

The Kearney Consumer Stress Index

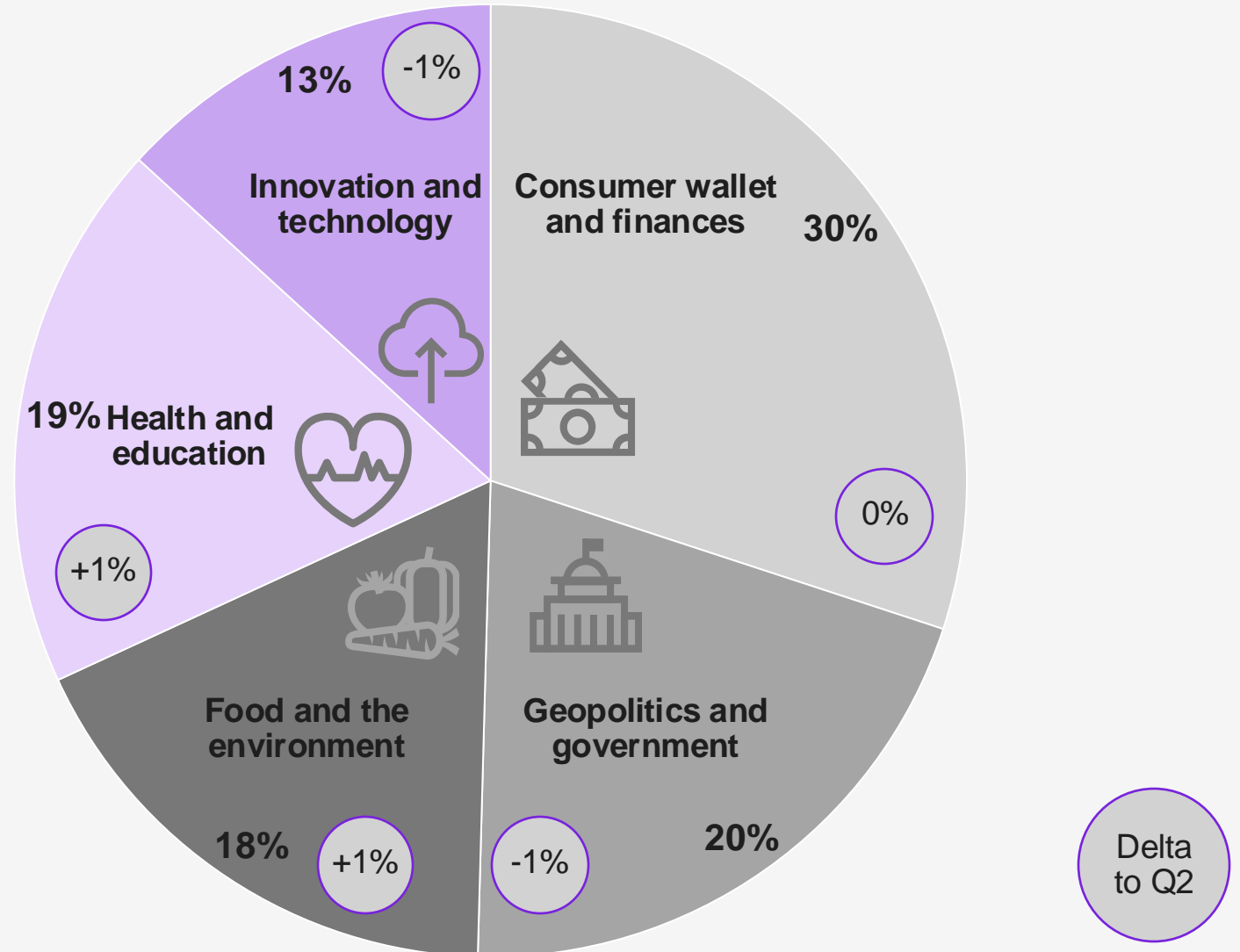
Kearney Consumer Institute
Q3 2024 data pack

KEARNEY



Top perceived stressors globally

Global consumers ranking category as the “most stressful”



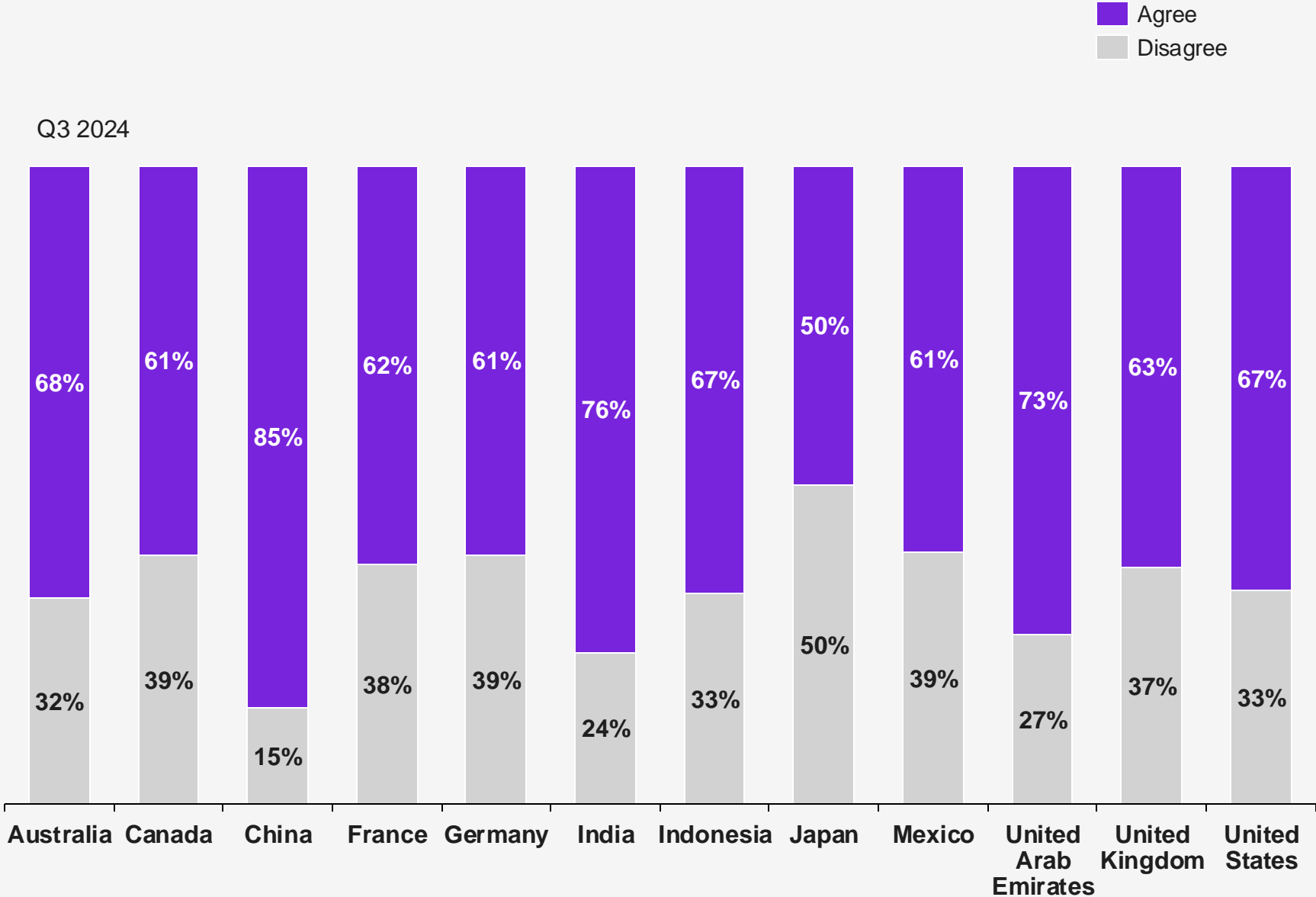
Consumer Stress Index scores by wave

Country	Q4 2023	Q1 2024	Q2 2024	Q3 2024
Australia	101.0	101.7	102.1	100.5
Canada	102.1	100.8	99.9	100.0
China	88.9	85.0	84.4	87.0
France	103.8	96.4	101.0	101.8
Germany	99.3	97.8	97.4	95.5
India	94.8	92.1	91.6	91.7
Indonesia	91.7	91.4	91.5	91.6
Japan	99.6	99.5	100.7	97.3
Mexico	93.7	91.8	91.5	91.6
United Arab Emirates	94.6	91.1	94.7	95.1
United Kingdom	103.7	102.1	102.2	101.6
United States	103.5	99.5	101.9	103.3

Consumer Stress Index scores by pillar

Country	Consumer Stress Index score Q3 24		Consumer wallet and finances	Health and education	Geopolitics and government	Food and the environment	Innovation and technology
Australia	100.5		104.5	93.8	101.4	99.7	98.0
Canada	100.0		101.3	96.7	104.3	99.0	96.6
China	87.0		78.8	89.4	98.6	86.3	98.2
France	101.8		101.0	96.8	116.1	101.5	93.6
Germany	95.5		93.9	93.2	109.1	92.0	91.2
India	91.7		89.8	91.8	97.2	89.4	94.3
Indonesia	91.6		91.9	87.3	101.7	87.9	89.7
Japan	97.3		95.9	97.4	102.8	94.4	98.7
Mexico	91.6		87.4	91.6	99.7	92.0	95.2
United Arab Emirates	95.1		92.4	98.6	104.3	88.7	94.8
United Kingdom	101.6		102.8	95.0	113.3	100.1	94.9
United States	103.3		106.6	96.2	110.1	100.7	98.4

Consumers living paycheck to paycheck by country

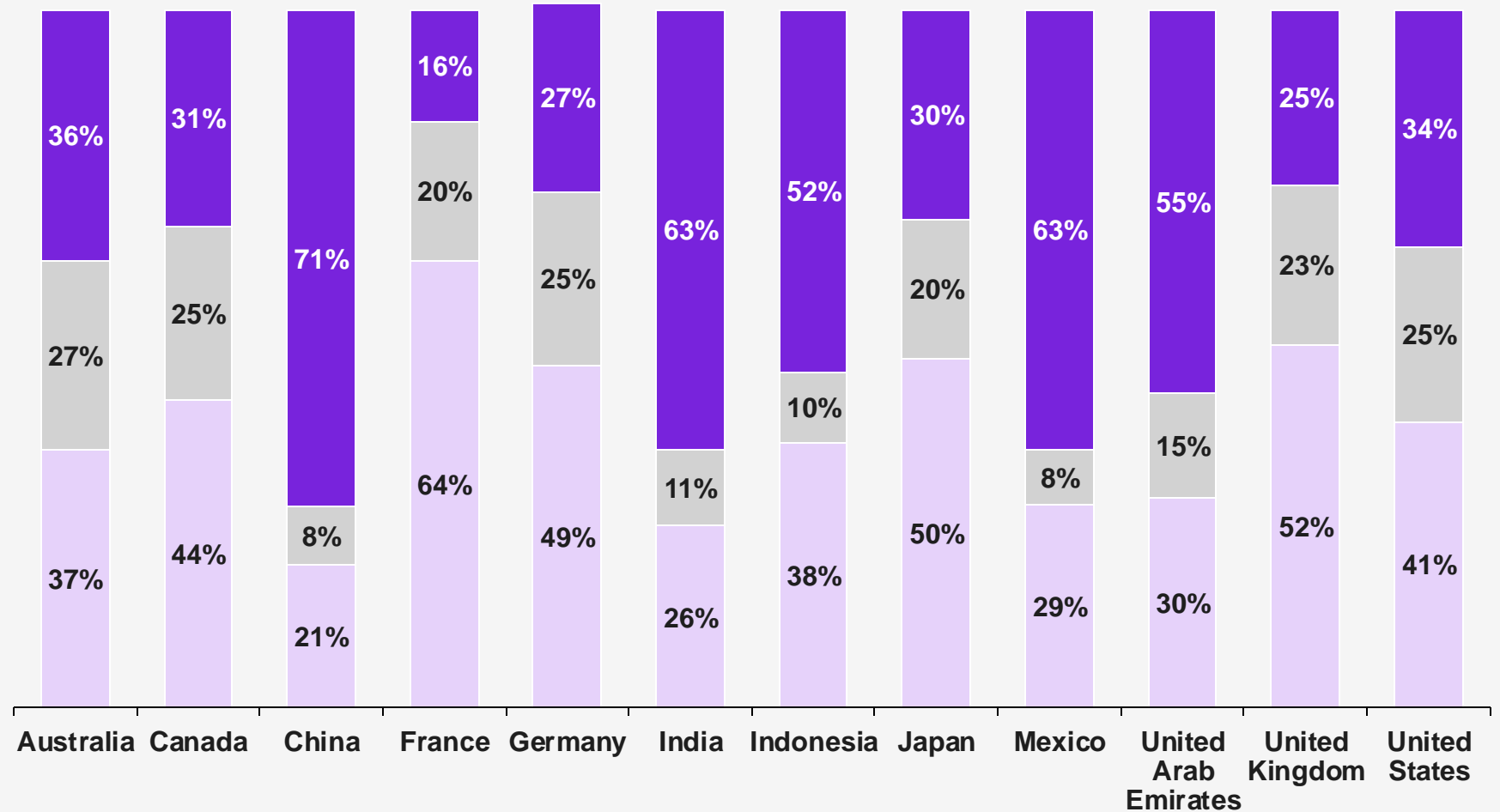


Question: Please select the answer that most closely reflects how you feel about this statement: I would say I live paycheck to paycheck.
 Source: Kearney Consumer Institute Consumer Stress Index, Q3 2024

Consumer sentiment on political future by country

- I feel optimistic.
- I feel indifferent.
- I feel pessimistic.

Q3 2024



Source: Kearney Consumer Institute Consumer Stress Index, Q3 2024

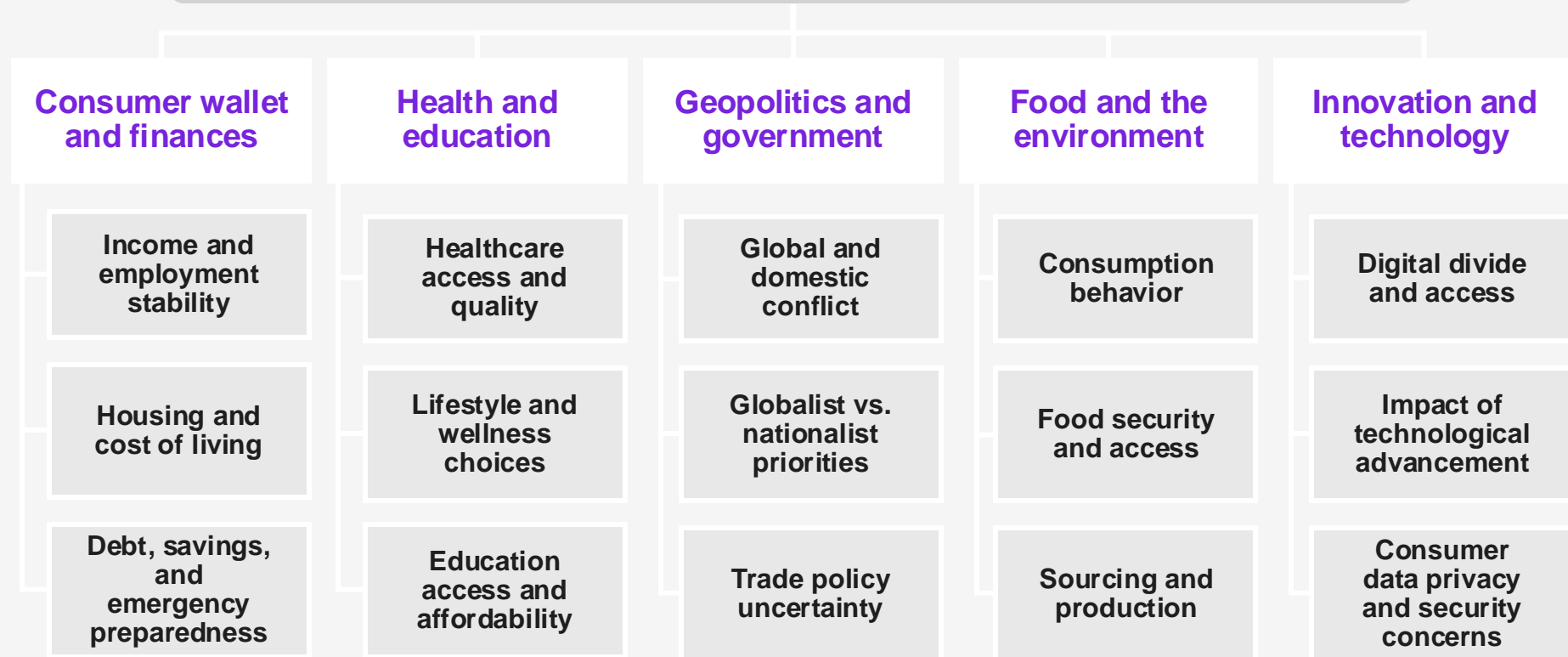
Question: How do you feel about your country's political future? Answer options: I am optimistic about the political future of my country; I am pessimistic about the political future of my country; I am indifferent.

Methodology and KCI summary

1. Consumer Stress Index pillars
2. About the Kearney Consumer Institute



Five pillars of the Kearney Consumer Stress Index



Source: Kearney Consumer Institute Consumer Stress Index

Kearney Consumer Institute (KCI)

Think tank creating thoughtful, consumer-first content and perspectives, assessing existing and evolving consumer behaviors, needs, and decision-making

What does KCI do?

- Advocates for the consumer
- Challenges existing assumptions
- Reframes to ask different questions
- Generates conversation
- Translates into action

Thought leadership

Consumer content is the heart of the KCI, which includes connection with over 100,000 consumers through global surveys.

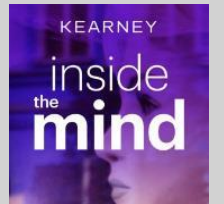
Select content examples:

Quarterly briefing: Recurring briefing that reframes core business challenges from the lens of the consumer. Topics include convenience, price/value, trust, and loyalty.

Consumer Stress Index: Assessment of consumer stress and sentiment on key macro factors ranging from economics to geopolitics to health and education

Inside the Mind: Podcast exploring critical consumer communities, including luxury consumers, home chefs, outdoor adventurers, and superfans

Topic deep dives: Sample topics include generative AI and its impact on consumer trust and closing the consumer sustainability aspiration gap



Consumer expertise

Client advisory: Engage with 50+ consumer and retail clients annually to discuss consumer behavior and pain points, including via workshops and executive 1:1s

Spotlight events: Panelist and moderator at leading industry events, including the Consumer Goods Forum, ShopTalk, and NACDS

Leading media representation at Kearney: Consumer expertise featured in premier global print, digital, and broadcast media



The New York Times

THE WALL STREET JOURNAL

FINANCIAL TIMES

Bloomberg npr

BBC BOF