my price range, and it recommended three retailers, including a national chain I had never bought from and a family-owned business in Colorado with a great reputation.

From that point, it became a more traditional process. I checked out all three retailers online and chose the Colorado store. My daughter and daughter-in-law, whose tastes are both better than mine, helped me pick the specific item, and I purchased it online.

Little did I know as I did this that I'm an example of today's seismic shift in consumer behavior. A new report from BCG's Center for Customer Insight— Global Consumers Have Moved On. Has Your Growth Strategy Caught Up?—found that nearly one-third of consumers now turn to AI at some point in their purchase journey, up from 1 in 10 just 18 months ago. That, and a number of other key findings—including changes in how consumers define value, success, household structure, and trust—are based on a survey of more than 13,000 consumers across 12 countries around the world and the analysis of over 1,000 brands.

The conclusion is straightforward: the assumptions that have guided consumer strategy for decades are quickly becoming unreliable predictors of what people will buy, or why. Several big themes stood out to me:

- **Value has decisively overtaken price, a shift that's consistent across incomes.** Sixty-seven percent of consumers said they won't buy something they can afford if they don't believe it's worth it. Price gets you into consideration, but value is what closes the sale.
- **Almost three-quarters of respondents ranked health and well-being as the strongest indicator of prosperity,** compared with career (40%) and financial wealth (28%). The rapid adoption of GLP-1s, with the number of US users growing more than eightfold since 2020, is one example of how changing health priorities are reshaping behavior across categories.
- **Nearly one-third of households in mature markets are made up of a single person.** These households spend two to three times more per capita than multi-person households do, yet 50% to 70% of those living alone said the products and services they buy weren't designed with people like them in mind.
- **Forty-three percent of consumers said they feel overwhelmed by information,** and more than half don't fully trust any single source. Instead, they increasingly rely on a small circle of experts, friends and family, and—somewhat surprisingly—AI, which is now the second most trusted source of information, after experts. Brands, notably, control none of the sources people trust most.
- **Today, 13% of consumers said they purchase whatever the AI tool recommends**. In nearly two-thirds of AI-assisted purchases, consumers landed on a brand they would not have considered.

Based on these findings, here's some of what business leaders need to do.

Reframe your mindset to reflect the new consumers. A longevity-seeking, solo-living consumer who increasingly turns to AI and trusted third parties is different from the one your segmentation was built around a decade ago, whether it comes to buying groceries, insurance, or skincare.

Audit your AI presence the way you would a sales channel, in line with your strategic differentiation. In nearly two-thirds of AI-assisted purchase journeys, the tool expands the set of brands a consumer considers. But most companies still have no real visibility into how AI tools rank, recommend, or exclude them.

Resist the instinct to compete on price when value is what wins. Winning means consistently delivering the quality, convenience, trust, and emotional relevance that drive choice in your category, not just discounting under pressure. Yet only 14% of brands studied win consistently on value.

The themes laid out in this report cut across every category studied, unearthing how people are living now and not just what they're buying. Addressing these shifts and better anticipating where consumer demand is headed will be a critical driver of future growth.

This is a big topic, and there's more to unpack. In the coming months, I'll come back to this, connecting with BCG's experts to go deeper on individual pieces of the consumer picture. And in the meantime, I hope my wife's Guatemalan jade necklace will get worn more than some of my past gifts.

Until next time,

Rich

Rich Lesser
Global Chair

Further Insights

Global Consumers Have Moved On. Has Your Growth Strategy Caught Up?

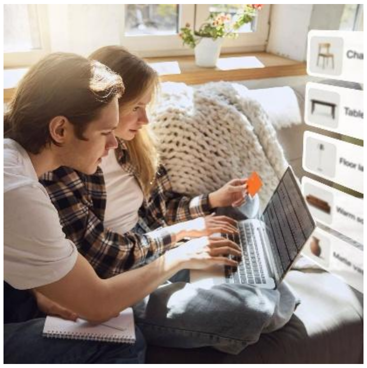
A seismic shift in consumer behavior is underway. Five consumer-led themes reveal where demand is heading and where the next wave of growth will emerge.

Catch Up to Consumers

The Unexpected Ways GLP-1s Are Transforming Consumer Behavior

GLP-1s are doing more than shrinking appetites. They're stimulating lasting changes in the way users—and their households—eat, shop, dress, exercise, and spend.

Decode the GLP-1 Effect



Future of Influence: The Research-Led Consumer Journey Is Changing the Rules of Marketing Influence

To win in this environment, brands must be discoverable, desirable, and trusted across the touchpoints that matter to consumers.

Redefine Influence

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