

QUANTIFIED CUSTOMER FORESIGHT STUDY 2025

HOW DO WE WANT TO LIVE IN 10 YEARS?
UNDER THE ASSUMPTION OF POLYCHANGE

QCF

September 2025



FORE
SIGHT
ACA
DEMY



QUANTIFIED COSTUMER FORESIGHT 2025

- In the Quantified Customer Foresight Study (QCF), Trend Receiver insights - a qualitative exploration of emerging phenomena through interviews with so called Trend Receivers - are translated into a quantitative study involving around 8.500 consumers globally to determine their prevalence across different consumer segments.
- The Quantified Customer Foresight Study 2025 is a collaborative effort, with several brand partners (Allianz, IKEA, Lidl, SAP, Ströer) and the Foresight Academy working together to realize this study. Key topics were selected by the QCF team, drawing on insights from the current Trend Receiver Report 2025. Driven by the partners from Allianz and Ströer, the team collaboratively developed the questionnaire. The survey itself was conducted by the renowned field institute Kantar. The Customer Insights and Experience team from Lidl supported the analysis of the raw data and the creation of diagrams. The project began in May 2025, with fieldwork taking place from June to July 2025, followed by analysis and preparation of the final presentation from August to September 2025.
- Funding for the study was provided by SAP.
- Following previous studies in 2020 and 2022, the Foresight Academy is now conducting this type of quantitative foresight study for the third time. To highlight the quantitative aspect of the study, its name was changed from Mass Customer Foresight (MCF) to Quantified Customer Foresight (QCF) in 2025.
- The survey was conducted in 14 countries, i.a. China. In China, certain questions could not be asked due to their social research nature (e.g., questions about global risks, government). The countries were grouped into seven regions, following the regional split as in the previous 2022 study.
- Following the Hot Top Space (HTS) research on “Alternative Futures” participants were asked about their orientation on social and economic issues (e.g., “right-wing oriented”) in the closeout block. Furthermore, the income groups in the demographics section were aligned with existing data from the HTS research “Next Billion Middle Class Consumers” in order to enable meaningful insights into middle-class consumers.

QUANTIFIED CUSTOMER FORESIGHT 2025: PUTTING TREND RECEIVER STATEMENTS IN CONTEXT BY QUANTITATIVE SURVEY

How do we want to live in 10 Years?

Quantified Customer Foresight = new market research tool

Supplementation and Validation

of research findings by Foresight Academy

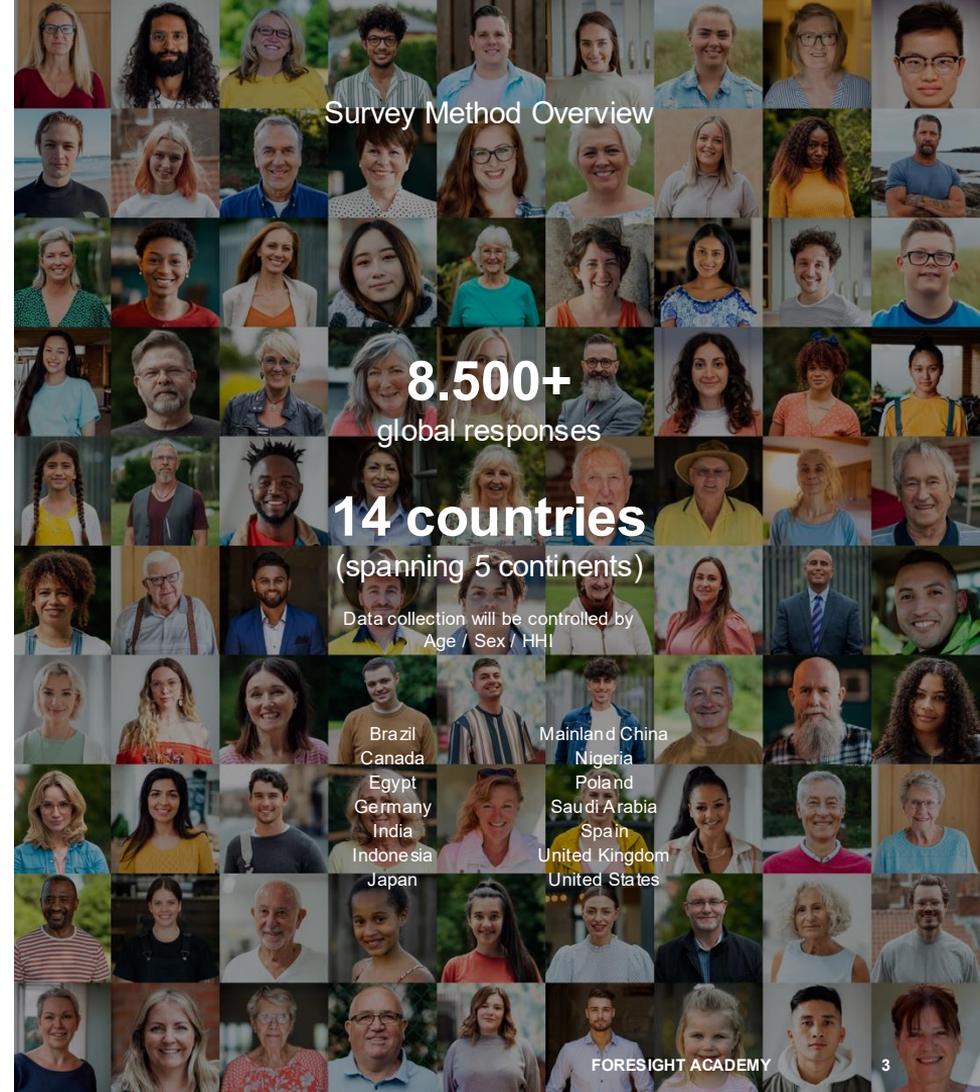
Key Topics

based on Trend Receiver Report 2025

Timing

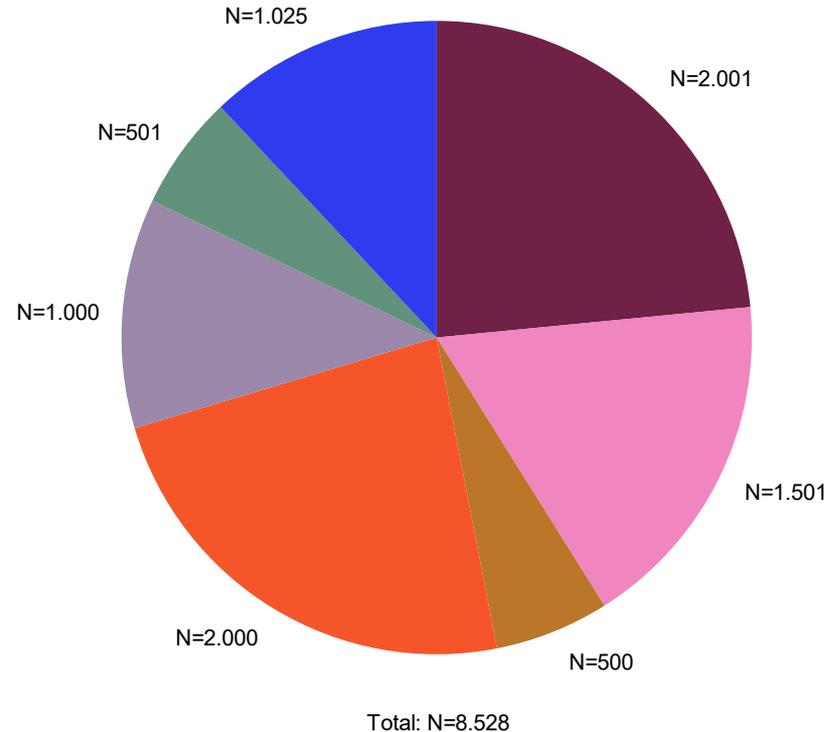
June to July 2025

Field Institute
KANTAR



QUANTIFIED COSTUMER FORESIGHT 2025

REGIONAL SPLIT



QUANTIFIED CUSTOMER FORESIGHT 2025

EXECUTIVE SUMMARY

1/2

- Recent findings show a clear shift in **global risk** perceptions, with increasing violence and crime and armed conflicts now ranking at the top globally and regionally - except for East Asia & Pacific, where economic insecurity is viewed as the most pressing issue and South Asia, where job losses due to AI and robotics rank second.
- Looking ahead, armed conflicts remain among the top two perceived risks over the next decade across nearly all countries and demographic groups, with Poland showing the highest concern. Additionally, job loss due to AI and robotics is gaining significance as a future risk, particularly in Africa, the Middle East, and North America.
- Globally, the most important **life goal** is ensuring physical health and mental wellbeing, followed by attaining financial stability and maintaining strong relationships with family and friends. Home ownership is a widely shared aspiration.
- Looking ahead to the next 10 years, entrepreneurship — specifically running one's own company — is gaining importance, above all in the Middle East and Africa. Meanwhile, interest in working in jobs that contribute to environmental and social good is declining.
- The **United Nation (UN) goal** 'good health and wellbeing' is globally seen as the top priority for a more sustainable future – perfectly aligned with the top ranked personal life goal 'ensuring physical health and wellbeing'. In contrast, support for the UN goals 'zero hunger' and 'climate action' has declined since 2022, while 'affordable and clean energy' and 'clean water and sanitation' are gaining importance.
- When it comes to **health and wellbeing**, and coping with the increasing complexity of life, people prefer talking to friends or family, spending time in nature, and finding joy and humor.
- Looking ahead, people expect tech-based solutions like carbon capture to play a key role in solving environmental challenges. Overall, **sustainability** is widely viewed as a responsibility of others — such as companies, governments, and communities — rather than of the individual.

QUANTIFIED CUSTOMER FORESIGHT 2025

EXECUTIVE SUMMARY

2/2

- Globally, the **role of business** is viewed broadly — from environmental and social responsibility to overall welfare. However, compared to 2022, its importance in tackling environmental and social issues has declined.
- The traditional “shareholder-first” mindset finds strongest support in Asia and the Middle East, while being most rejected in Europe and South America. Looking ahead, South America and the Middle East express a stronger expectation for businesses to lead the shift from consumption to regeneration within the next decade.
- Since 2022, expectations towards **brand role** have risen — not only in functional areas (such as durable, high-quality products and services with a good value for money), but also in soft aspects like moral leadership and social cohesion.
- Globally, **future consumers** increasingly value meaningful choices, enriching life experiences, and ethical consumer products. These preferences reflect a shift toward more conscious and purpose-driven consumption.
- Around 80% of respondents are open to engaging with **artificial intelligence** in various forms. However, there's a clear regional divide: Western markets (Europe, North America) remain cautious, preferring AI in a supportive role. Other regions show greater openness to automated AI solutions.
- Despite regional differences, people around the world value work-life balance and security & stability most when thinking about the **future of work**.
- In education, a top **future skill** will be stress management and mental health — except in Africa and Middle East, where AI skills and entrepreneurial competencies are considered more essential than in other regions.
- Across all regions, tech leaders and innovators as well as young people are widely believed to play a key role **in future leadership** (in the public and private sector).

TOPICS OVERVIEW

GLOBAL RISKS P8

LIFE GOALS P28

SUSTAINABLE LIFE P45

HEALTH AND WELLBEEING P52

BUSINESS ROLE P58

BRAND ROLE P65

FUTURE CONSUMERS P76

ARTIFICIAL INTELLIGENCE P89

FUTURE WORKFORCE P99

GLOBAL POWER SHIFTS P113

DEMOGRAPHICS P117

**QCF Survey 2025 findings based on
the Trend Receiver Report 2025** P128



A photograph of a person lying on their back on a wooden floor. Their hands are held over their face, covering their eyes and mouth. The lighting is dramatic, with strong shadows and highlights, suggesting a window with blinds. The overall mood is one of vulnerability and concern.

GLOBAL RISKS

GLOBAL RISKS _ KEY FINDINGS

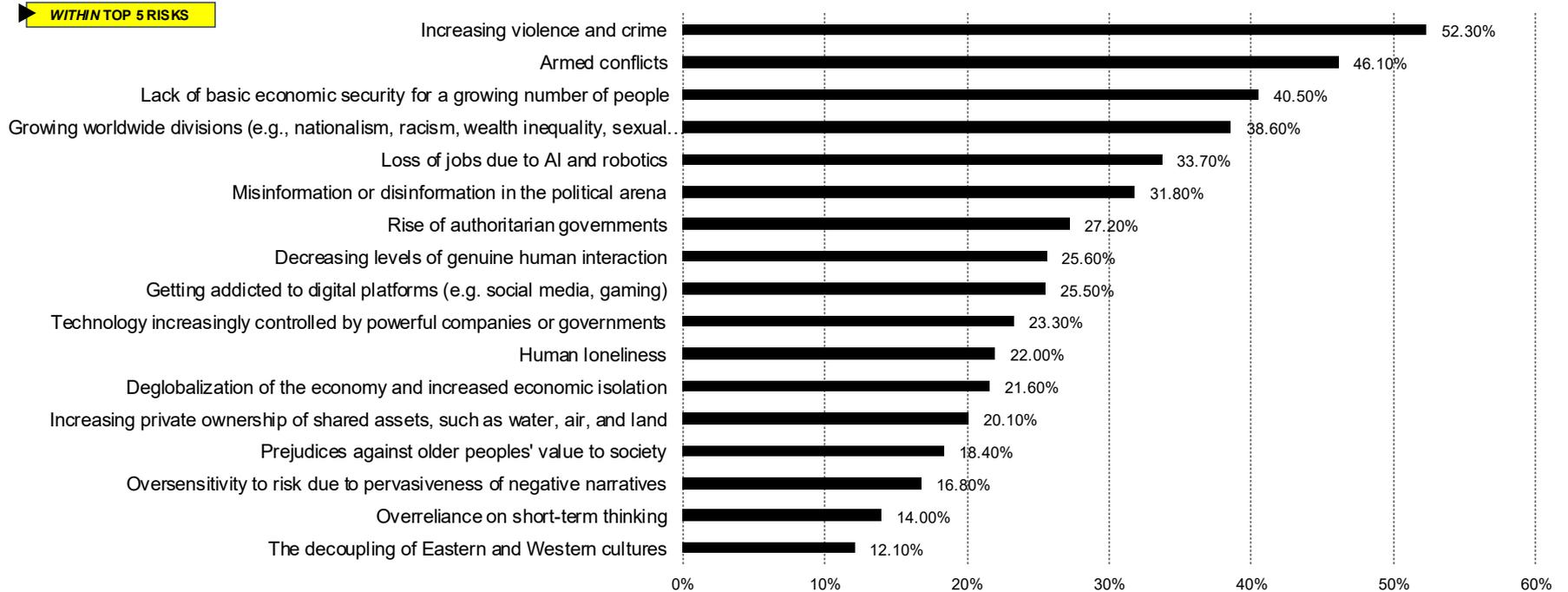
- Right away, the new risk statements '**increasing violence and crime**' and '**armed conflicts**' moved to first and second place on a global and regional level - except for East Asia & Pacific where '**lack of basic economic security for a growing number of people**' is seen as the highest risk. And in South Asia, 'armed conflicts' are considered less significant than **job losses due to AI and robotics**.
- '**Armed conflicts**' are still considered as one of top 2 highest risks in 10 years throughout all countries (except Canada, India) and all demographic sub-groups; Poland is the country with the highest score!
- '**Loss of jobs due to AI and robotics**' moves up in the ranking as top 2 risk in the future. At the regional level, this is particularly evident in Africa, South Asia, Middle East and North America.
- '**Increasing violence and crime**' is still ranked third as significant in 10 years, though with lower approval. Instead, over a ten-year horizon, the risk of '**technology being increasingly controlled by powerful companies and governments**' is considered more significant.

GLOBAL RISKS _ TOTAL

Risks1a _ Which of these risks worry you the most right now?

Please rank up to 5, with #1 being the risk you're most worried about.

Percentage of respondents that selected each risk within their top 5 risks:



N=7,528 (except China)

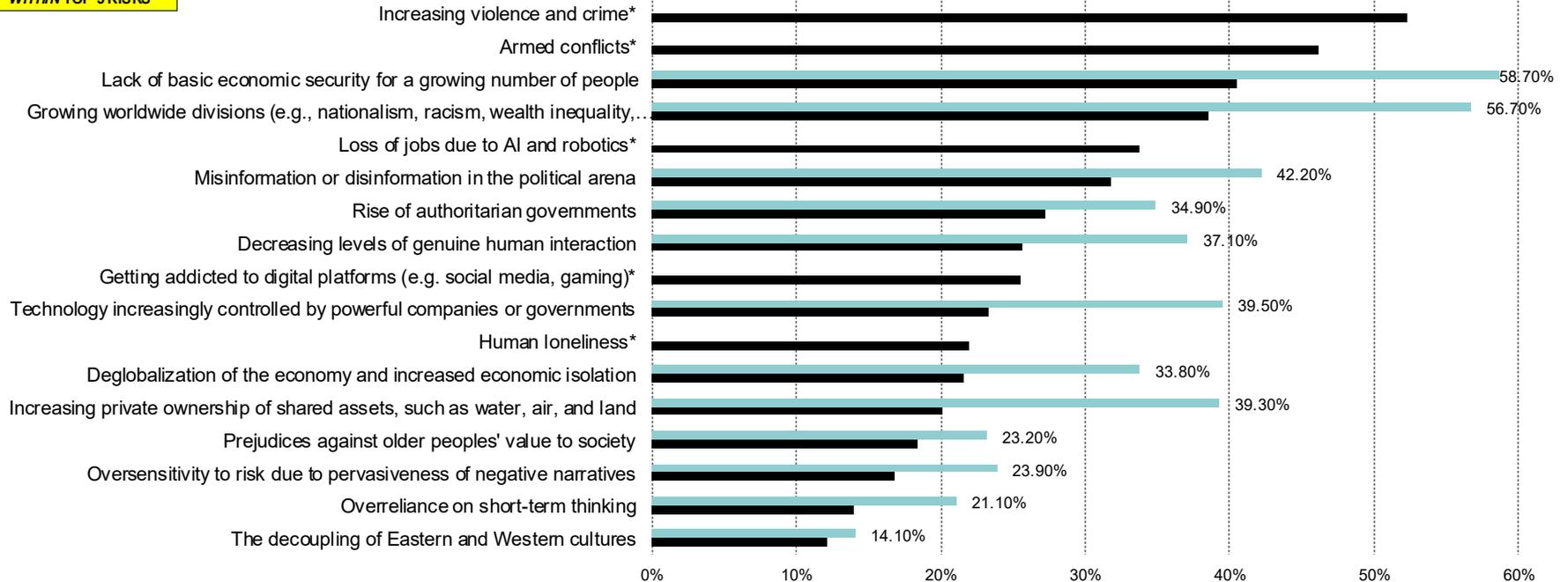
GLOBAL RISKS _ TOTAL _ 2025 vs. 2022

Risks1a _ Which of these risks worry you the most right now?

Please rank up to 5, with #1 being the risk you're most worried about.

Percentage of respondents that selected each risk within their top 5 risks:

▶ **WITHIN TOP 5 RISKS**



■ MCF 2022: Global
N=13.102

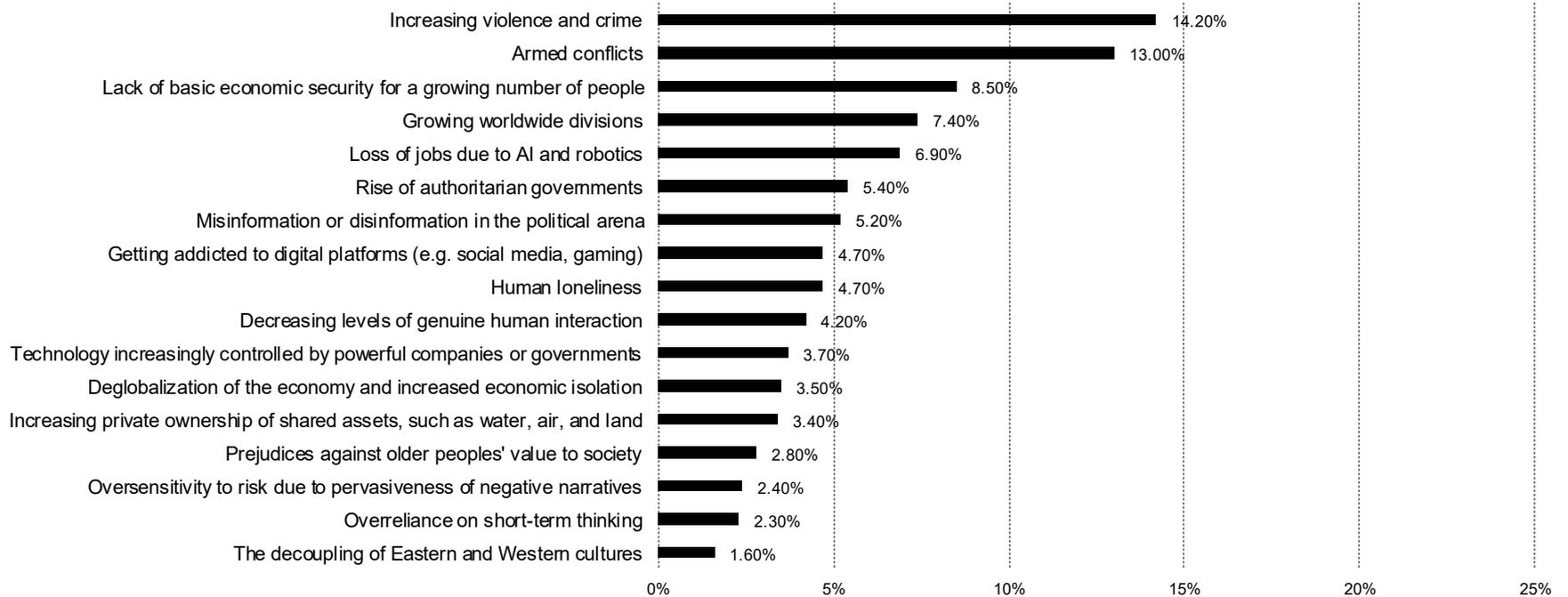
■ QCF 2025: Global
N=7.528 (except China) * NEW STATEMENTS!

GLOBAL RISKS _ TOTAL

Risks1a _ Which of these risks worry you the most right now?

Please rank up to 5, with #1 being the risk you're most worried about.

▶ TOP 1 RISK



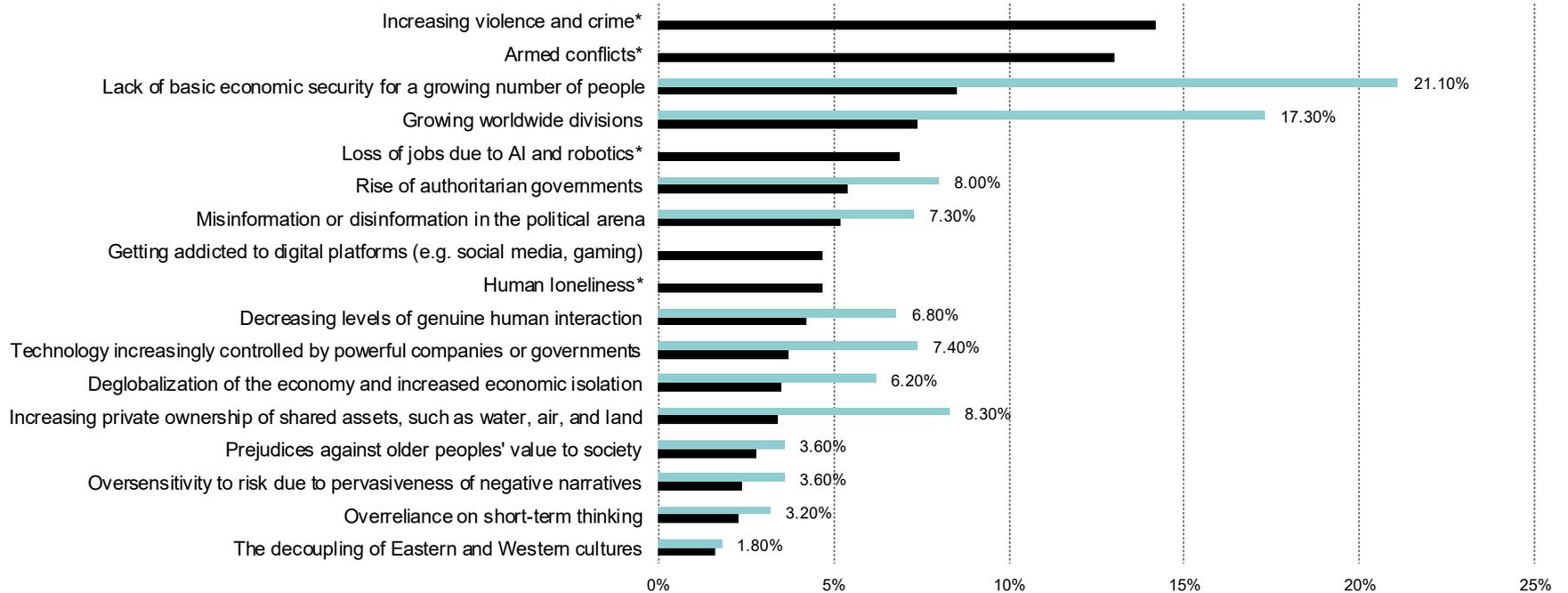
N=7,528 (except China)

GLOBAL RISKS _ TOTAL _ 2025 vs. 2022

Risks1a _ Which of these risks worry you the most right now?

Please rank up to 5, with #1 being the risk you're most worried about.

▶ TOP 1 RISK



■ MCF 2022: Global
N=13.102

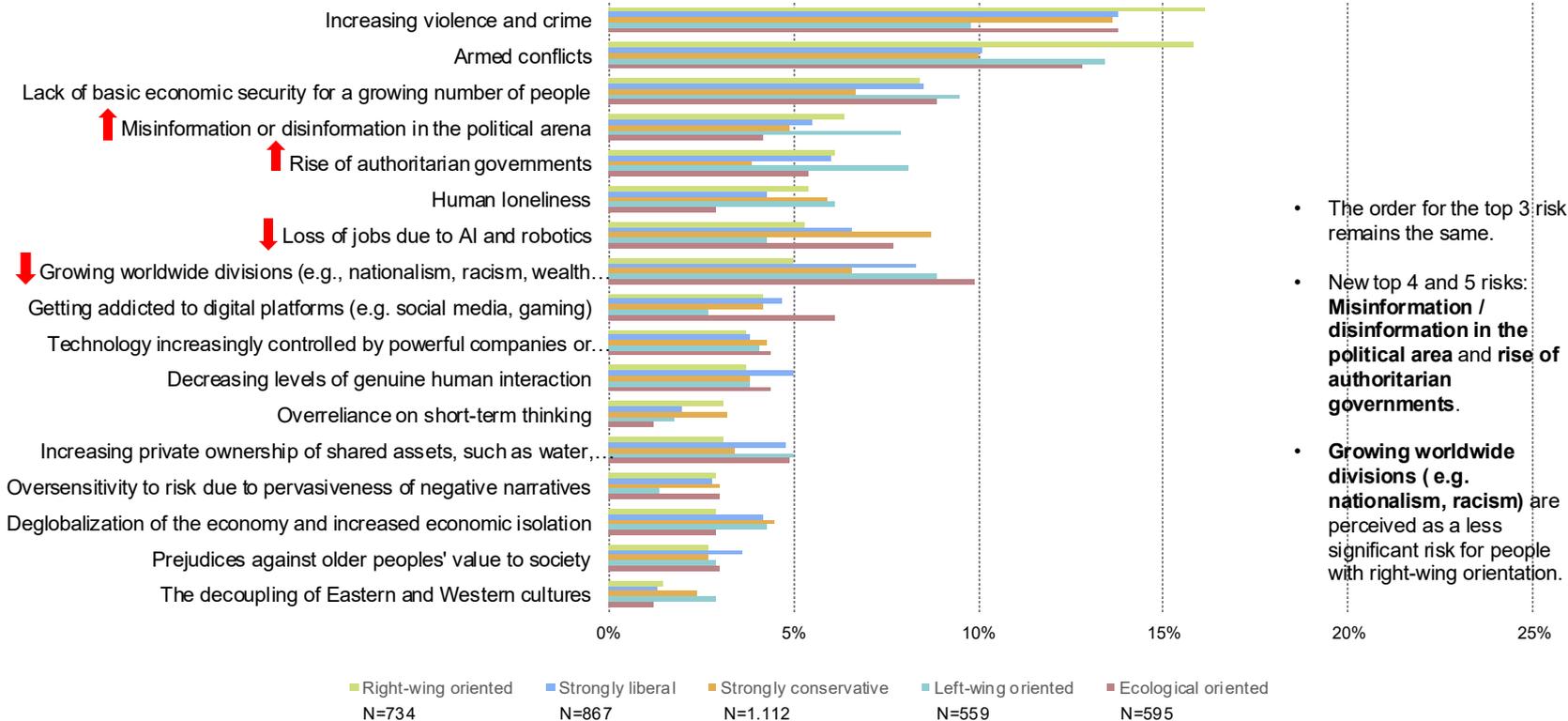
■ QCF 2025: Global
N=7.528 (except China) * NEW STATEMENTS!

GLOBAL RISKS _ RIGHT - WING vs. OTHER ORIENTATIONS

Risks1a _ Which of these risks worry you the most right now?

Please rank up to 5, with #1 being the risk you're most worried about.

▶ TOP 1 RISK



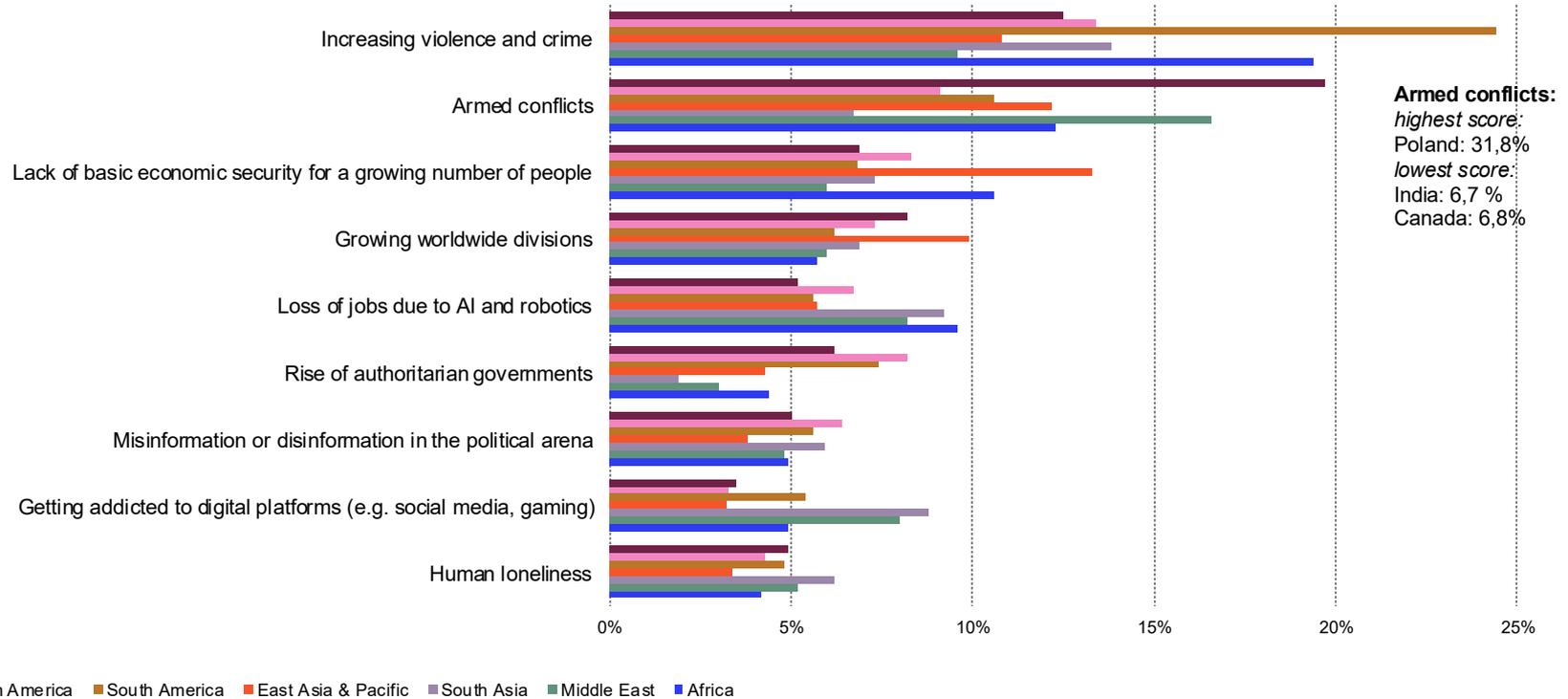
- The order for the top 3 risks remains the same.
- New top 4 and 5 risks: **Misinformation / disinformation in the political area and rise of authoritarian governments.**
- **Growing worldwide divisions (e.g. nationalism, racism)** are perceived as a less significant risk for people with right-wing orientation.

GLOBAL RISKS _ REGIONAL 1/2

Risks1a _ Which of these risks worry you the most right now?

Please rank up to 5, with #1 being the risk you're most worried about.

▶ TOP 1 RISK



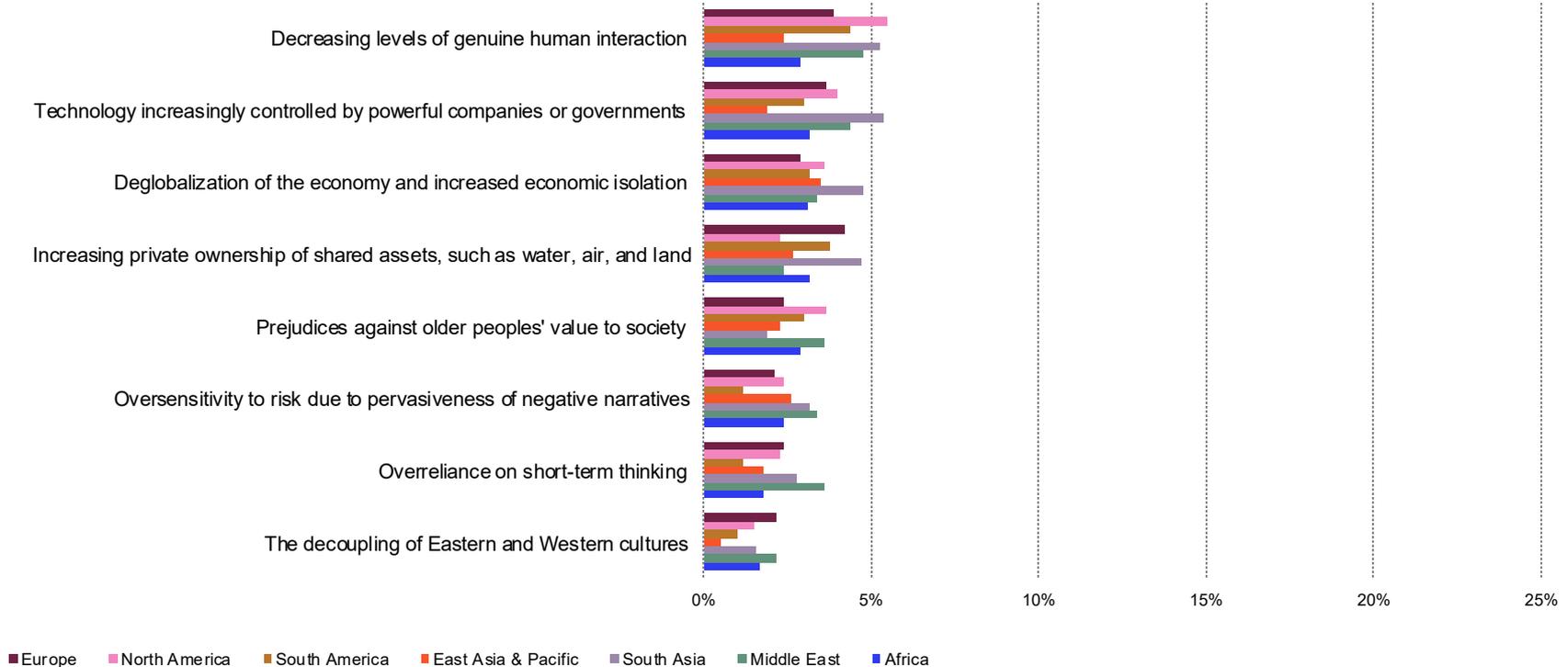
■ Europe ■ North America ■ South America ■ East Asia & Pacific ■ South Asia ■ Middle East ■ Africa

GLOBAL RISKS _ REGIONAL 2/2

Risks1a _ Which of these risks worry you the most right now?

Please rank up to 5, with #1 being the risk you're most worried about.

▶ TOP 1 RISK

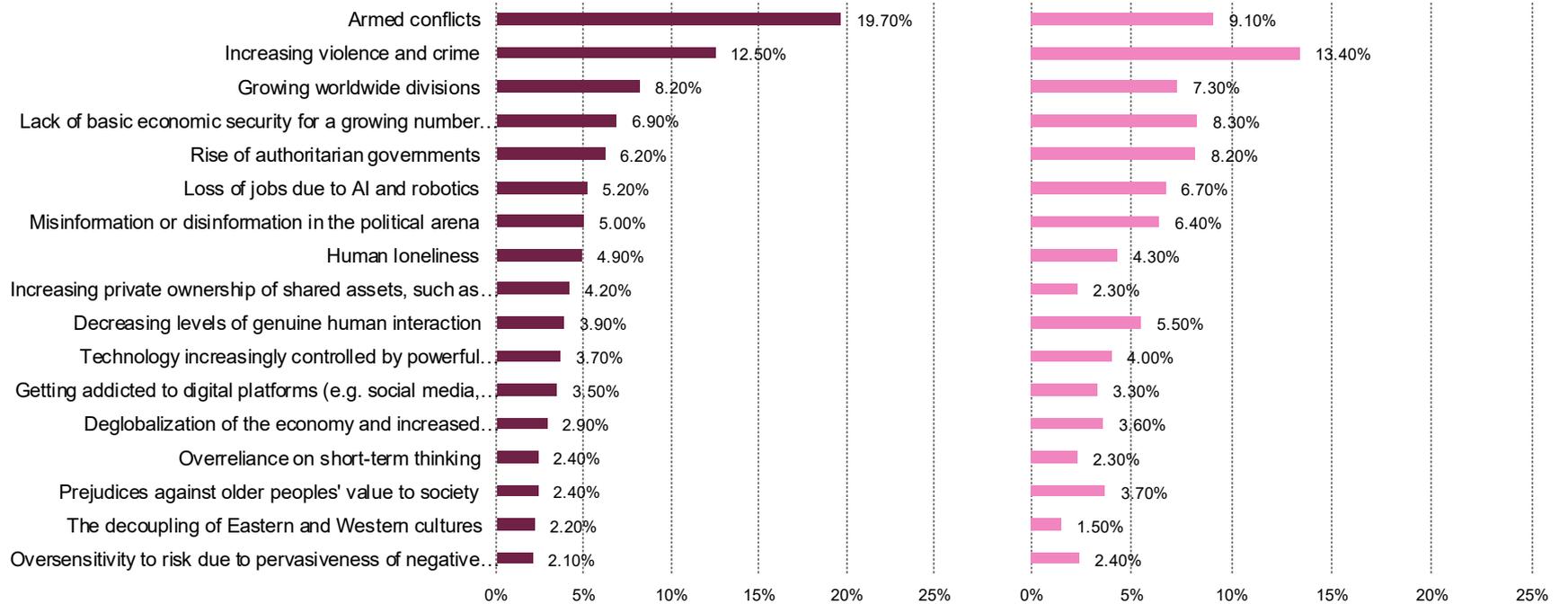


GLOBAL RISKS _ EUROPE vs. NORTH AMERICA

Risks1a _ Which of these risks worry you the most right now?

Please rank up to 5, with #1 being the risk you're most worried about.

▶ TOP 1 RISK



■ Europe N=2.001

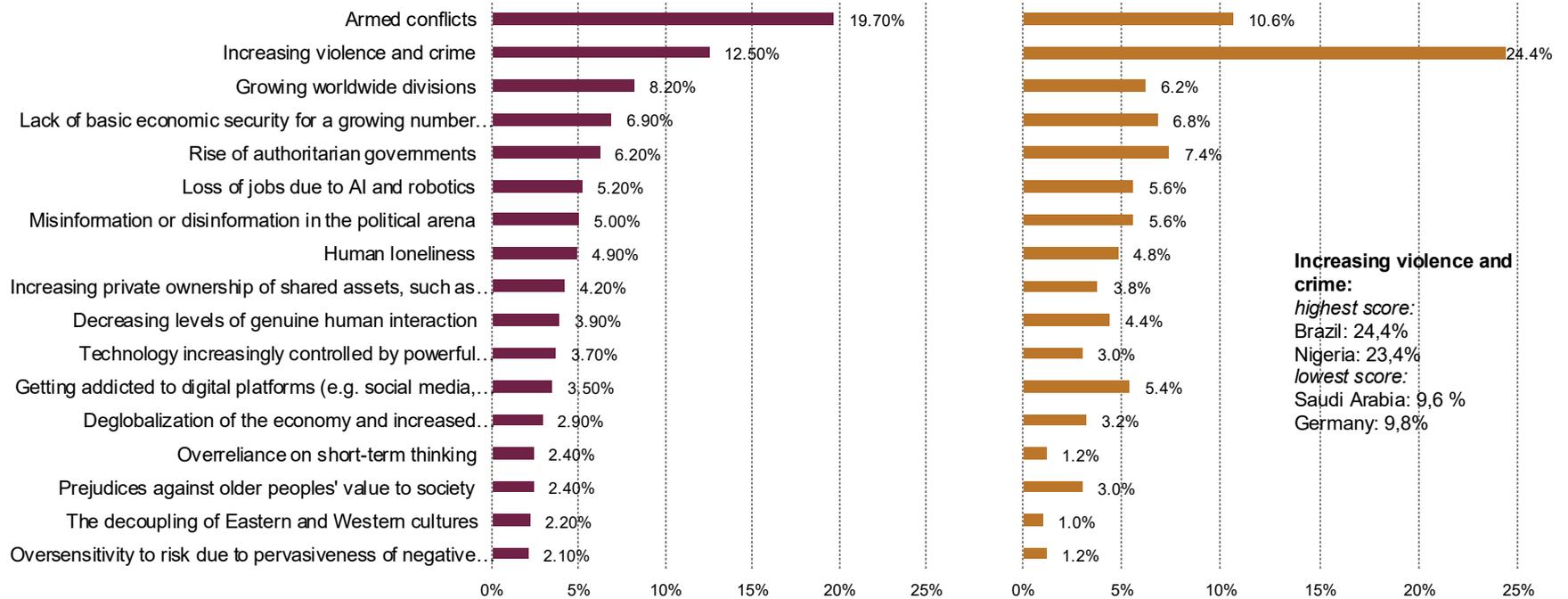
N=1.501 ■ North America

GLOBAL RISKS _ EUROPE vs. SOUTH AMERICA

Risks1a _ Which of these risks worry you the most right now?

Please rank up to 5, with #1 being the risk you're most worried about.

▶ TOP 1 RISK



Increasing violence and crime:
highest score:
 Brazil: 24,4%
 Nigeria: 23,4%
lowest score:
 Saudi Arabia: 9,6 %
 Germany: 9,8%

■ Europe N=2.001

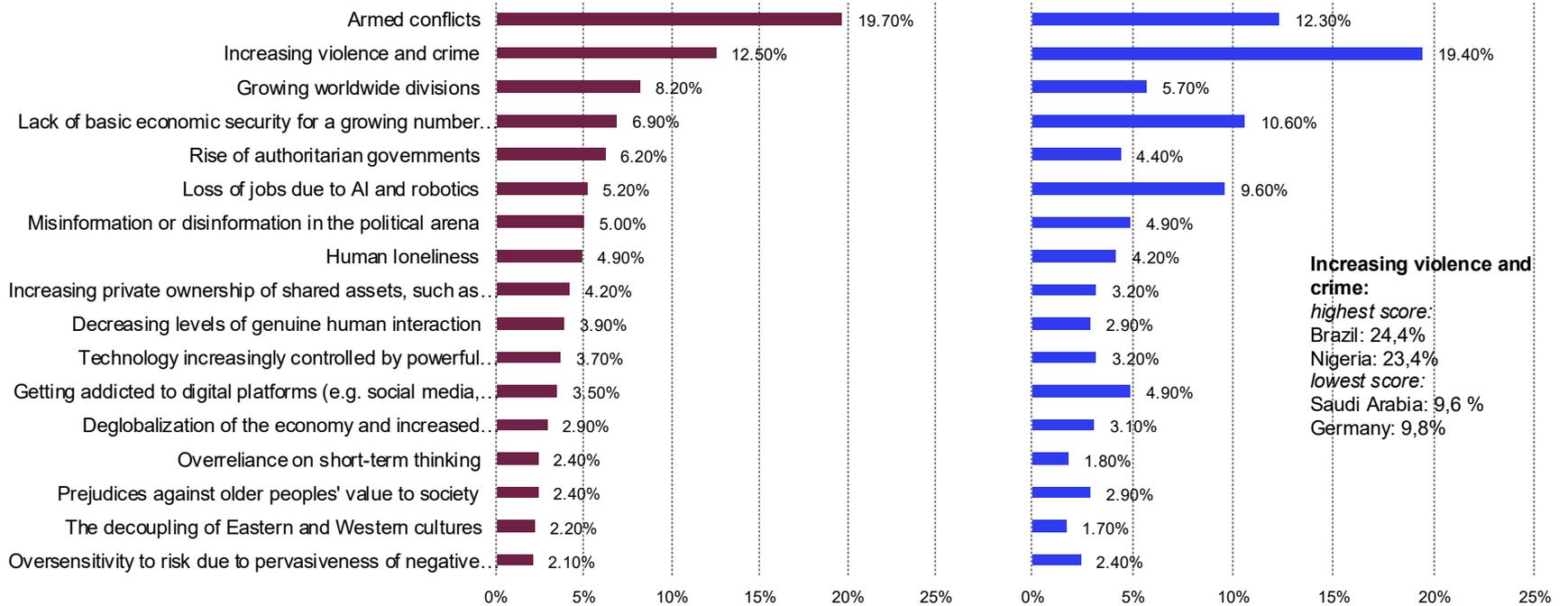
■ South America N=500

GLOBAL RISKS _ EUROPE vs. AFRICA

Risks1a _ Which of these risks worry you the most right now?

Please rank up to 5, with #1 being the risk you're most worried about.

▶ TOP 1 RISK



Increasing violence and crime:
highest score:
 Brazil: 24,4%
 Nigeria: 23,4%
lowest score:
 Saudi Arabia: 9,6 %
 Germany: 9,8%

■ Europe N=2.001

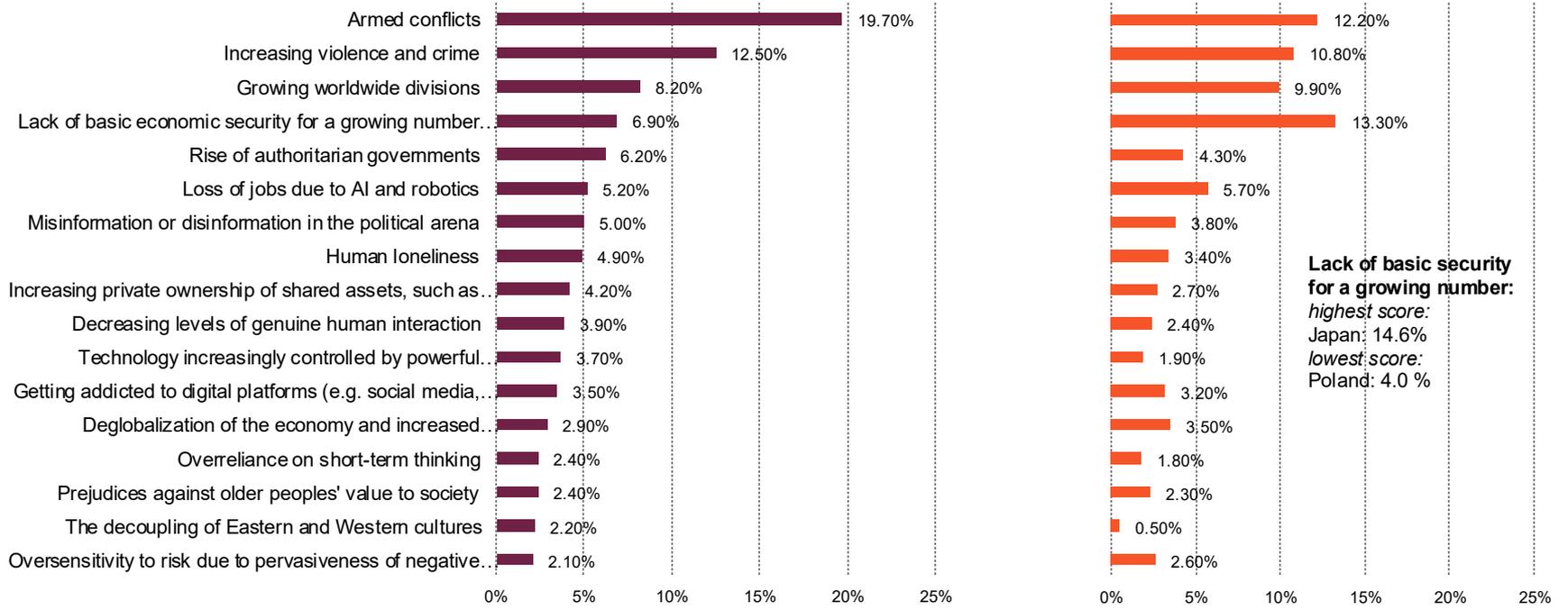
N=1.025 ■ Africa

GLOBAL RISKS _ EUROPE vs. EAST ASIA & PACIFIC

Risks1a _ Which of these risks worry you the most right now?

Please rank up to 5, with #1 being the risk you're most worried about.

▶ TOP 1 RISK



Lack of basic security for a growing number:
highest score: Japan: 14.6%
lowest score: Poland: 4.0 %

■ Europe N=2.001

N=2.000 ■ East Asia Pacific

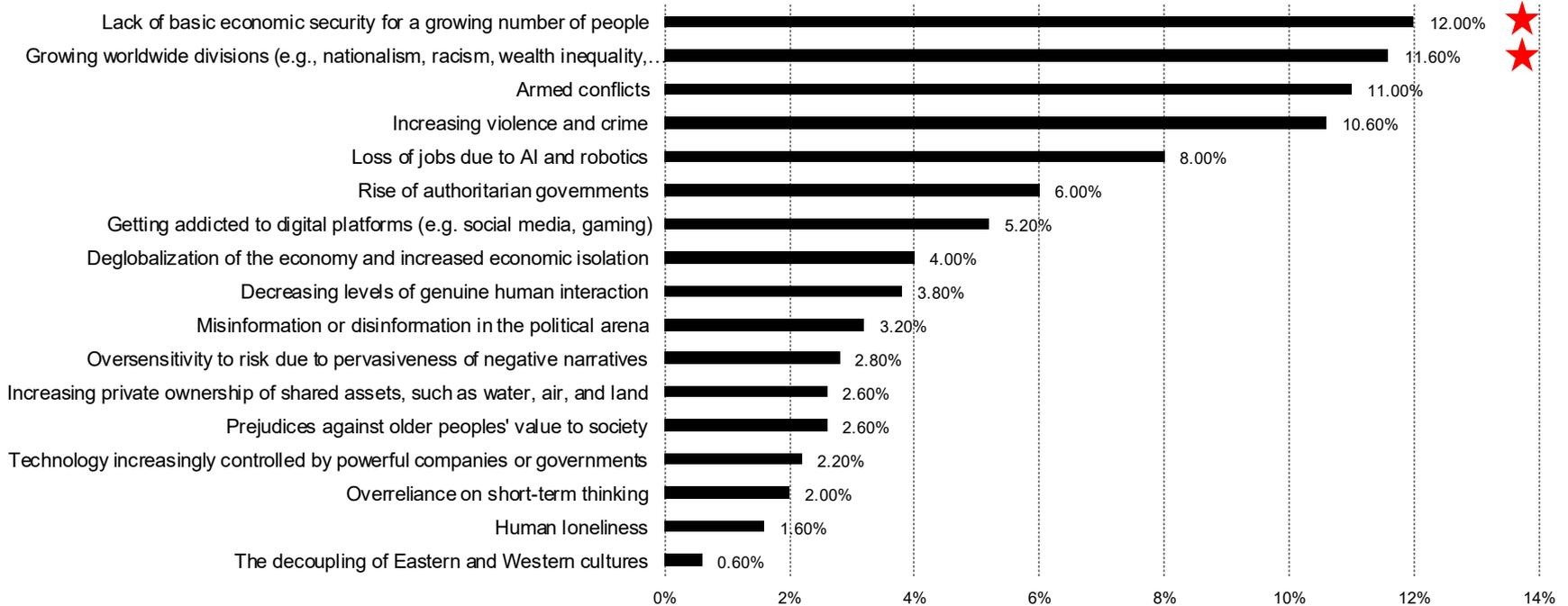
GLOBAL RISKS _ INDONESIA

Risks1a _ Which of these risks worry you the most right now?

Please rank up to 5, with #1 being the risk you're most worried about.



TOP 1 RISK



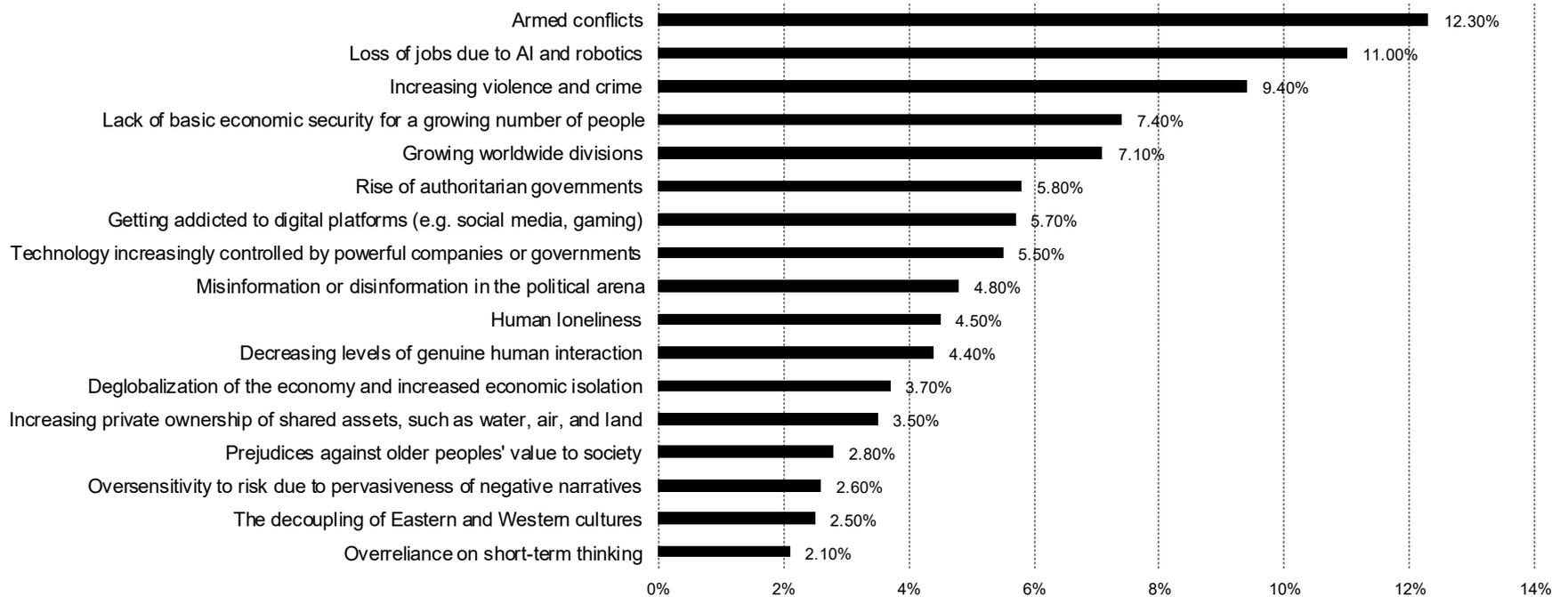
■ Indonesia N=500

GLOBAL RISKS _ TOTAL

Risks1b _ Which of these risks do you think will be the most significant in **10 years**?

Please rank up to 5, with #1 being the risk you think will be the most significant 10 years from now.

▶ TOP 1 RISK



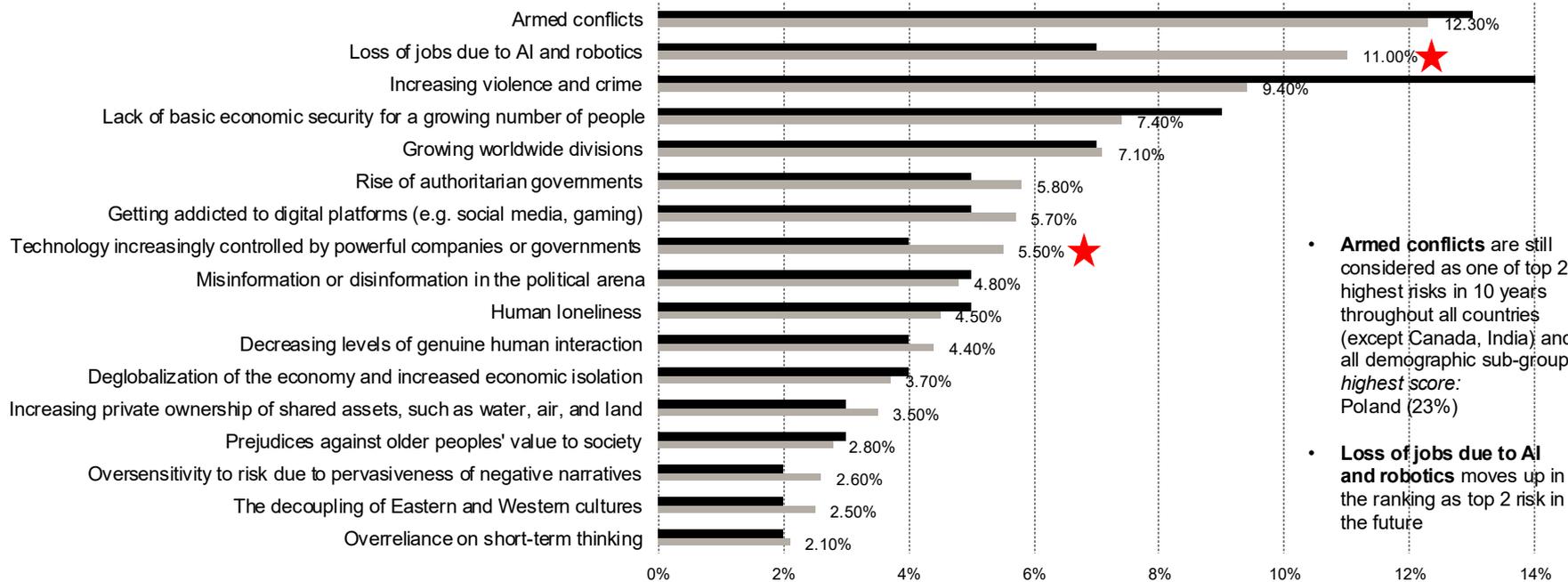
N=7,528 (except China)

GLOBAL RISKS _ TOTAL _ right now vs. in 10 years

Risks1b _ Which of these risks do you think will be the most significant in **10 years**?

Please rank up to 5, with #1 being the risk you think will be the most significant 10 years from now.

▶ TOP 1 RISK



- **Armed conflicts** are still considered as one of top 2 highest risks in 10 years throughout all countries (except Canada, India) and all demographic sub-groups *highest score:* Poland (23%)
- **Loss of jobs due to AI and robotics** moves up in the ranking as top 2 risk in the future

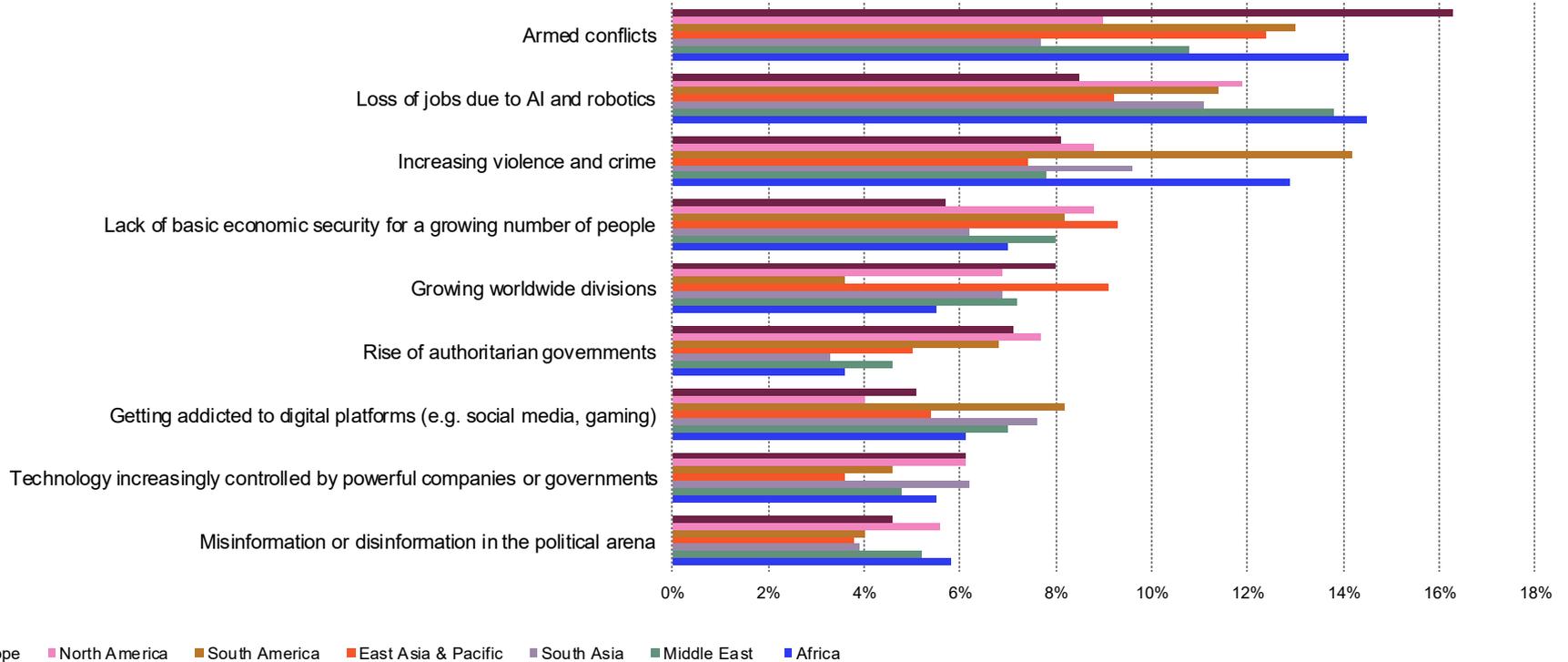
■ Right now: Global ■ In 10 years: Global N=7.528 (except China)

GLOBAL RISKS _ REGIONAL 1/2

Risks1b _ Which of these risks do you think will be the most significant in **10 years**?

Please rank up to 5, with #1 being the risk you think will be the most significant 10 years from now.

▶ TOP 1 RISK

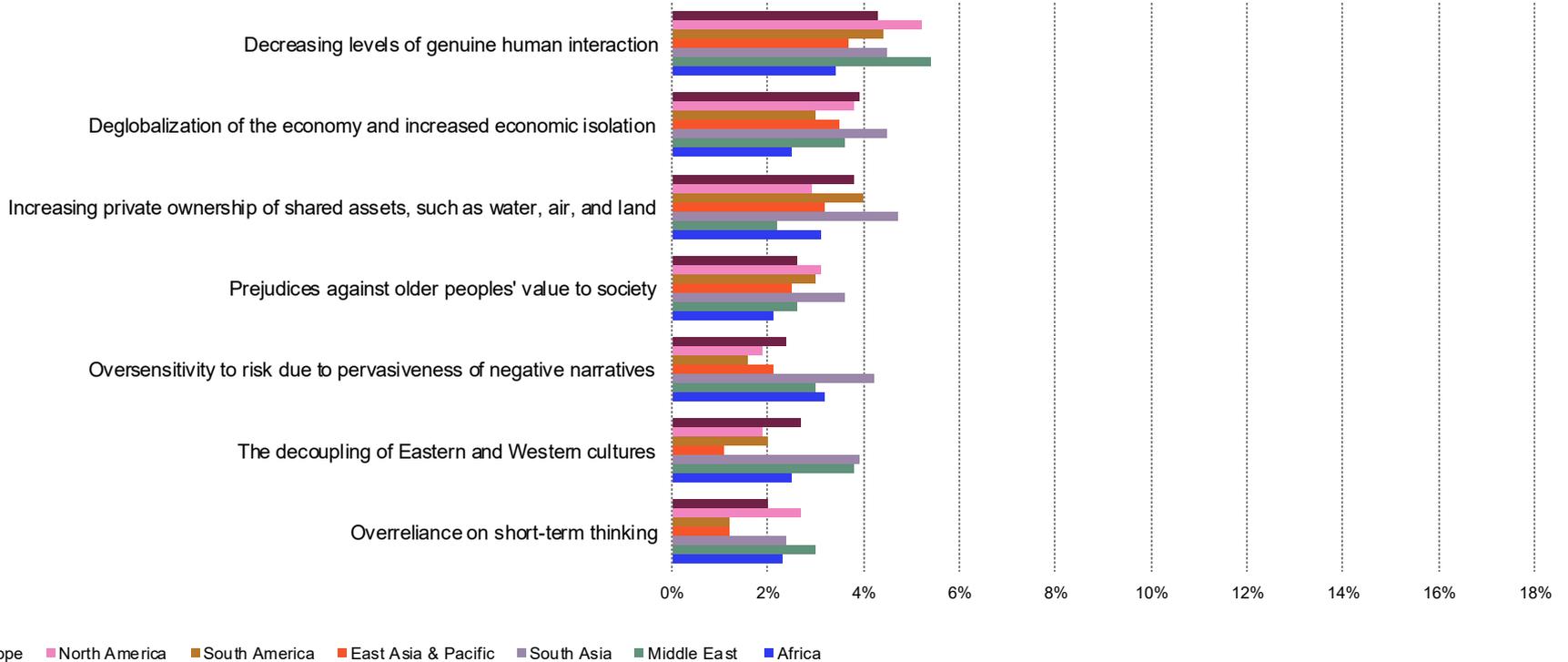


GLOBAL RISKS _ REGIONAL 2/2

Risks1b _ Which of these risks do you think will be the most significant in 10 years?

Please rank up to 5, with #1 being the risk you think will be the most significant 10 years from now.

▶ TOP 1 RISK

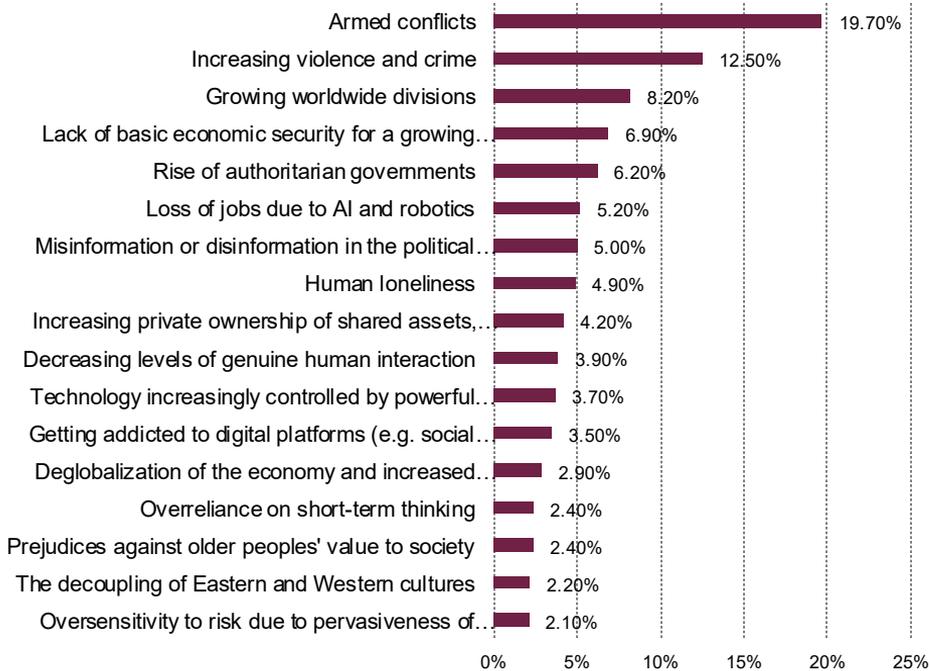


GLOBAL RISKS _ EUROPE

Risks1a _ Which of these risks worry you the most right now?

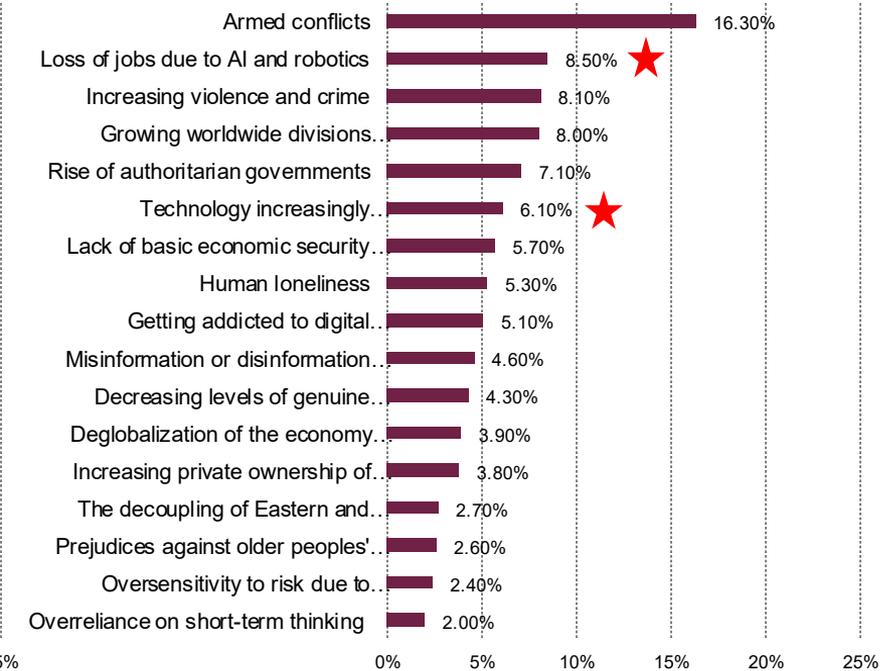
Please rank up to 5, with #1 being the risk you're most worried about.

TOP 1 RISK



■ Europe N=2.001

Risks1b _ Which of these risks do you think will be the most significant in 10 years? Please rank up to 5, with #1 being the risk you think will be the most significant 10 years from now



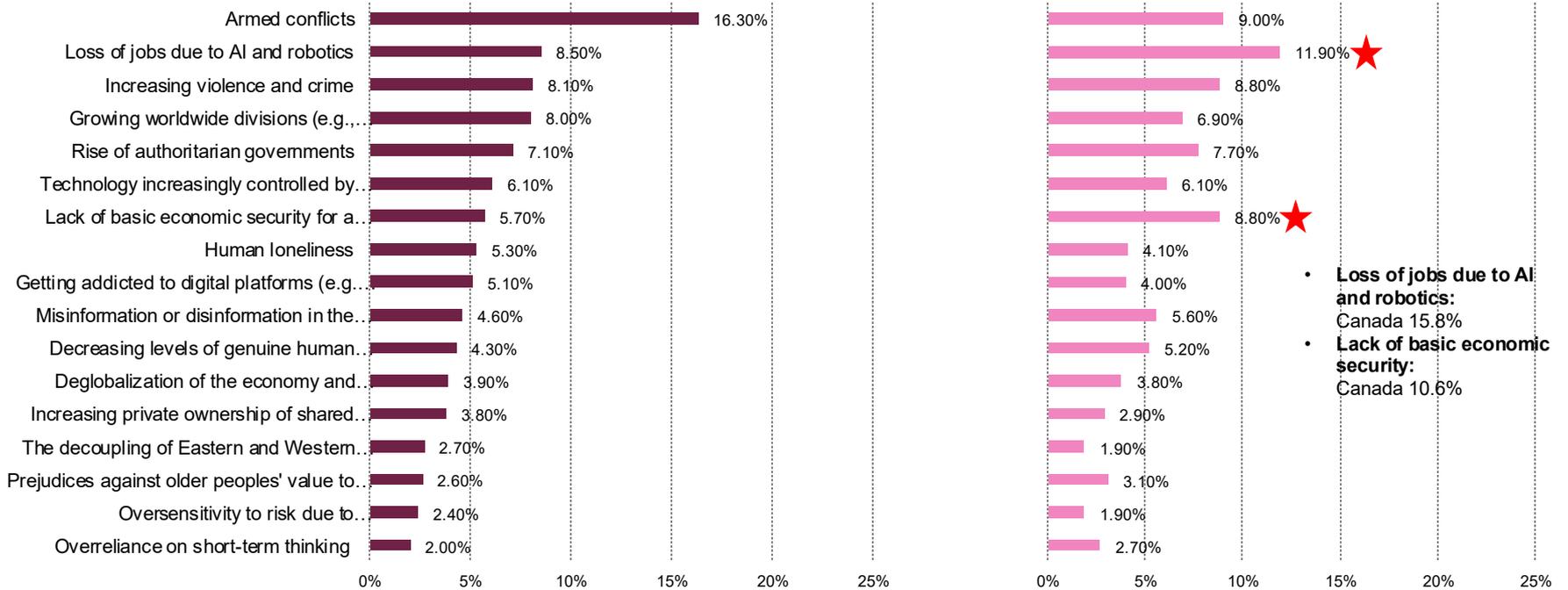
■ Europe

GLOBAL RISKS _ EUROPE vs. NORTH AMERICA

Risks1b _ Which of these risks do you think will be the most significant in **10 years**?

Please rank up to 5, with #1 being the risk you think will be the most significant 10 years from now

▶ TOP 1 RISK



- **Loss of jobs due to AI and robotics:**
Canada 15.8%
- **Lack of basic economic security:**
Canada 10.6%

■ Europe N=2.001

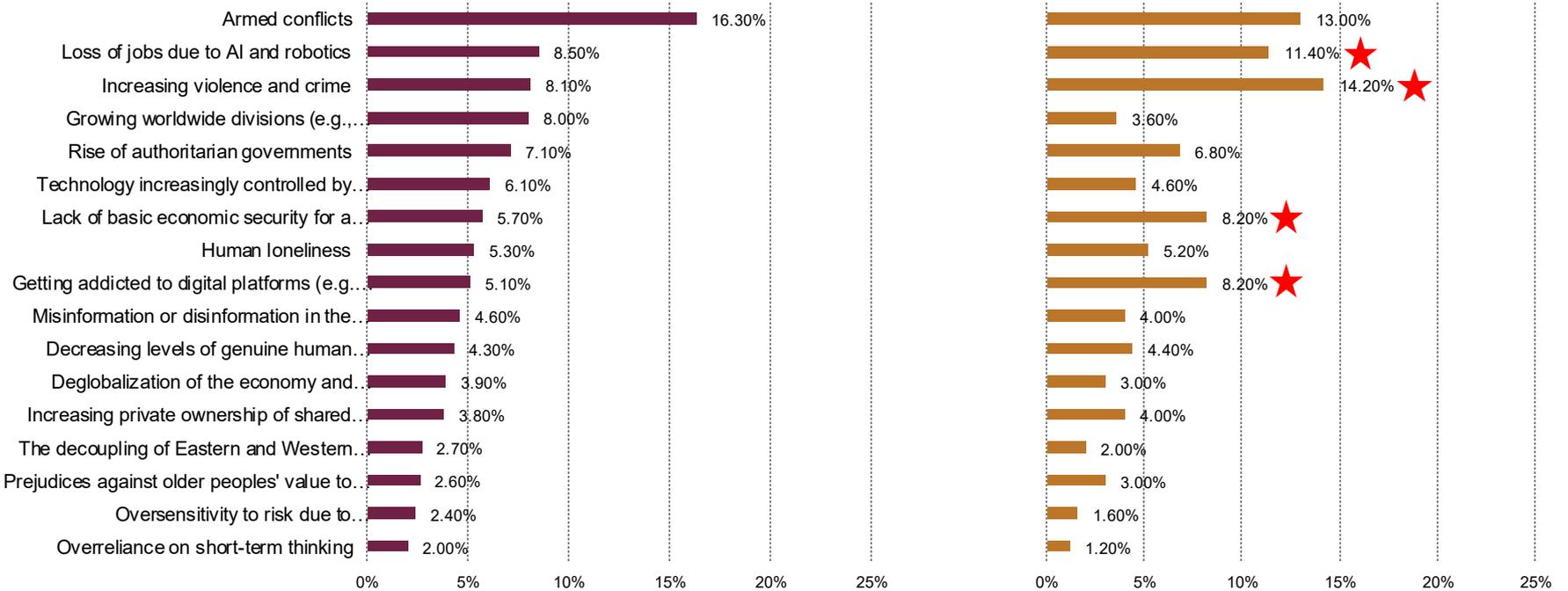
N=1.501 ■ North America

GLOBAL RISKS _ EUROPE vs. SOUTH AMERICA

Risks1b _ Which of these risks do you think will be the most significant in **10 years**?

Please rank up to 5, with #1 being the risk you think will be the most significant 10 years from now

▶ TOP 1 RISK



■ Europe N=2.001

■ South America N=500

A close-up photograph of a person's hand reaching upwards towards a bright light source, creating a lens flare effect. The hand is silhouetted against the light, and the background is dark and out of focus. The text "LIFE GOALS" is overlaid in the center in a bold, yellow font.

LIFE GOALS

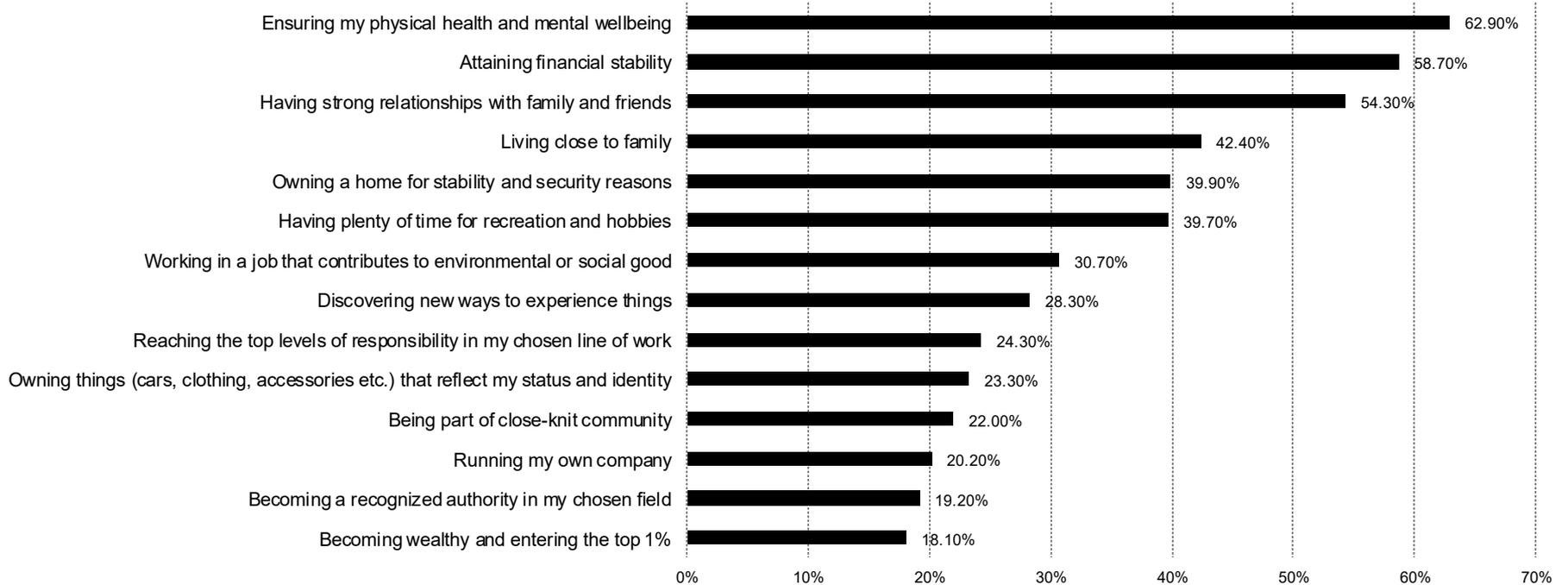
LIFE GOALS _ KEY FINDINGS

- **‘Ensuring my physical health and mental wellbeing’** is worldwide the number one life goal followed by **‘attaining financial stability’** and **‘having strong relationships with family and friends’**. Even though these statements receive slightly less approval compared to the previous round in 2022.
- For the age group 50-69 years old **‘ensuring my physical health and mental wellbeing’** and social factors such as **‘living close to family’** and **‘having strong relationships with family and friends’** are more important than for the younger age groups.
- Whereas the youngest age group (18 – 29 years old) considers **‘attaining financial stability’** as their number one life goal. **‘Owning a home for stability and security reasons’** is ranked third. Similarly, **‘becoming wealthy and entering the top 1%’** receives significantly higher approval in this age group (rank 7).
- **‘Owning a home’** is widely seen as an aspiration in South America and Middle East. Countries with highest approval are Brazil, Poland and Spain. Home ownership receives the least approval in Germany when compared with other countries.
- When asked about their life goals for the next 10 years, **‘running my own company’** emerges as a more important aspiration, receiving the highest approval ratings in Middle East and Africa. In contrast **‘working in a job that contributes to environmental and social goods’** is becoming less important.

LIFE GOALS _ TOTAL

Goals2a _ Thinking about your most important life goals today, please pick and rank up to 5 of your most important goals, with #1 being most important.

▶ WITHIN TOP 5 GOALS

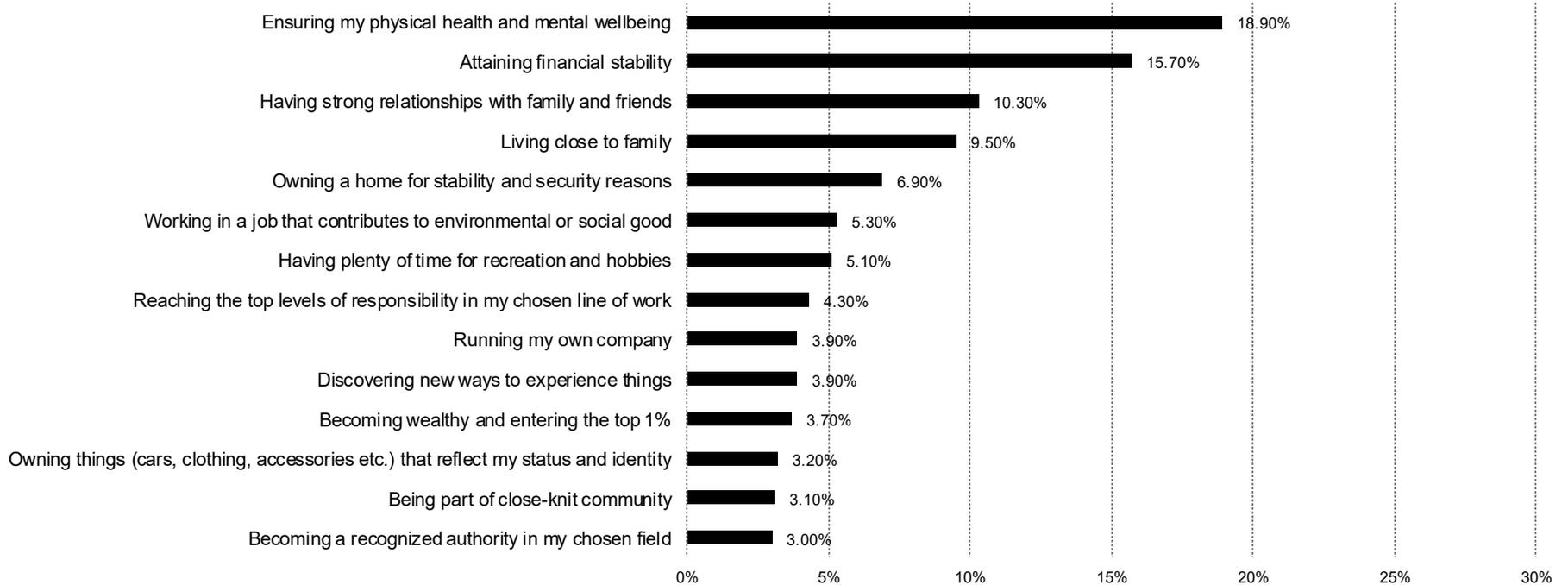


N=8,528

LIFE GOALS _ TOTAL

Goals2a _ Thinking about your most important life goals today, please pick and rank up to 5 of your most important goals, with #1 being most important.

▶ **TOP 1 GOAL**

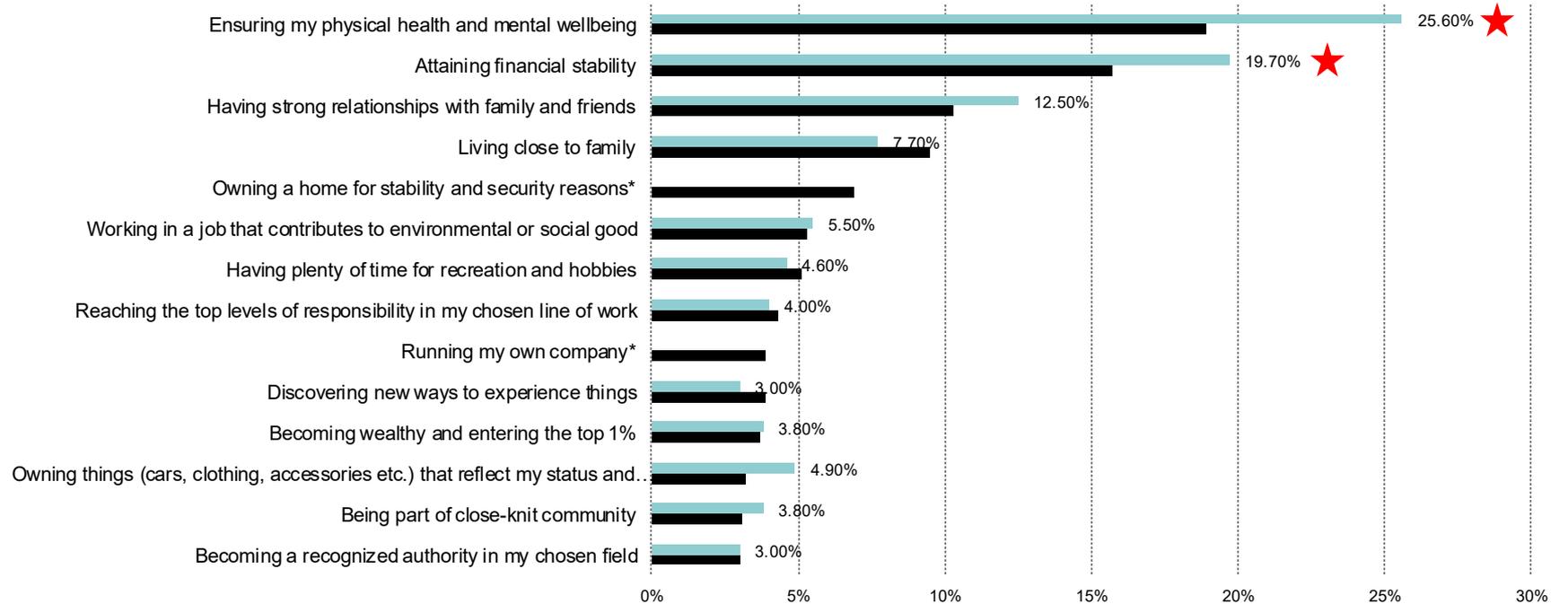


N=8.528

LIFE GOALS _ TOTAL _ 2025 vs. 2022

Goals2a _ Thinking about your most important life goals today, please pick and rank up to 5 of your most important goals, with #1 being most important.

▶ **TOP 1 GOAL**

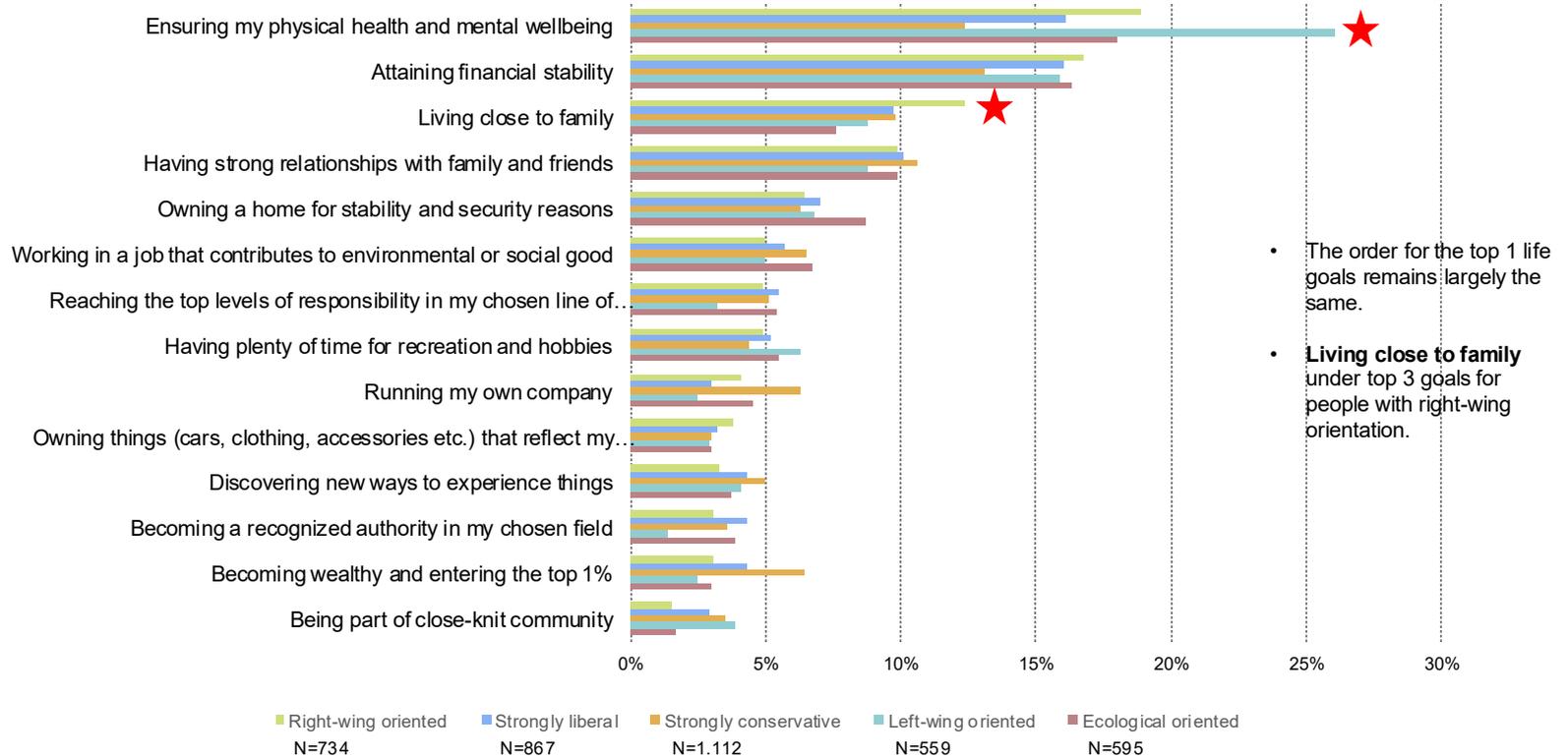


■ MCF 2022: Global N=13.102
 ■ QCF 2025: Global N=7.528 (except China) * NEW STATEMENTS!

LIFE GOALS _ RIGHT-WING ORIENTED vs. OTHER ORIENTATIONS

Goals2a _ Thinking about your most important life goals today, please pick and rank up to 5 of your most important goals, with #1 being most important.

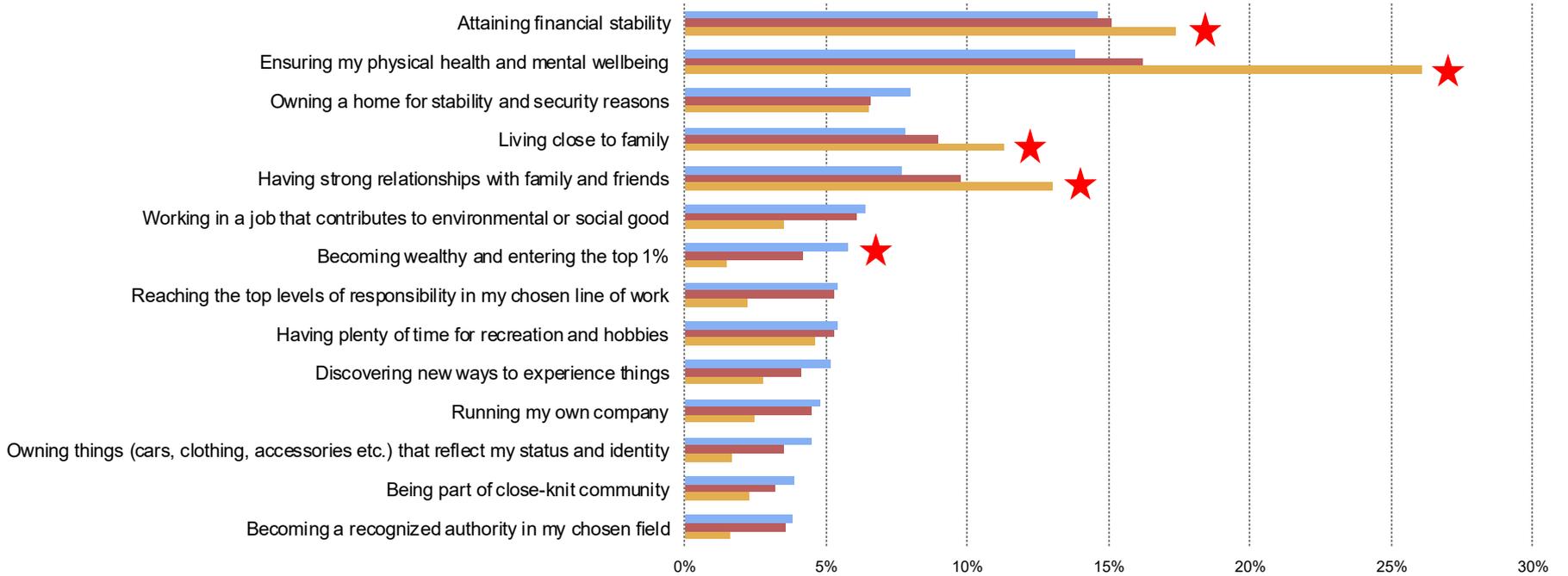
▶ TOP 1 GOAL



LIFE GOALS _ 18 - 29 vs. 30 – 49 vs. 50 - 69 YEARS OLD

Goals2a _ Thinking about your most important life goals today, please pick and rank up to 5 of your most important goals, with #1 being most important.

▶ TOP 1 GOAL



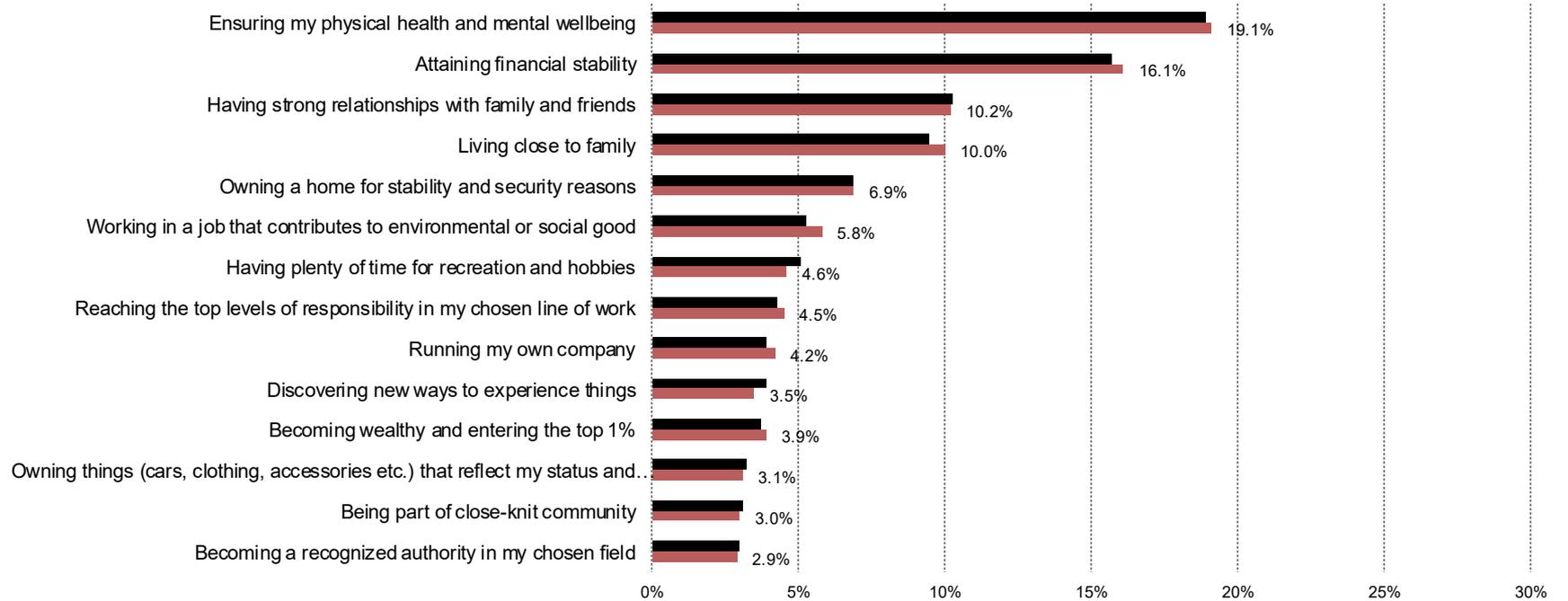
■ 18-29 y.o ■ 30-49 y.o ■ 50-69 y.o

N=2.240 N=3.447 N=2.841

LIFE GOALS _ Middle Class Consumers

Goals2a _ Thinking about your most important life goals today, please pick and rank up to 5 of your most important goals, with #1 being most important.

▶ TOP 1 GOAL



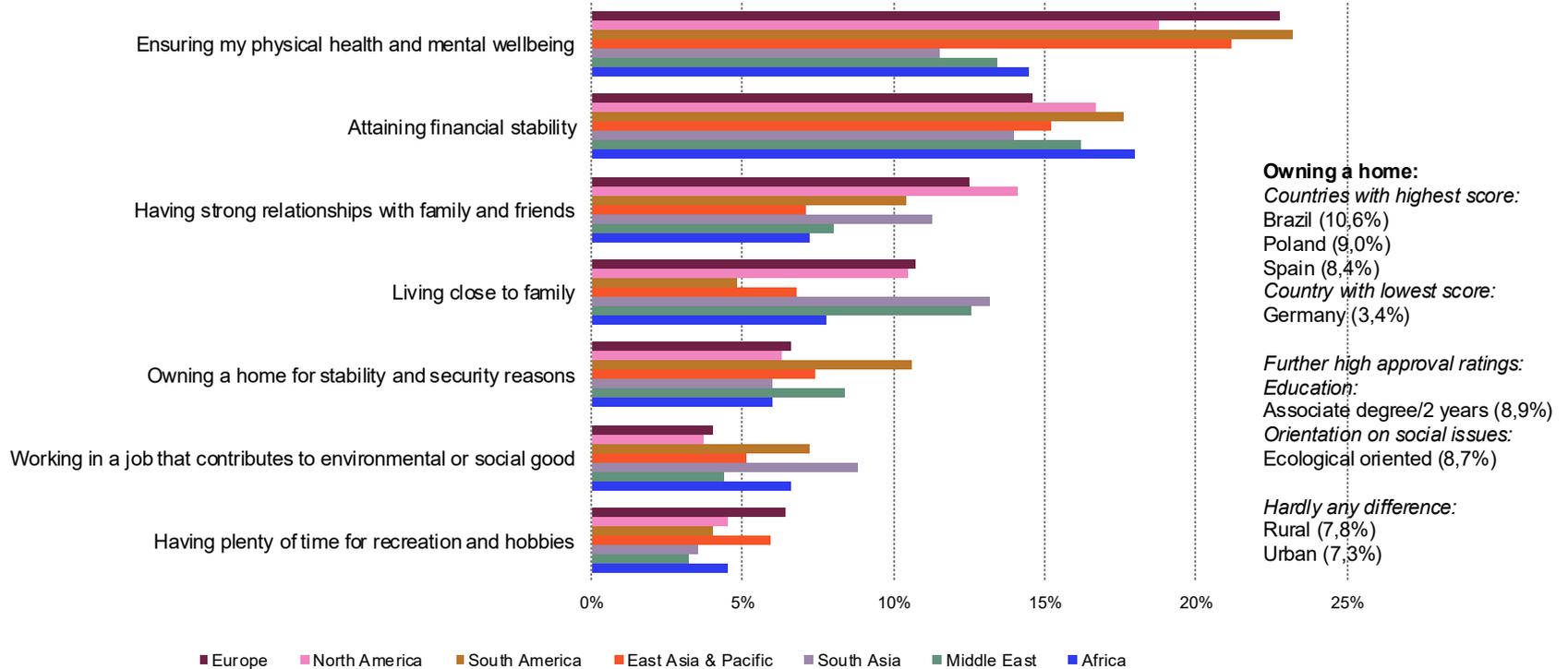
■ Global ■ Middle Class Consumers

N=8.528 N=4.477

LIFE GOALS _ REGIONAL 1/2

Goals2a _ Thinking about your most important life goals today, please pick and rank up to 5 of your most important goals, with #1 being most important.

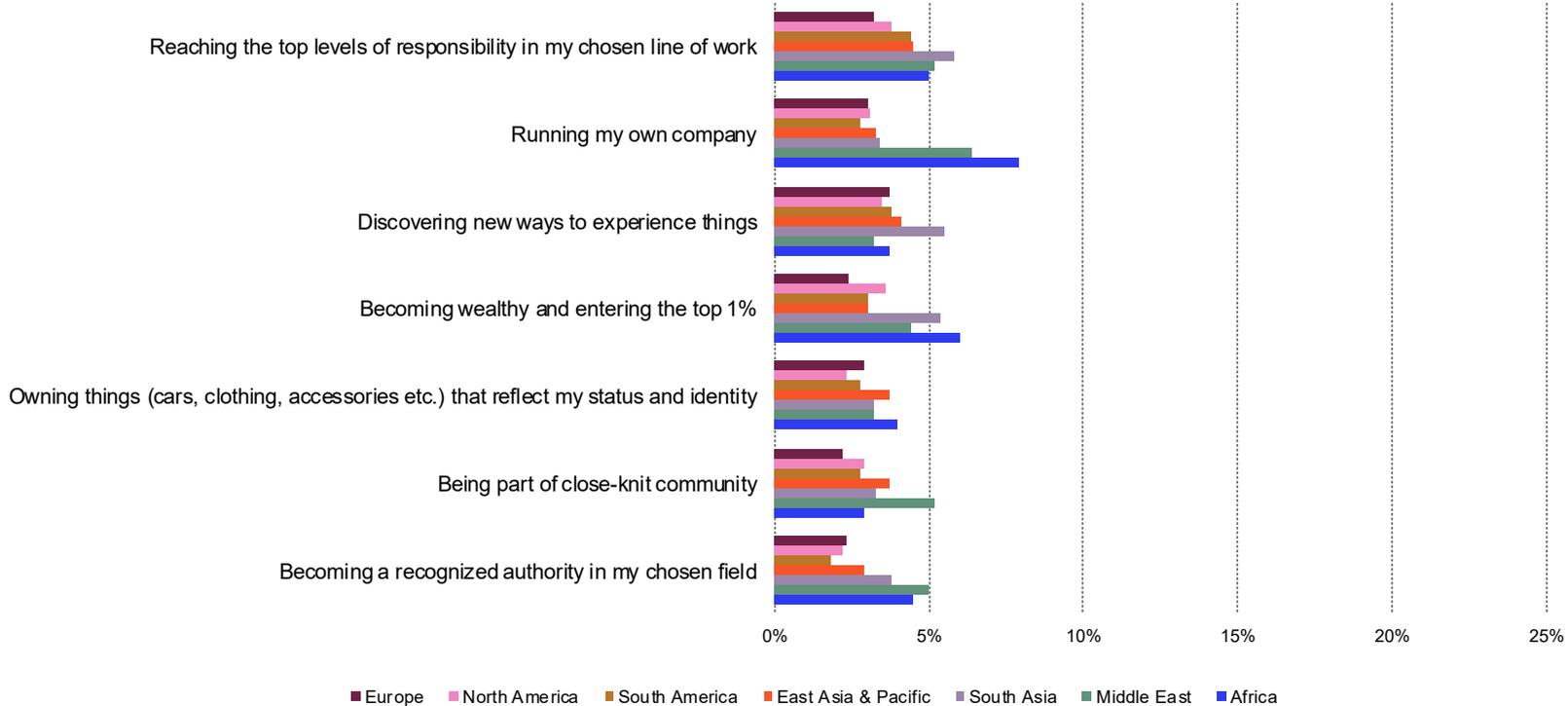
▶ TOP 1 GOAL



LIFE GOALS _ REGIONAL 2/2

Goals2a _ Thinking about your most important life goals today, please pick and rank up to 5 of your most important goals, with #1 being most important.

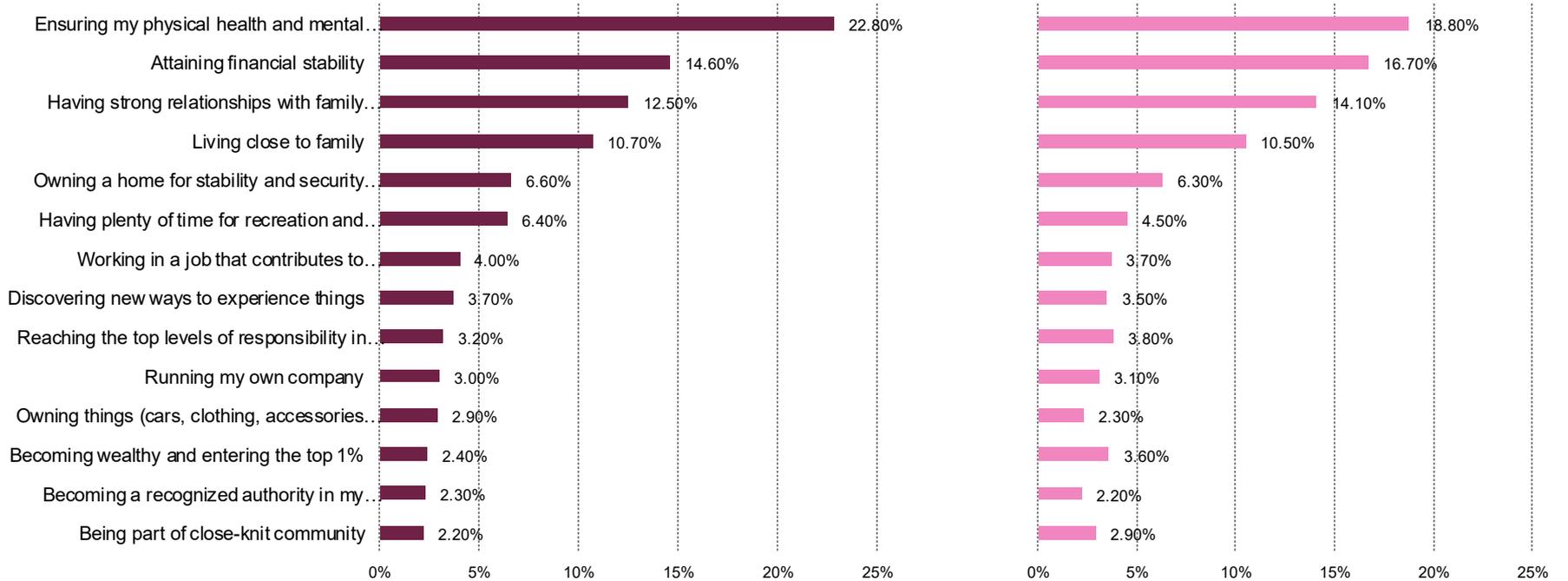
▶ TOP 1 GOAL



LIFE GOALS _ EUROPE vs. NORTH AMERICA

Goals2a _ Thinking about your most important life goals today, please pick and rank up to 5 of your most important goals, with #1 being most important.

▶ TOP 1 GOAL



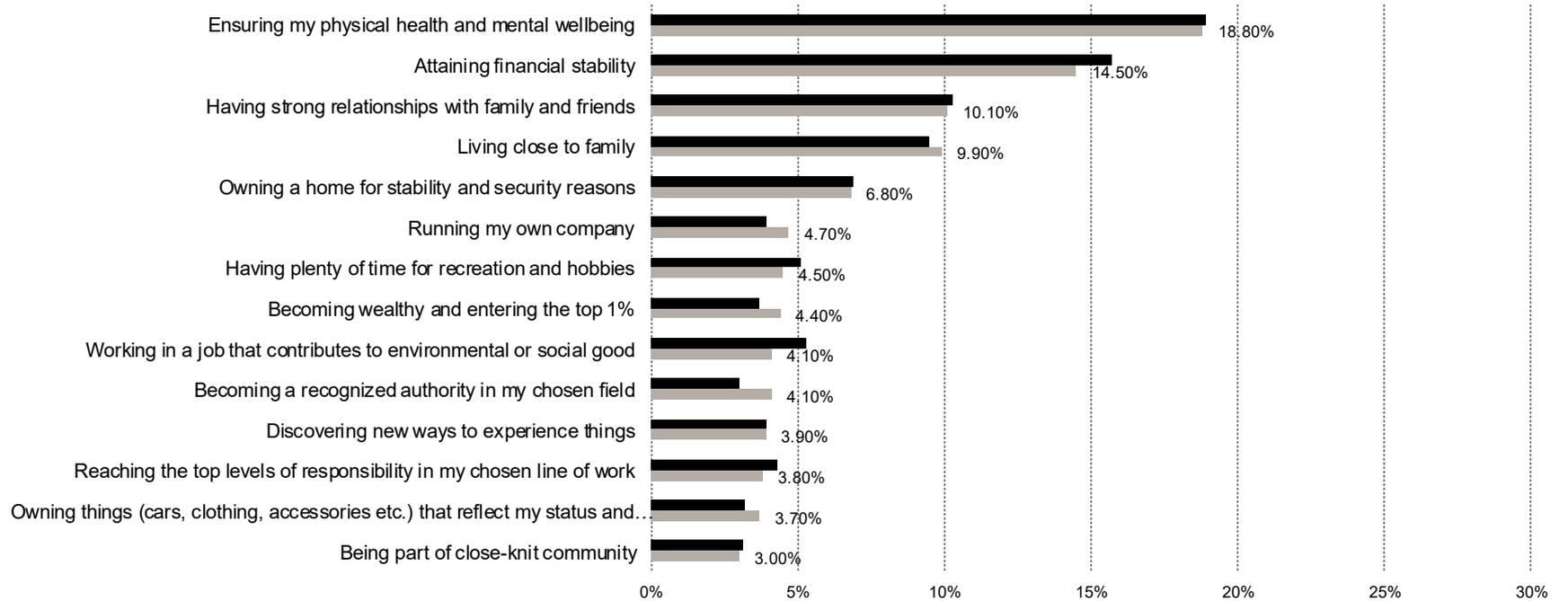
■ Europe N=2.001

■ North America N=1.501

LIFE GOALS _ TOTAL _ right now vs. in 10 years

Goals2b _ Thinking about your most important life goals 10 years from now, please pick and rank up to 5 of your most important goals, with #1 being most important.

TOP 1 GOAL

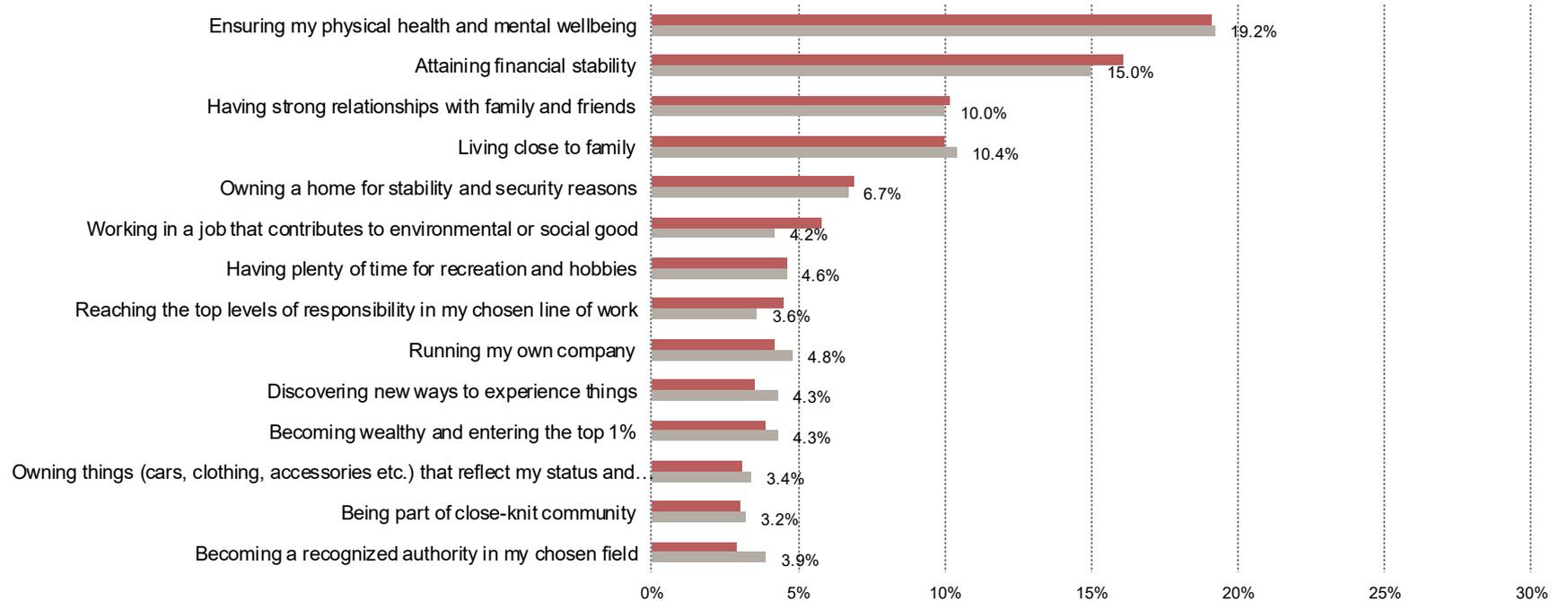


■ Right now: Global ■ In 10 years: Global N=8.528

LIFE GOALS _ Middle Class Consumers _ right now vs. in 10 years

Goals2b _ Thinking about your most important life goals 10 years from now, please pick and rank up to 5 of your most important goals, with #1 being most important.

▶ **TOP 1 GOAL**

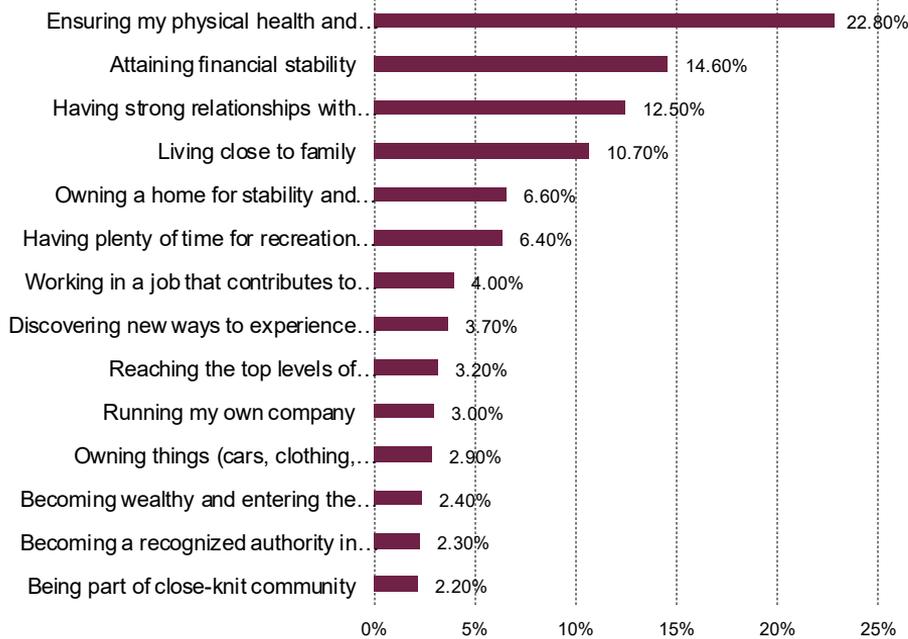


■ Right now: Middle Class Consumers ■ In 10 years: Middle Class Consumers N=4.477

LIFE GOALS _ EUROPE _ right now vs. in 10 years

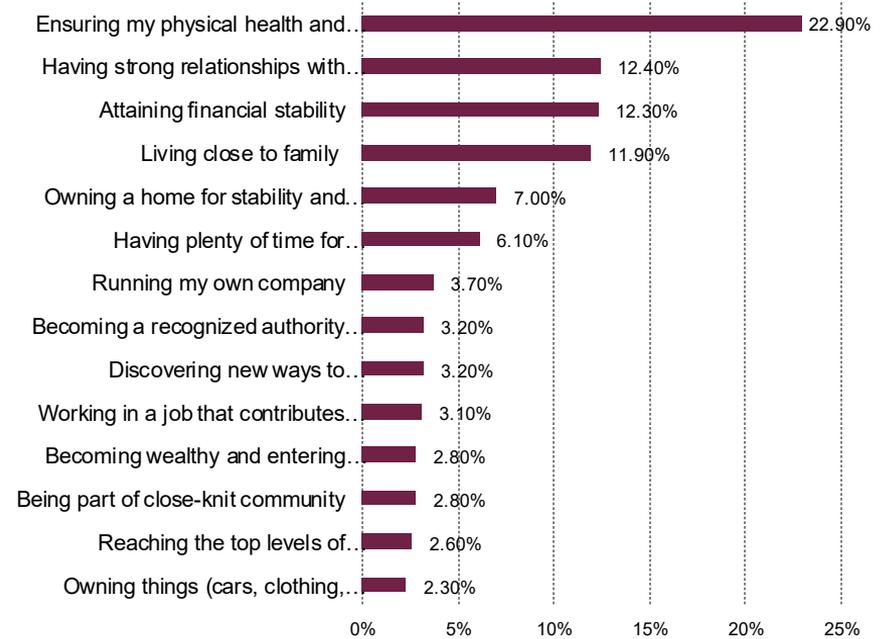
Goals2a _ Thinking about your most important life goals today, please pick and rank up to 5 of your most important goals, with #1 being most important.

▶ TOP 1 GOAL



■ Europe N=2.001

Goals2b _ Thinking about your most important life goals 10 years from now, Please pick and rank up to 5 of your most important goals, with #1 being most important.

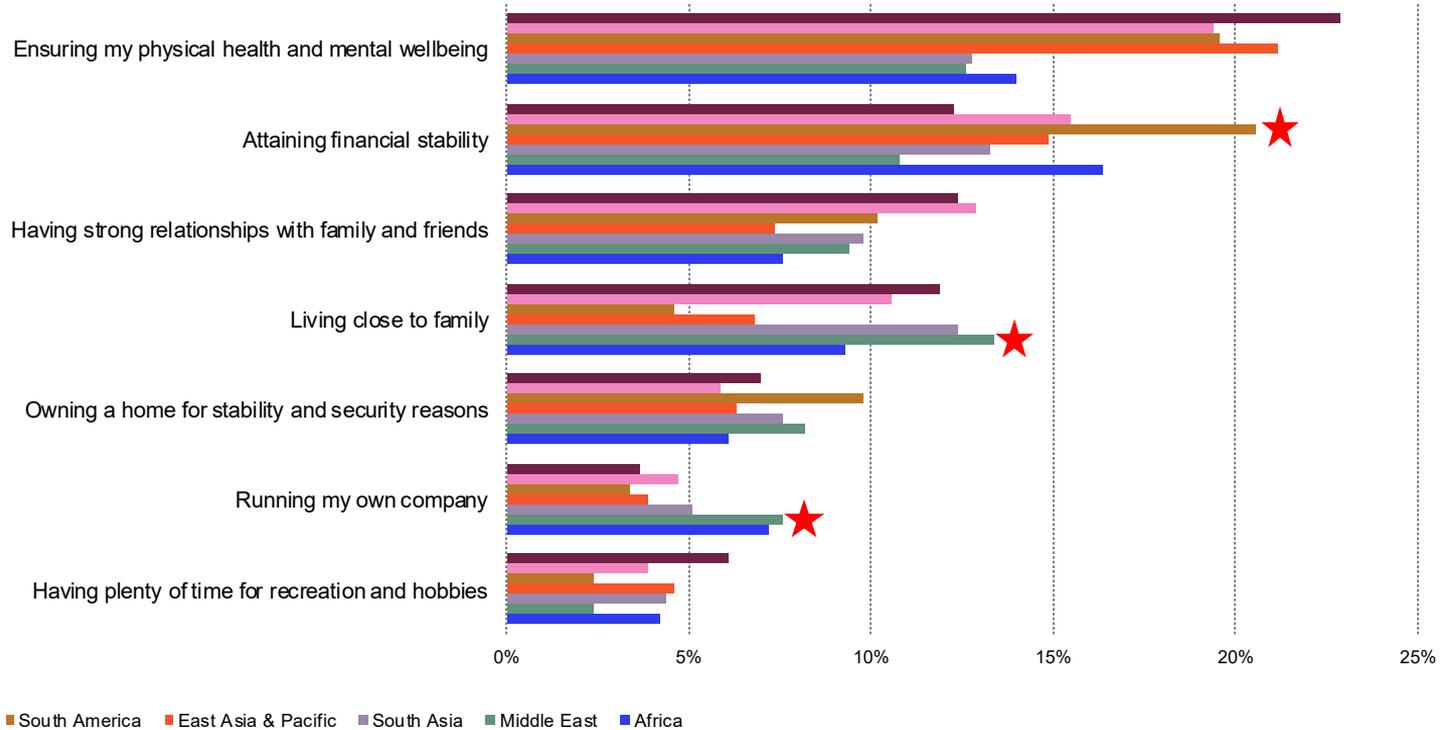


N=1.501 ■ Europe

LIFE GOALS _ REGIONAL 1/2

Goals2b _ Thinking about your most important life goals 10 years from now, please pick and rank up to 5 of your most important goals, with #1 being most important.

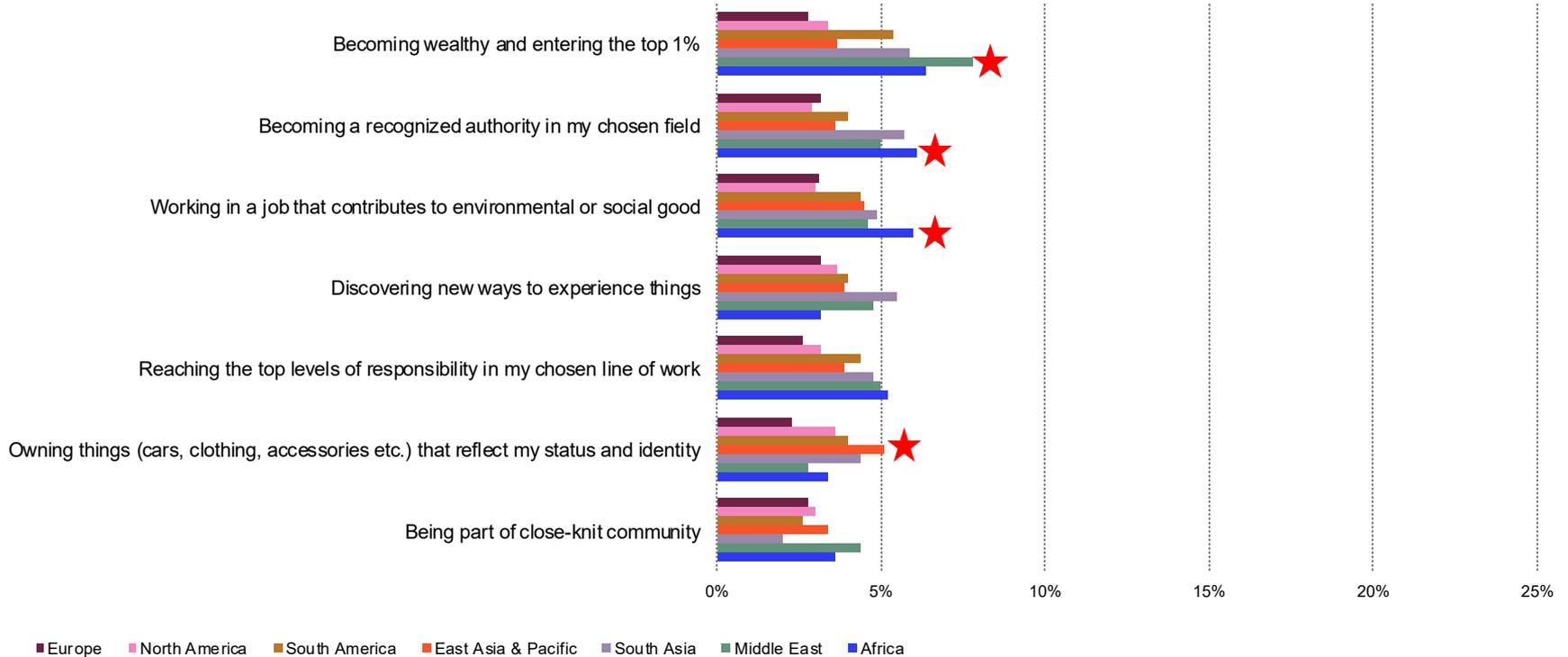
▶ TOP 1 GOAL



LIFE GOALS _ REGIONAL 2/2

Goals2b _ Thinking about your most important life goals 10 years from now, please pick and rank up to 5 of your most important goals, with #1 being most important.

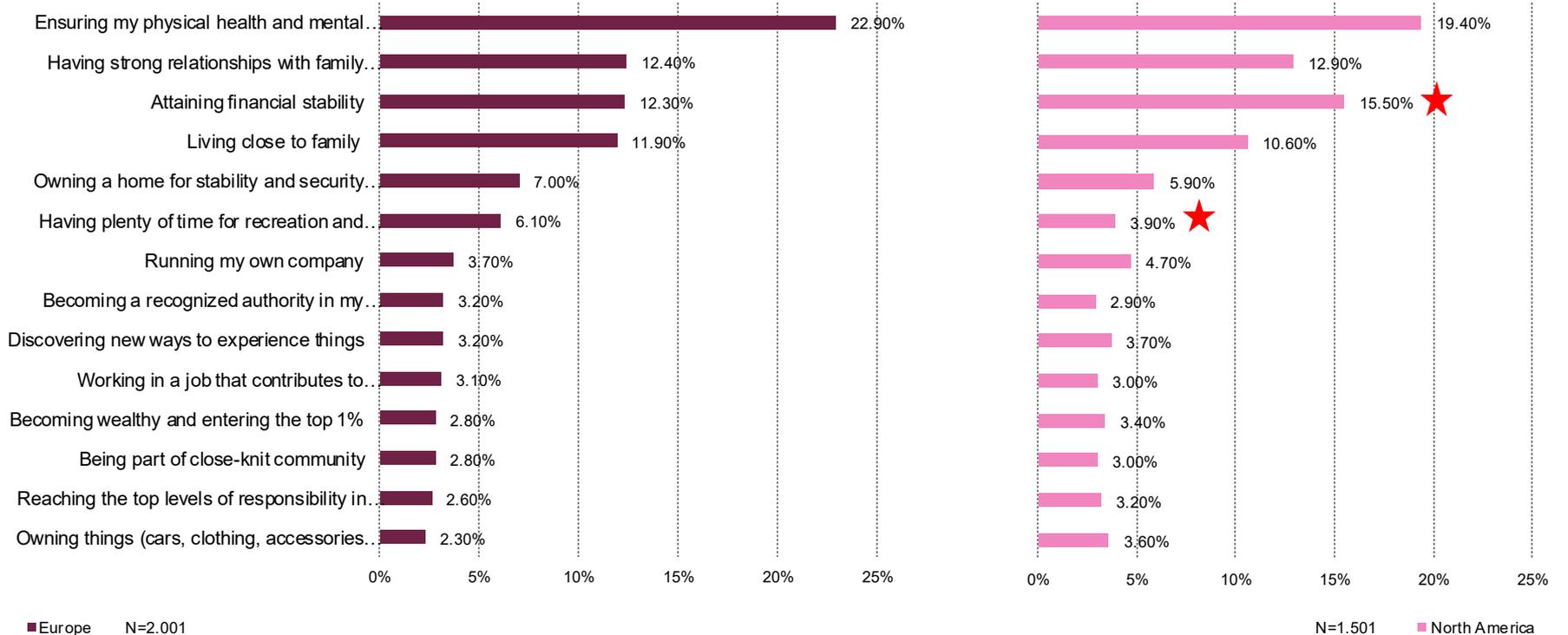
▶ TOP 1 GOAL



LIFE GOALS _ EUROPE vs. NORTH AMERICA

Goals2b _ Thinking about your most important life goals 10 years from now, please pick and rank up to 5 of your most important goals, with #1 being most important.

TOP 1 GOAL



A woman with long blonde hair, wearing a white, short-sleeved, knee-length dress, stands on a sandy beach. She is holding a silver, circular inflatable ring high above her head with both hands. The background shows the ocean with gentle waves and a clear blue sky. The text 'SUSTAINABLE LIFE' is overlaid in large, bold, yellow letters across the center of the image.

SUSTAINABLE LIFE

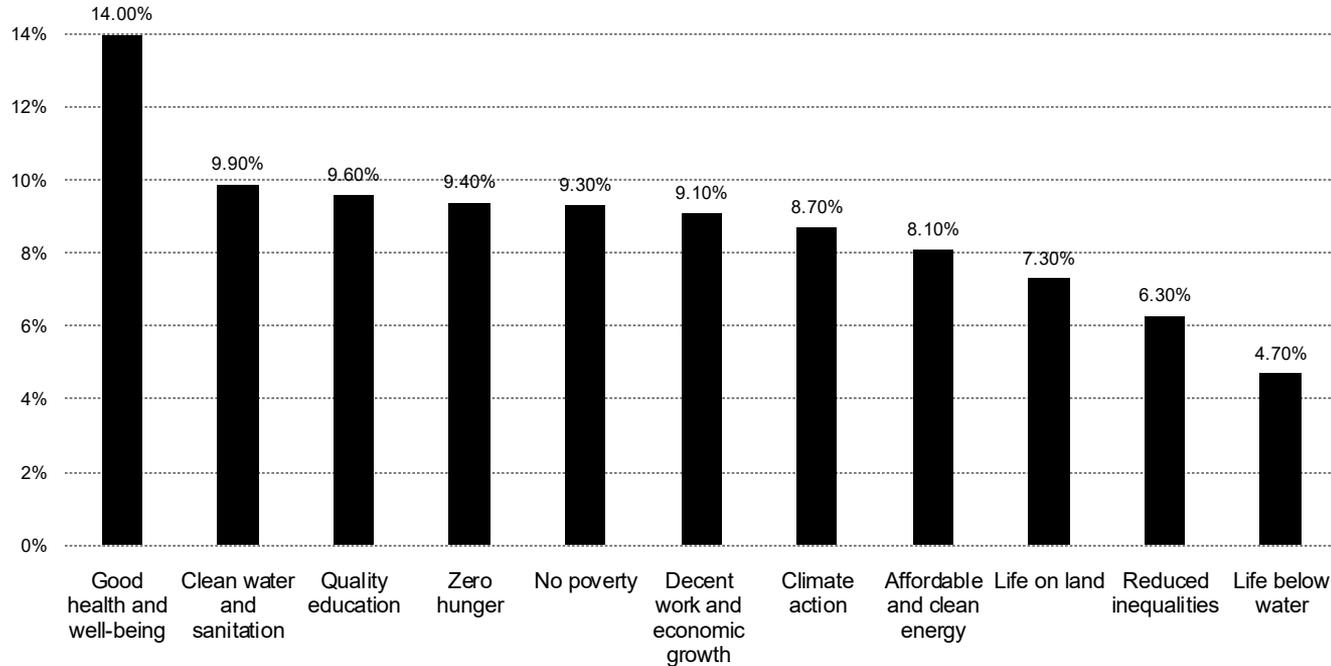
SUSTAINABLE LIFE _ KEY FINDINGS

- The United Nation sustainable development goal **‘good health and wellbeing’** is by far seen as top priority for making the world more sustainable.
- Compared to the 2022 study ,**‘zero hunger’** and **‘climate action’** show a decline in approval. Whereas **‘affordable and clean energy’** and **‘clean water and sanitation’** are becoming more important.
- **‘Quality education’** with highest approval ratings in the Middle East, Africa, and South Asia.
- When asked about most likely sustainable behavior of people in the future, the most common answer is **‘People will find tech-based solutions to solve environmental challenges, e.g. carbon capture (New technologies might help remove CO2 from the atmosphere)’** - with high approval ratings in Germany, Brazil, Nigeria and Saudi-Arabia. **‘Green urban living’** and **‘human-centered innovation’** globally ranked second and third.
- In general, the responsibility for sustainable behavior is perceived as lying with others (corporates, nations, communities etc.) rather than with oneself.

SUSTAINABILITY _ TOTAL

SustainabilityPreference5 _ When thinking about goals for making the world more sustainable, the UN Sustainable Development Goals often come to mind. Which of the following goals are most important to you? Please pick and rank your top 5, with #1 being most important to you.

▶ # 1 RANKING



N=8.528

Good health and well-being: Reduce the number of deaths and illnesses from hazardous chemicals and air, water and soil pollution and contamination. Ensure healthy lives and promote well-being for all at all ages.

Clean water and sanitation: Ensure availability and sustainable management of water and sanitation for all.

Quality education: Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all.

Zero hunger: End hunger, achieve food security and improved nutrition and promote sustainable agriculture.

No poverty: End poverty in all its forms everywhere.

Decent work and economic growth: Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all.

Climate action: Take urgent action to combat climate change and its impacts.

Affordable and clean energy: Ensure access to affordable, reliable, sustainable, and modern energy for all.

Life on land: Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and

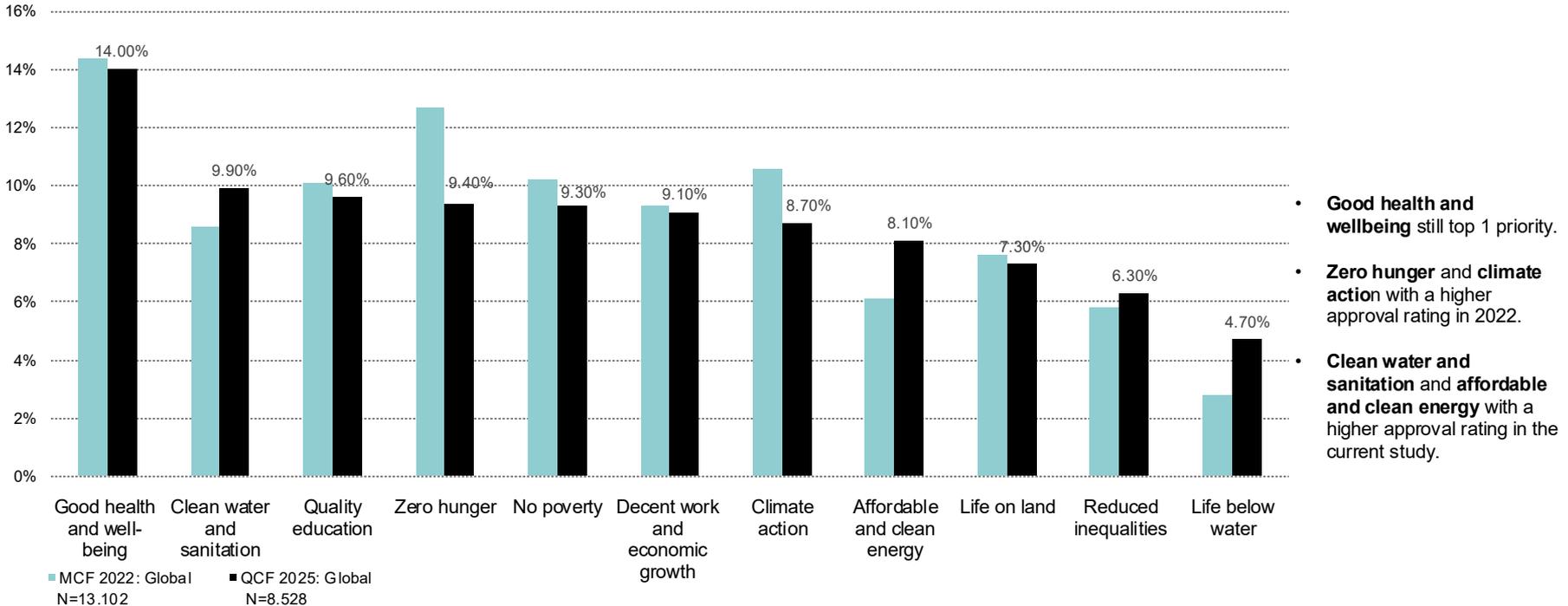
Reduced inequalities: Eliminate inequalities such as those based on gender, race, ability, and sexual preference.

Life below water: Conserve and sustainably use the oceans, seas, and marine resources for sustainable development.

SUSTAINABILITY _ TOTAL _ 2025 vs. 2022

SustainabilityPreference5 _ When thinking about goals for making the world more sustainable, the United Nations' Sustainable Development Goals often come to mind. Which of the following goals are most important to you?
Please pick and rank your top 5, with #1 being most important to you.

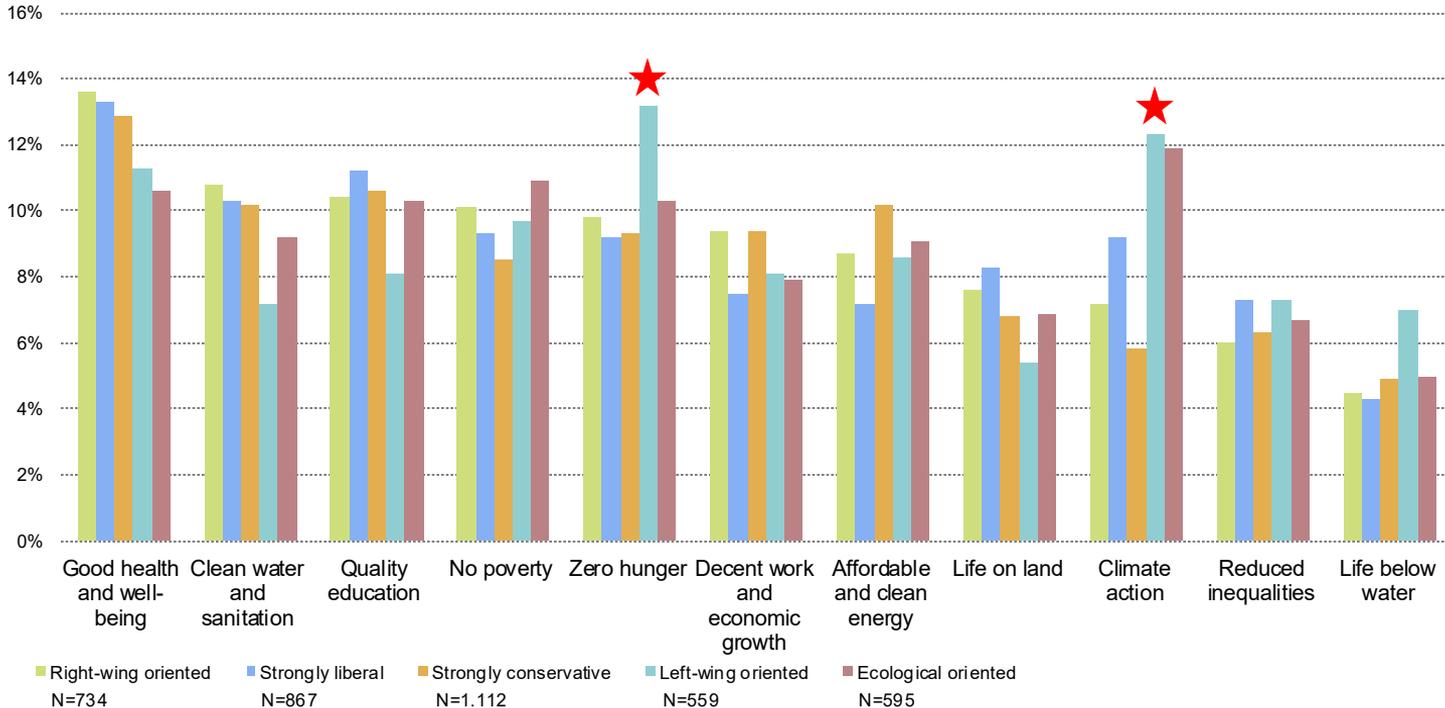
▶ # 1 RANKING



SUSTAINABILITY _ RIGHT - WING vs. OTHER ORIENTATIONS

SustainabilityPreference5 _ When thinking about goals for making the world more sustainable, the United Nations' Sustainable Development Goals often come to mind. Which of the following goals are most important to you?
Please pick and rank your top 5, with #1 being most important to you.

1 RANKING

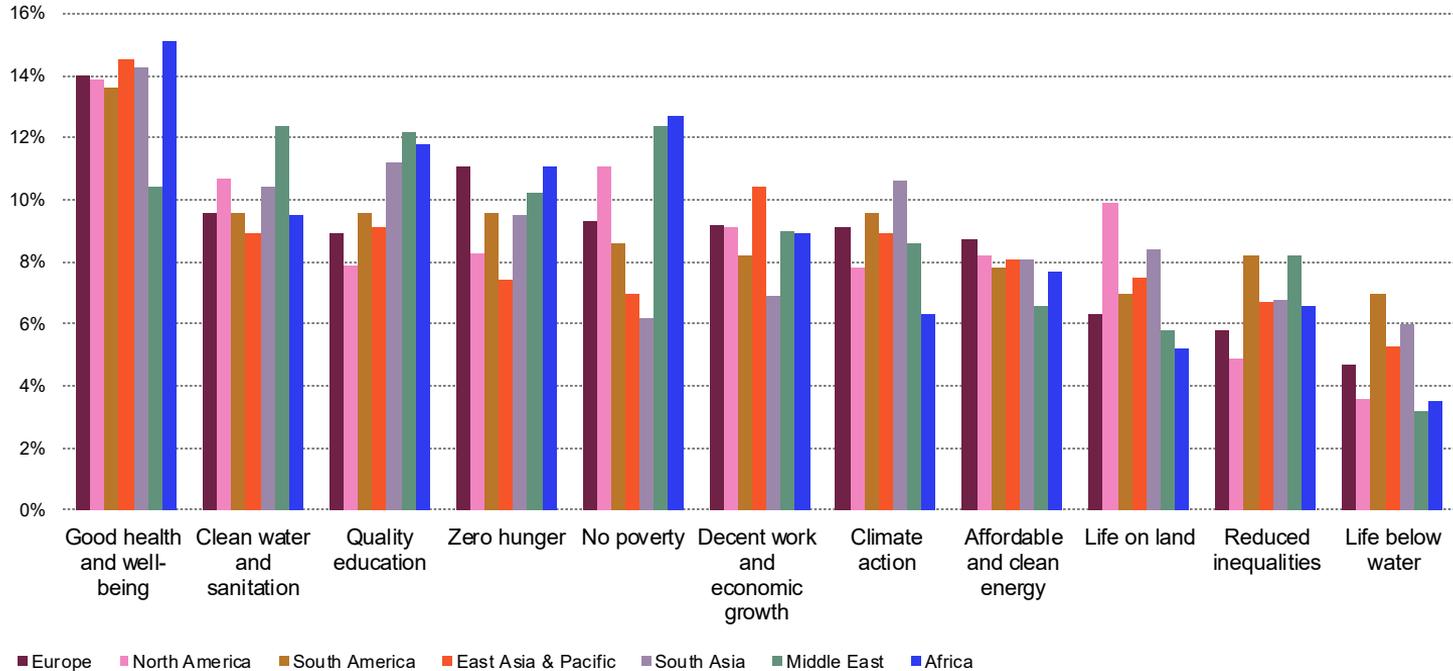


- Top 5 priorities remain largely the same.
- **Climate action** for people with strongly conservative and right-wing orientation less important.

SUSTAINABILITY _ REGIONAL

SustainabilityPreference5 _ When thinking about goals for making the world more sustainable, the United Nations' Sustainable Development Goals often come to mind. Which of the following goals are most important to you?
Please pick and rank your top 5, with #1 being most important to you.

1 RANKING



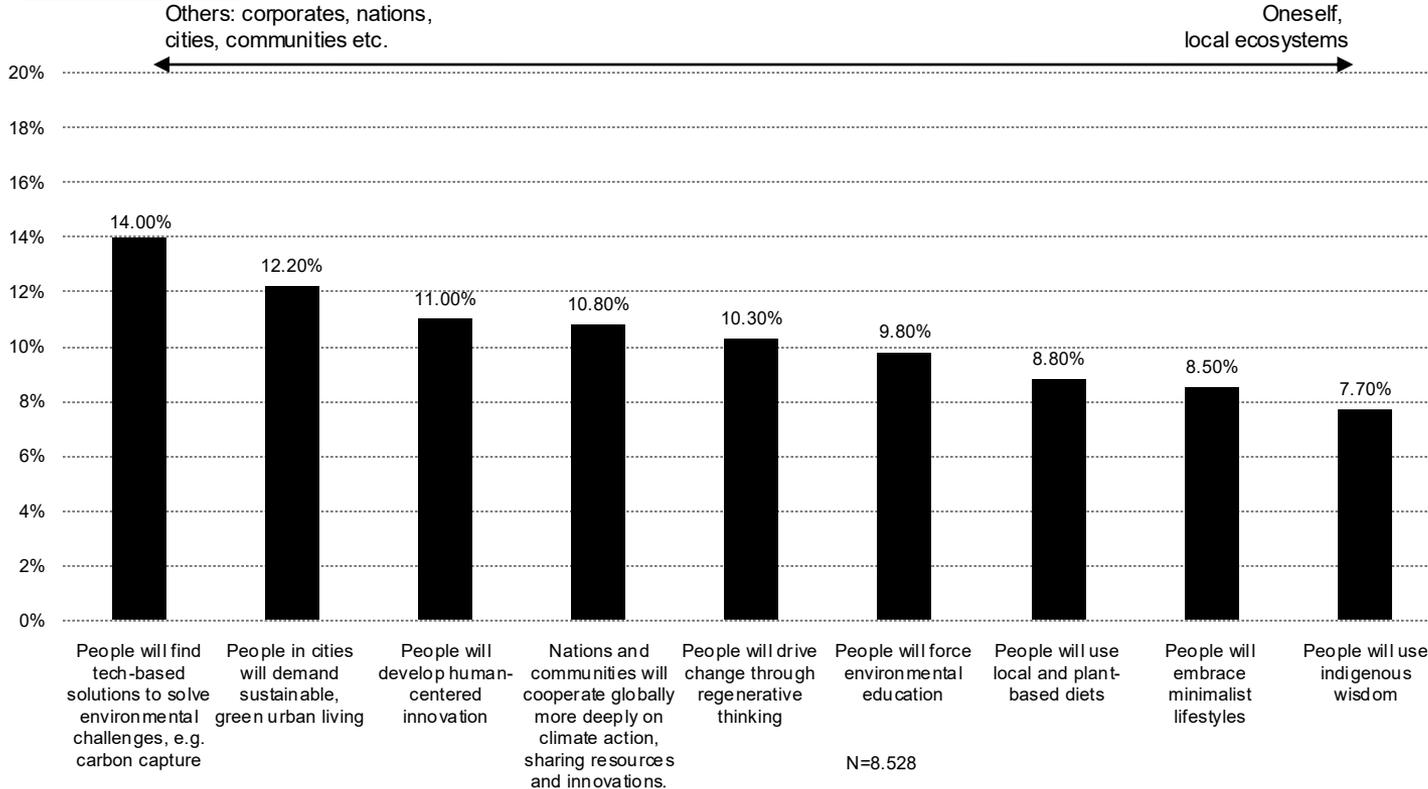
- Africa (12.7%) and Middle East (12.4%) show highest approval for **no poverty**.
- **Clean water and sanitation** highest ranked in Middle East (12.4%).
- **Quality education** regarded as most important in Middle East (12.2%), Africa (11.8%) and South Asia (11.2%).

SUSTAINABILITY _ TOTAL

SustainableLife6 _ Which are the most likely sustainable behaviors of people in the future?

Please rank the top 3 items, with #1 being the most important.

1 RANKING



People will find tech-based solutions to solve environmental challenges, e.g. carbon capture (New technologies might help remove CO2 from the atmosphere).

People in cities will demand sustainable, green urban living (Cities could be redesigned for walkability, public transport, and green spaces, reducing).

People will develop human-centered innovation (Future innovations should be fair and good for the environment. Technology shouldn't just focus on speed).

Nations and communities will cooperate globally more deeply on climate action, sharing resources and innovations.

People will drive change through regenerative thinking (People could adopt a circular economy where products are reused, repaired, and recycled to reduce).

People will force environmental education (Greater awareness and education from a young age could lead to a cultural shift in how people interact with).

People will use local and plant-based diets (Prioritize local, seasonal food to reduce agricultural emissions and food miles).

People will embrace minimalist lifestyles (Consuming less and focusing more on quality of life than material wealth).

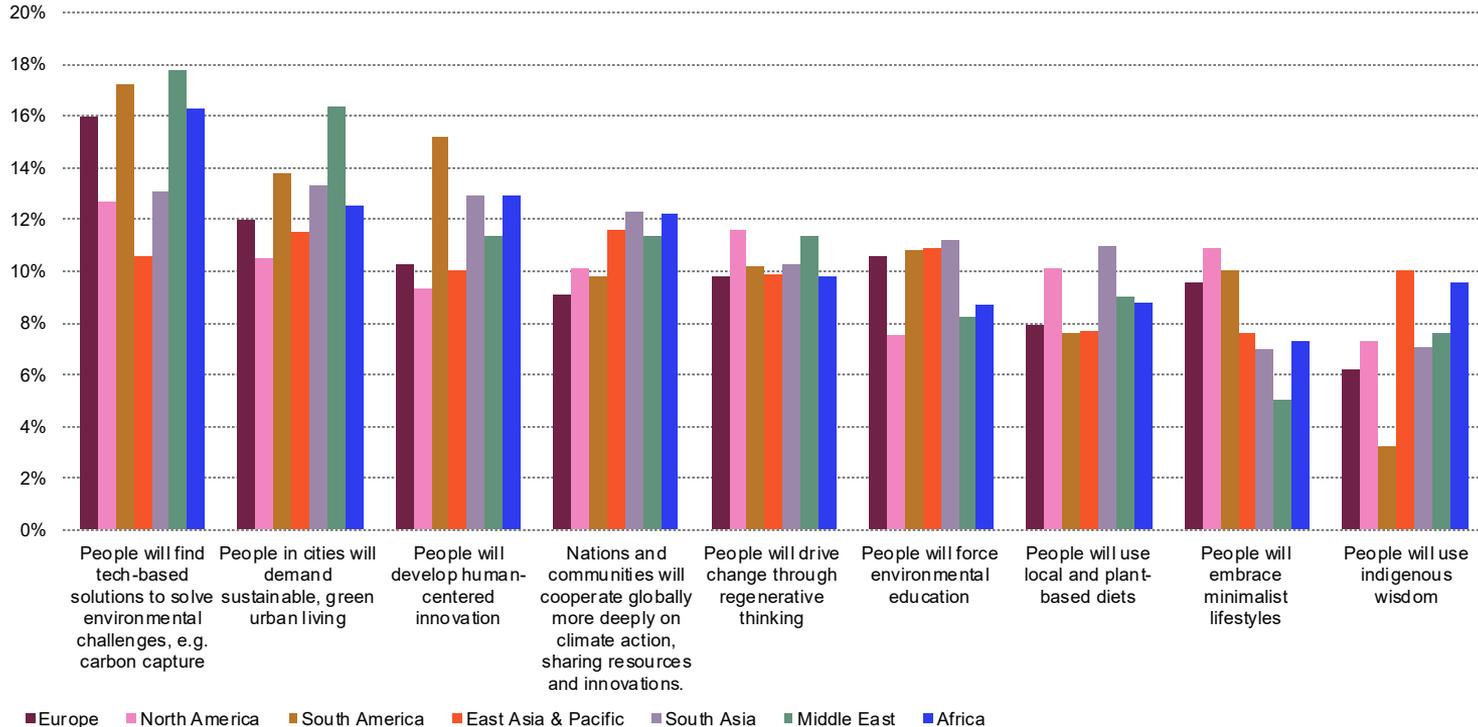
People will use indigenous wisdom (Their deep understanding of local ecosystems, seasonal cycles, and sustainable practices can guide future societies).

SUSTAINABILITY _ REGIONAL

SustainableLife6 _ Which are the most likely sustainable behaviors of people in the future?

Please rank the top 3 items, with #1 being the most important.

1 RANKING



- High approval ratings for **tech-based solutions** in Germany, Brazil, Nigeria and Saudi-Arabia (< 17%).
- Students see **nations and communities will cooperate globally more deeply** on 2nd place (15.5%).



HEALTH AND WELLBEEING

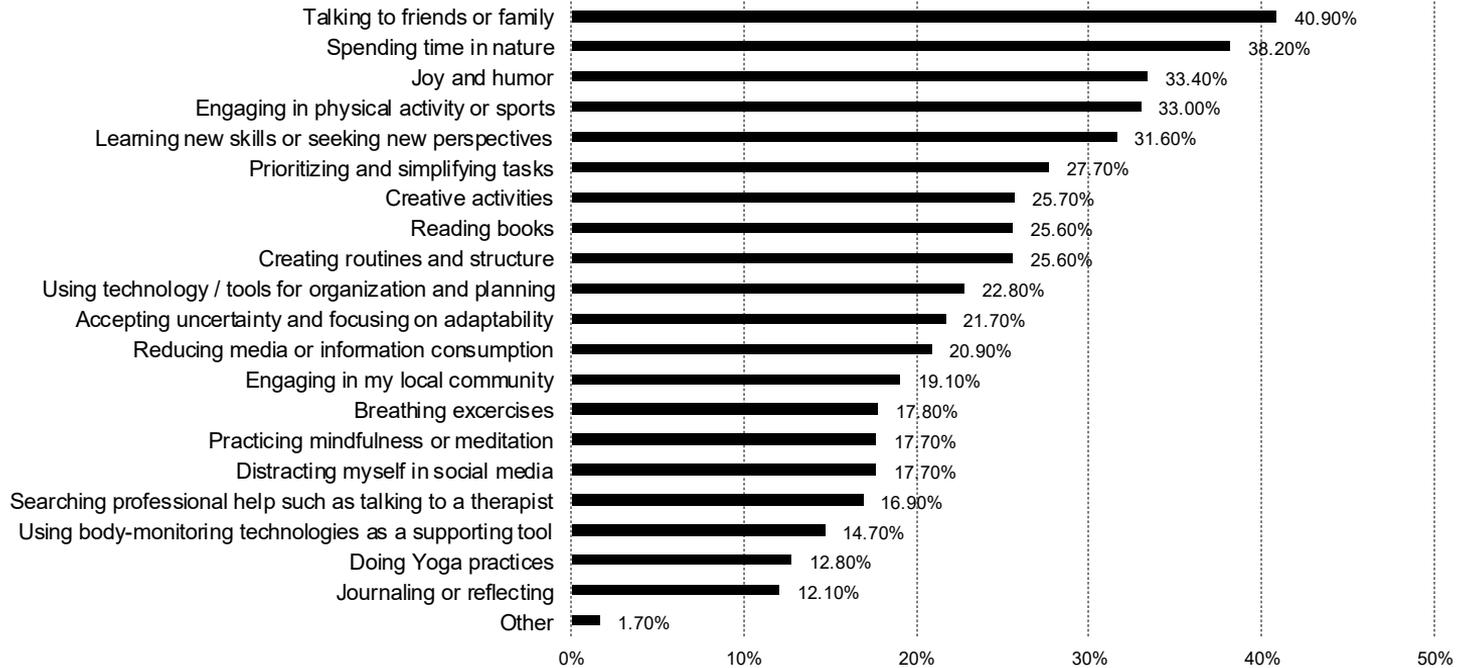
HEALTH AND WELLBEING _ KEY FINDINGS

- **‘Talking to friends or family’, ‘spending time in nature’ and ‘joy and humor’** are preferred ways of coping with increased complexity in life on a global level.
- On a regional and country level, **‘learning new skills or searching new perspectives’** are top ranked in Africa, Indonesia and India.
- **‘Engaging in physical activity or sports’** is number one in **Spain** and **Brazil**, second in **Indonesia**.
- **‘Accepting uncertainty and focusing on adaptability’** with highest approval in Africa, followed by North America.
- In South America and North America **‘reducing media or information consumption’** seen as way to cope with increased complexity as well.
- **‘Practicing mindfulness or meditation’, ‘breathing exercises’ and ‘doing yoga practices’** with higher importance in South Asia / India.

HEALTH AND WELLBEING_ TOTAL

HealthWellbeing7 _ Modern life is becoming increasingly complex, shaped by social, technological, and environmental changes. People face growing demands in both their external environments and personal lives. What are your preferred ways of coping with increased complexity in life? Please rank your top 5 items, with #1 being the most important.

▶ WITHIN TOP 5 RISKS

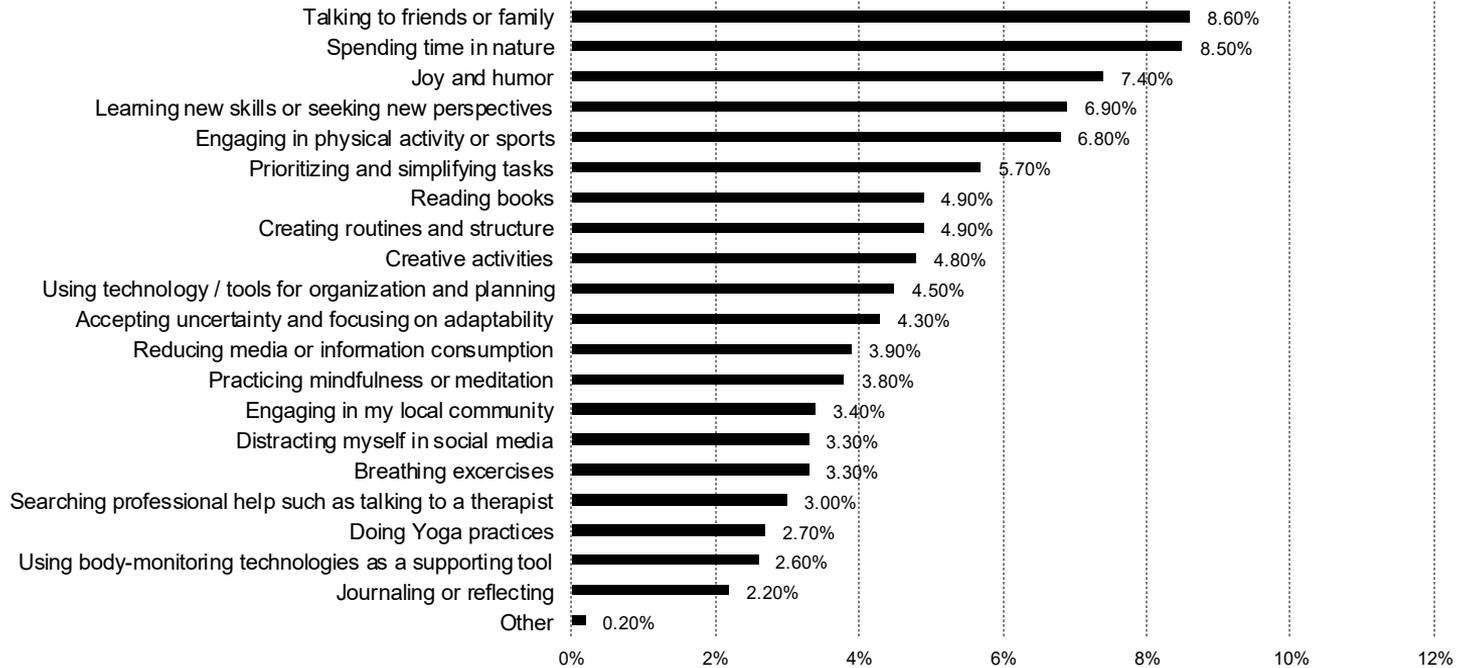


N=8.528

HEALTH AND WELLBEING_ TOTAL

HealthWellbeing7 _ Modern life is becoming increasingly complex, shaped by social, technological, and environmental changes. People face growing demands in both their external environments and personal lives. What are your preferred ways of coping with increased complexity in life? Please rank your top 5 items, with #1 being the most important.

1 RANKING

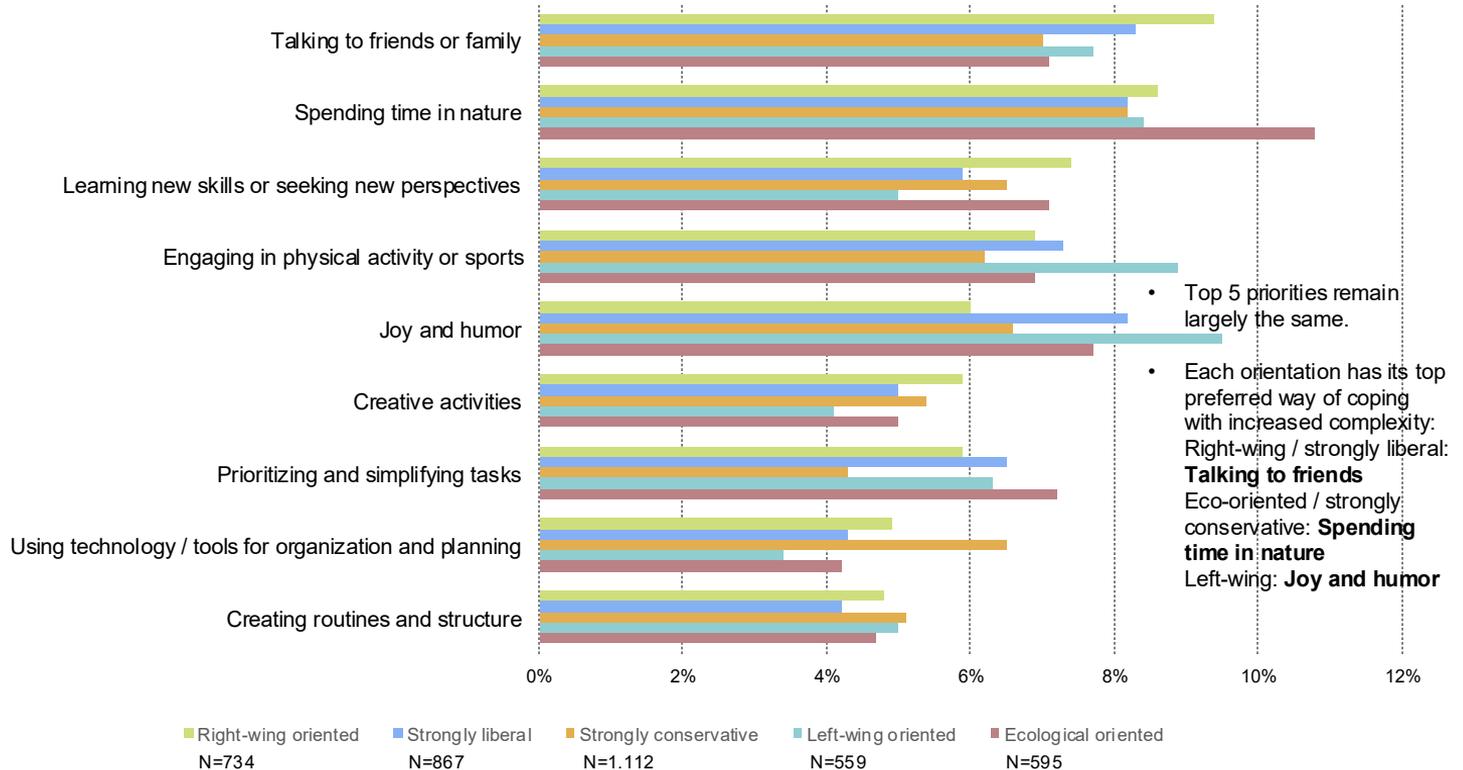


N=8.528

HEALTH AND WELLBEING_ RIGHT – WING ORIENTED vs. OTHER 1/2

HealthWellbeing7 _ Modern life is becoming increasingly complex, shaped by social, technological, and environmental changes. People face growing demands in both their external environments and personal lives. What are your preferred ways of coping with increased complexity in life? Please rank your top 5 items, with #1 being the most important.

1 RANKING

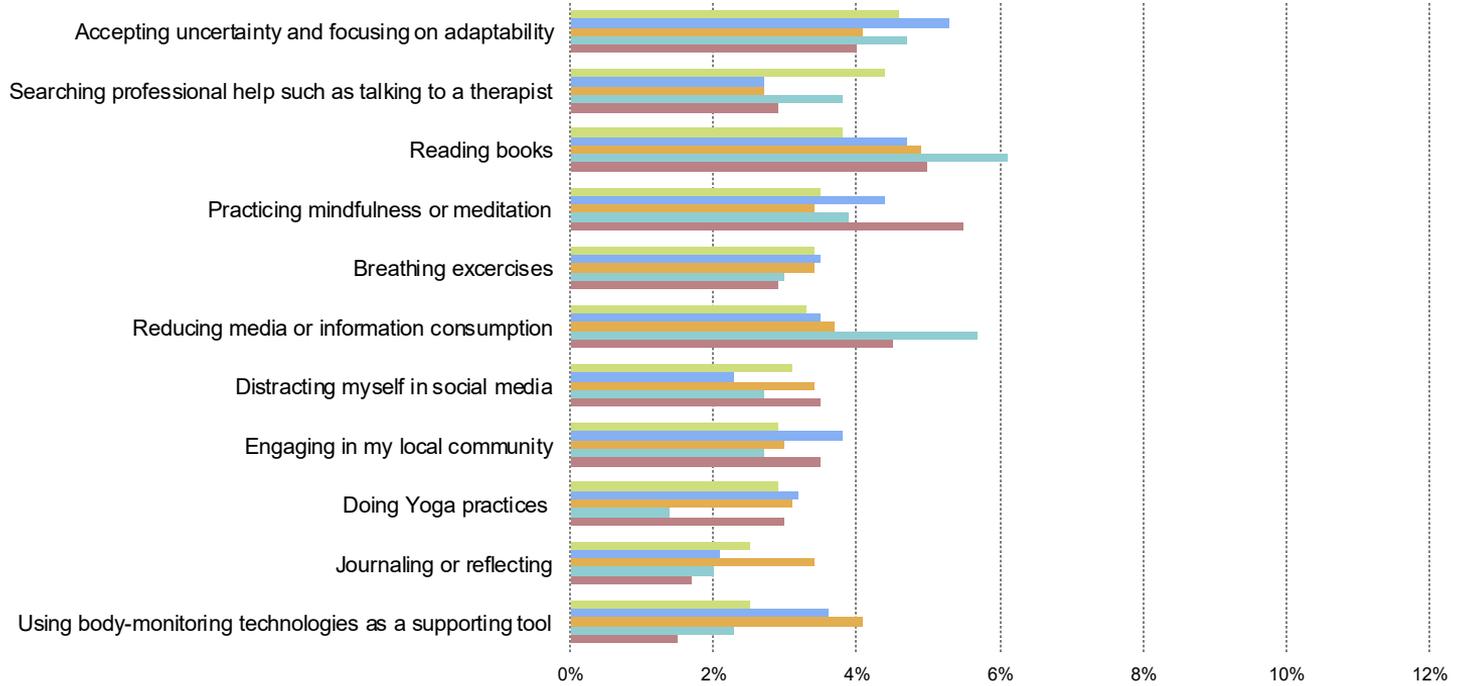


N=8,528

HEALTH AND WELLBEING_ RIGHT – WING ORIENTED vs. OTHER 2/2

HealthWellbeing7 _ Modern life is becoming increasingly complex, shaped by social, technological, and environmental changes. People face growing demands in both their external environments and personal lives. What are your preferred ways of coping with increased complexity in life? Please rank your top 5 items, with #1 being the most important.

1 RANKING



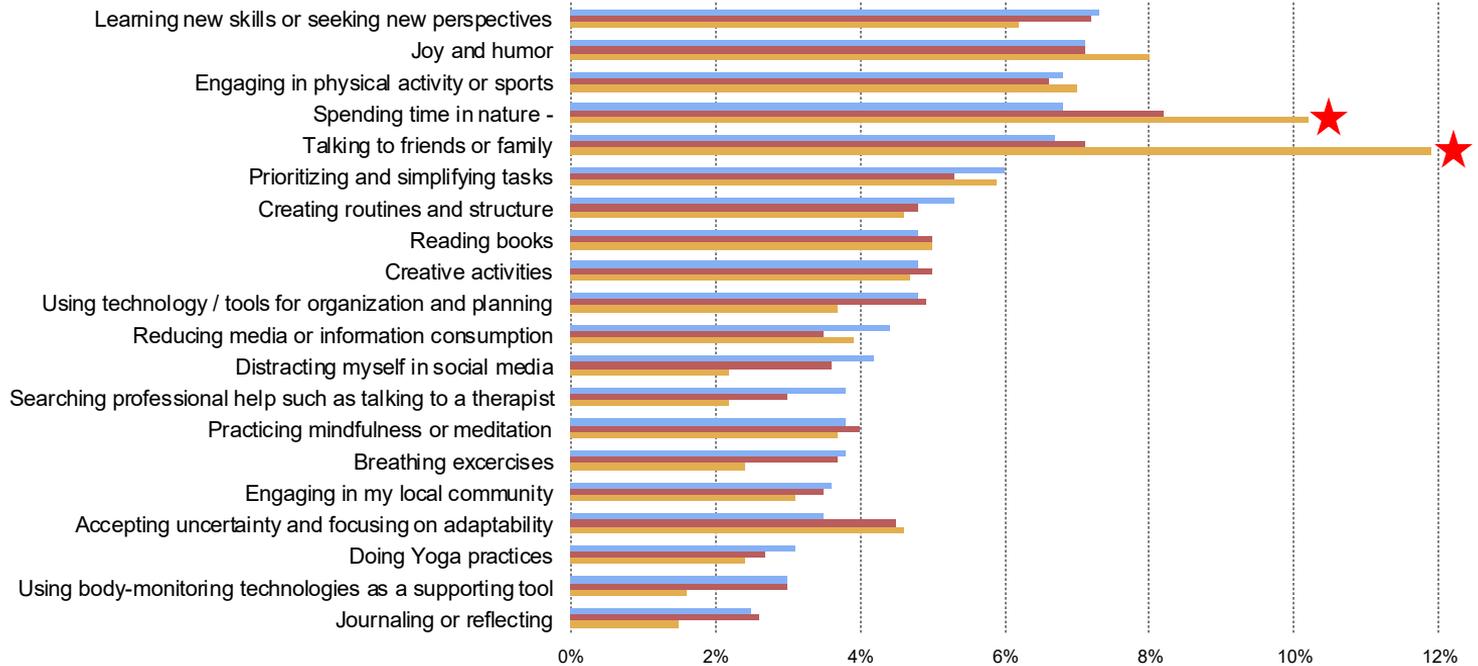
N=8,528

■ Right-wing oriented N=734
 ■ Strongly liberal N=867
 ■ Strongly conservative N=1,112
 ■ Left-wing oriented N=559
 ■ Ecological oriented N=595

HEALTH AND WELLBEING_ 18 - 29 vs. 30 – 49 vs. 50 - 69 YEARS OLD

HealthWellbeing7 _ Modern life is becoming increasingly complex, shaped by social, technological, and environmental changes. People face growing demands in both their external environments and personal lives. What are your preferred ways of coping with increased complexity in life? Please rank your top 5 items, with #1 being the most important.

1 RANKING



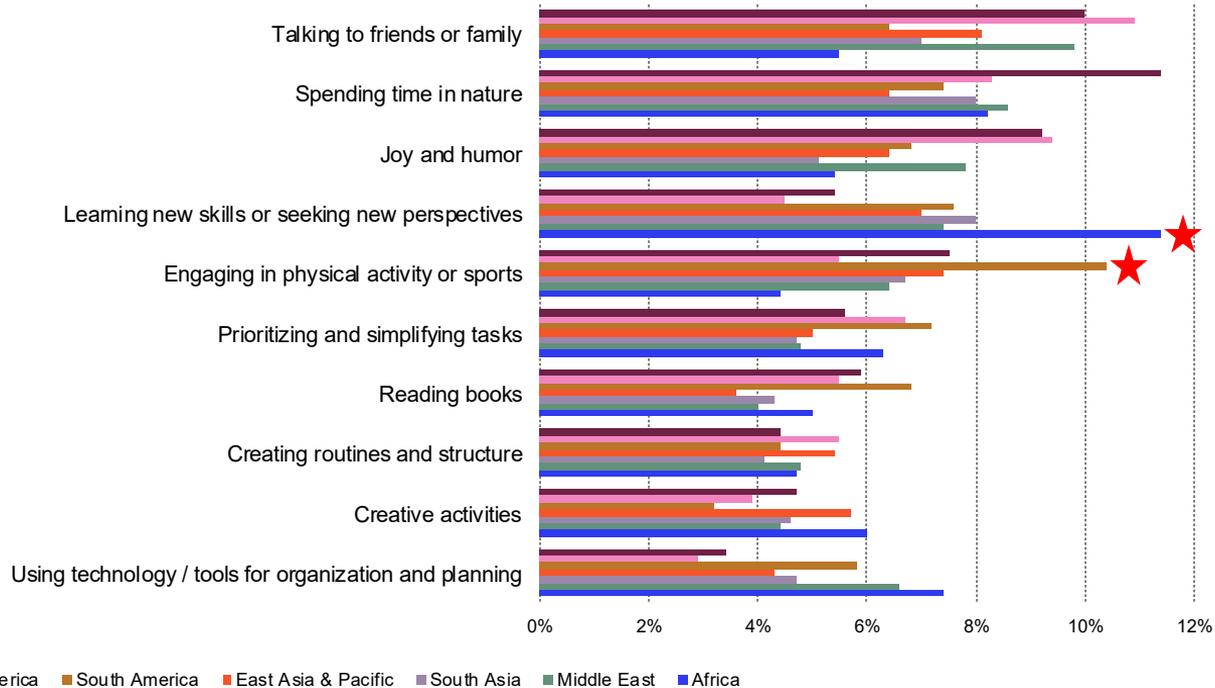
■ 18-29 y.o. ■ 30-49 y.o. ■ 50-69 y.o.

N=2.240 N=3.447 N=2.841

HEALTH AND WELLBEING _ REGIONAL 1/2

HealthWellbeing7 _ Modern life is becoming increasingly complex, shaped by social, technological, and environmental changes. People face growing demands in both their external environments and personal lives. What are your preferred ways of coping with increased complexity in life? Please rank your top 5 items, with #1 being the most important.

1 RANKING

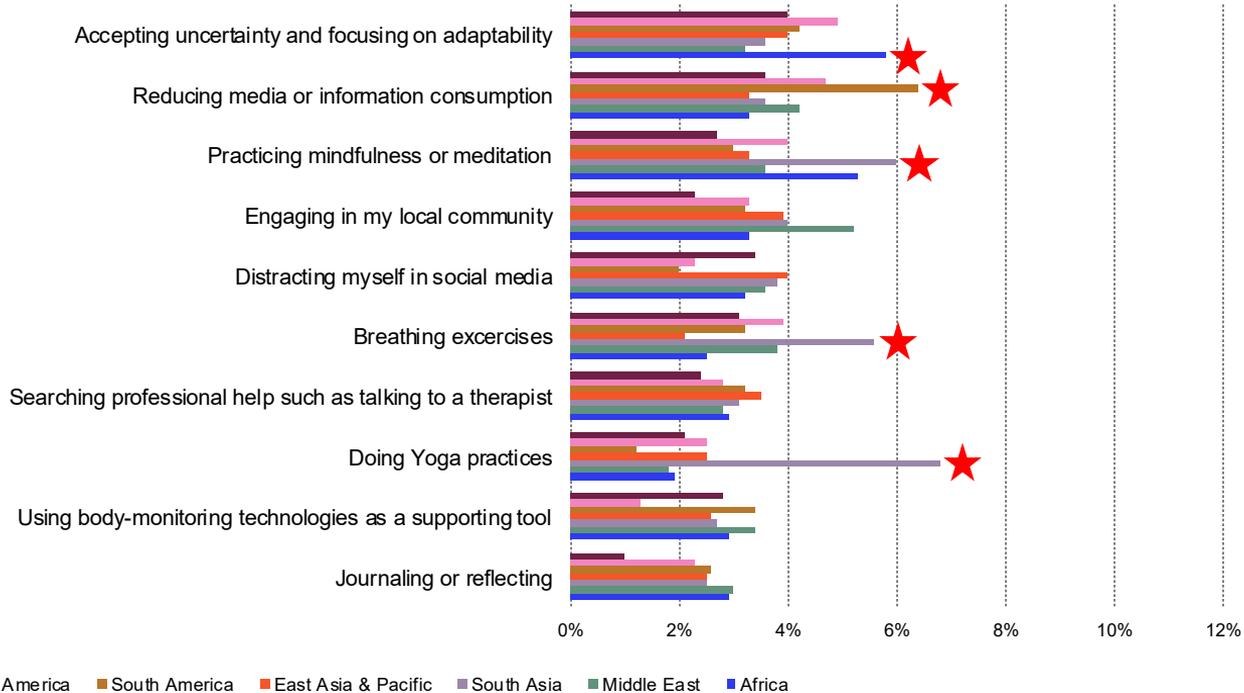


- In Africa (10.1%), Indonesia (11%) and India (8%) **learning new skills or seeking new perspectives** are top ranked.
- **Engaging in physical activity or sports** is #1 in Spain (11.2%) and Brazil (10.4%), #2 in Indonesia (11%)

HEALTH AND WELLBEING _ REGIONAL 2/2

HealthWellbeing7 _ Modern life is becoming increasingly complex, shaped by social, technological, and environmental changes. People face growing demands in both their external environments and personal lives. What are your preferred ways of coping with increased complexity in life? Please rank your top 5 items, with #1 being the most important.

1 RANKING



- **Accepting uncertainty and focusing on adaptability** with highest approval ratings in Africa, followed by North America.
- In South America and North America **reducing media or information consumption** seen as way to cope with increased complexity as well.
- **Practicing mindfulness or meditation, breathing exercises and doing yoga practices** with higher importance in South Asia / India.

A woman with short dark hair, wearing a beige button-down shirt and a dark blue skirt, is speaking and gesturing with her hands. She is in a modern office environment with large windows in the background. In the foreground, the backs of two people's heads are visible, suggesting she is addressing a group. The text "BUSINESS ROLE" is overlaid in large, bold, yellow letters across the center of the image.

BUSINESS ROLE

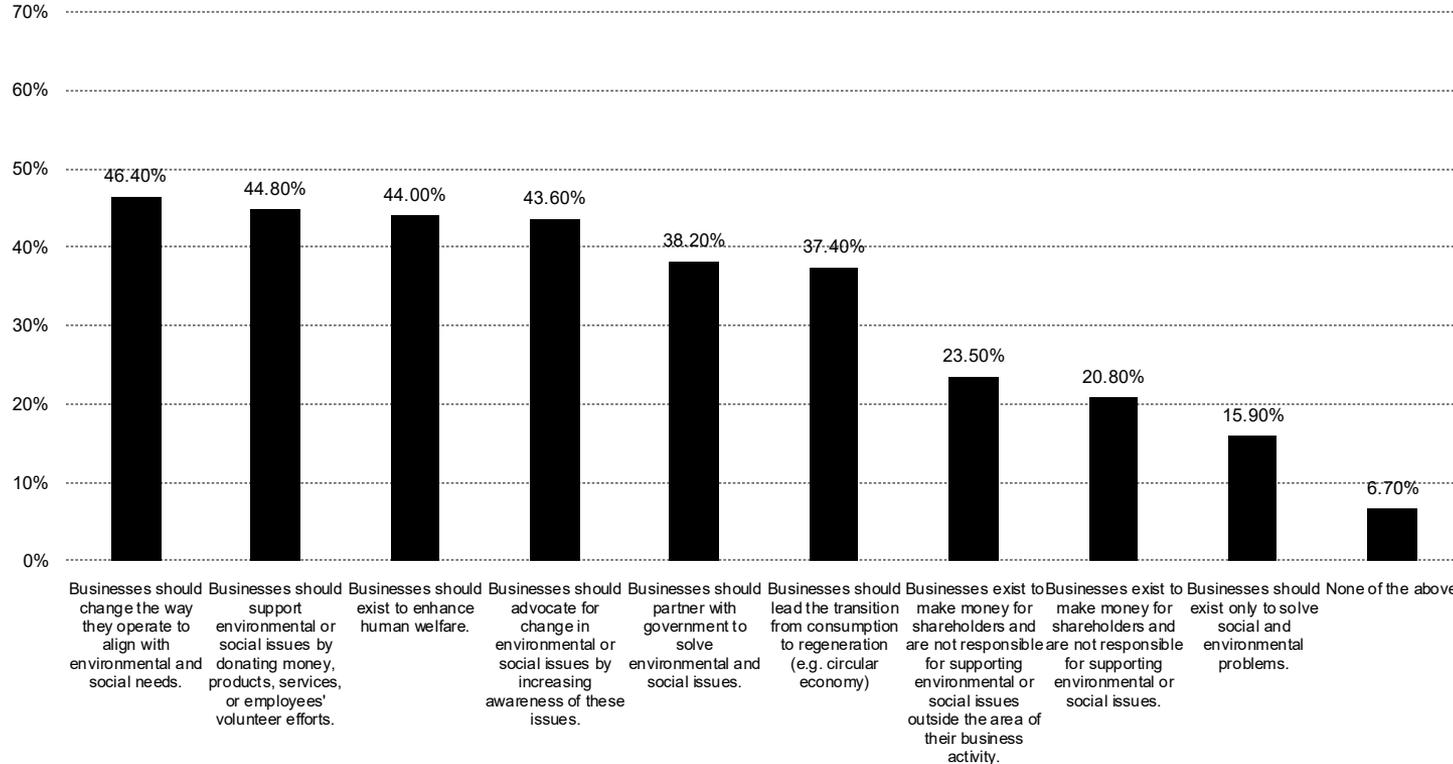
BUSINESS ROLE_ KEY FINDINGS

- The **role of business is viewed very broadly** on a global scale – ranging from environmental and social issues to overall welfare. Compared to 2022, the role of business in tackling environmental and social issues is seen as significantly less important.
- Africa shows the highest level of approval for the **role of businesses in addressing social and environmental issues**. India, Indonesia and Nigeria emerge as the top countries in this field.
- The traditional **'shareholder-first' view** is most supported in South Asia and Middle East and most rejected in Europe and South America.
- Extreme views (e.g., only for problem-solving) have low support everywhere, except in South Asia and Middle East.
- South America and Middle East see a stronger need for **Businesses to lead the transition from consumption to regeneration** in 10 years from now.
- **Partnering with government** finds less agreement from Europe for the period 10 years from now than in today's period.

BUSINESS ROLE _ TOTAL

BusinessRole3a _ Which of the following statements about the purpose of business today do you agree with?

Select all that apply.



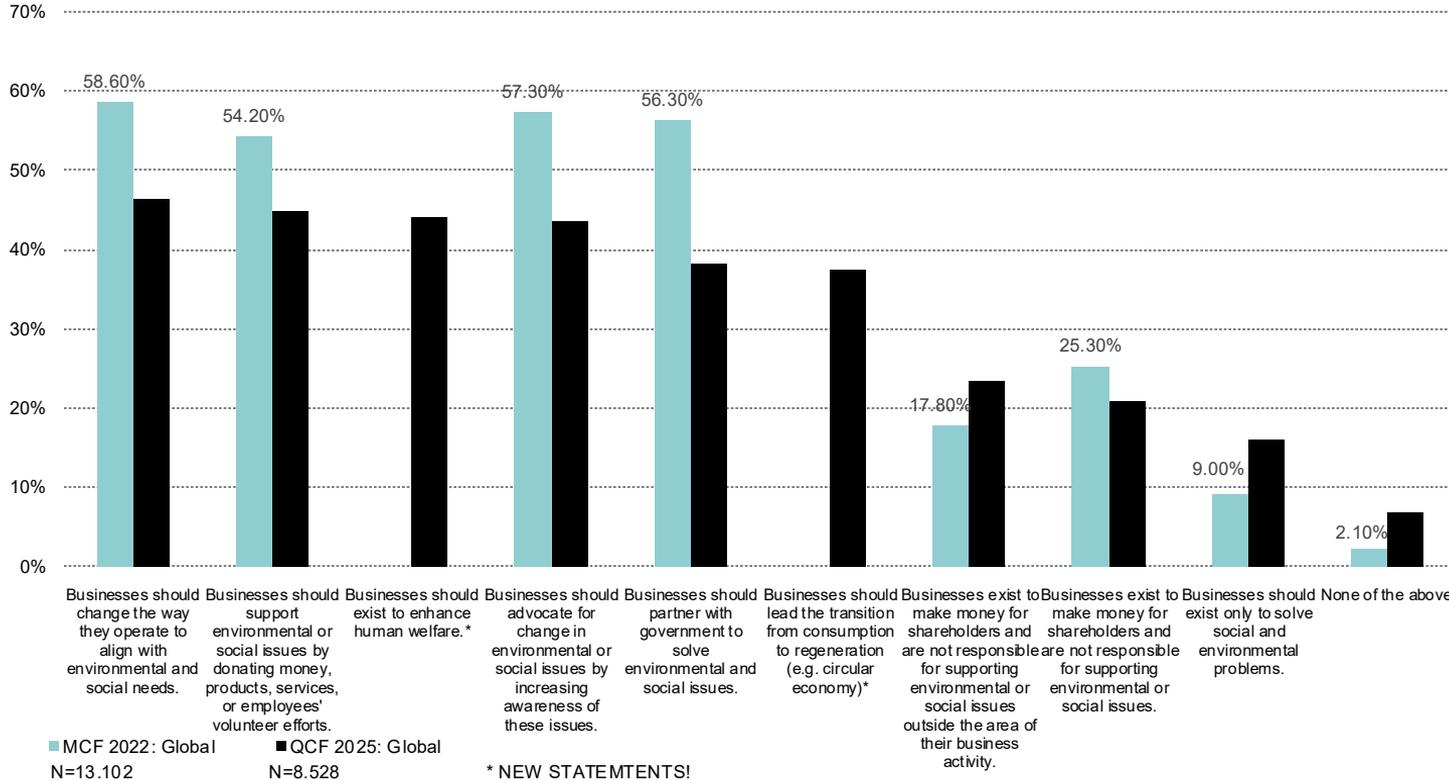
The role of business is viewed very broadly on a global scale – ranging from environmental and social issues to overall welfare.

N=8.528

BUSINESS ROLE _ TOTAL _ 2025 vs. 2022

BusinessRole3a _ Which of the following statements about the purpose of business today do you agree with?

Select all that apply.

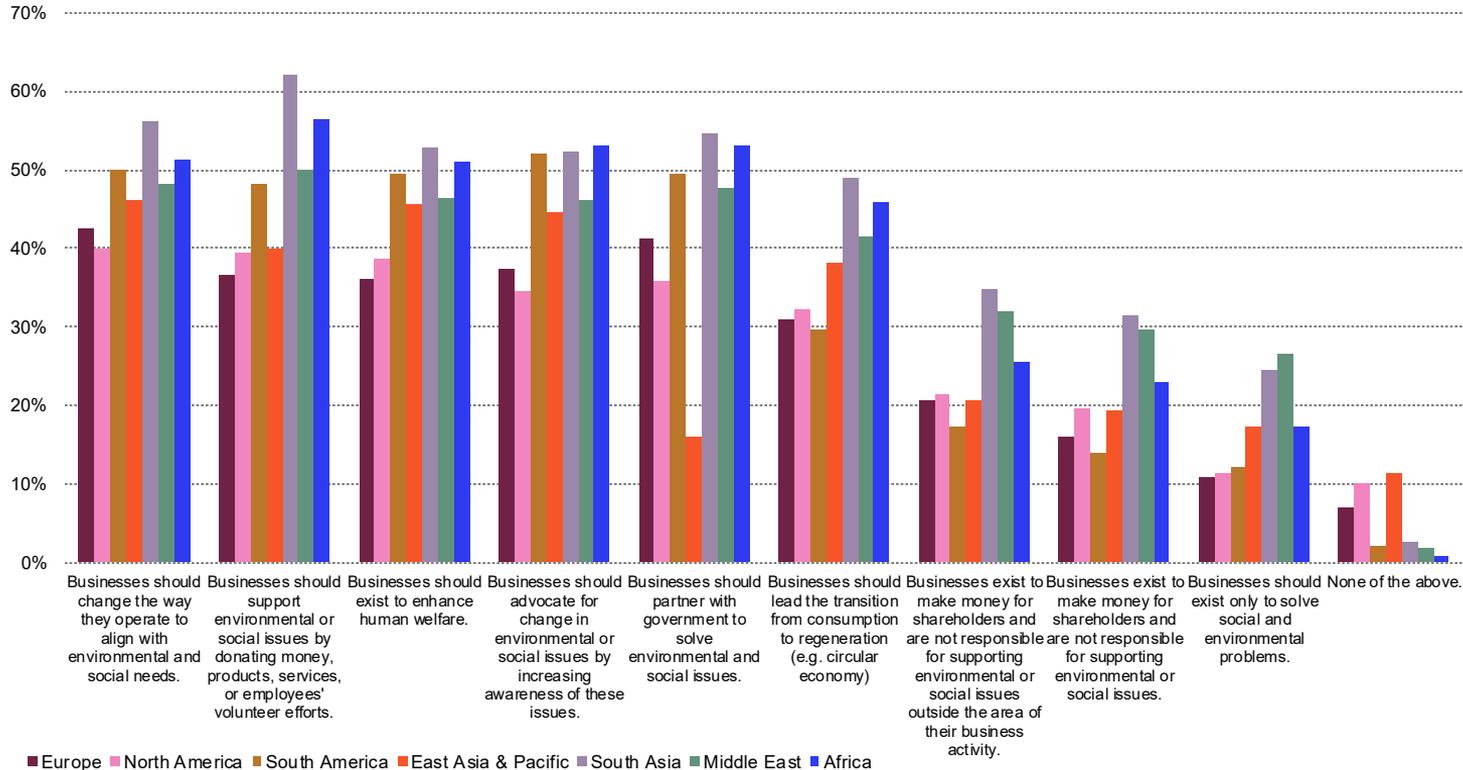


The role of business in tackling environmental and social issues is seen as significantly less important compared to 2022.

BUSINESS ROLE _ REGIONAL

BusinessRole3a _ Which of the following statements about the purpose of business today do you agree with?

Select all that apply.

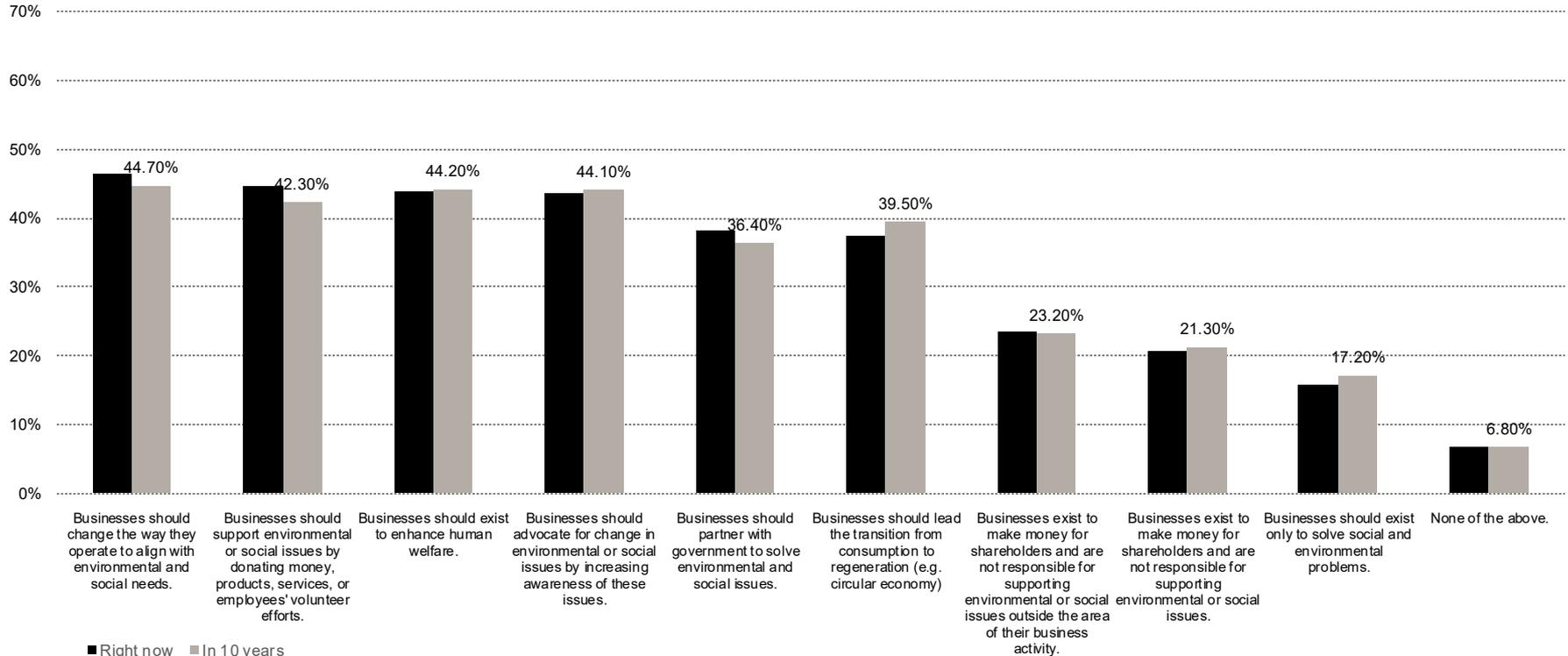


- Africa shows the highest level of agreement with most **social and environmental statements**.
- On country level, India, Indonesia and Nigeria with highest scores for **business role in social and environmental issues**.
- The traditional **'shareholder-first' view** is most supported in South Asia and Middle East and most rejected in Europe and South America.
- Extreme views (e.g., **only for problem-solving**) with least support everywhere, except in South Asia and Middle East (>20%).

BUSINESS ROLE _ TOTAL _ right now vs. in 10 years

BusinessRole3b _ Which of the following statements do you agree with regarding the purpose of business 10 years from now?

Please select all that you agree with.

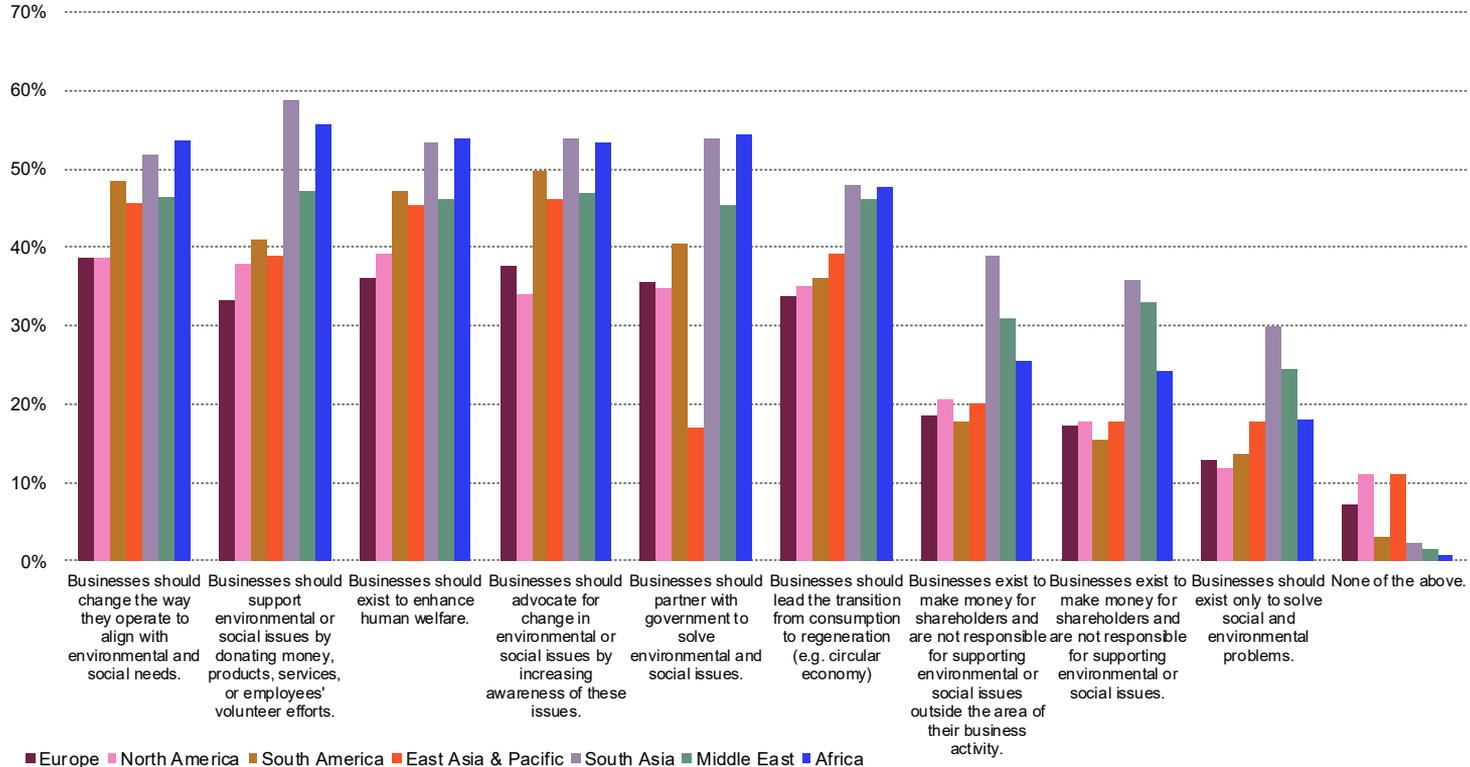


N=8.528

BUSINESS ROLE _ REGIONAL

BusinessRole3b _ Which of the following statements do you agree with regarding the purpose of business **10 years from now**?

Please select all that you agree with.



- Africa show only little change in today's view vs. 10 years from now.
- South America and Middle East see a stronger need for **Businesses to lead the transition from consumption to regeneration** in 10 years from now.
- **Partnering with government** finds less agreement from Europe for the period 10 years from now than in today's period.
- Extreme views (e.g., **only for problem-solving**) show higher approval especially in South Asia.

BRAND ROLE

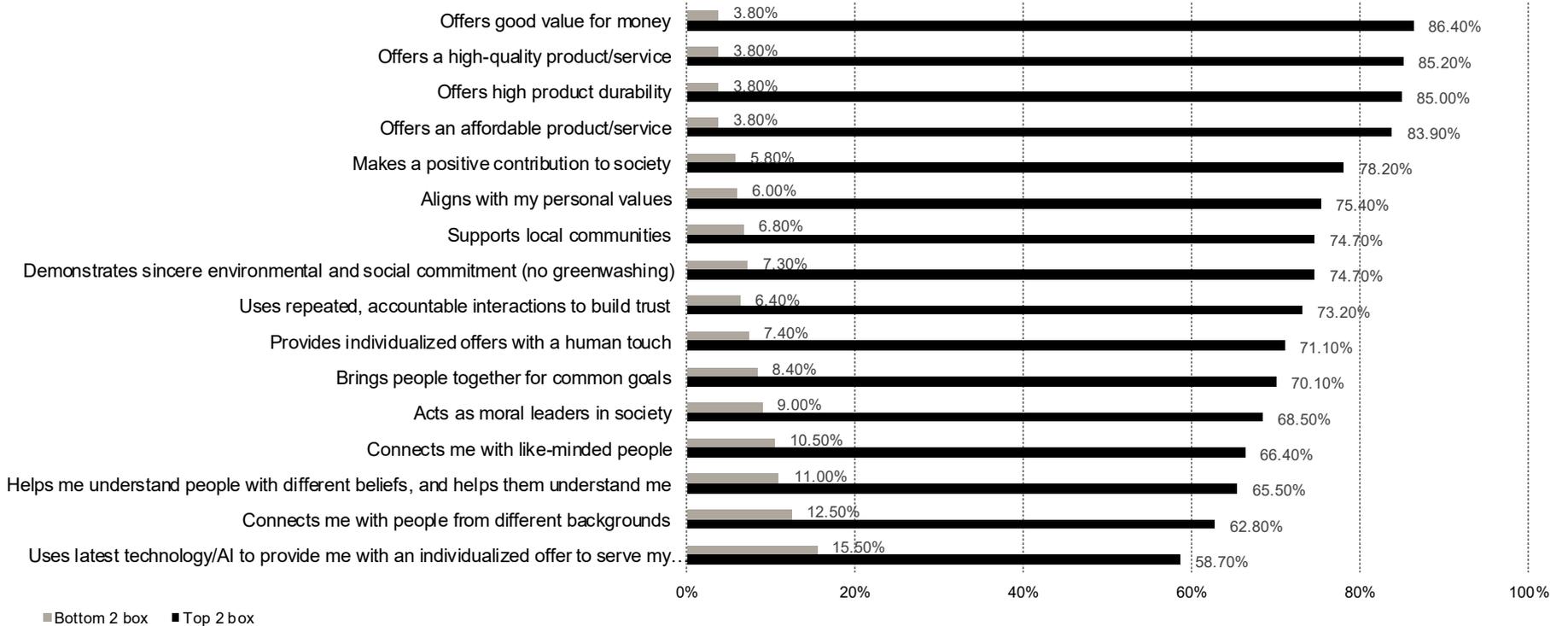
BRAND ROLE _ KEY FINDINGS

- **Durable, high-quality products and services with a good value for money** are the most important factors for buyers.
- Compared to 2022, the **expectations towards brands have significantly increased** - not only in tangible areas, but also in softer aspects like demonstrating moral leadership and bringing people together.
- In Africa, the Middle East and Asia place considerably more **emphasis on softer brand attributes** — including societal contribution, value alignment, local community support, and authentic environmental and social responsibility.
- **Technology- and AI-related features** are generally less important – above all for Europe and North America.

BRAND ROLE _ TOTAL

BrandRole4 _ Thinking about the brands you purchase from or are considering purchasing from, how important is each of the following traits or behaviors in your purchase decision?

▶ TOP / BOTTOM 2 BOX

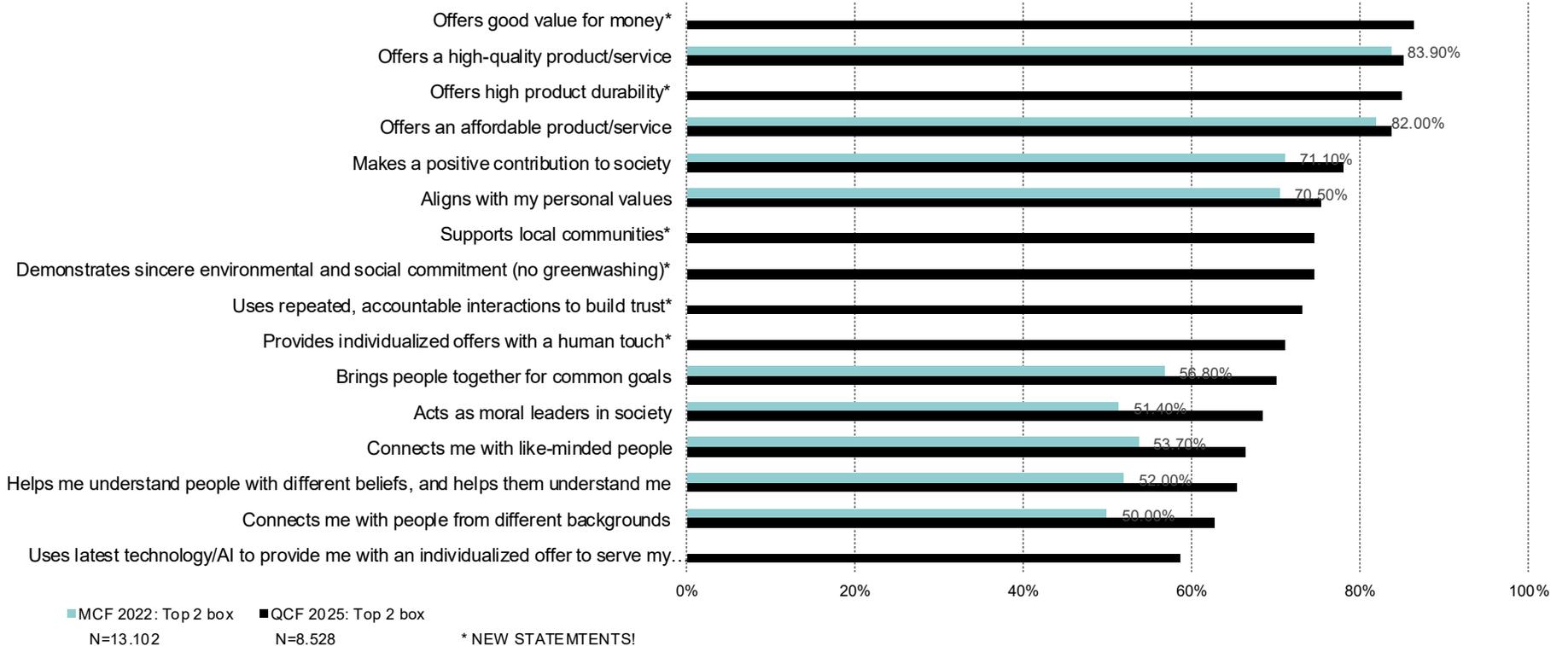


■ Bottom 2 box ■ Top 2 box

BRAND ROLE _ TOTAL _ 2025 vs. 2022

BrandRole4 _ Thinking about the brands you purchase from or are considering purchasing from, how important is each of the following traits or behaviors in your purchase decision?

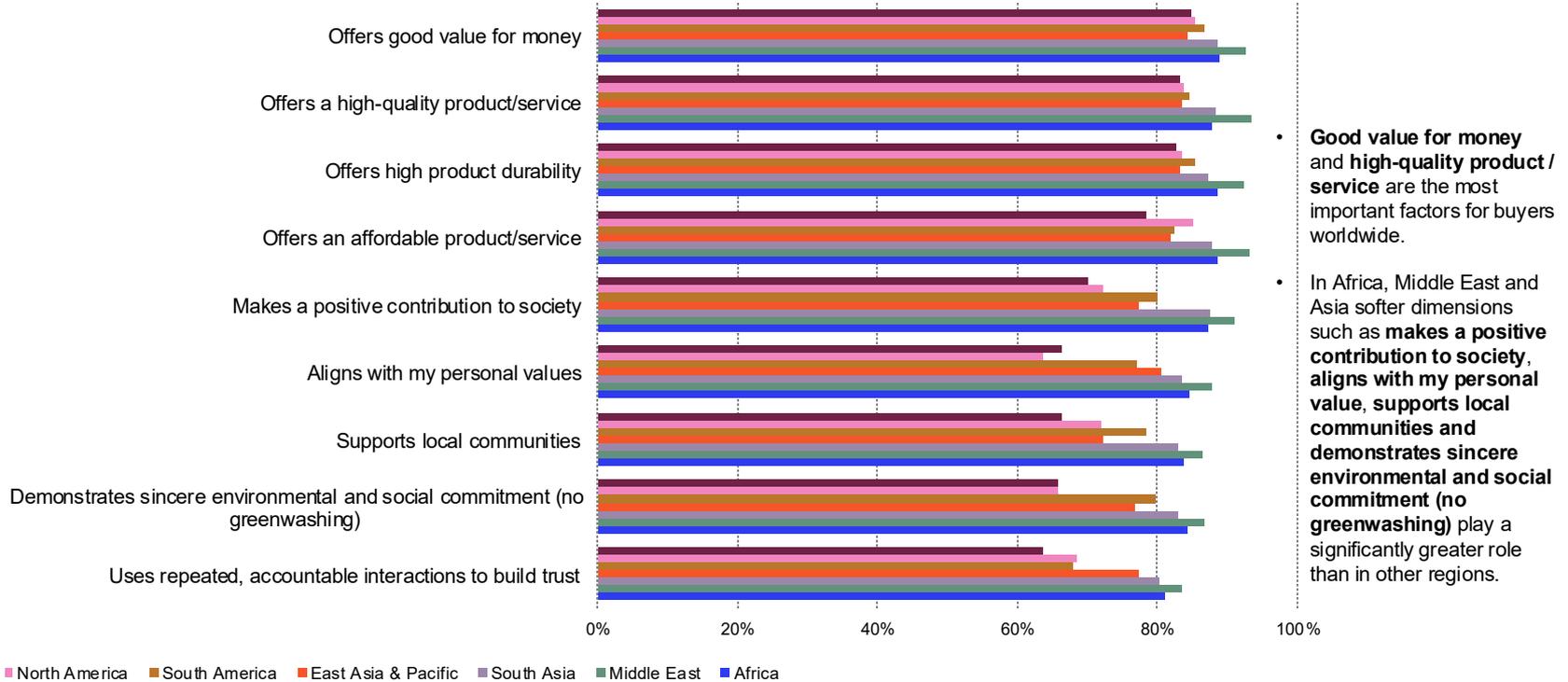
▶ TOP 2 BOX



BRAND ROLE _ REGIONAL 1/2

BrandRole4 _ Thinking about the brands you purchase from or are considering purchasing from, how important is each of the following traits or behaviors in your purchase decision?

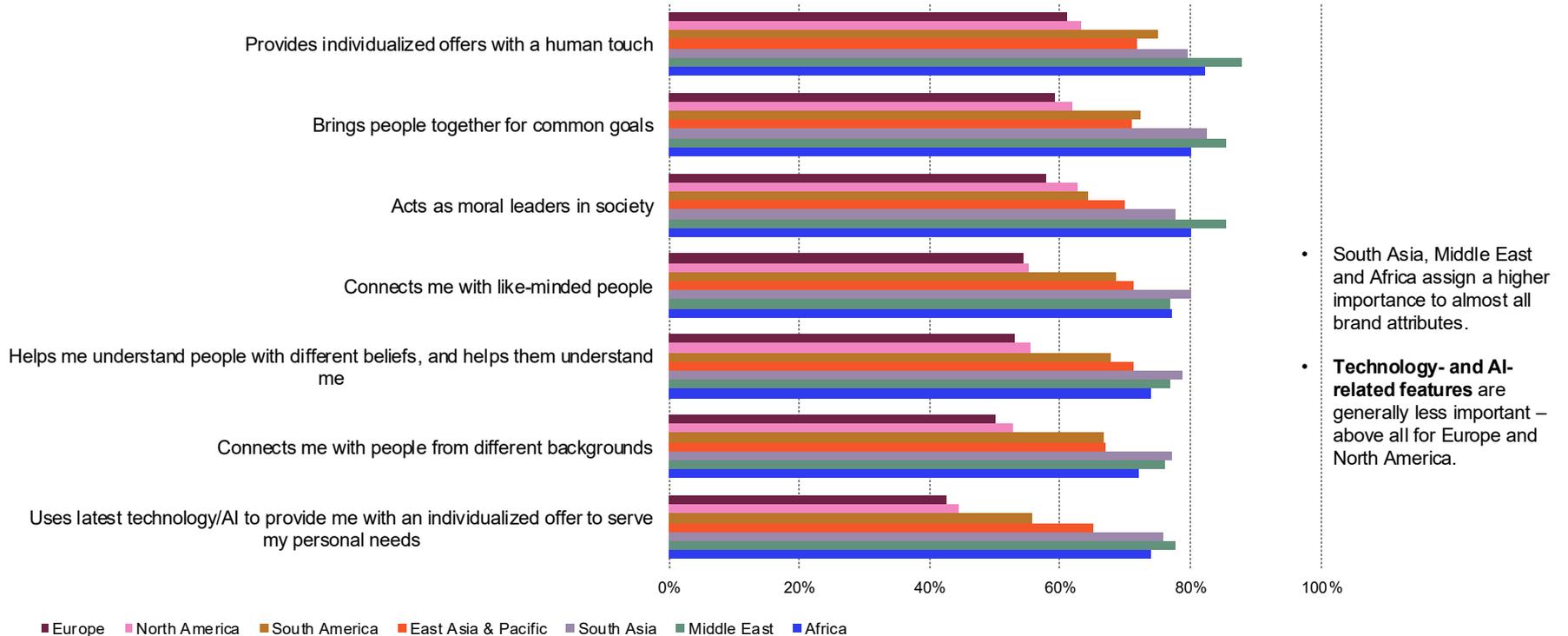
▶ TOP 2 BOX



BRAND ROLE _ REGIONAL 2/2

BrandRole4 _ Thinking about the brands you purchase from or are considering purchasing from, how important is each of the following traits or behaviors in your purchase decision?

▶ TOP 2 BOX



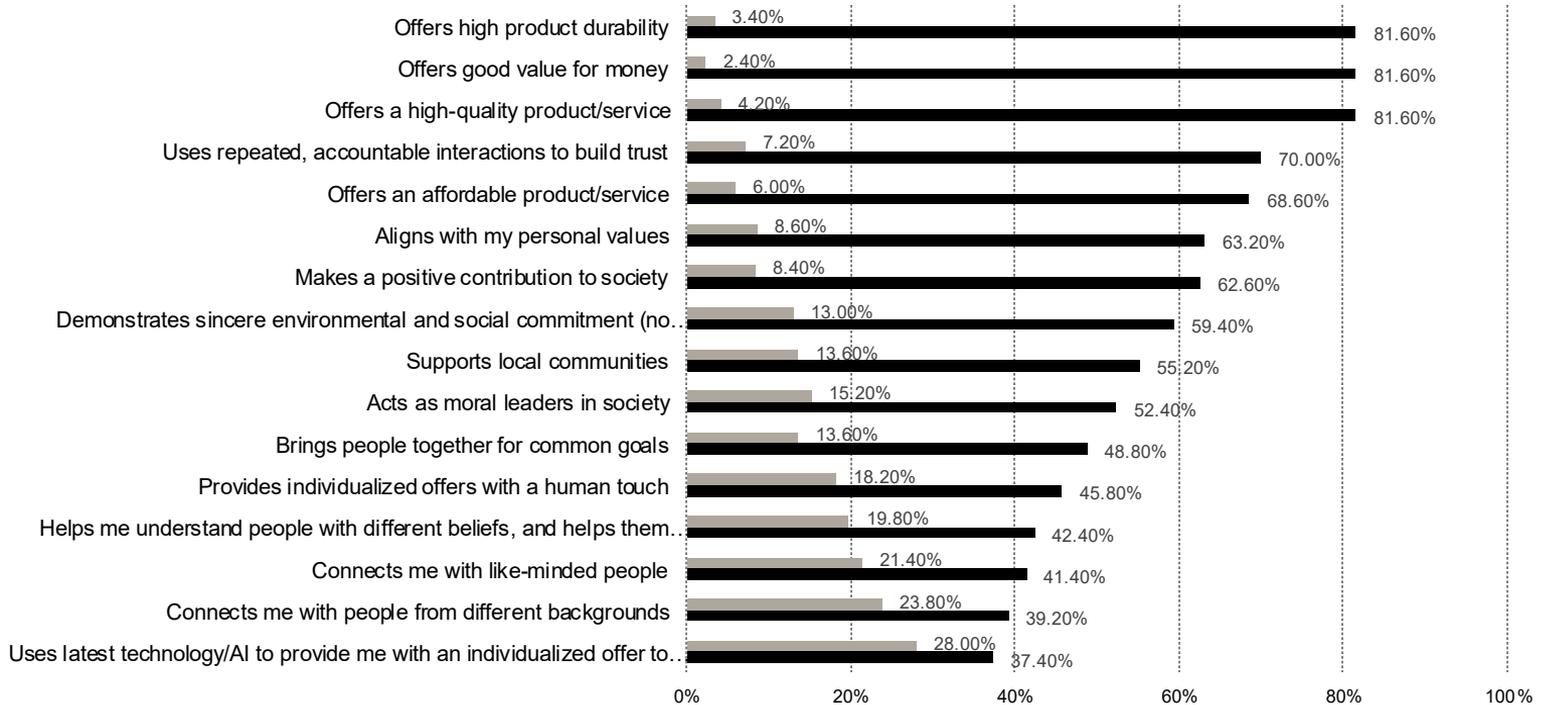
- South Asia, Middle East and Africa assign a higher importance to almost all brand attributes.
- **Technology- and AI-related features** are generally less important – above all for Europe and North America.

BRAND ROLE _ GERMANY



BrandRole4 _ Thinking about the brands you purchase from or are considering purchasing from, how important is each of the following traits or behaviors in your purchase decision?

▶ TOP / BOTTOM 2 BOX



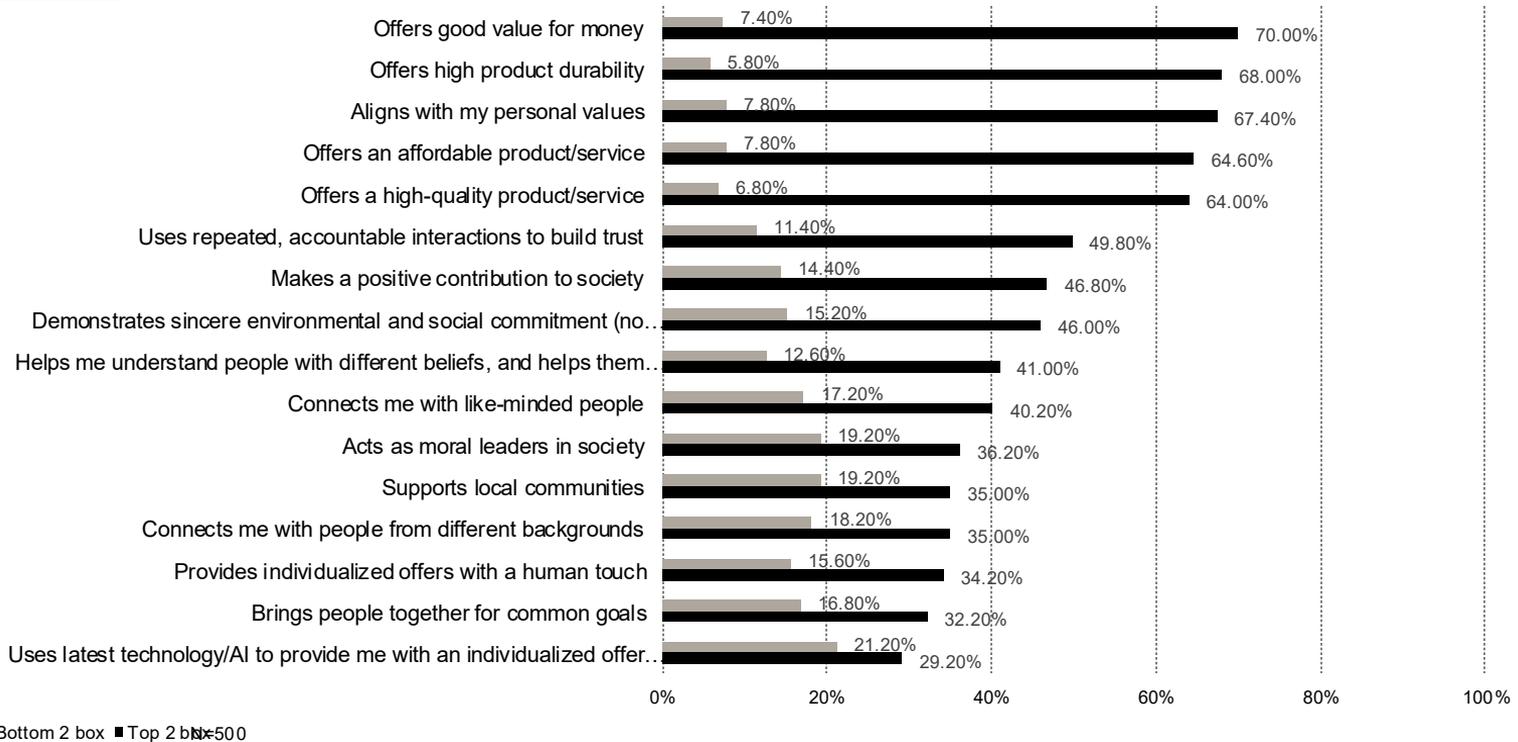
■ Bottom 2 box ■ Top 2 box N=500



BRAND ROLE _ JAPAN

BrandRole4 _ Thinking about the brands you purchase from or are considering purchasing from, how important is each of the following traits or behaviors in your purchase decision?

TOP / BOTTOM 2 BOX



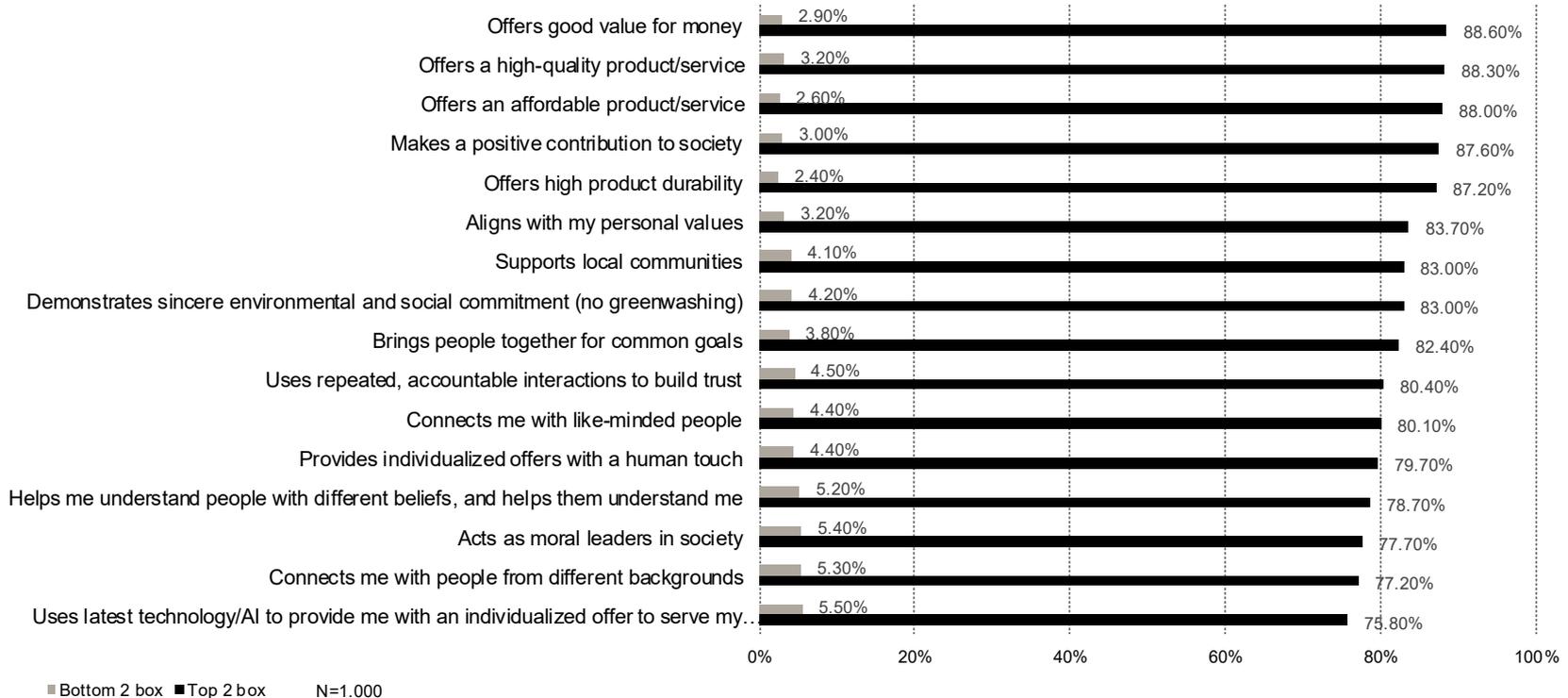
■ Bottom 2 box ■ Top 2 box N=500

BRAND ROLE _ INDIA



BrandRole4 _ Thinking about the brands you purchase from or are considering purchasing from, how important is each of the following traits or behaviors in your purchase decision?

▶ TOP / BOTTOM 2 BOX

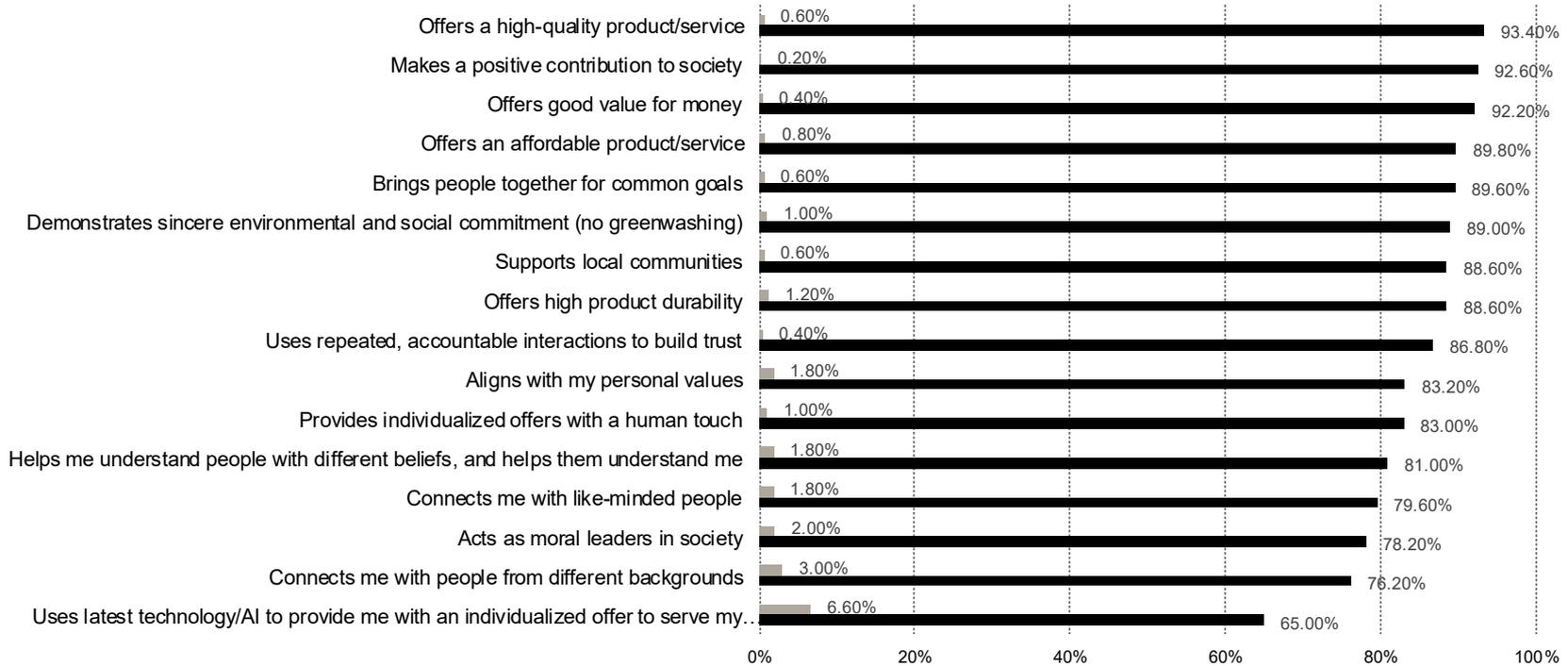


BRAND ROLE _ INDONESIA

BrandRole4 _ Thinking about the brands you purchase from or are considering purchasing from, how important is each of the following traits or behaviors in your purchase decision?



▶ TOP / BOTTOM 2 BOX



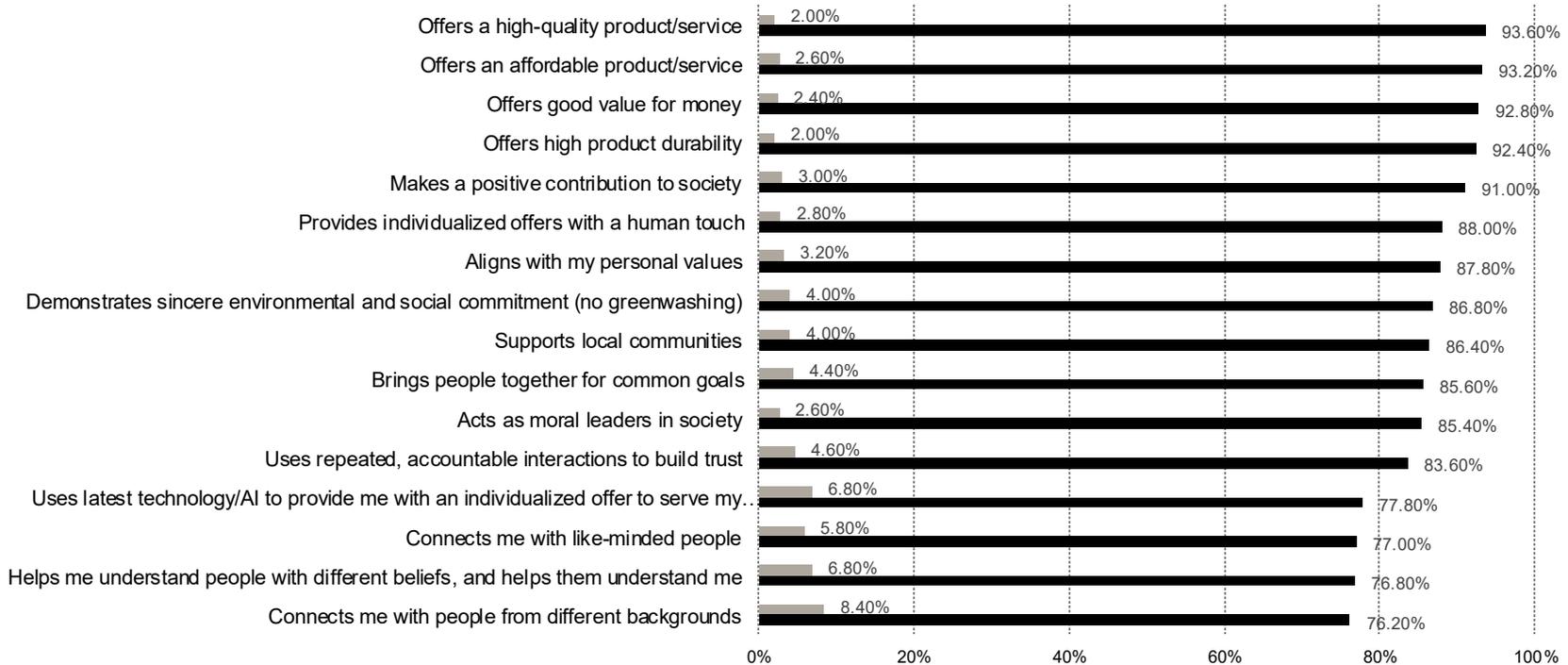
■ Bottom 2 box ■ Top 2 box N=500

BRAND ROLE _ SAUDI-ARABIA



BrandRole4 _ Thinking about the brands you purchase from or are considering purchasing from, how important is each of the following traits or behaviors in your purchase decision?

▶ TOP / BOTTOM 2 BOX



■ Bottom 2 box ■ Top 2 box N=501



FUTURE CONSUMERS

FUTURE CONSUMERS _ KEY FINDINGS

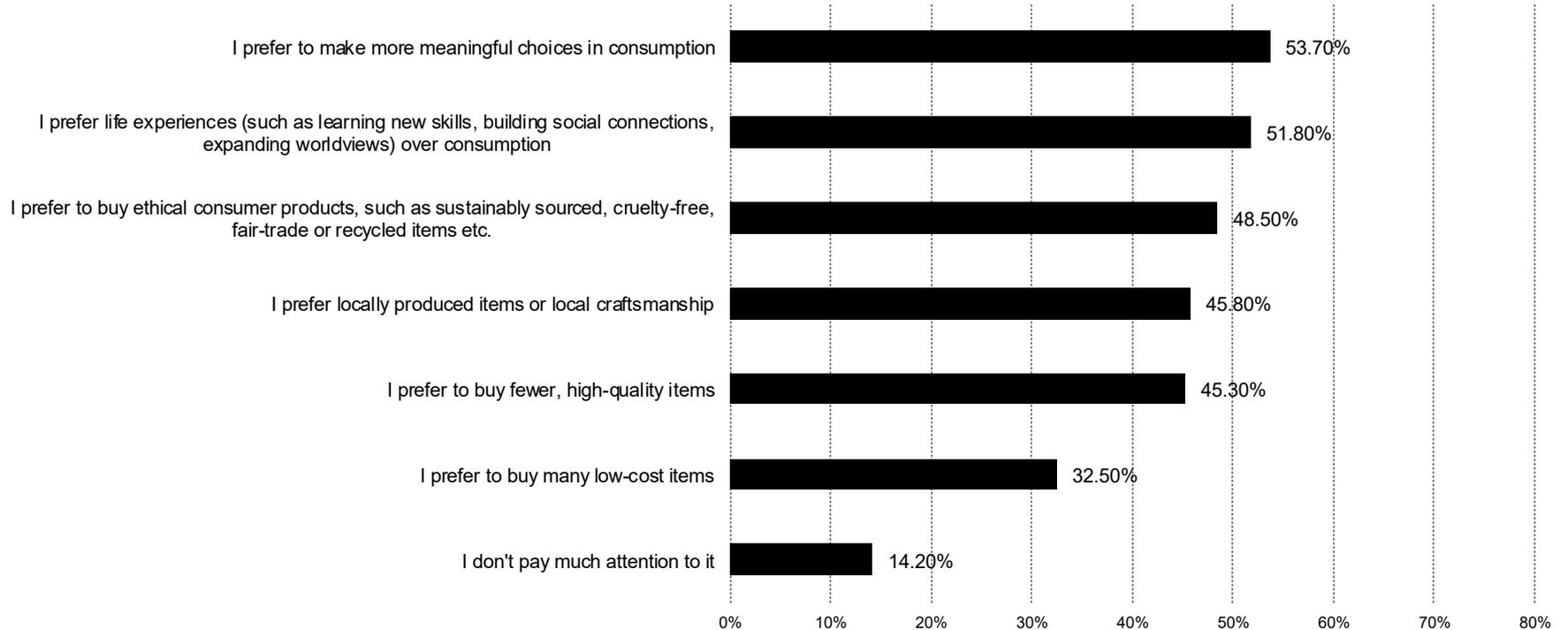
- Globally, the top three consumer preferences are **meaningful choices in consumption, enriching life experiences, ethical consumer products**.
- At a regional level: Europe has a clear focus on **meaningful choices, ethical products, and high quality over quantity**. North America also values **conscious consumption**, but there's a more significant segment that remains price-sensitive and interested in quantity compared to Europe. Africa and South Asia is **driven by experiences, ethics, and local goods**, but price remains a crucial consideration, leading to a balance between values and affordability. South America, East Asia & Pacific and the Middle East are also moving towards more **conscious consumption**. The importance of **price and affordability** is a key distinguishing factor above all in Middle East.
- When asked about the most important factor, consumers in South America, South Asia, Middle East and Africa place the highest priority on **purchasing ethically produced goods**. Across all regions (except Middle East), there is a **universal focus on making meaningful choices and buying fewer, high-quality products**.
- In North America and Middle East, a small but notable segment of consumers still shows **a preference for many low-cost items**.
- **Experiences, such as learning new skills**, are particularly important in East Asia & Pacific, often being prioritized over material consumption

FUTURE CONSUMERS _ TOTAL

FutureConsumers8a _ Which of the following best describes the way you would like to spend your money?

Please select up to 5 that apply.

▶ TOP 5



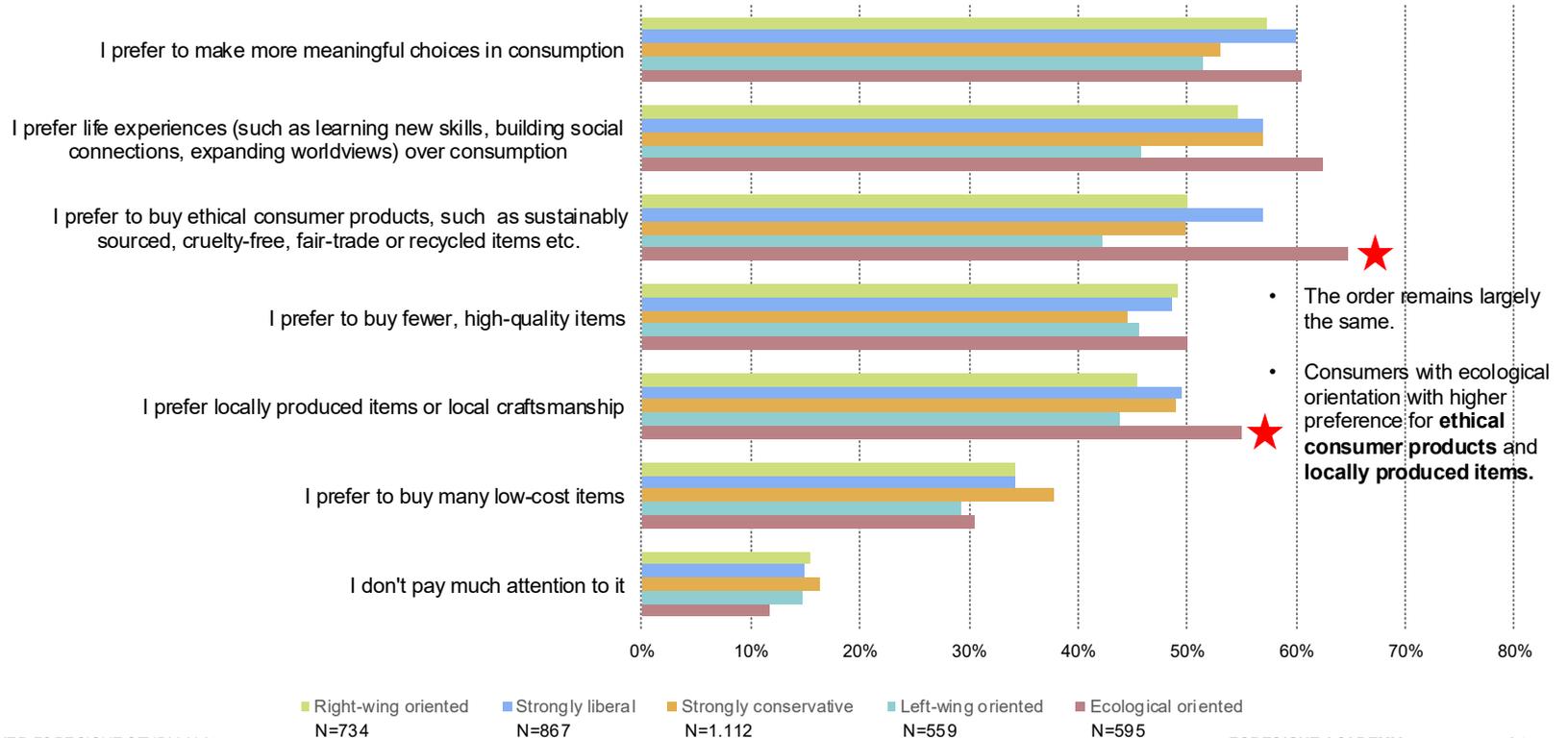
N=8.528

FUTURE CONSUMERS _ RIGHT – WING vs. OTHER ORIENTATION

FutureConsumers8a _ Which of the following best describes the way you would like to spend your money?

Please select up to 5 that apply.

TOP 5

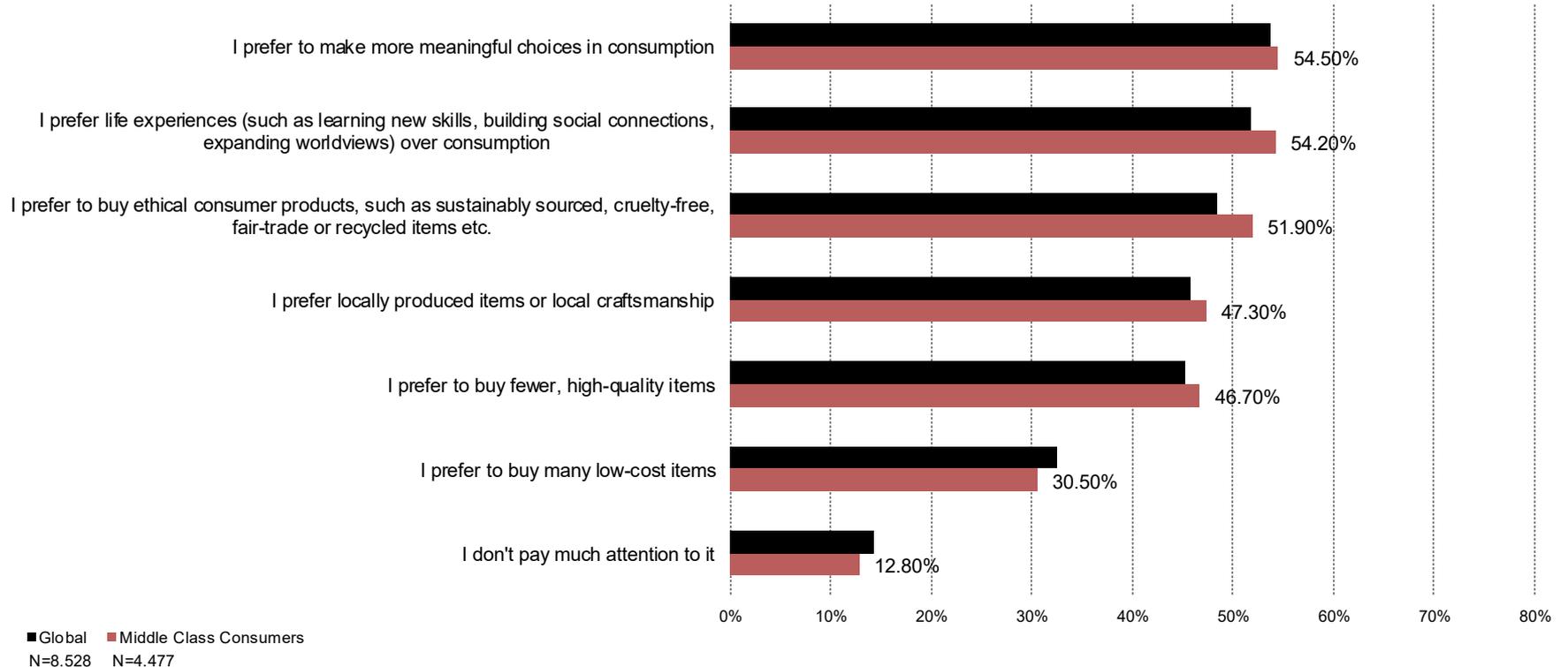


FUTURE CONSUMERS _ MIDDLE CLASS CONSUMERS

FutureConsumers8a _ Which of the following best describes the way you would like to spend your money?

Please select up to 5 that apply.

TOP 5

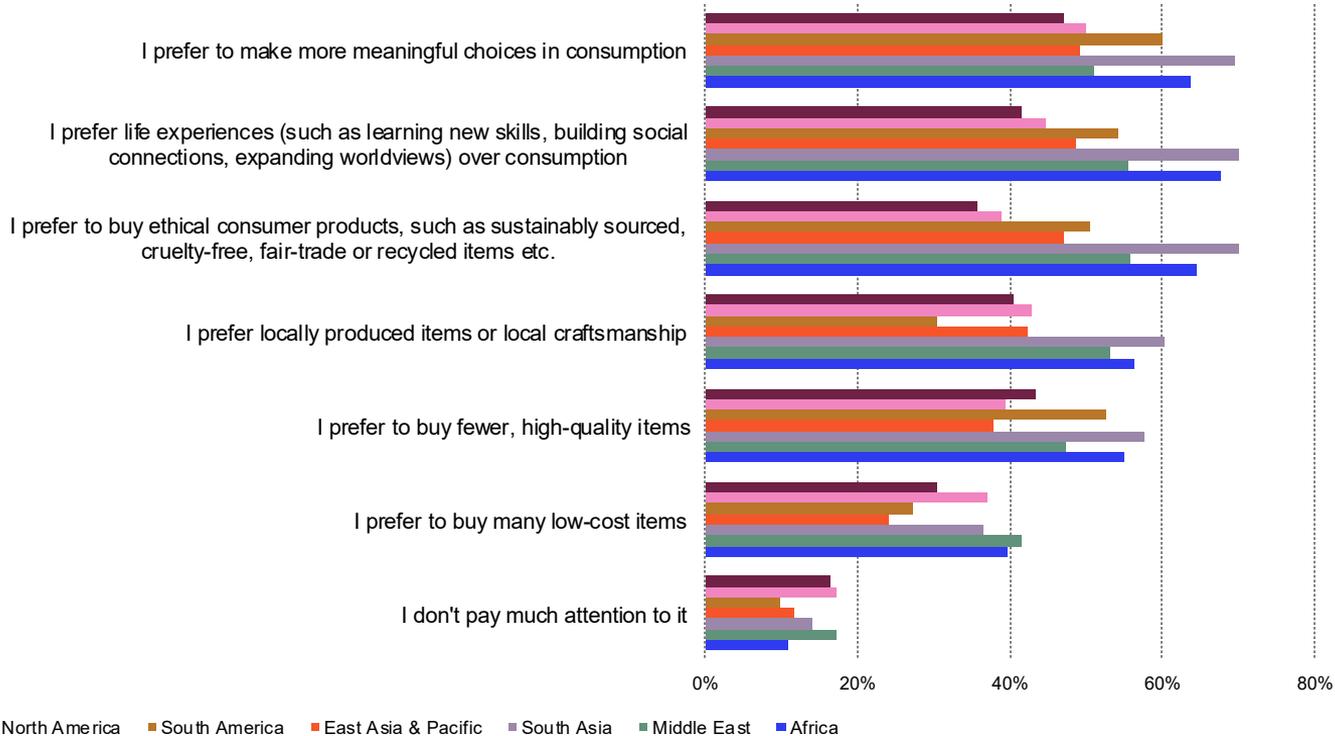


FUTURE CONSUMERS _ REGIONAL

FutureConsumers8a _ Which of the following best describes the way you would like to spend your money?

Please select up to 5 that apply.

TOP 5



Europe has a clear focus on meaningful choices, ethical products, and high quality over quantity.

North America also values conscious consumption, but there's a more significant segment that remains price-sensitive and interested in quantity compared to Europe.

Africa and South Asia is driven by experiences, ethics, and local goods, but price remains a crucial consideration, leading to a balance between values and affordability.

South America, East Asia & Pacific and Middle East are also moving toward more conscious consumption. The importance of price and affordability is a key distinguishing factor above all in Middle East.

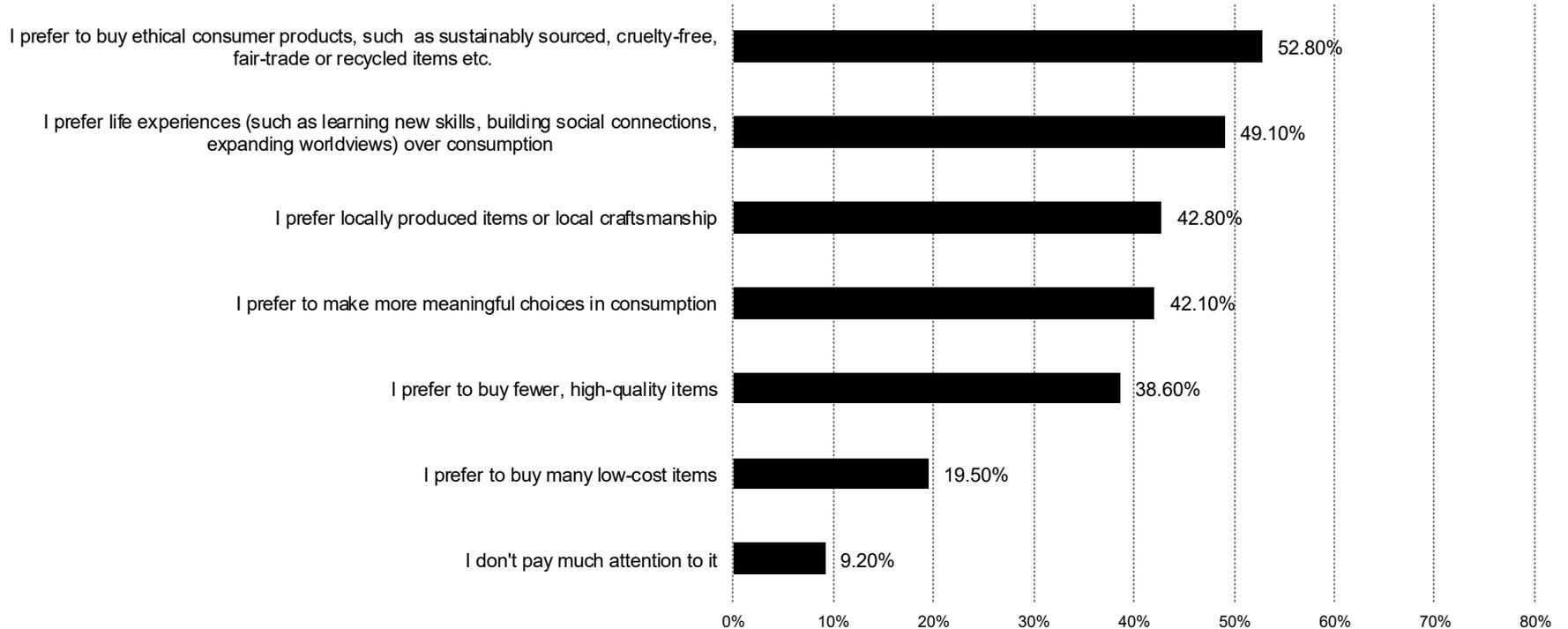
FUTURE CONSUMERS _ CHINA



FutureConsumers8a _ Which of the following best describes the way you would like to spend your money?

Please select up to 5 that apply.

▶ TOP 5



N=1.000

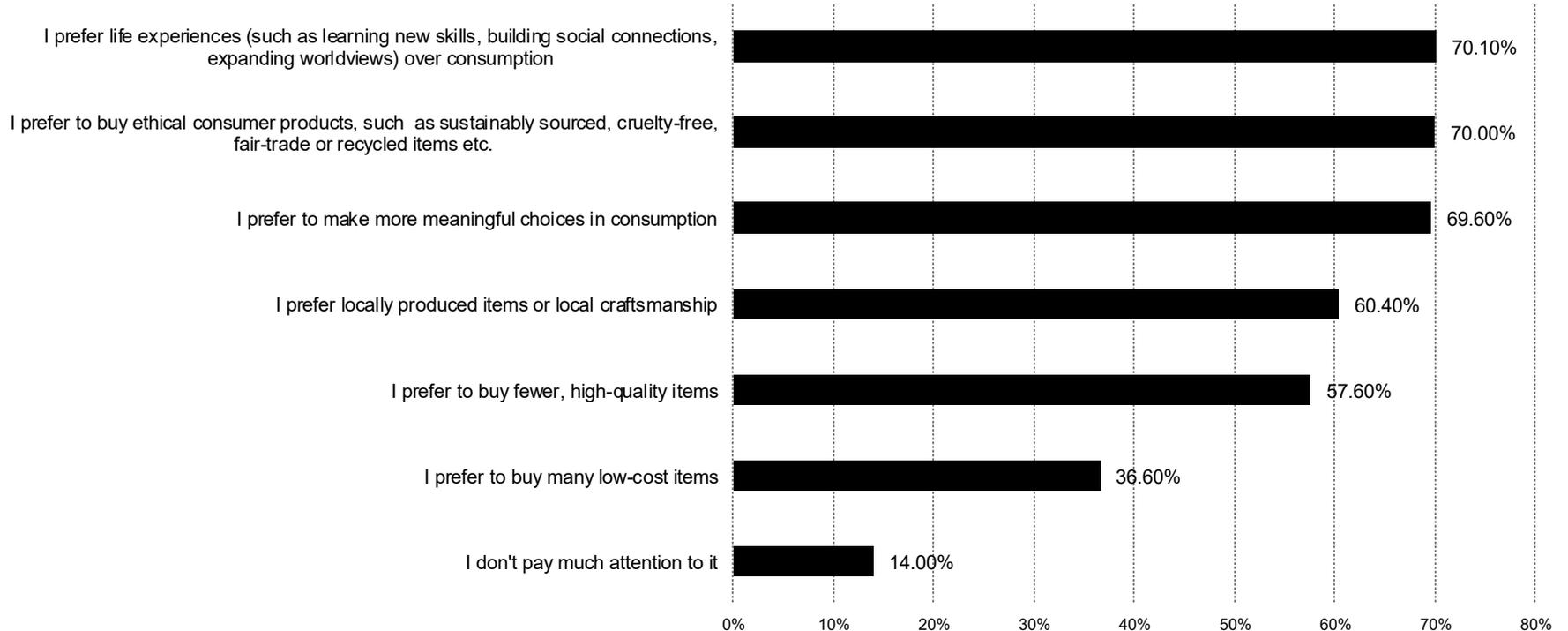
FUTURE CONSUMERS _ INDIA



FutureConsumers8a _ Which of the following best describes the way you would like to spend your money?

Please select up to 5 that apply.

▶ TOP 5



N=1.000

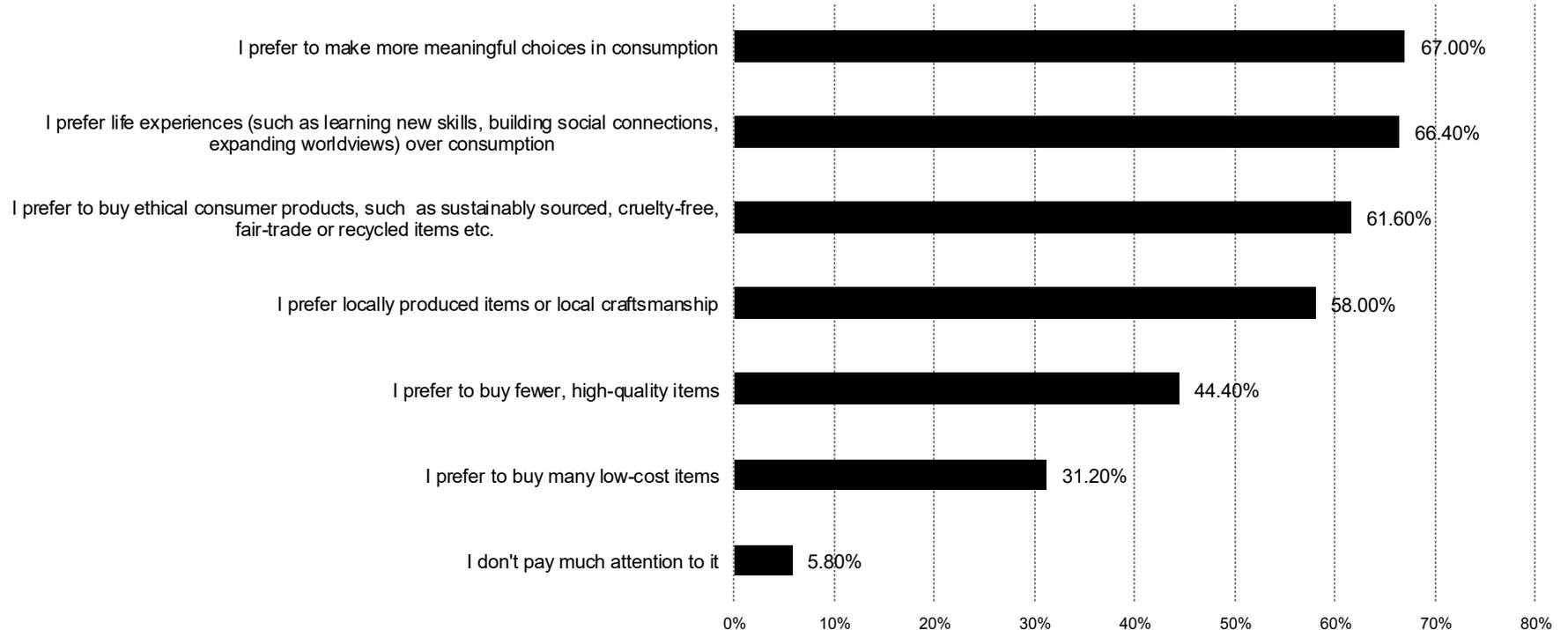
FUTURE CONSUMERS _ INDONESIA



FutureConsumers8a _ Which of the following best describes the way you would like to spend your money?

Please select up to 5 that apply.

▶ TOP 5



N=500

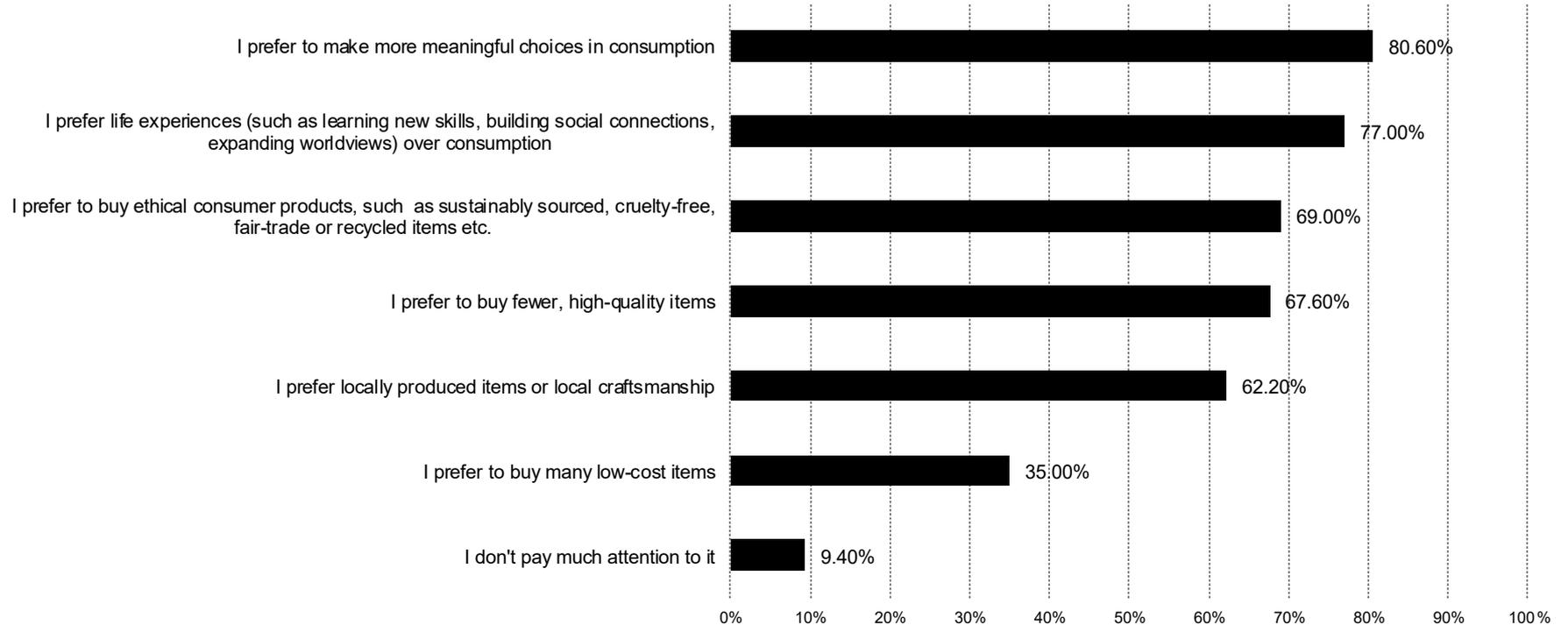
FUTURE CONSUMERS _ NIGERIA



FutureConsumers8a _ Which of the following best describes the way you would like to spend your money?

Please select up to 5 that apply.

TOP 5



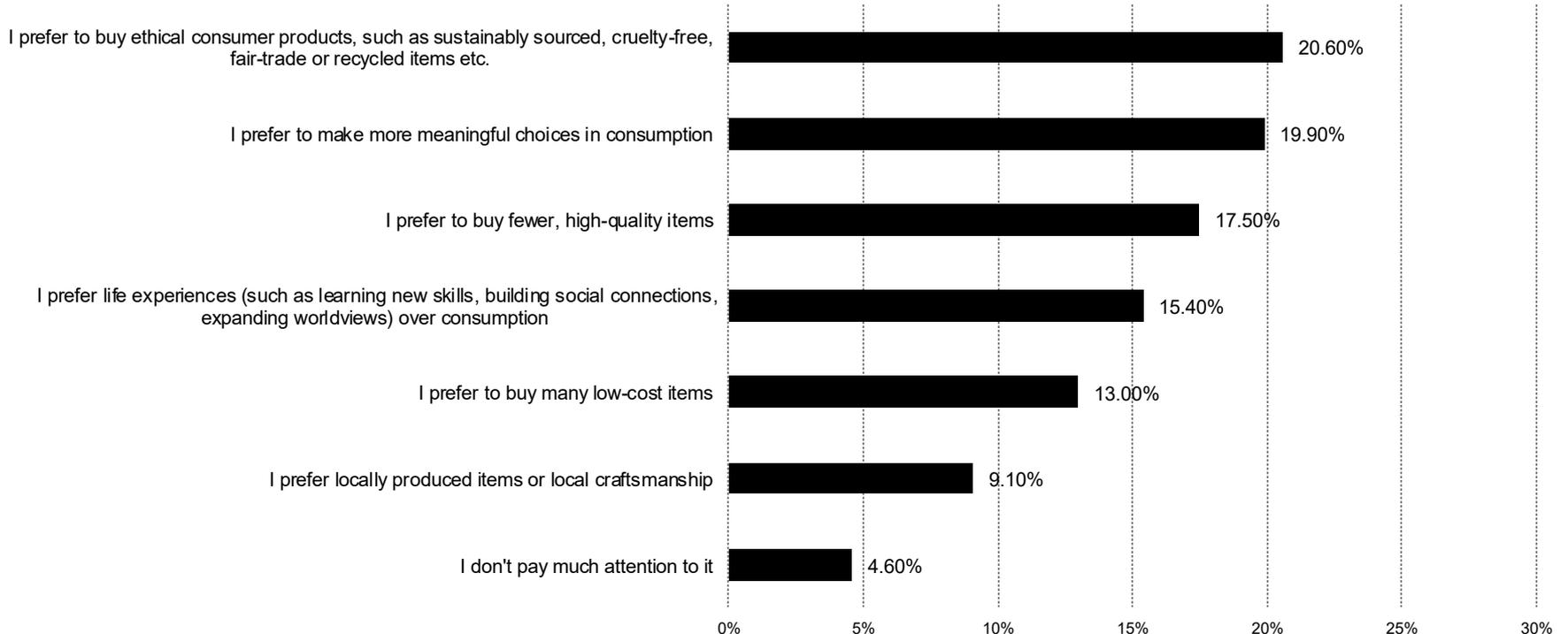
N=500

FUTURE CONSUMERS _ TOTAL

FutureConsumers8ab _ And which one of these is most important to you?

Please select 1 item.

▶ # 1 RANKING

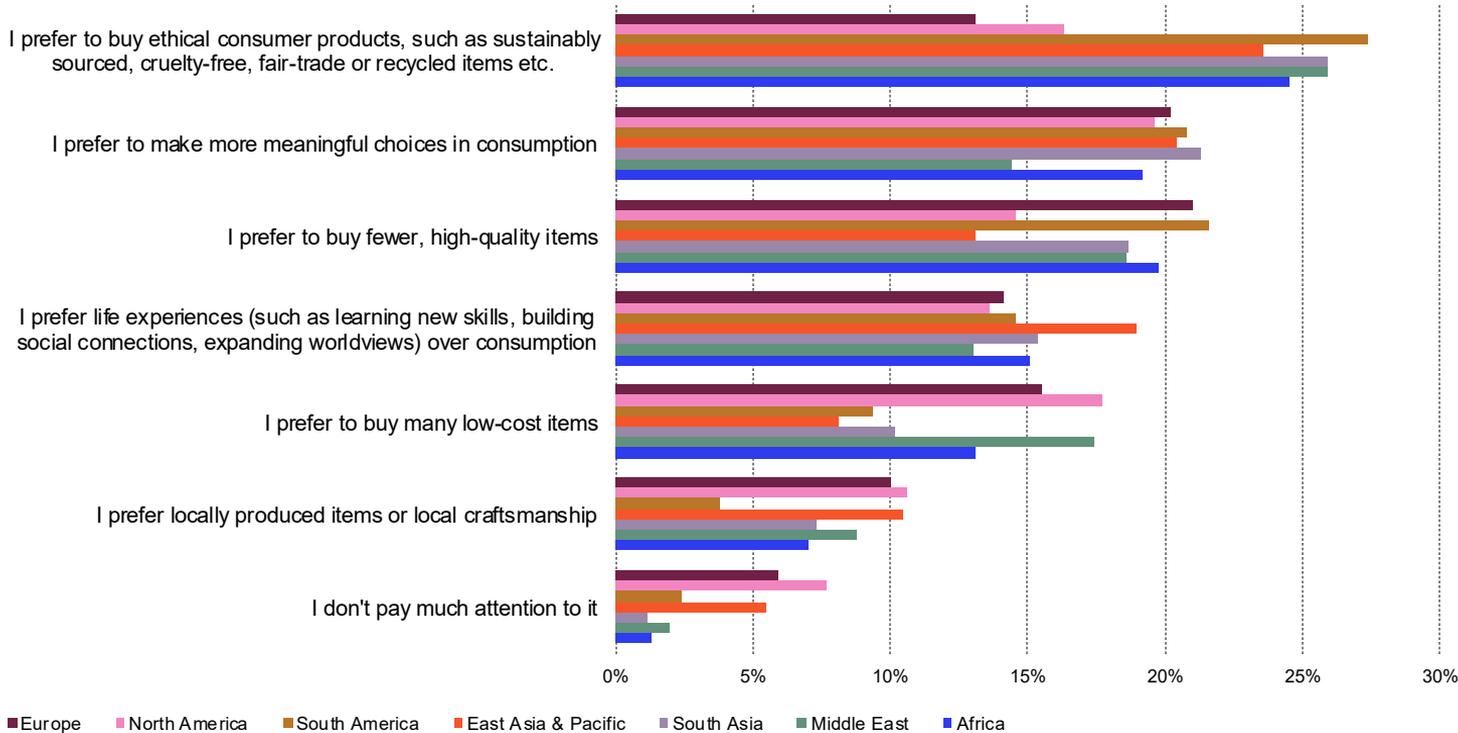


FUTURE CONSUMERS _ REGIONAL

FutureConsumers8ab _ And which one of these is most important to you?

Please select 1 item.

1 RANKING



Consumers in **South America, South Asia, Middle East and Africa** place the highest priority on purchasing ethically produced goods.

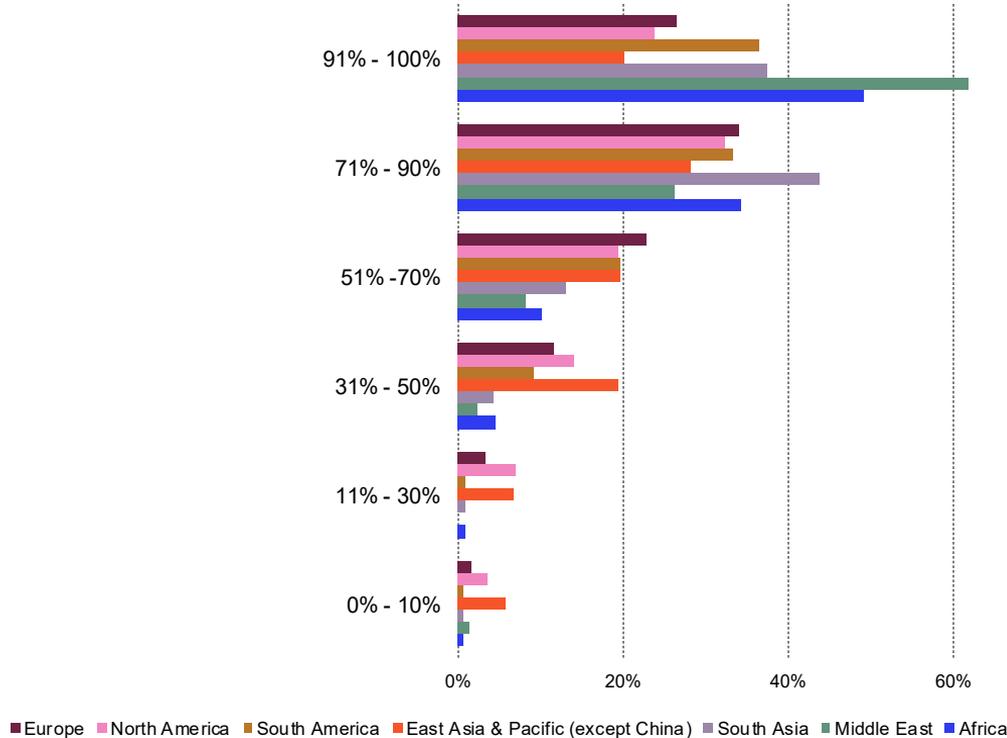
Across all regions (except Middle East), there is a universal focus on making meaningful choices and buying fewer, high-quality products.

In **North America and Middle East**, a small but notable segment of consumers still shows a preference for many low-cost items.

Experiences, such as learning new skills, are particularly important in **East Asia & Pacific**, often being prioritized over material consumption

FUTURE CONSUMERS _ REGIONAL

FutureConsumers8b _ To what extent do you feel a sense of identification with your culture and heritage?



Middle East and **Africa** show the strongest sense of cultural identification, with over half of respondents reporting a 91-100% level of feeling identified with their culture and heritage.

South America and **South Asia** also have a very high level of cultural identification.

Europe demonstrates a subordinate level of identification with its own culture and heritage.

North America and East Asia & Pacific (without China) showing a low level of identification with its culture and heritage.

Overall, there appears to be a correlation between the sense of cultural identification and buying locally produced items



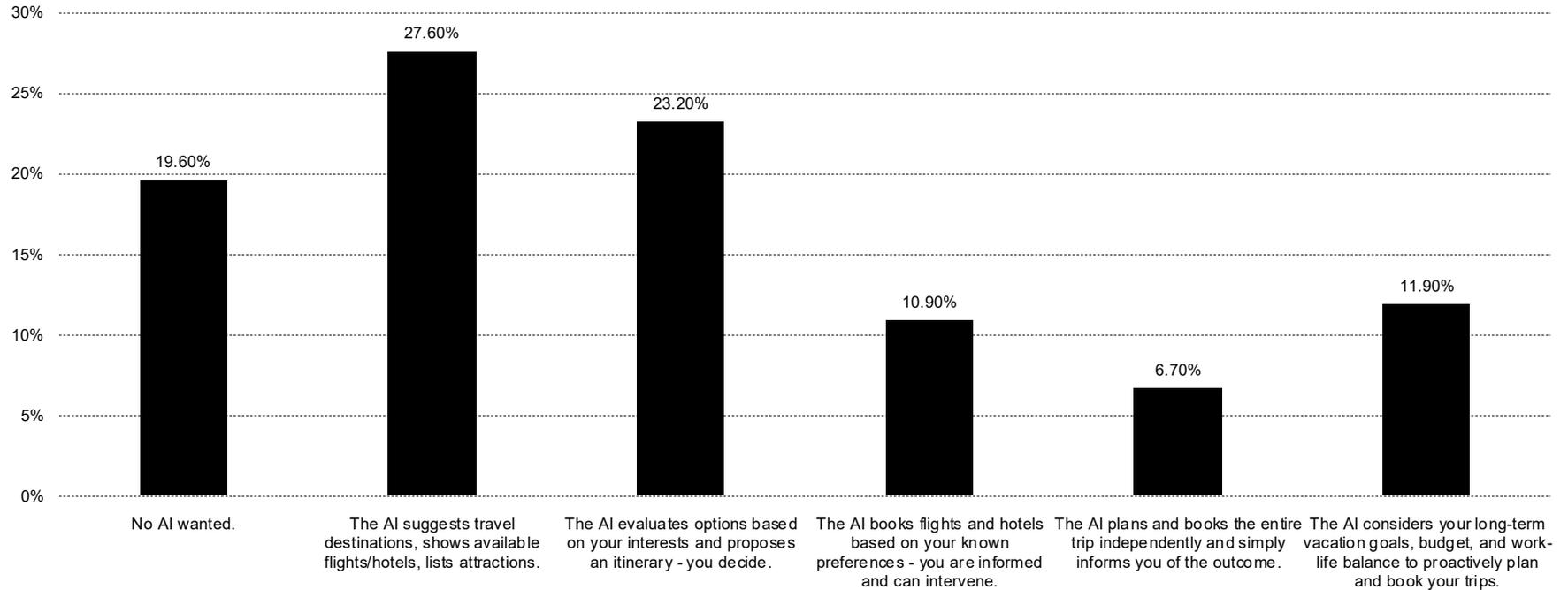
ARTIFICIAL INTELLIGENCE

ARTIFICIAL INTELLIGENCE _ KEY FINDINGS

- Approximately 80% of respondents, on average, express a **willingness to engage with AI** in various forms.
- Overall, there's a regional divide: Western markets (Europe, North America) are more cautious and prefer a **suggestive role for AI**, while other regions are more willing to embrace deeper, **more automated AI solutions**.
- East Asia & Pacific is the most willing to give AI control in travel and insurance management. It also ranks second in acceptance of AI for fitness management (behind South Asia) and household tasks (led by Africa).

ARTIFICIAL INTELLIGENCE _ TOTAL

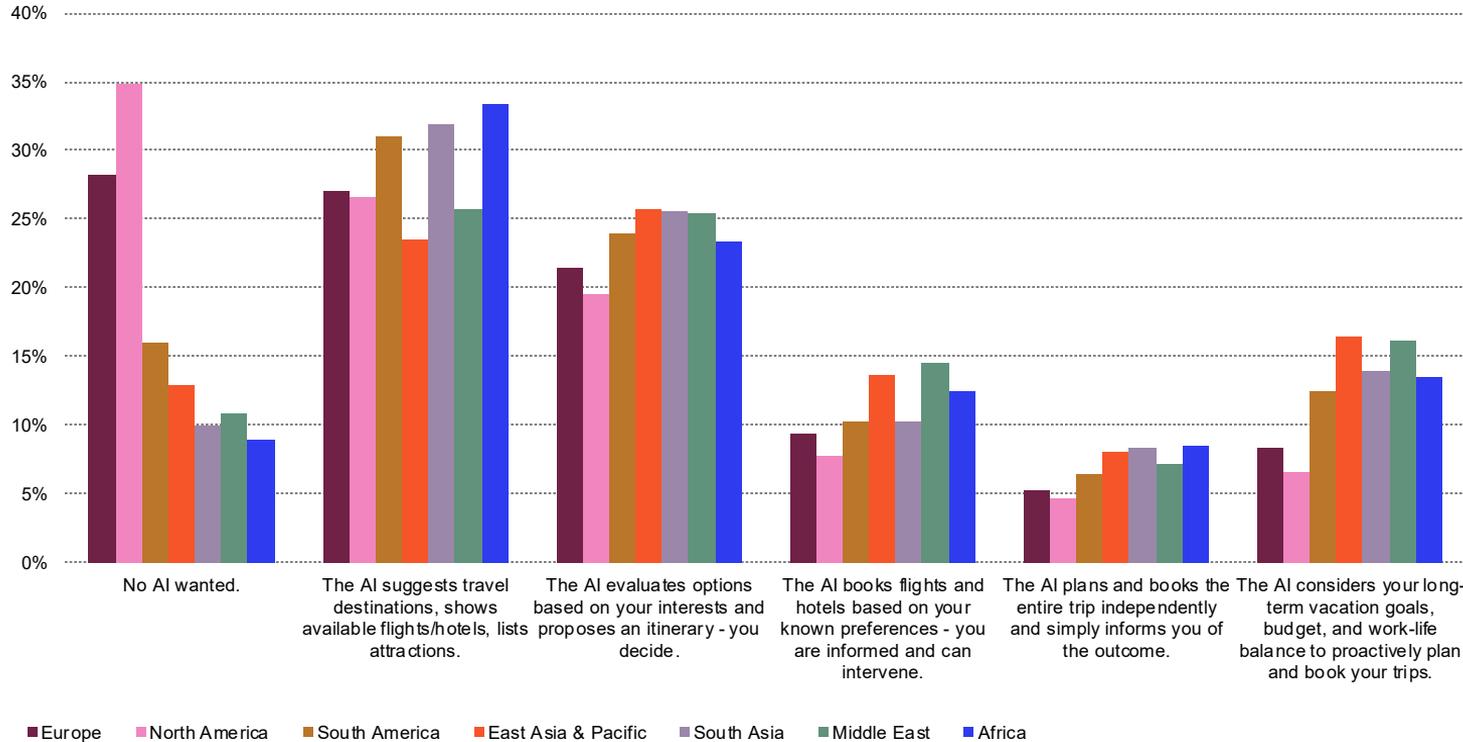
Travel Management _ Please imagine you would like to organize a trip in the future. How deeply will AI be part of it?



N=8.528

ARTIFICIAL INTELLIGENCE _ REGIONAL

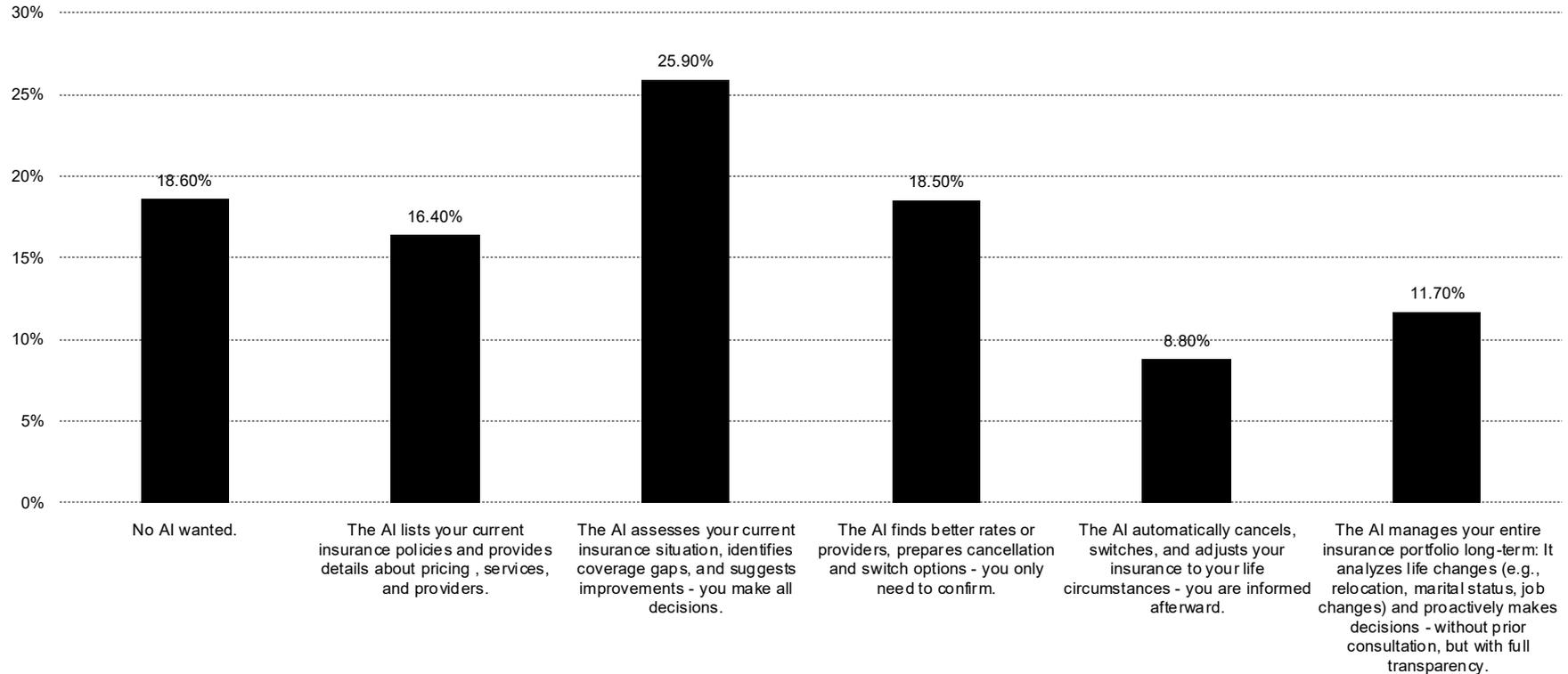
Travel Management _ Please imagine you would like to organize a trip in the future. How deeply will AI be part of it?



Overall, there's a regional divide: Western markets (Europe, North America) are more cautious and prefer a suggestive role for AI, while other regions are more willing to embrace deeper, more automated AI solutions.

ARTIFICIAL INTELLIGENCE _ TOTAL

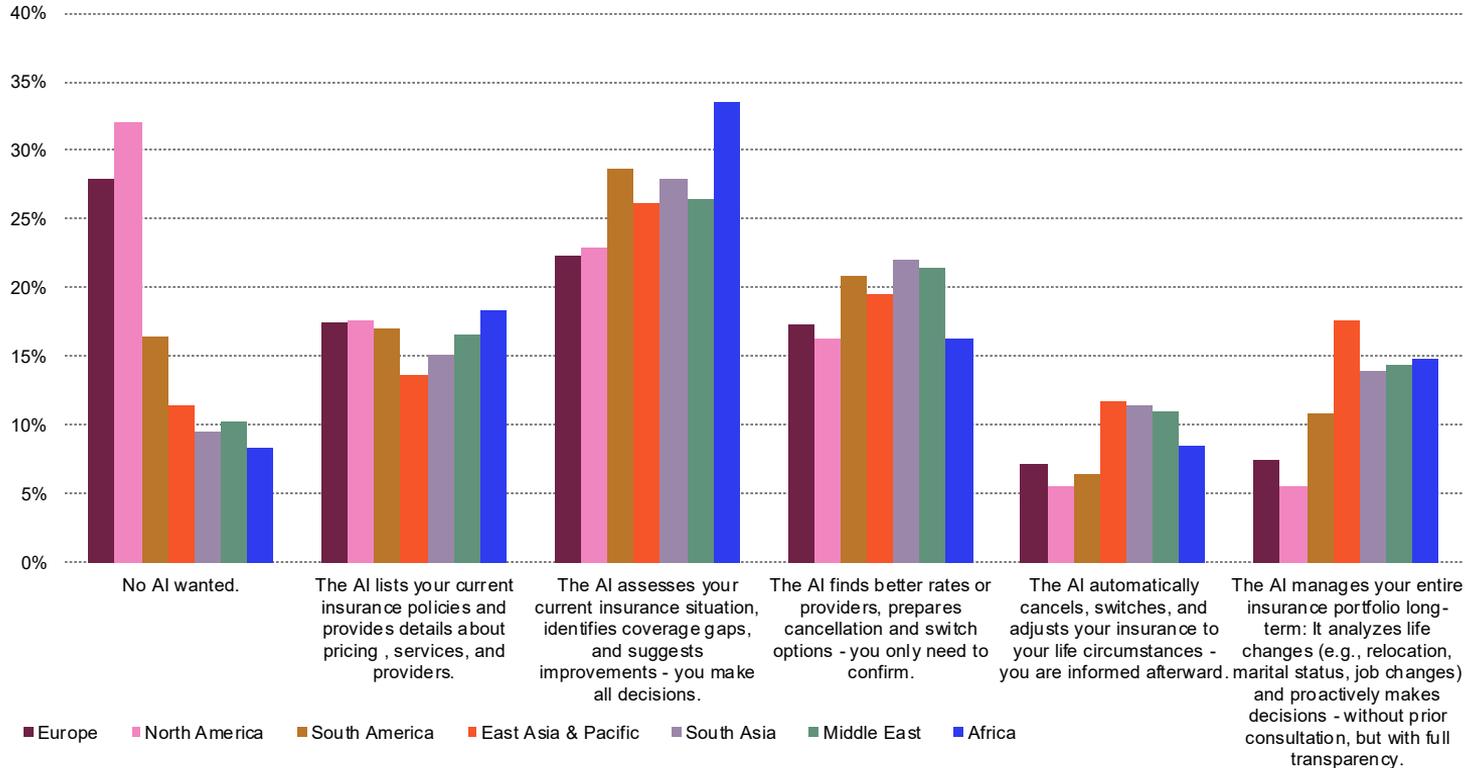
Insurance Management _ Please imagine you would like to review your insurance policies in the future. How deeply will AI be part of it?



N=8.528

ARTIFICIAL INTELLIGENCE _ REGIONAL

Insurance Management _ Please imagine you would like to review your insurance policies in the future. How deeply will AI be part of it?



Europe and North America are the most skeptical regions, with the highest number of respondents rejecting AI entirely for insurance management. When accepted, the preferred role for AI is purely informational.

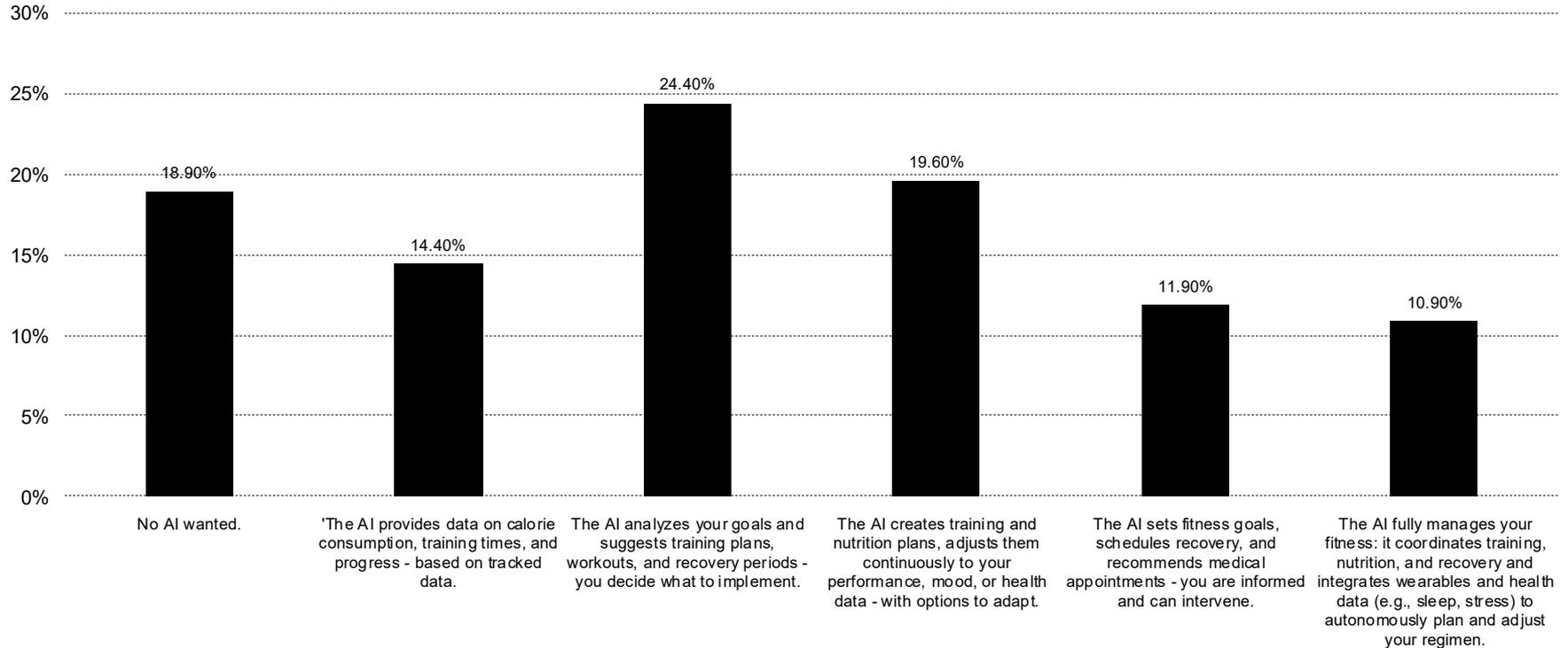
Africa, Middle East, South Asia and South America are open to deeper AI integration. Africa shows the highest interest in AI assessing the individual situation.

East Asia & Pacific is the most willing to give AI control, with the highest preference for AI to manage their insurance policies and suggest improvements.

Overall, a clear regional divide is evident. Western markets (Europe, North America) prefer AI in a limited, advisory role, whereas other regions are more willing to use AI for analysis, automation, and full management.

ARTIFICIAL INTELLIGENCE _ TOTAL

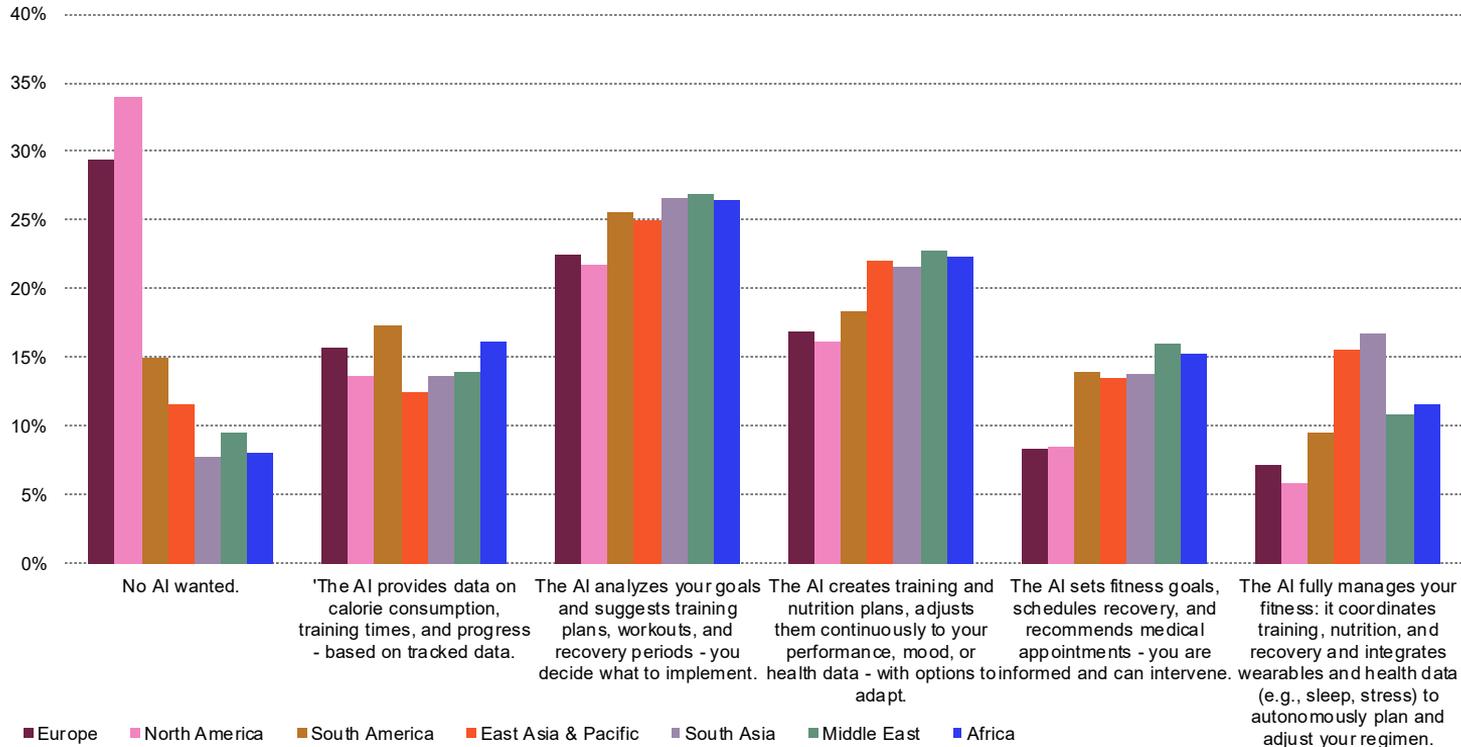
Fitness Management _ Please imagine you would like to improve your physical health and fitness in the future. How deeply will AI be part of it?



N=8,528

ARTIFICIAL INTELLIGENCE _ REGIONAL

Fitness Management _ Please imagine you would like to improve your physical health and fitness in the future. How deeply will AI be part of it?



North America continues to be the most skeptical region, with the highest percentage of respondents rejecting AI for fitness management. Their preferred role for AI, if any, is purely to provide data.

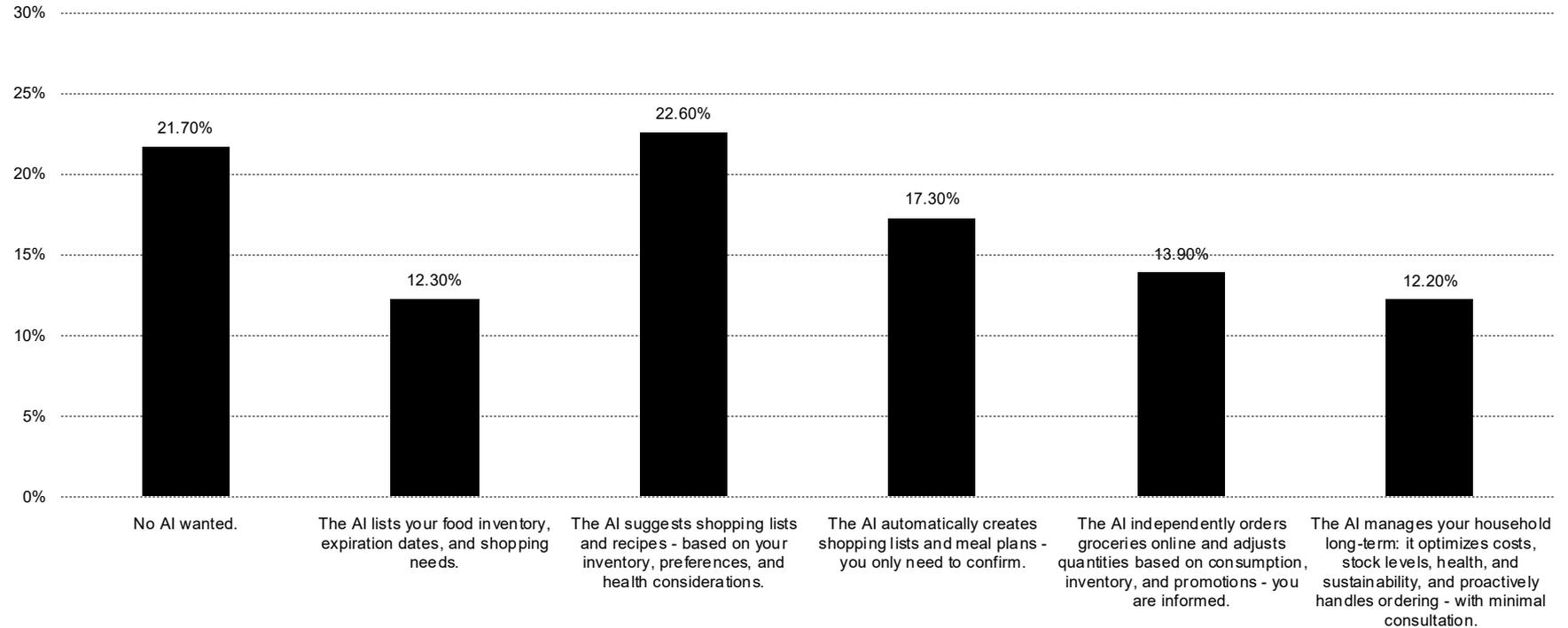
Africa, Middle East and Asia show the highest acceptance of AI in fitness, with a strong preference for autonomous and fully managed solutions. They are most willing to let AI create, adjust, and even fully manage their training and nutrition plans.

South America is most receptive to AI providing data and analysing the individual situation.

Overall, a consistent regional pattern emerges: Western markets (Europe, North America) prefer an advisory or data-providing role for AI, while other regions are more open to fully automated and autonomous AI solutions in their fitness routines.

ARTIFICIAL INTELLIGENCE _ TOTAL

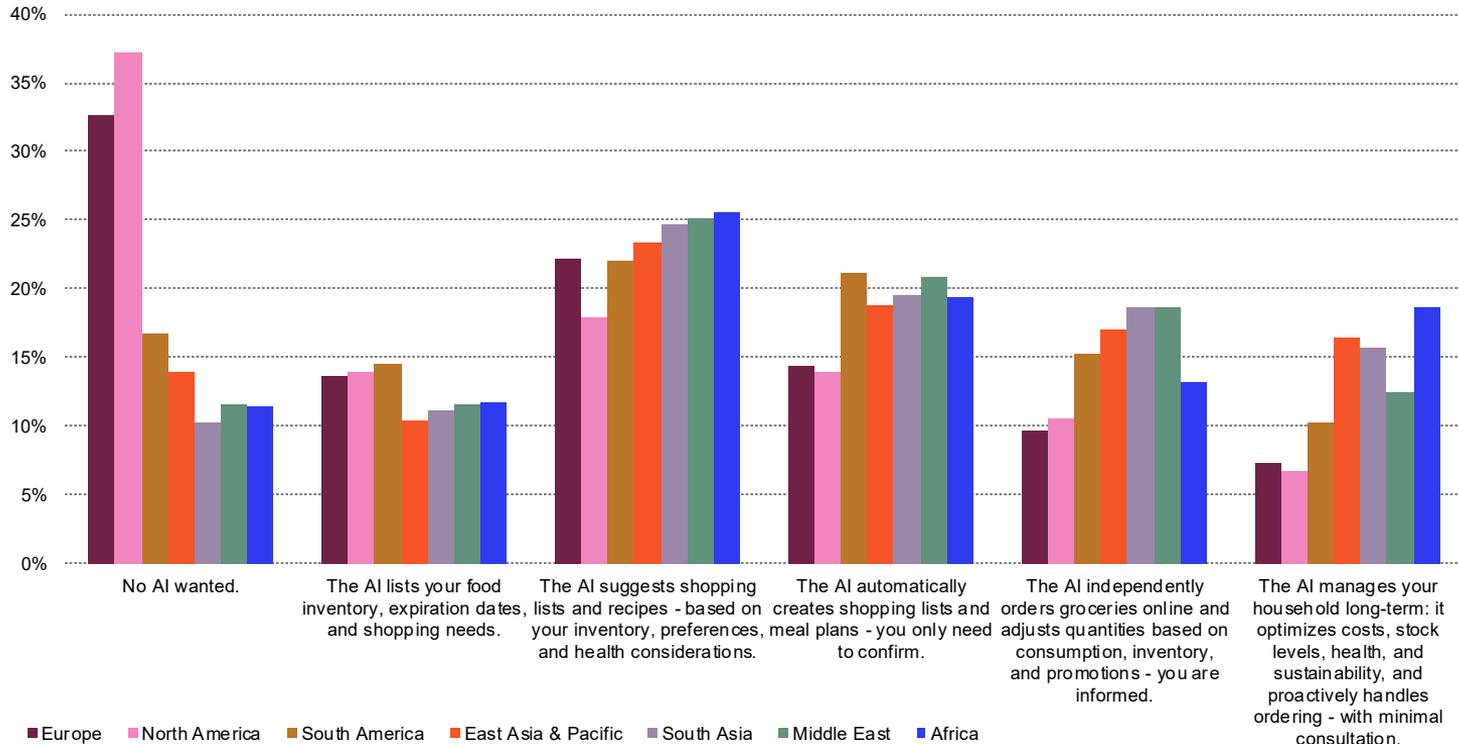
Household Organisation _ Please imagine how you'd like your household to be organized in the future. How deeply will AI be part of it?



N=8.528

ARTIFICIAL INTELLIGENCE _ REGIONAL

Household Organisation _ Please imagine how you'd like your household to be organized in the future. How deeply will AI be part of it?



North America continues its trend of high skepticism, with the majority of respondents rejecting AI for household organization. When accepted, the preferred role is limited to providing information.

Europe is open to AI that acts as a personal assistant, suggesting shopping lists and meal plans based on user preferences.

Africa and Asia are the most receptive to automated and autonomous AI solutions. Africa shows the strongest preference for AI that proactively manages the household and optimizes inventory.

South America is most interested in a highly automated AI that creates shopping lists and meal plans, requiring only a final confirmation.

Overall, a clear East-West divide persists: Western markets (Europe and North America) prefer an advisory or semi-automated role for AI, while other regions are more willing to embrace fully automated and proactive AI solutions in their daily lives.



FUTURE WORKFORCE

FUTURE WORKFORCE _ KEY FINDINGS

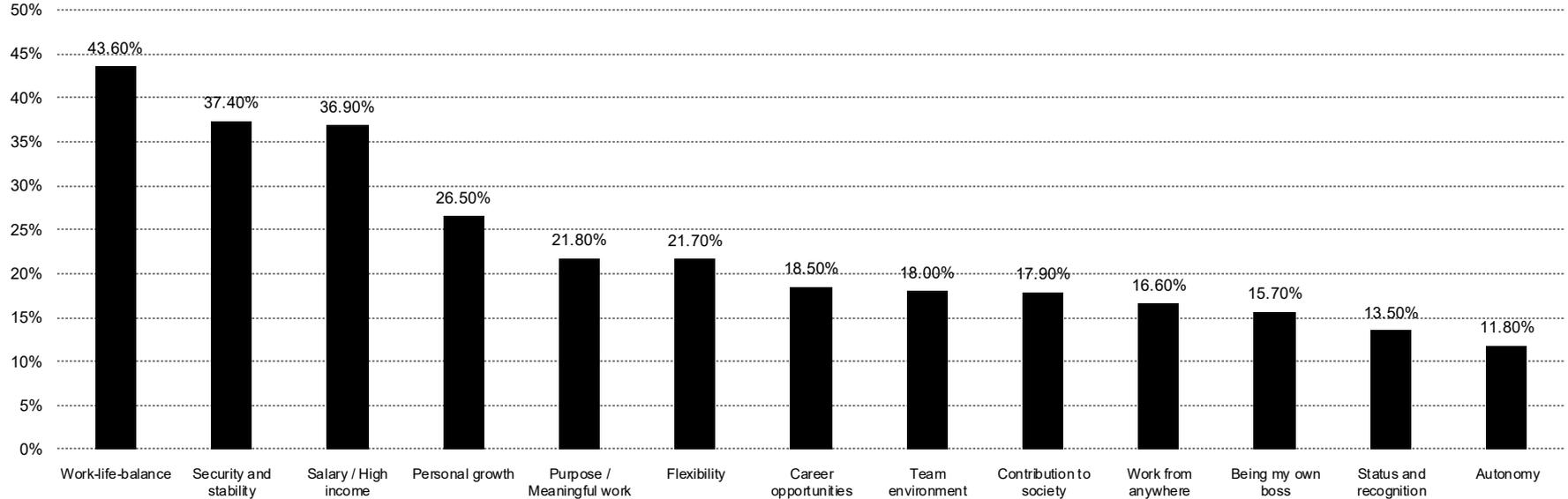
- **Work-life balance** and **security & stability** are the most important aspects of work life across all regions.
- Europe places the highest value on **work-life balance** and **job security**, while South America prioritizes **autonomy** more than other regions.
- Africa place emphasis on **security** and **high income** but also **personal growth** and **independence**.
- North America places a lower priority on salary compared to other regions and prioritizes a **work-life-balance**, as well as **security and stability**.
- East Asia & Pacific shows a focus on **work-life-balance** and **high income**.
- When asked how education systems should be changed to prepare people and humanity to successfully face today's and tomorrow's challenges the most important skills are **stress management** and the **ability to stay mentally healthy** worldwide, except in Africa.
- Acquiring **new skills related to artificial intelligence** is considered more important in Africa, Middle East and Asia than in Europe and North America.
- **Entrepreneurial skills** are highly valued across Middle East and Africa.

FUTURE WORKFORCE_ TOTAL

HardWork11 _ Which aspects of your work life are most important to you?

Please rank the following aspects according with #1 being the most important.

▶ **Top 3**



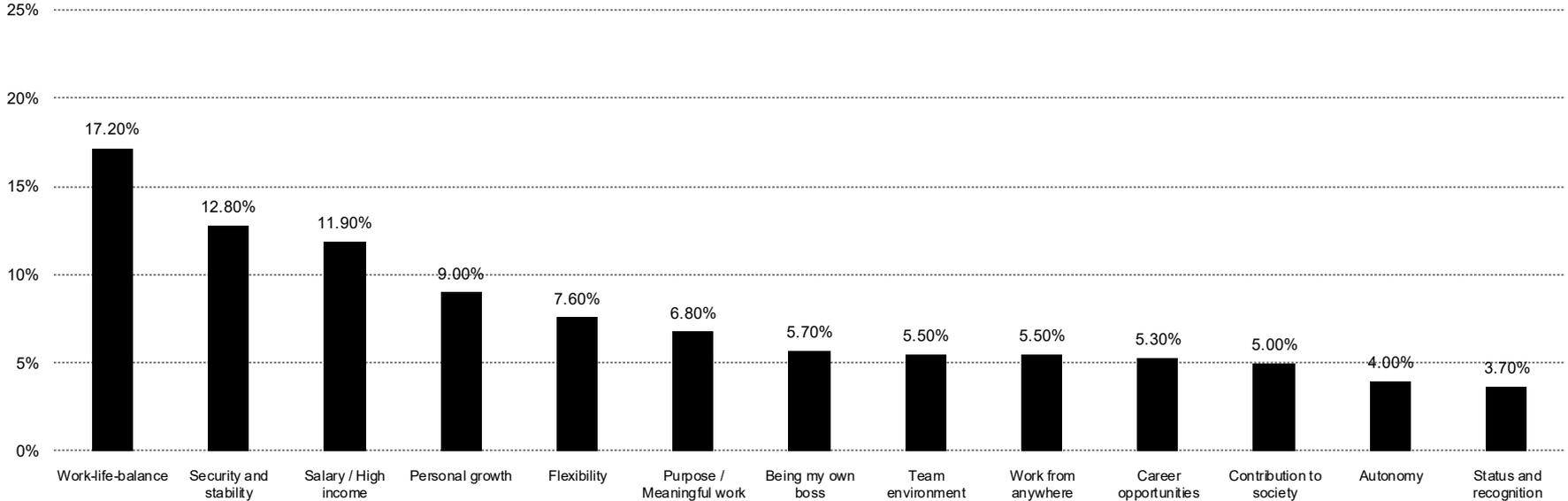
N=6.663 ("I currently work full-time / part-time")

FUTURE WORKFORCE_ TOTAL

HardWork11 _ Which aspects of your work life are most important to you?

Please rank the following aspects according with #1 being the most important.

▶ # 1 RANKING



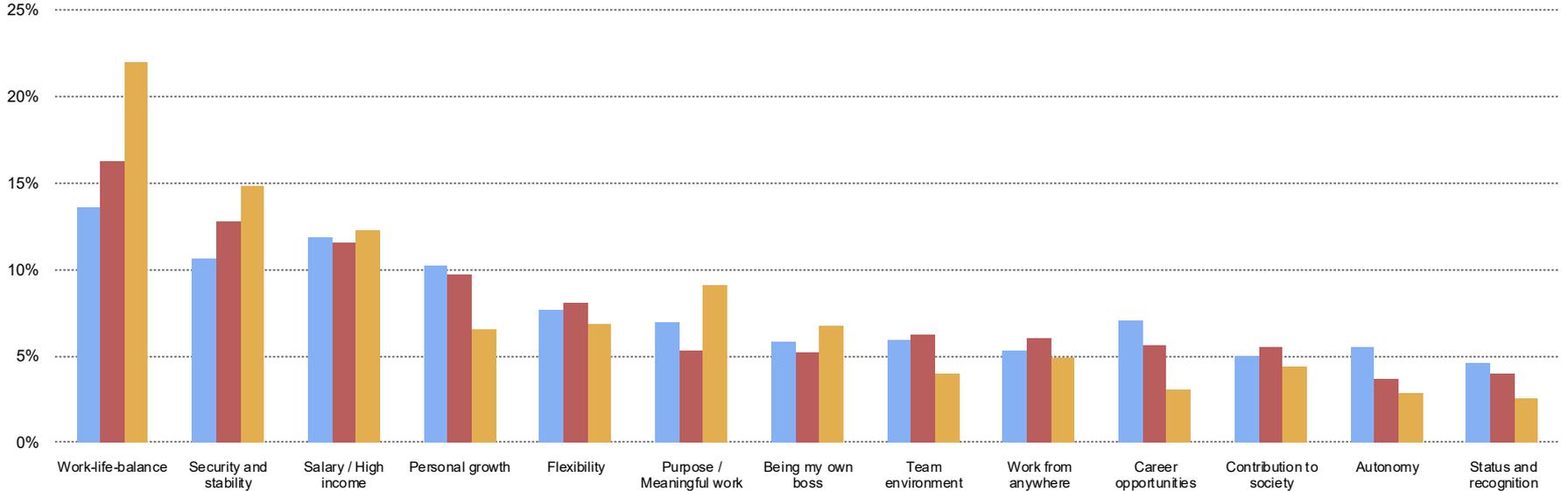
N=6.663 ("I currently work full-time / part-time")

FUTURE WORKFORCE_ 18 - 29 vs. 30 – 49 vs. 50-69 YEARS OLD

HardWork11 _ Which aspects of your work life are most important to you?

Please rank the following aspects according with #1 being the most important.

▶ # 1 RANKING



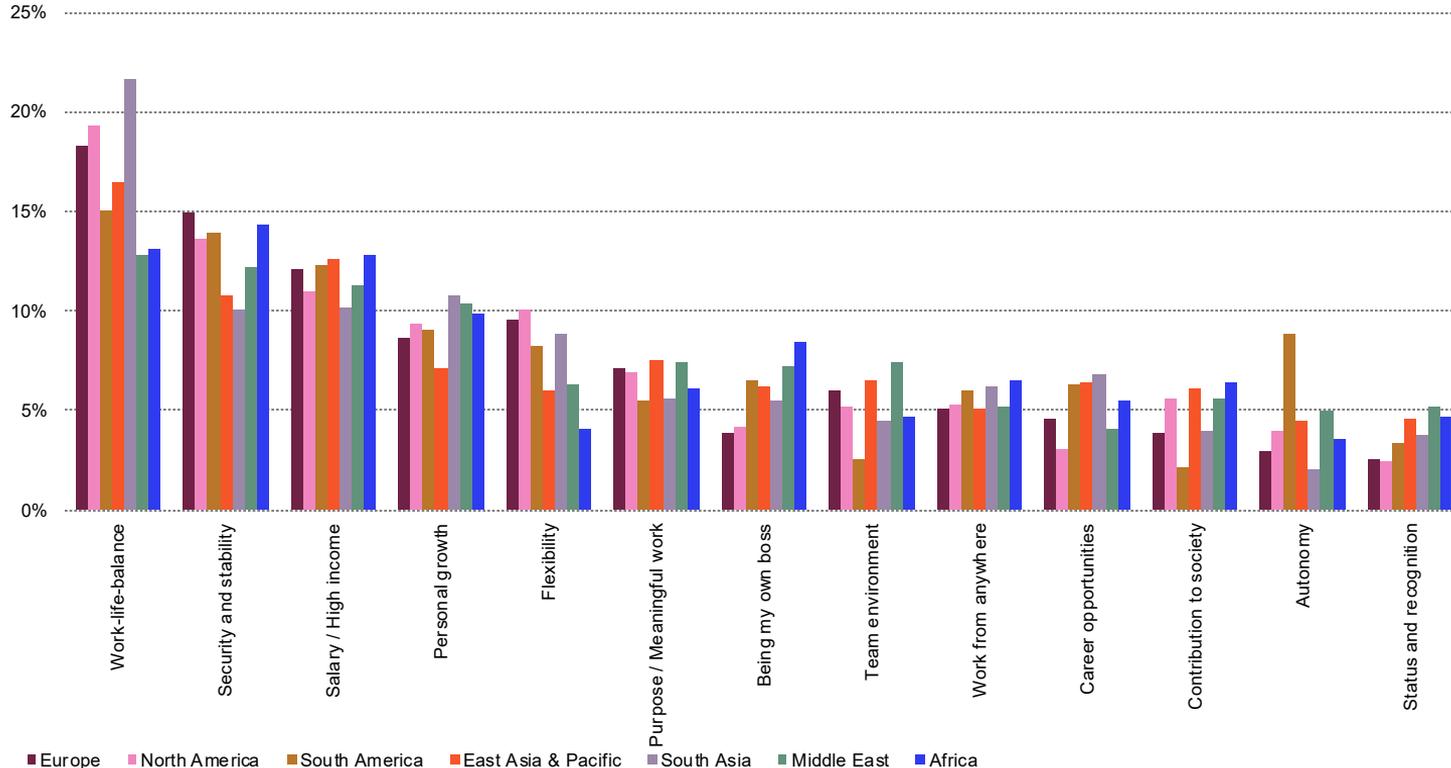
■ 18-29 years old* N=2.240 ■ 30-49 years old* N=3.447 ■ 50-69 years old* N=2.841 * "I currently work full-time / part-time"

FUTURE WORKFORCE _ REGIONAL

HardWork11 _ Which aspects of your work life are most important to you?

Please rank the following aspects according with #1 being the most important.

1 RANKING



Work-life balance and **security & stability** are the most important aspects of work life across all regions - highest ranked in South Asia.

Europe places the highest value on work-life balance and job security, while **South America** prioritizes autonomy and career opportunities.

Africa prioritize security and high income but also personal growth and independence.

North America places a lower priority on salary compared to other regions and prioritizes a work-life-balance, as well as security and stability.

East Asia & Pacific shows a focus on work-life-balance and high income.

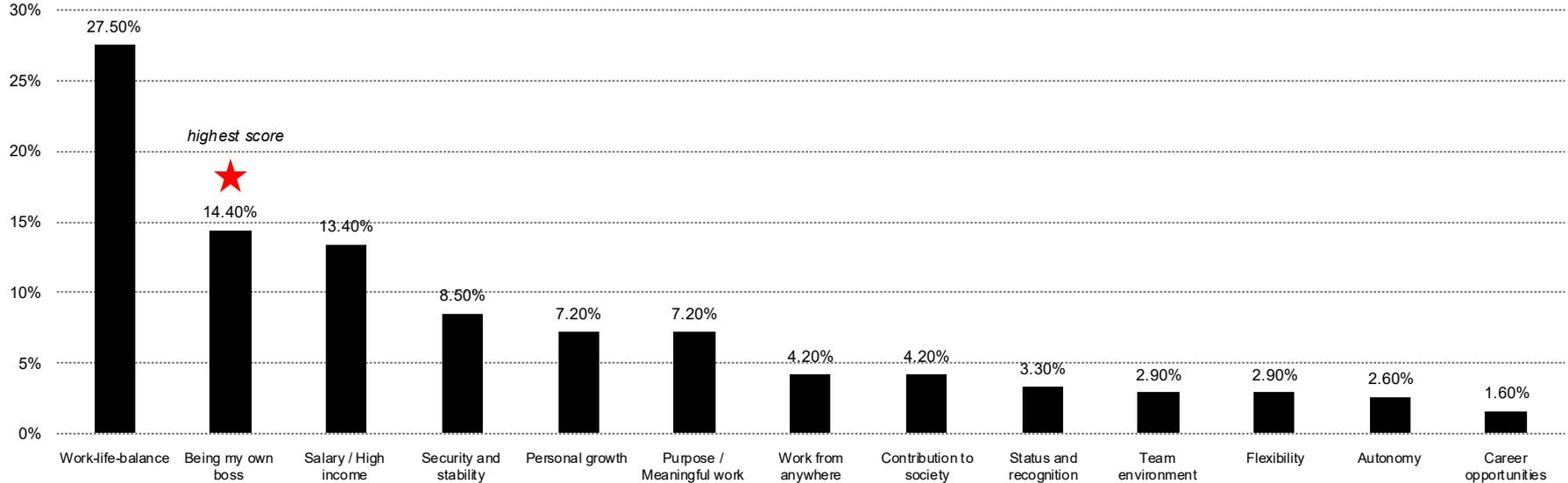
FUTURE WORKFORCE_ JAPAN



HardWork11 _ Which aspects of your work life are most important to you?

Please rank the following aspects according with #1 being the most important.

▶ # 1 RANKING



■ Japan

N=306 ("I currently work full-time / part-time")

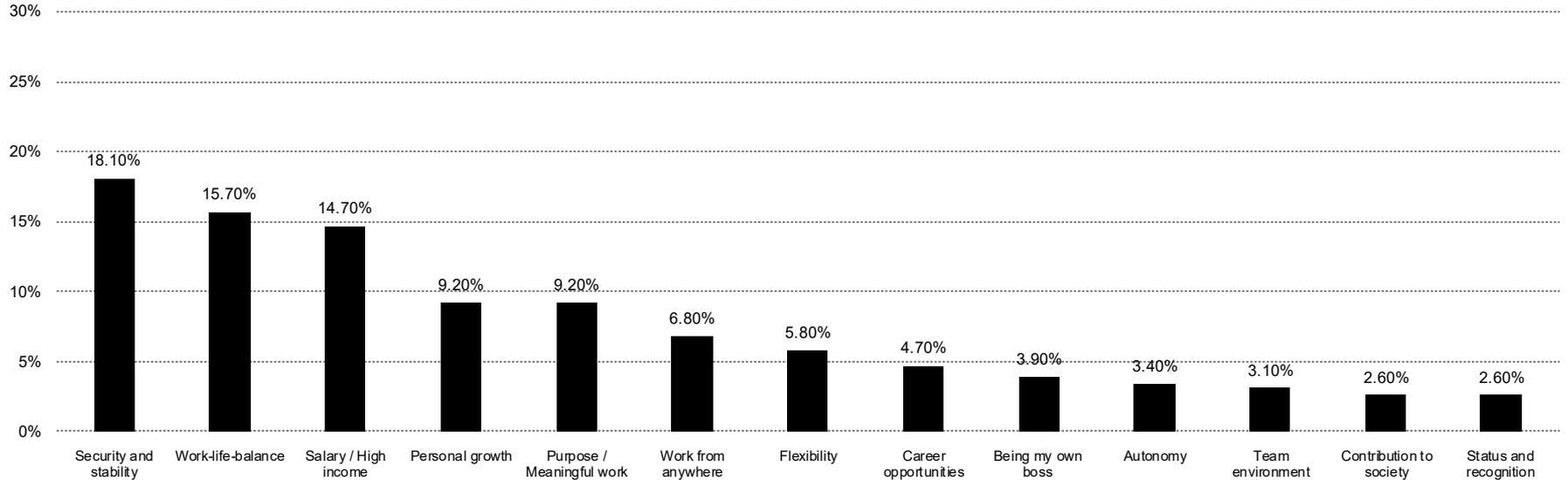
FUTURE WORKFORCE_ POLAND



HardWork11 _ Which aspects of your work life are most important to you?

Please rank the following aspects according with #1 being the most important.

1 RANKING



■ Poland

N=381 ("I currently work full-time / part-time")

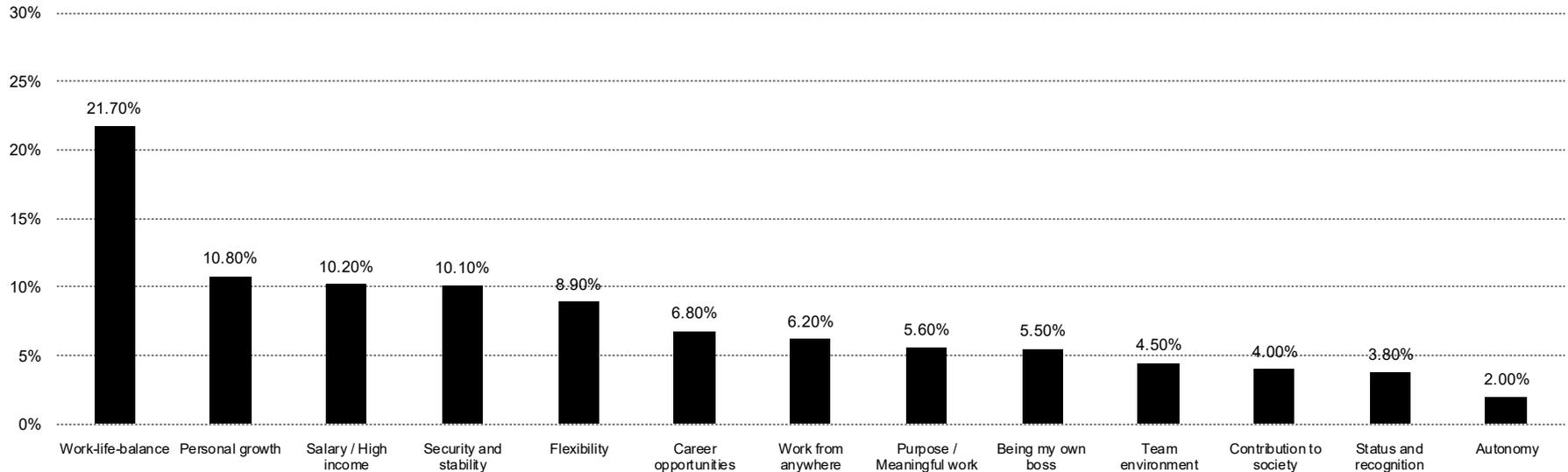
FUTURE WORKFORCE_ INDIA



HardWork11 _ Which aspects of your work life are most important to you?

Please rank the following aspects according with #1 being the most important.

▶ # 1 RANKING



■ India

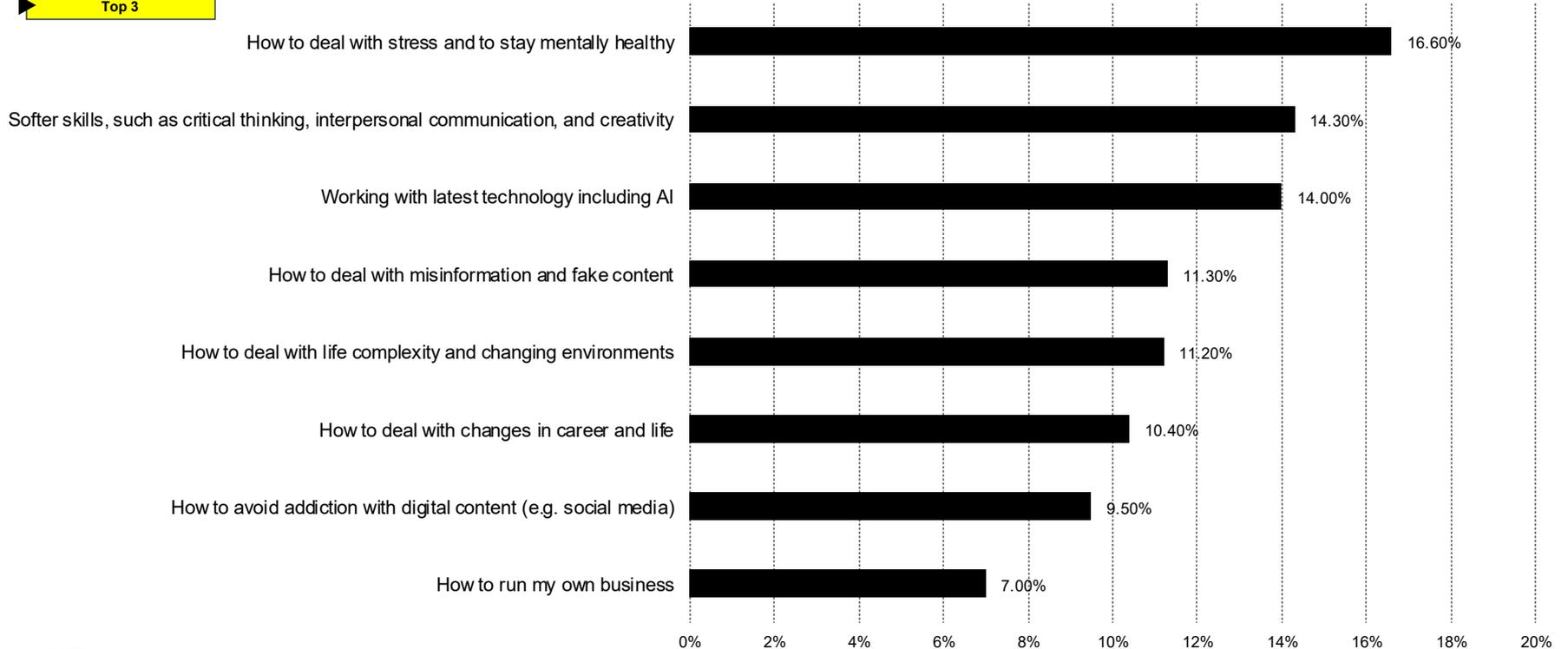
N=853 ("I currently work full-time / part-time")

FUTURE WORKFORCE _ TOTAL

NewSkills10 _ Some people say that education systems need to be changed to prepare people and humanity to successfully face today's and tomorrow's challenges.

Please rank the following skills according with top 3 being the most important for people (young & old) to develop.

▶ **Top 3**



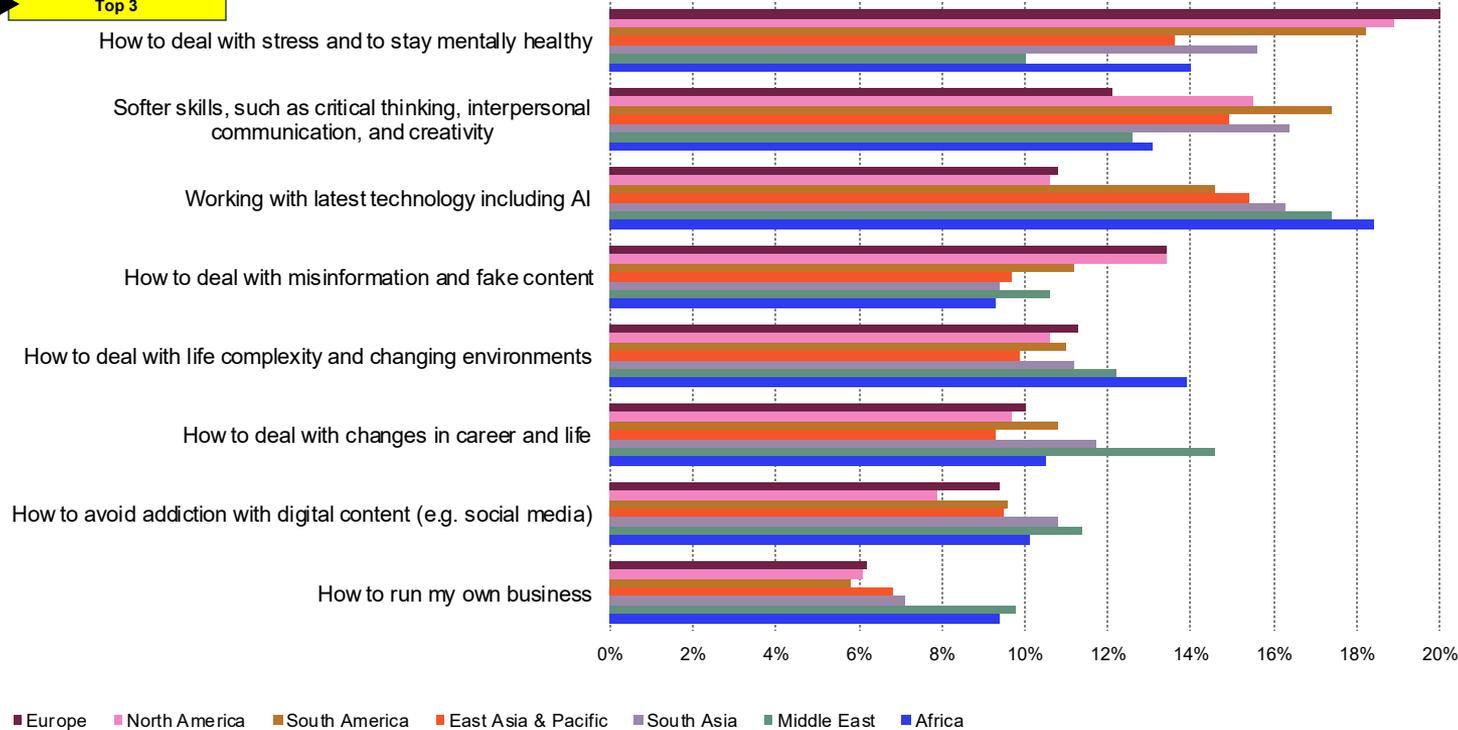
N=8.528

FUTURE WORKFORCE _ REGIONAL

NewSkills10 _ Some people say that education systems need to be changed to prepare people and humanity to successfully face today's and tomorrow's challenges.

Please rank the following skills according with top 3 being the most important for people (young & old) to develop.

Top 3



Stress management and mental health is a worldwide top priority topic in terms of new skills to learn, except in Africa.

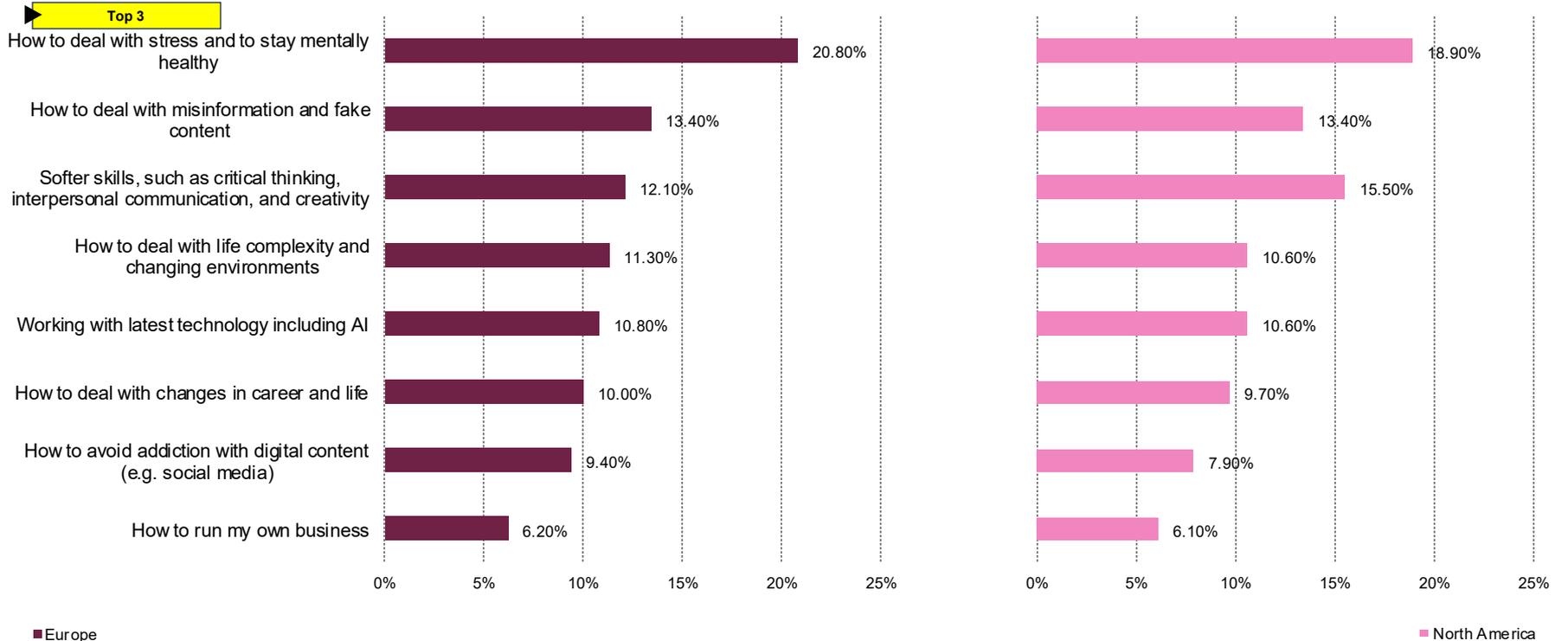
Acquiring new skills related to artificial intelligence is considered more important in Africa, Middle East and Asia than in Europe and North America.

Entrepreneurial skills highly valued across Middle East and Africa.

FUTURE WORKFORCE _ EUROPE vs. NORTH AMERICA

NewSkills10 _ Some people say that education systems need to be changed to prepare people and humanity to successfully face today's and tomorrow's challenges.

Please rank the following skills according with top 3 being the most important for people (young & old) to develop.



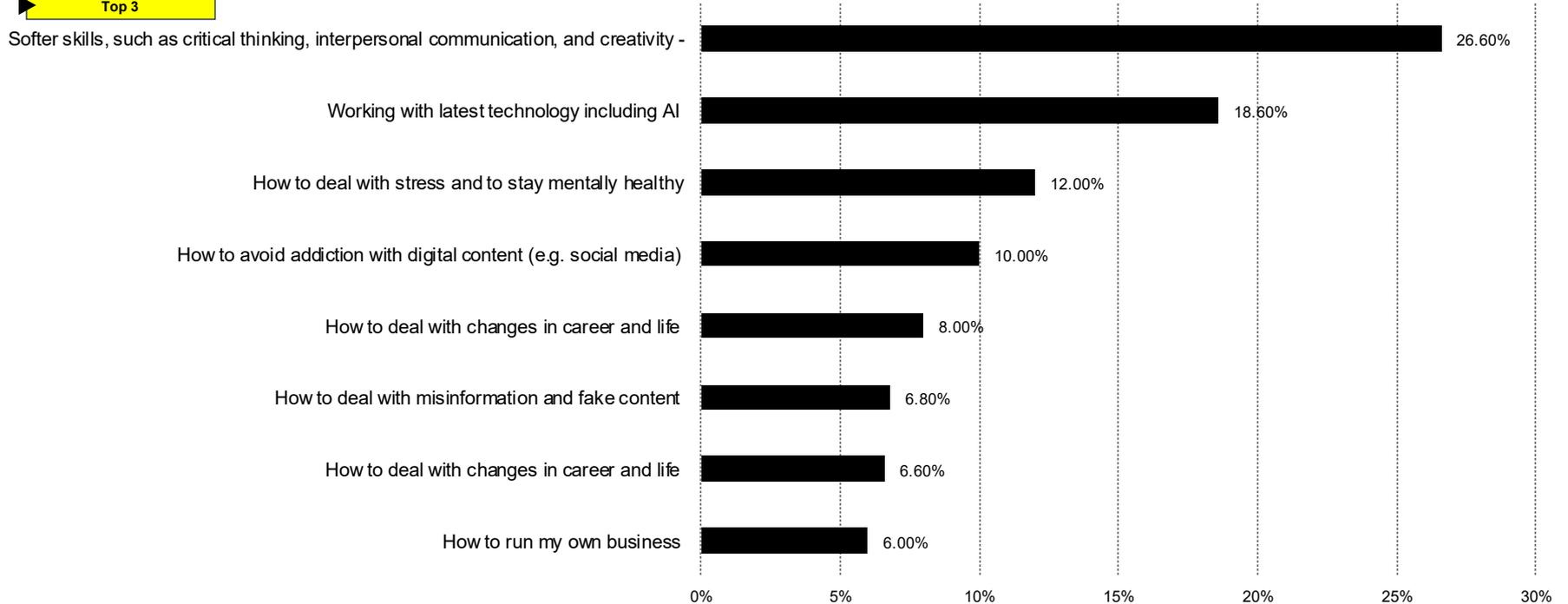
FUTURE WORKFORCE _ INDONESIA



NewSkills10 _ Some people say that education systems need to be changed to prepare people and humanity to successfully face today's and tomorrow's challenges.

Please rank the following skills according with top 3 being the most important for people (young & old) to develop.

▶ **Top 3**



■ Indonesia

N=500

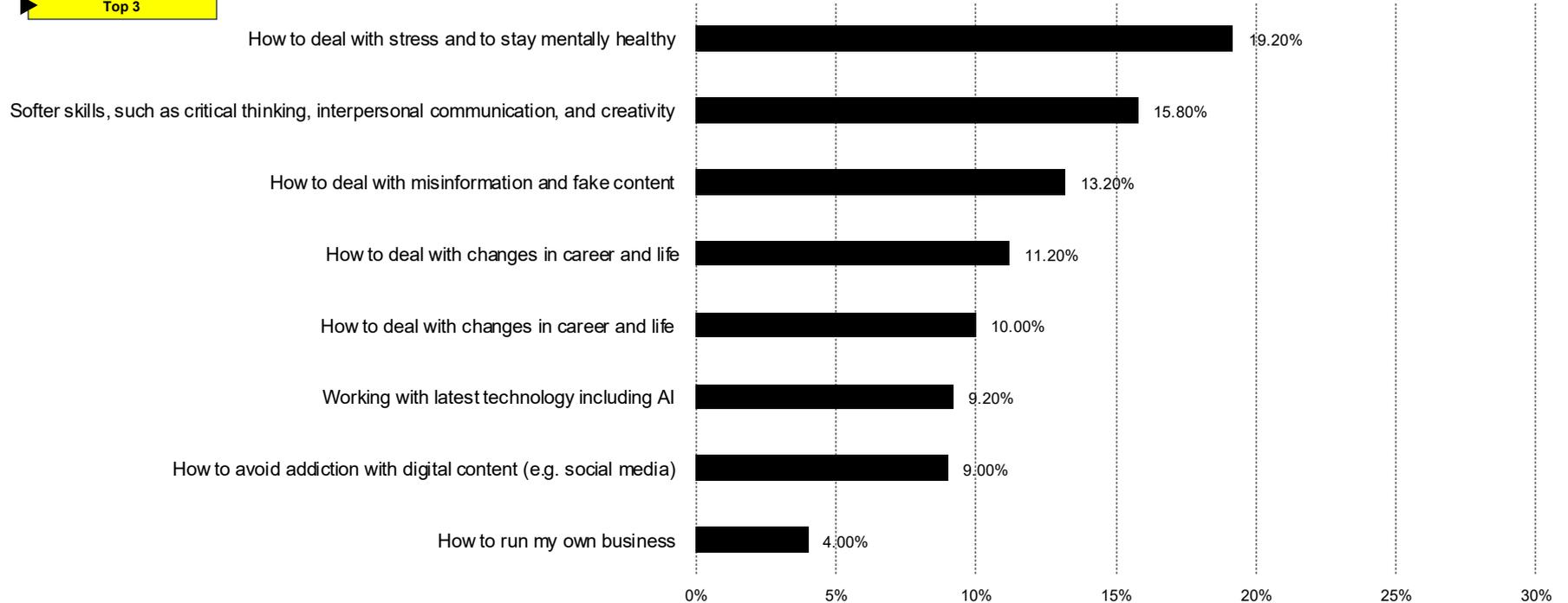
FUTURE WORKFORCE _ GERMANY



NewSkills10 _ Some people say that education systems need to be changed to prepare people and humanity to successfully face today's and tomorrow's challenges.

Please rank the following skills according with top 3 being the most important for people (young & old) to develop.

▶ **Top 3**



■ Germany

N=500

A photograph of four diverse young people standing side-by-side with their arms crossed against a light blue background. From left to right: a young man with curly red hair wearing a mustard-colored jacket over a red and white argyle sweater; a young woman with long blonde braids wearing a blue and black patterned long-sleeve shirt and high-waisted blue jeans; a young woman with dark hair in buns wearing a white t-shirt under a black denim vest and a black denim skirt; and a young man with short dark hair wearing a blue and white tie-dye hoodie and matching pants. The text 'GLOBAL POWER SHIFTS' is overlaid in large, bold, yellow capital letters across the center of the image.

GLOBAL POWER SHIFTS

GLOBAL POWER SHIFTS _ KEY FINDINGS

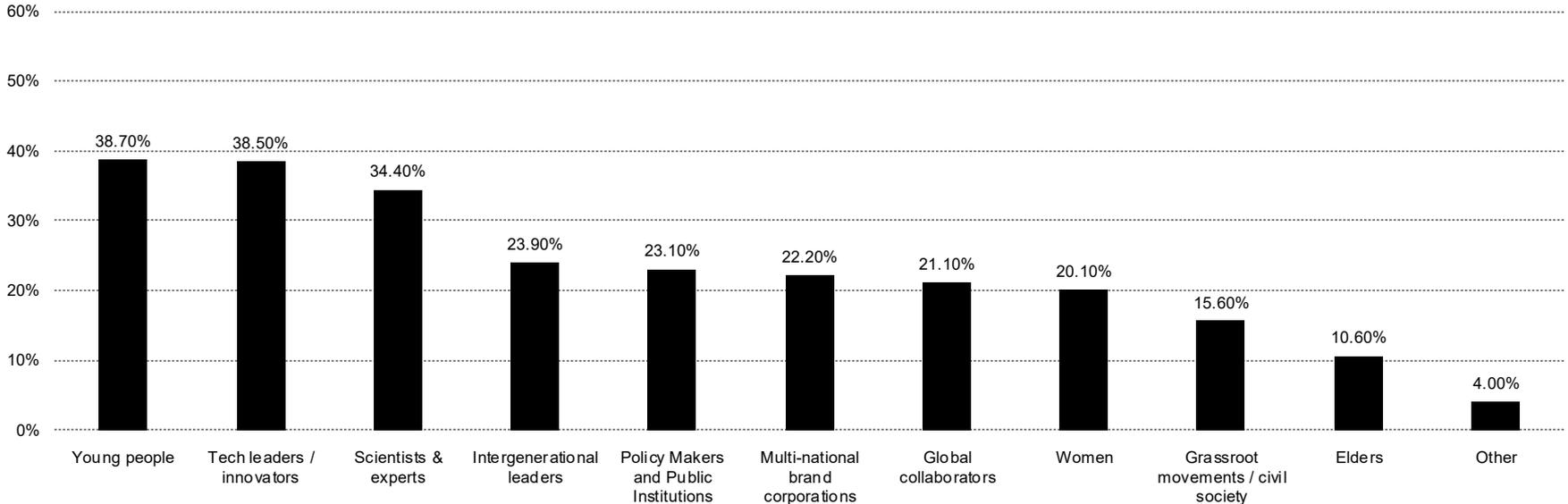
- Across all regions, **'tech leaders / innovators'** and **'young people'** are widely believed to play a key role in future leadership.
- South America also shows stronger belief in **'tech leaders'** but also **'women'** and **'intergenerational leaders'** as well as **'multi-national brand corporations'**.
- East Asia & Pacific show the highest approval ratings for **'intergenerational leaders'**.
- Africa also believes in **'tech leaders / innovators'**, the **'young people'** and **'scientists & experts'** but also **'policy makers and public institutions'**.

GLOBAL POWER SHIFTS_ TOTAL

NewLeadership12 _ Which group do you believe will play a key role in leadership (in the public and private sector) in the future?

Please select up to 3 answer options of relevant groups.

▶ TOP 3 RANKING



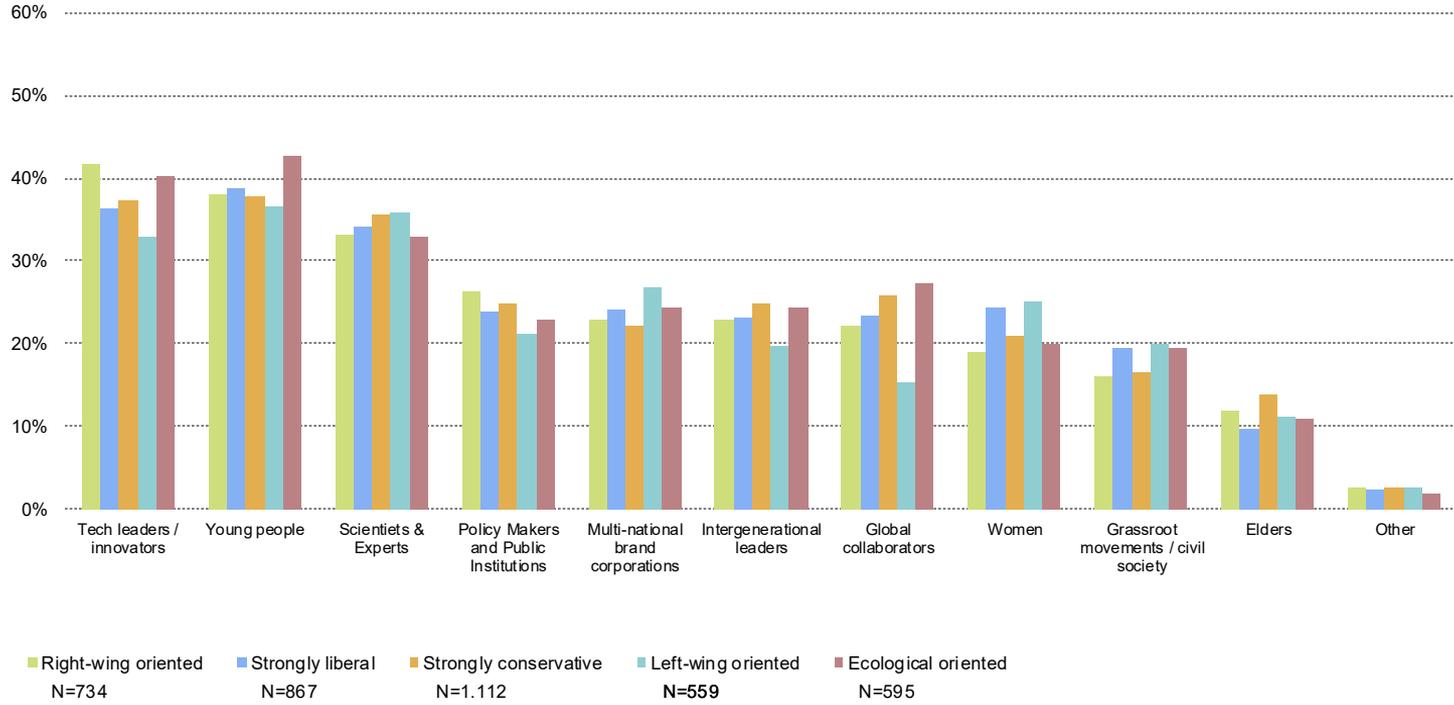
N=7.528 (except China)

GLOBAL POWER SHIFTS _ RIGHT – WING vs. OTHER ORIENTATION

NewLeadership12 _ Which group do you believe will play a key role in leadership (in the public and private sector) in the future?

Please select up to 3 answer options of relevant groups.

▶ TOP 3 RANKING



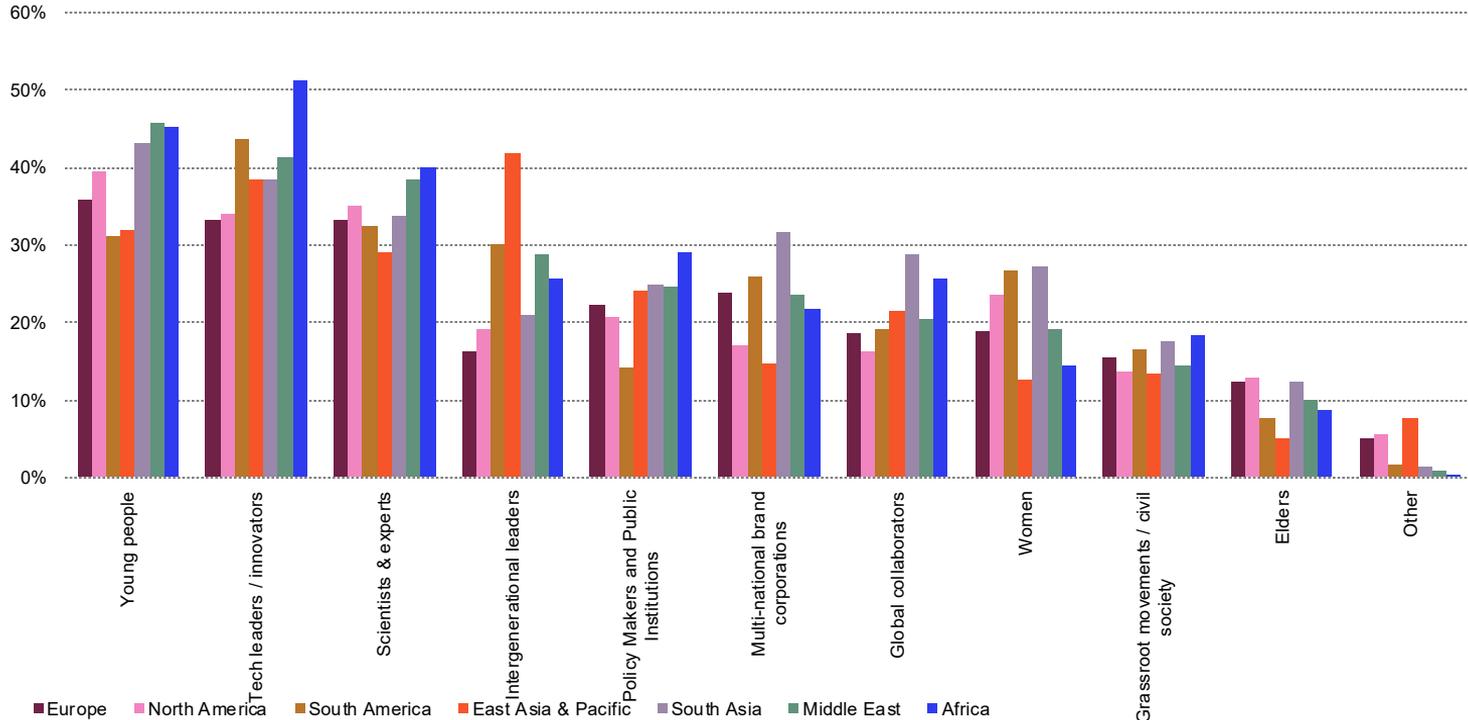
The order remains largely the same – difference only in nuances.

GLOBAL POWER SHIFTS _ REGIONAL

NewLeadership12 _ Which group do you believe will play a key role in leadership (in the public and private sector) in the future?

Please select up to 3 answer options of relevant groups.

▶ TOP 3 RANKING



South America also shows stronger belief in tech leaders, but also women and intergenerational leaders as well as multi-national brand corporations.

East Asia & Pacific with highest approval ratings for intergenerational leaders.

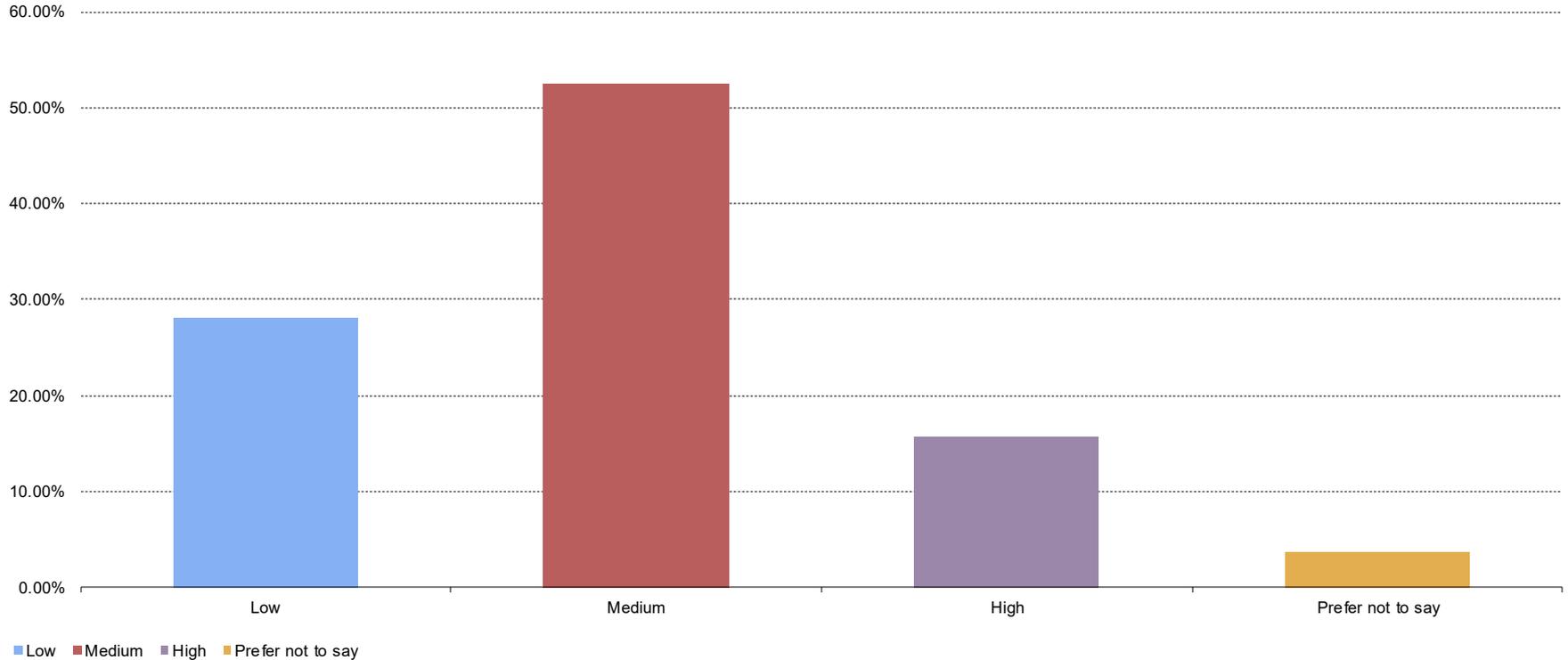
Africa also believes in tech leaders / innovators, young and scientists & experts but also policy makers and public institutions.

A photograph of three diverse individuals smiling and walking in a city street. On the left is a young man of East Asian descent wearing a blue sweater over a white collared shirt. In the center is a woman with short blonde hair, wearing glasses and a brown and white striped shirt. On the right is an older man with a full white beard and glasses, wearing a light blue shirt and a grey blazer. The background shows modern city buildings under a clear sky.

DEMOGRAPHICS

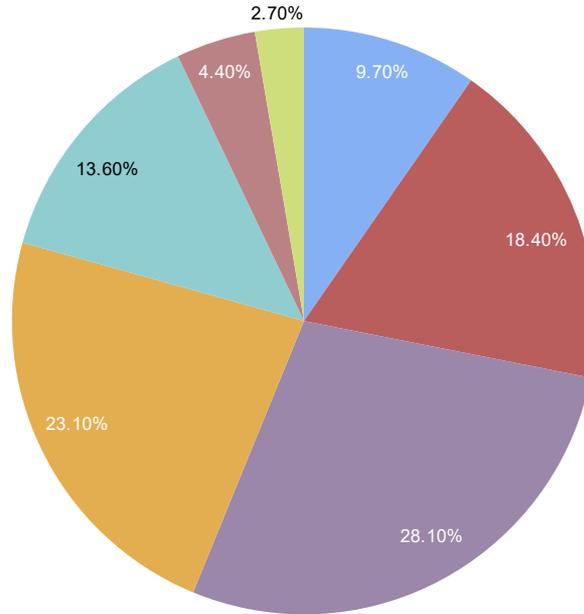
DEMOGRAPHICS_ TOTAL

Income _ Information about income is very important to understand. Which of the following best describes your combined total household income **per month after tax**? *Select one.*



DEMOGRAPHICS_TOTAL

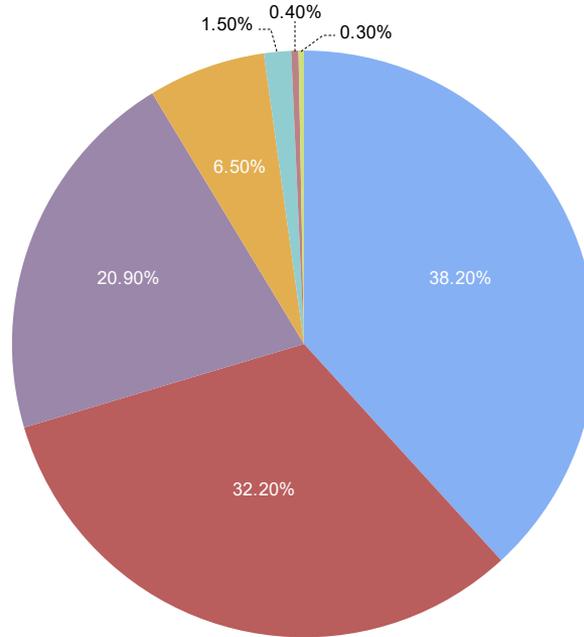
HHpeople _ Including yourself, how many people currently live in your household?



■ 1 ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 or more

DEMOGRAPHICS_TOTAL

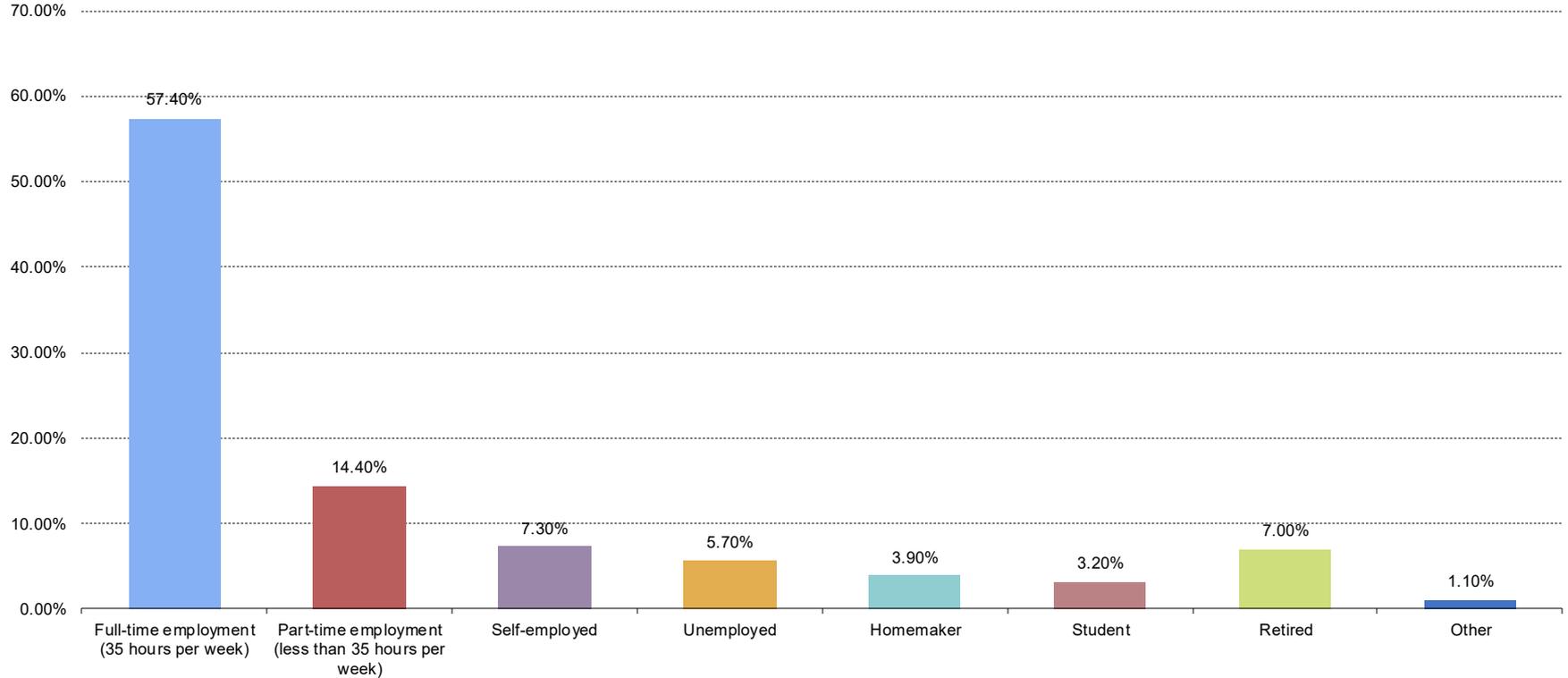
HHkids _ How many of your household members are under the age of 18?



■ 0 ■ 1 ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 or more

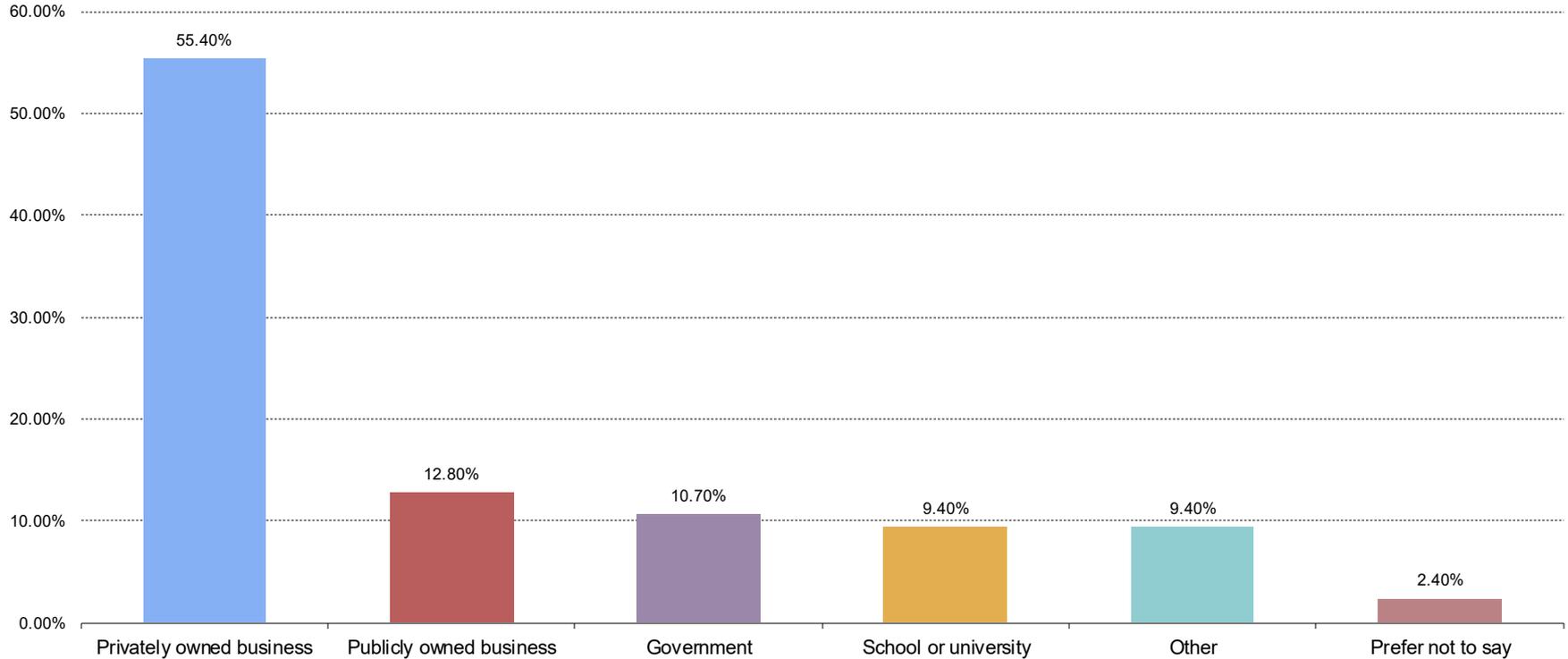
DEMOGRAPHICS_TOTAL

Employment _ What is your current employment status?



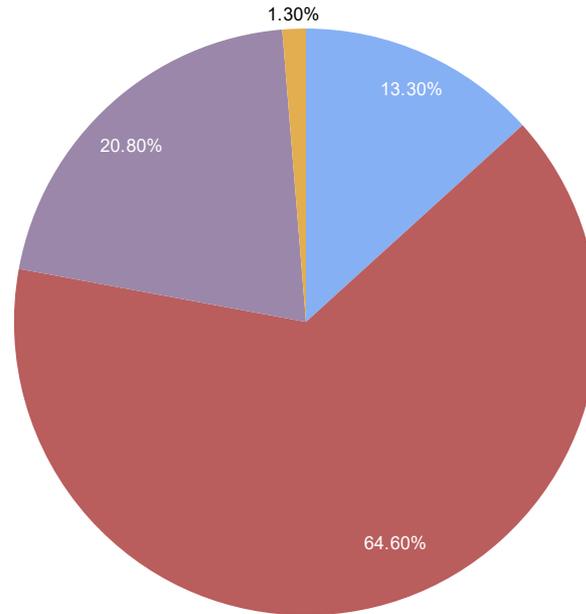
DEMOGRAPHICS_TOTAL

Emptype _ Which best describes your employer or most of your clients?



DEMOGRAPHICS_TOTAL

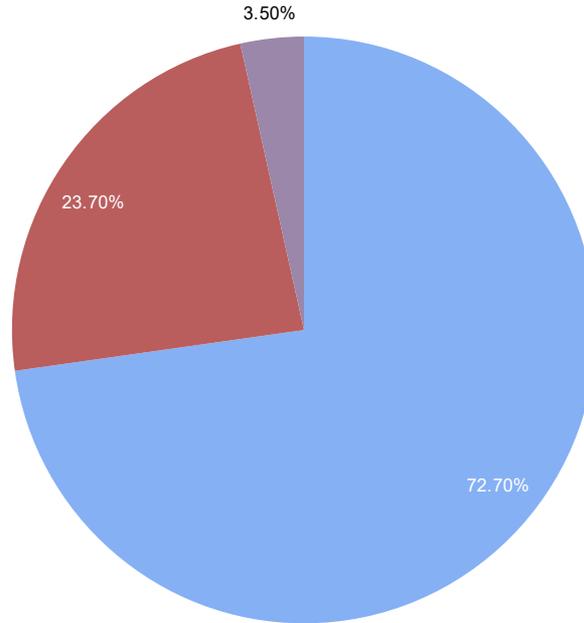
RuralUrban _ Which best describes where you live?



■ Rural ■ Urban ■ Suburban ■ Prefer not to say

DEMOGRAPHICS_ TOTAL

LivingForm _ Do you live in a rented home or own house?

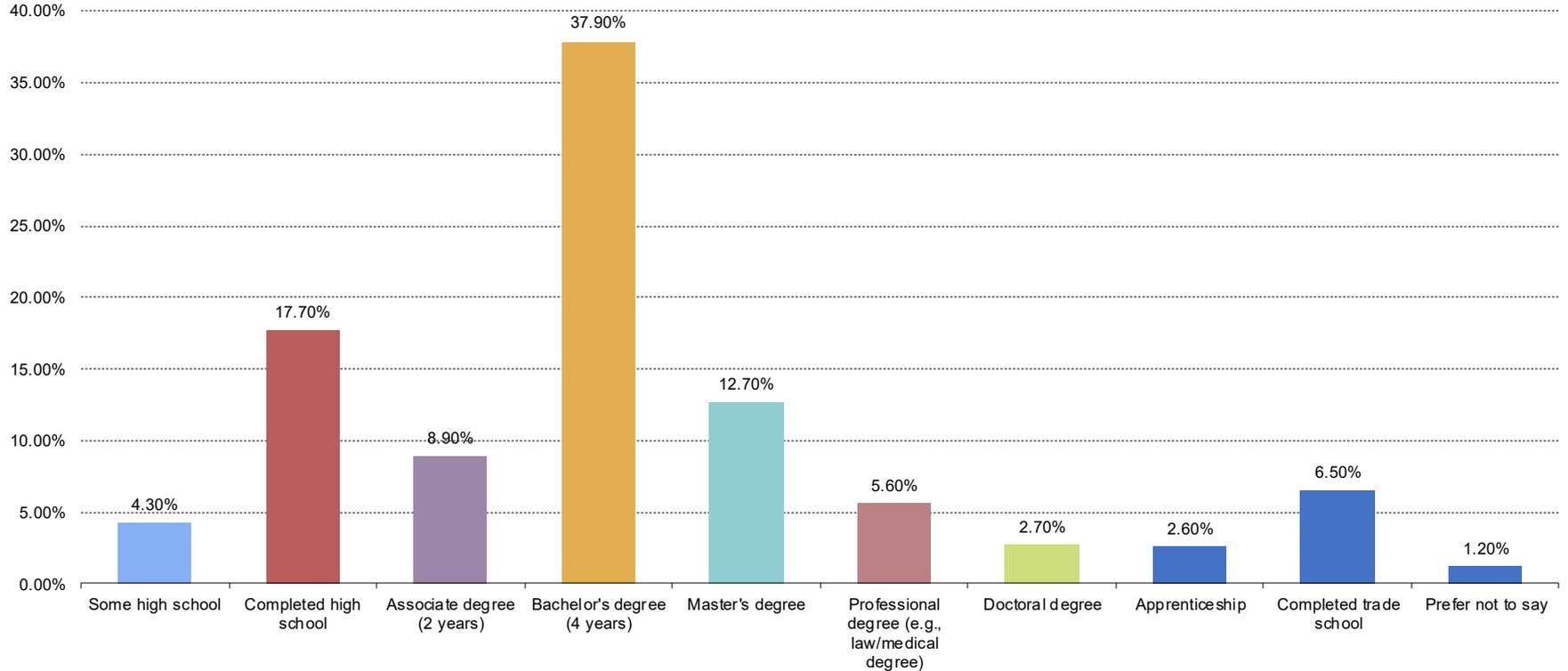


■ Apartment / house is owned by me / family ■ Apartment / house is rented by me / family ■ I use a different living form

DEMOGRAPHICS _ TOTAL

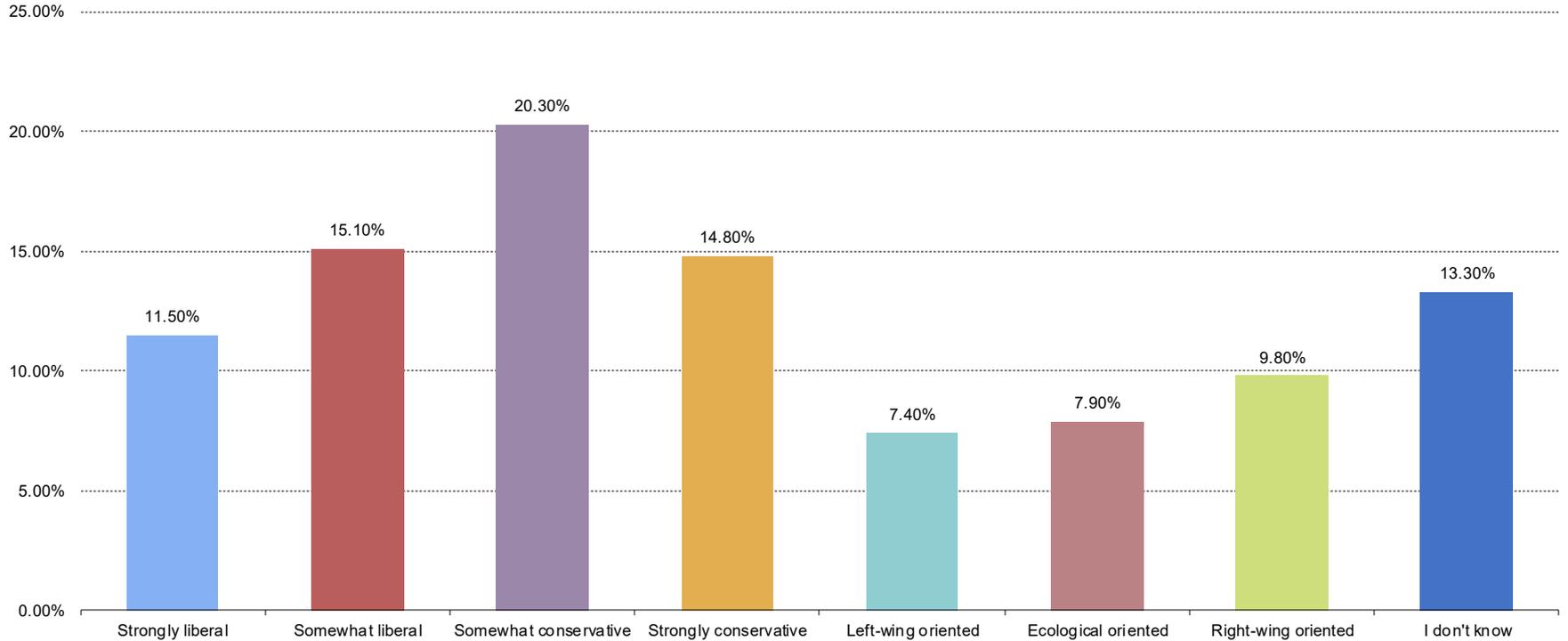
Education _ What is the highest level of school you have completed or the highest degree you have received?

Select one.



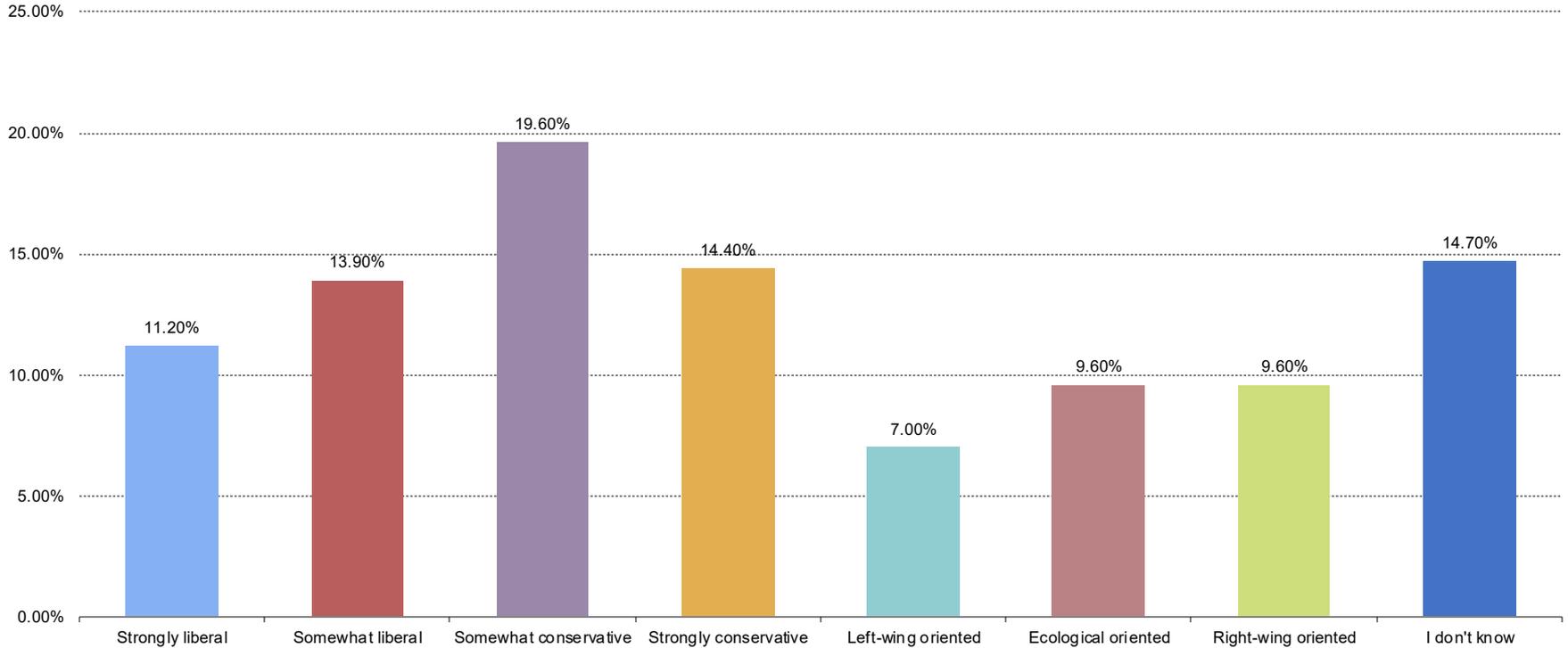
DEMOGRAPHICS_TOTAL

Social Issues _ On social issues I am:



DEMOGRAPHICS_TOTAL

Economic issues _ On economic issues I am:





QCF Survey 2025 findings based on the Trend Receiver Report 2025

QUANTIFIED CUSTOMER FORESIGHT 2025

SELECTED TOPICS (1/2)



01 FUTURE CONSUMERS

Evolving consumer mindsets and choices?

1.1 SCALING DOWN, BUILDING UP (see 03)

1 1.2 PRIDE IN THE LOCAL

2 1.4 THE NEO YOLO MINDSET

3 1.6 ORCHESTRATED & HYPER-NICHE RETAIL

4 1.7 PERSONAL EXPANSION (see 05)

02 FUTURE (CITY) LIFE

Is home-ownership a shared aspiration?

Rural transformation based on digital access?

5 2.3 PEOPLE WANT HOMES

03 HEALTH AND WELLBEING

Ways of coping with complexity?

6 3.1 COPING WITH COMPLEXITY

7 3.2 BREATH OF LIFE /3.3 EMBODIMENT

04 INFORMATION SPACE

Emerging relationship to (social) media, content, and online interaction? Rejection of dominant platforms?

Opportunities for brands?

8 4.3 DANCING WITH THE DOPAMINE MONSTER

9 4.5 CONSISTENT CONNECTION

05 SOCIETY & COMMUNITY

Engaging beyond one's bubble?

10 5.1 COMMUNITY AS A WAY THROUGH CRISIS (see 06)

11 5.3. BUBBLE BUSTING & THE VALUE OF SERENDIPITY

06 SUSTAINABLE LIFE

Trust in diverse sources of knowledge and knowledge systems?

Where do you expect solutions to our pressing problems to come from? Business role?

12 6.3 POST-TECH SOLUTIONISM

13 6.5 BEYOND PERFORMATIVE SUSTAINABILITY

QUANTIFIED CUSTOMER FORESIGHT 2025

SELECTED TOPICS (2/2)



07 AI & AUTOMATION

AI impact on your future life? Possibility to opt out of AI?

- 14 7.4 CODE OR BE CODED
- 15 7.5 THE HUMAN PLATEAU
- 16 7.6 TECHNOLOGY IN SERVICE OF HUMAN WELLBEING
- opt. 7.8 INVISIBLE INFRASTRUCTURE, VISIBLE CONSEQUENCES

08 FUTURE WORKFORCE

Sources of meaning in life and work?
What skills should we teach in the future?

- 17 8.1 PIVOTING TOWARDS MEANING
- opt. 8.3 HARD WORK
- 18 8.4 NEW SKILLS FOR A NEW AGE

09 GLOBAL POWER SHIFTS

Expected sources of future impulses? Who should lead the way?

- 19 9.6 NEW LEADERSHIP AND POWER

10 FUTURE BUSINESS MODELS

How should we measure success? Future KPIs?
Entrepreneurship as source of impact, income, and meaning?
A necessity? Business Role: Public-private partnerships?

- 20 10.2 EVOLVING CAPITALISM
- opt. 10.4 SKIN IN THE GAME
- 21 10.5 EVERYBODY HAS A COMPANY

1.2 PRIDE IN THE LOCAL



TREND RECEIVER REPORT 2025

Local identity is becoming central to how people imagine better futures, with traditional craftsmanship, cultural wisdom, and rural ingenuity emerging as engines of innovation, pride, and sustainability.

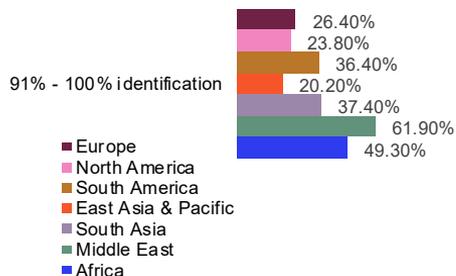
"We never looked up to 'Made in India' with respect and love, but now we do that."

Priyanka Lohiya, India

QUANTITATIVE CUSTOMER FORESIGHT 2025

FutureConsumers8b:

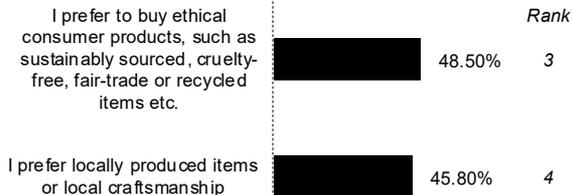
To what extent do you feel a sense of identification with your culture and heritage?



FutureConsumers8a:

Which of the following best describes the way you would like to spend your money?

TOP 5



Nearly half of consumers globally favor local and ethical products. Strongest in South Asia, Africa and Middle East. Overall, there appears to be a correlation between the sense of cultural identification and buying locally produced items. Confirms Trend Receiver Report that local pride is a significant consumer driver, though with regional variation.

1.4 THE NEO YOLO MINDSET



TREND RECEIVER REPORT 2025

Consumption patterns are shifting toward fewer, more meaningful choices, rooted in values rather than volume, and aligned with the pursuit of guilt-free consumption.

"Yes, we need to care about the future and sustainability, but we also need to live. We only live once, and we should be happy. That's part of well-being."

Hiba Alshareef, Jordan

QUANTITATIVE CUSTOMER FORESIGHT 2025

FutureConsumers8a

Which of the following best describes the way you would like to spend your money?



Consumers globally prioritize meaningful and high-quality consumption over low-cost mass buying. This validates the Trend Receiver Report: the Neo YOLO mindset reflects a shift towards quality and meaning, not quantity.

1.6 ORCHESTRATED & HYPER-NICHE RETAIL



TREND RECEIVER REPORT 2025

The retail landscape will transform into hyper-personalized experiences where brands orchestrate multi-sensory journeys that increasingly dissolve the boundaries between shopping, media, and social engagement – digitally and physically

"We often say a retail space is like a stage and all the brand consultants are dancers and actors, with the customers being the audience."

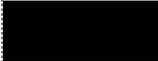
Hiroko Shiratori, Japan

QUANTITATIVE CUSTOMER FORESIGHT 2025

BrandRole4

Thinking about the brands you purchase from or are considering purchasing from, how important is each of the following traits or behaviors in your purchase decision?

▶ TOP 2 BOX / RANK 10

Provides individualized offers with a human touch  71.10%

A clear global majority (7 in 10 consumers) expect individualized offers with a human touch. This shows personalization is not just emerging but becoming a mainstream expectation worldwide.

1.7 PERSONAL EXPANSION

TREND RECEIVER REPORT 2025

Consumers are increasingly seeking transformative life experiences beyond instant gratification and excessive consumption, aiming to build social connection, learn new skills, and expand their worldview through life-changing travel abroad.

“There are many experience centers that have come up, especially in cities. Spiritual centers that help you to introspect and be a better human being.”

Gurmit Singh, India

QUANTITATIVE CUSTOMER FORESIGHT 2025

FutureConsumers8a

Which of the following best describes the way you would like to spend your money?

TOP 5 / RANK 2

I prefer life experiences (such as learning new skills, building social connections, expanding worldviews) over consumption

51.80%

LifeGoals2a

Thinking about your most important life goals today...

TOP 5 / RANK 8

Discovering new ways to experience things

28.30%

HealthWellbeing7

What are your preferred ways of coping with increased complexity in life?

TOP 5 / RANK 5

Learning new skills or seeking new perspectives

31.60%

HardWork11

Which aspects of your work life are most important to you?

TOP 3 / RANK 4

Personal Growth

26.50%

Roughly 3 in 10 globally place “new experiences” among their most important life goals. Data about consumer behavior supports this: More than 50% prefer experiences over products. Learning new skills is regarded as top 5 coping mechanism and personal growth as future skill. Together, these findings reinforce the Trend Receiver insights regarding the aspiration for personal growth and expansion.

2.3 PEOPLE WANT HOMES

TREND RECEIVER REPORT 2025

Owning a home is a fundamental human dream tied to stability, dignity, and security.

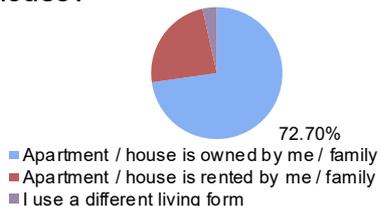
“People want homes.”

Brian Hioe, Taiwan

QUANTITATIVE CUSTOMER FORESIGHT 2025

LivingForm

Do you live in a rented home or own house?



From those who rent, 42,20% want to own a home

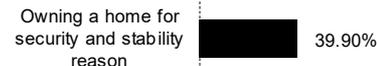
Other sub-groups with high scores:

Rural	44,00%
Urban	39,70%
Homemaker	47,40%
Students	45,40%

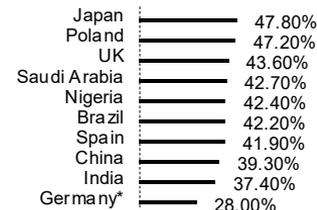
LifeGoals2a

Thinking about your most important life goals today...

TOP 5 / RANK 5



Country list (exemplary):



* Of these, 28% are currently living in rented homes.

A majority of 7 out of 10 people already live in an owned accommodation. About 40% globally list home ownership among their top life goals – stable today and in the future. But still, it's dependent on the country. From those who rent, 42% want to own a home. Even among those from urban areas, nearly 40% aspire to own a home.

TREND RECEIVER REPORT 2025

What are preferred ways of coping with increased complexity in life?

Reconnection with nature provides a foundational sense of calm and belonging.

Cultural shifts are beginning to value embodied practices, drawing from Indigenous and holistic knowledge systems once dismissed as fringe.

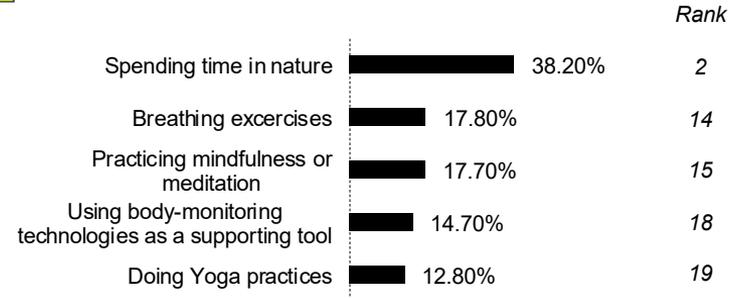
Emerging technologies and apps may help translate bodily signals into actionable self-care, reintroducing self-healing as a daily practice.

QUANTITATIVE CUSTOMER FORESIGHT 2025

HealthWellbeing7

Modern life is becoming increasingly complex, shaped by social, technological, and environmental changes. People face growing demands in both their external environments and personal lives. What are your preferred ways of coping with increased complexity in life?

TOP 5



When it comes to coping with increased complexity in life spending time in nature to manage stress is ranked second. Practices such as yoga, mindfulness or meditation and breathing exercises currently play only a marginal role. The same with body-monitoring technologies. The survey only validates the Trend Receiver insight that reconnecting with nature is an essential coping mechanism.

1.1 SCALING DOWN, BUILDING UP

TREND RECEIVER REPORT 2025

People are shifting their focus toward what they can meaningfully affect in their immediate surroundings. This marks a move from global abstractions toward small, local actions and interpersonal connection as the foundation for future resilience.

“People feel a sense of being out of control. We’ve gone way beyond the human scale so quickly that we now look to what can be controlled – creating the sense of community and place.”

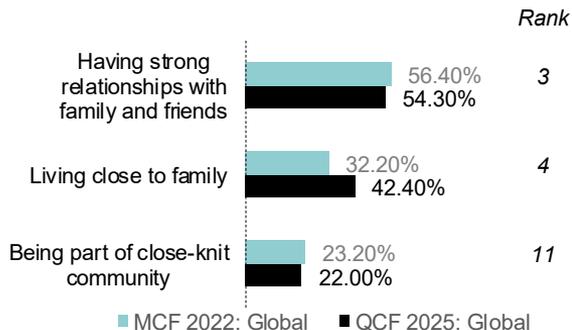
Yasmin Datta, USA

QUANTITATIVE CUSTOMER FORESIGHT 2025

LifeGoals2a

Thinking about your most important life goals today...

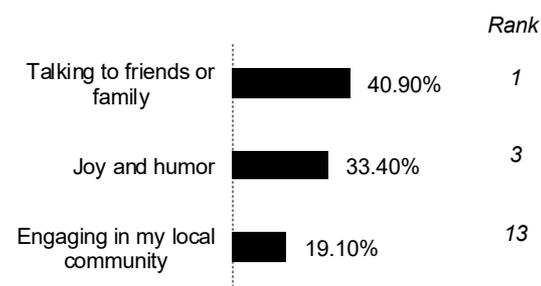
▶ TOP 5



HealthWellbeing7

What are your preferred ways of coping with increased complexity in life?

▶ TOP 5



Talking to friends or family is globally the number one strategy to cope with increased complexity in life. More than 50% of people identify “having strong relationships with family and friends” as most important life goal while over 40% express a desire to live close to family. Here a shift is seen to 2022. These findings underscore the Trend receiver insights of renewed emphasis on interpersonal connection.

4.3 DANCING WITH THE DOPAMINE MONSTER

TREND RECEIVER REPORT 2025

Youth are rehearsing new forms of media fluency through their engagement with fast, interactive, and immersive content. What looks like distraction may be a generational adaptation to a future shaped by real-time information flows, ambient advertising, and AI-mediated communication.

“Perhaps this whole cell phone addiction is an incredibly intelligent system for young people who are preparing themselves for a completely different world.”

Christian Mio Loclair, Germany

QUANTITATIVE CUSTOMER FORESIGHT 2025

Risks1a

Which of these risks worry you the most right now?

▶ TOP 5 / RANK 9

Getting addicted to digital platforms (e.g. social media, gaming) 25.50%

NewSkills10

Please rank the following skills according with top 3 being the most important for people (young & old) to develop?

▶ TOP 3 / RANK 7 (2nd last)

How to avoid addiction with digital content (e.g. social media) 30.60%

HealthWellbeing7

What are your preferred ways of coping with increased complexity in life?

▶ TOP 5 / RANK 16

Distracting myself in social media 17.70%

AI

How deeply will AI be part of it? 18 – 29 years old:
„No AI wanted“ in...

Travel Management 13.30%

Insurance 12.50%

Fitness Management 10.80%

Household 13.60%

The survey shows youth are more open to AI mediation (over 86%).
In general, digital media usage is neither perceived as a risk nor as a coping mechanism. If the youth is simply “distracted,” or developing fluency in navigating immersive, AI-driven media environments remains to be determined.

4.5 CONSISTENT CONNECTION



TREND RECEIVER REPORT 2025

Brands that engage consistently, build local relationships, and support autonomy will become valued members of the social fabric.

“Trust is not built as a ‘one-time’ thing – it’s built by coming back a second time.”

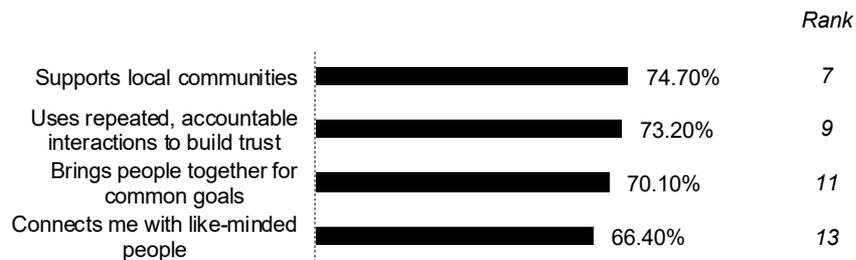
David Dao, Switzerland

QUANTITATIVE CUSTOMER FORESIGHT 2025

BrandRole4

Thinking about the brands you purchase from or are considering purchasing from, how important is each of the following traits or behaviors in your purchase decision?

TOP 2 BOX



Strong majorities globally (around 70% and more) expect reliability and continuity from brands, especially in Africa, Middle East and South Asia. This validates the Trend Receiver expectation: consistent connection is no longer optional.

5.1 COMMUNITY AS A WAY THROUGH CRISIS

TREND RECEIVER REPORT 2025

As individualism and consumer-driven lifestyles reach their limits, communities are re-emerging as essential structures for resilience. In the future, durable, human-scale networks will play a central role in how people adapt to uncertainty and disruption. Today renewed interest in local, in-person relationships signal a shift away from anonymous digital interactions.

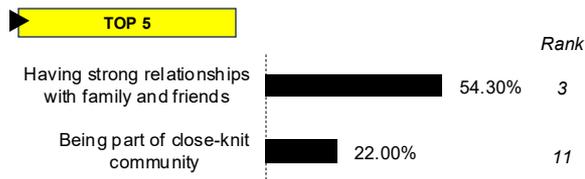
"As the world becomes more individualistic, having a sense of community would help us face all the difficult situations together."

Sujatro Ghosh, India

QUANTITATIVE CUSTOMER FORESIGHT 2025

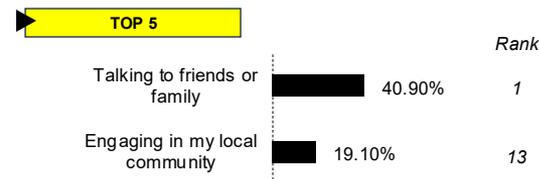
LifeGoals2a

Thinking about your most important life goals today...



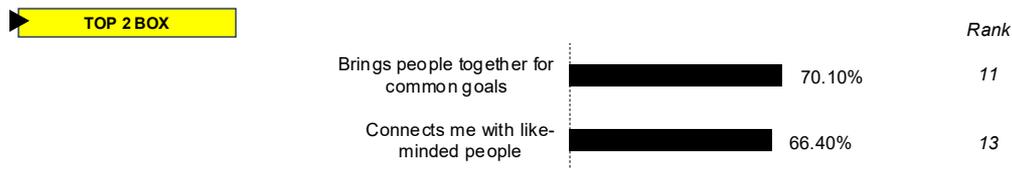
HealthWellbeing7

What are your preferred ways of coping with increased complexity in life?



BrandRole4

How important is each of the following traits or behaviors in your purchase decision?



Community emerges as recurring theme - reflected in life goals (22% want to be part of a close-knit community), coping behavior (19% engage locally and 41% with family or friends), and expectations towards brands to foster human connection. Quantitative data reinforces these Trend Receiver insights, confirming the broader societal relevance of community.

5.3 BUBBLE BUSTING & THE VALUE OF SERENDIPITY



TREND RECEIVER REPORT 2025

People and organizations will increasingly seek out unfamiliar environments, random encounters, and constructive friction to challenge assumptions and broaden understanding.

Individuals will prioritize experiences like travel that break the echo chamber and introduce unexpected viewpoints into their lives.

Random, unplanned social interactions will be valued as sources of learning and innovation.

QUANTITATIVE CUSTOMER FORESIGHT 2025

LifeGoals2a

Thinking about your most important life goals today...

TOP 5 / RANK 8

Discovering new ways to experience things 28.30%

BrandRole4

How important is each of the following traits or behaviors in your purchase decision?

TOP 2 BOX / RANK 15

Connects me with people from different backgrounds 62.80%

FutureConsumers8a

Which of the following best describes the way you would like to spend your money?

TOP 5 / RANK 2

I prefer life experiences (such as learning new skills, building social connections, expanding worldviews) over consumption 51.80%

Data shows strong appetite for experiences (around 52%) and discovery (around 28%), and a majority want brands to help connect across backgrounds (around 63%). While “serendipity” isn’t directly measured, these indicators point to a consumer desire for diverse, unplanned, and meaningful encounters.

6.3 POST-TECH SOLUTIONISM

TREND RECEIVER REPORT 2025

Future ways of living within planetary boundaries will move beyond over-reliance on tech fixes toward regenerative models grounded in cultural values, shared responsibility, and increased awareness of ecological interdependence.

*“The world will be saved
by analogue means – not digitally.”*

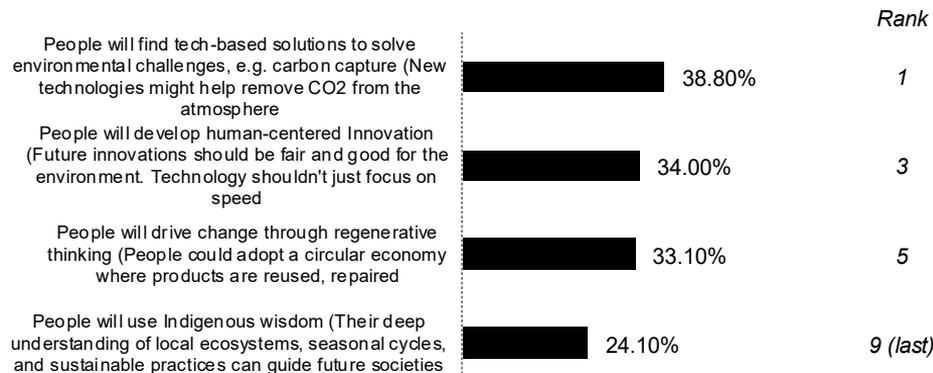
Jasmin El-Mahny, Germany

QUANTITATIVE CUSTOMER FORESIGHT 2025

SustainabilityLife6

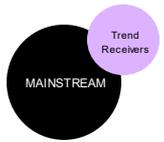
Which are the most likely sustainable behaviors of people in the future?

TOP 3



Technology still comes in first place as sustainable future behavior. A deep understanding of local ecosystems ranks last. Overall, sustainability is widely viewed as a responsibility of others — such as companies, governments, and communities — rather than of the individual.

6.5 BEYOND PERFORMATIVE SUSTAINABILITY



TREND RECEIVER REPORT 2025

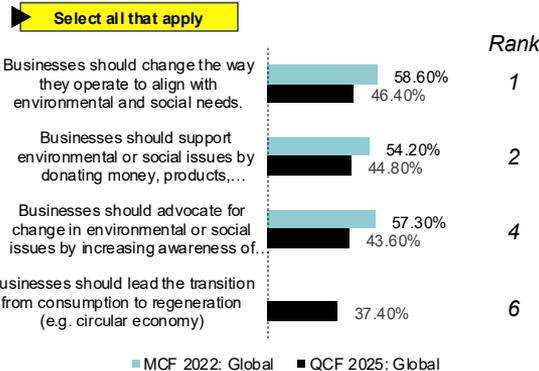
Companies will need to balance consumer expectations, with their moral obligations to address social and planetary challenges. Responsible production will innovate approaches that restore resources and replenish whatever is extracted – putting regeneration into practice. Product longevity will become paramount, disrupting frequent-replacement and short-sighted business models.

“Consumers can tell the difference between bullshit and reality. Brands should market things – but with intention. That intention – and the responsibility around it – need to come from within. If three brands do it, others will be inspired to follow.”
 Tanisha Arora, India

QUANTITATIVE CUSTOMER FORESIGHT 2025

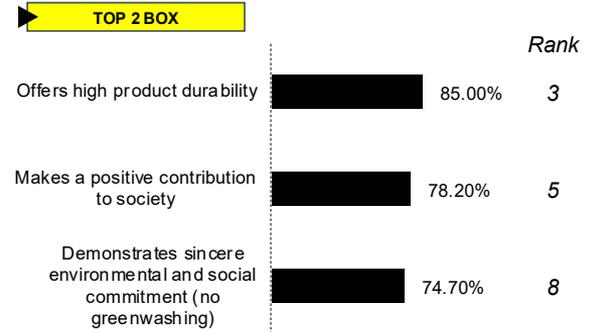
BusinessRole3a

Which of the following statements about the purpose of business **today** do you agree with?



BrandRole4

Thinking about the brands you purchase from or are considering purchasing from, how important is each of the following traits or behaviors in your purchase decision?



Compared to 2022, the role of business in tackling environmental and social issues is seen as significantly less important. Still, the expectation that business should lead the transition from consumption to regeneration is high: In some regions, approval ratings up to 50%. Future consumers demand product longevity (85%) and sincere environmental and social commitment (75%).

7.4 CODE OR BE CODED

TREND RECEIVER REPORT 2025

AI is viewed as a predetermined force shaping the future, with no credible alternative to full engagement.

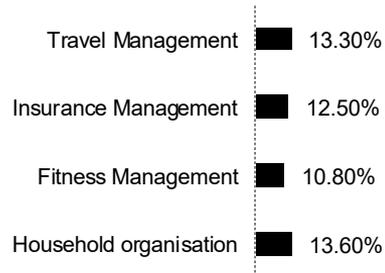
A shared perception exists that opting out of AI adoption is not feasible; the pace and direction are already set.

*“In the future,
it’s AI or die
– that’s the reality.”*

Ziad Taoud, UAE

QUANTITATIVE CUSTOMER FORESIGHT 2025

AI
How deeply will AI be part of it?
18 – 29 years old:
„No AI wanted“ in...



BrandRole4

Thinking about the brands you purchase from or are considering purchasing from, how important is each of the following traits or behaviors in your purchase decision?

▶ TOP 2 BOX / 18-29 Years old



The survey shows AI is already broadly accepted: About 80% globally are open for AI involvement – about 86% in the youngest group. Furthermore, cultural perspectives differ on how far automation should go. Yet, consumer expectations for brands to adopt the latest technologies or AI remain relatively low—ranking last among priorities.

7.5 THE HUMAN PLATEAU



TREND RECEIVER REPORT 2025

Future markets may revalue craftsmanship, intentionality, and human presence as a form of authenticity.

The human role in AI systems will remain essential, especially to navigate complexity, ambiguity, and context.

"If there is a plateau for tech, it will come from human resistance."

Ziad Taoud, UAE

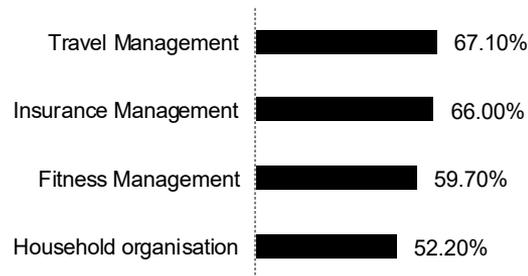
QUANTITATIVE CUSTOMER FORESIGHT 2025

AI

How deeply will AI be part of it?

All answer options (2-4) cumulated **where human decisions / interventions are still required!**

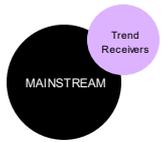
For 18-29 years old:



Globally, people prefer to keep humans in the loop, with advisory AI favored over full automation.

This confirms the "human plateau": Automation is rising, but human oversight remains essential. Regional differences matter. Europe and North America show the strongest demand for advisory AI, while Africa and Asia are somewhat more open to automation.

7.6 TECH IN SERVICE OF WELLBEING



TREND RECEIVER REPORT 2025

QUANTITATIVE COSTUMER FORESIGHT 2025

In desirable futures, technologies will increasingly be designed to enhance human capabilities, restore agency, and prioritize human well-being over pure efficiency gains.

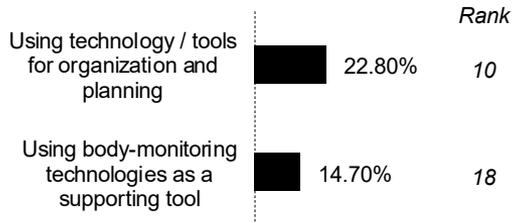
“We need to find a way to make sure that technology works for us rather than it overtaking our lives and we become slaves to it.”

Jamie Nonis, Singapore

HealthWellbeing7

What are your preferred ways of coping with increased complexity in life?

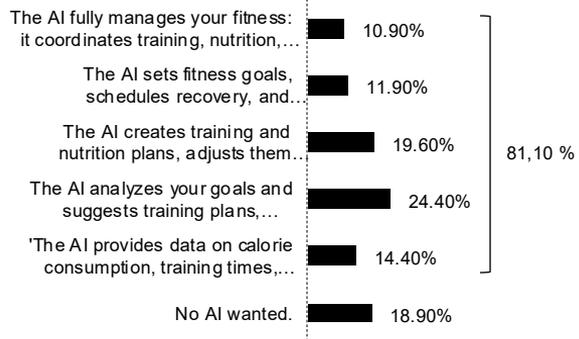
TOP 5



AI

How deeply will AI be part of it? In Fitness Management

TOTAL



More than 80% of consumers globally already accept AI in fitness/health coaching, and about 1 in 4 actively use tech for planning. Body-monitoring technologies stay niche. Together, these measures validate: technologies are not rejected, they are embraced when it supports human wellbeing but remains in early stages.

8.1 PIVOTING TOWARDS MEANING / 8.3 HARD WORK

TREND RECEIVER REPORT 2025

Work is no longer just a career path – for many, it’s becoming a foundation for personal meaning.

Psychological well-being is replacing traditional metrics like salary or job title as a primary goal and source of fulfillment.

“The journey I’m on is about being able to bring all of the parts of myself to whatever I’m doing and not just play the game.”

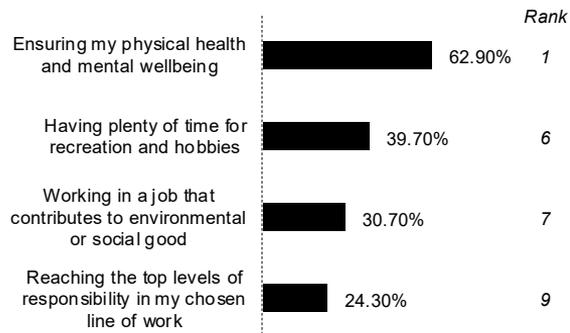
Yasmin Datta, USA

QUANTITATIVE CUSTOMER FORESIGHT 2025

LifeGoals2a

Thinking about your most important life goals today...

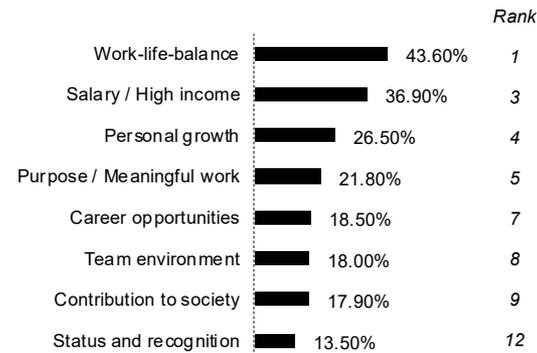
▶ TOP 5



HardWork11

Which aspects of your work life are most important to you?

▶ TOP 3



About 20% of respondents place meaningful work among their top goals, and work-life balance is the most important work aspect.

Meanwhile, traditional career paths and status seem to have lost their former significance.

This validates the Trend Receiver insights that people pivot toward meaning and balance over pure material success.

8.4 NEW SKILLS FOR A NEW AGE



TREND RECEIVER REPORT 2025

Adaptability will matter more than expertise, with individuals needing to unlearn fixed ideas and refocus on *how* to learn rather than *what* to learn.

Resilience and emotional regulation will be core skills, as people learn to navigate complexity through self-awareness and grounded emotional capacity.

“We need to prepare the young people in this world with a moral compass, an ability to think critically with an associative mind.”

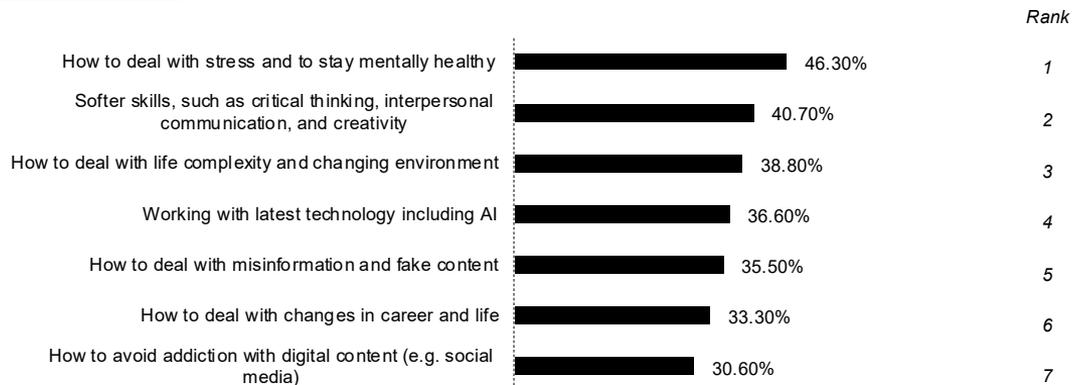
Tendai Pasipanodya, USA / Senegal

QUANTITATIVE CUSTOMER FORESIGHT 2025

NewSkills10

Please rank the following skills according with top 3 being the most important for people (young & old) to develop?

▶ TOP 3



Competencies in mental well-being, critical thinking, and adaptability are widely regarded as crucial, placing them in the top three most valued skill sets. Survey results support the Trend Receivers' demand for new competencies.

9.6 NEW LEADERSHIP AND POWER

TREND RECEIVER REPORT 2025

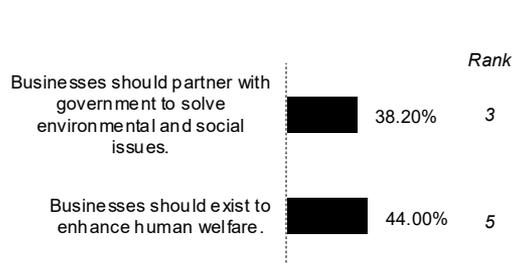
Amidst an unravelling geopolitical order and widening governance gap, rising economies will lead with transformative models of governance. Youth and women might set a direction towards restoring trust in government through inclusive, values-based leadership. A new generation will challenge old power structures by putting the collective well-being of society ahead of personal ambition. Businesses could lean into civic governance to nurture well-governed societies and enabling sustainable prosperity.

QUANTITATIVE CUSTOMER FORESIGHT 2025

BusinessRole3a

Which of the following statements about the purpose of business **today** do you agree with?

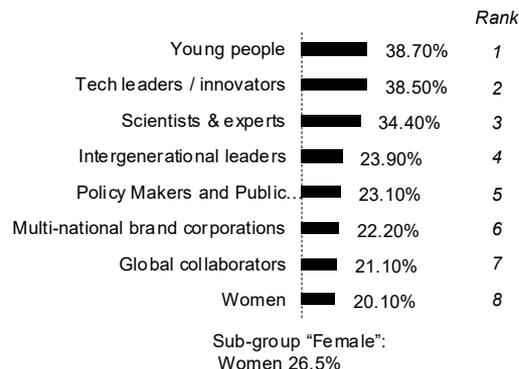
TOP 5 BOX



NewLeadership 12

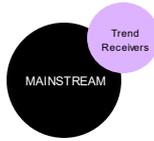
Which group do you believe will play a key role in leadership (in the public and private sector) in the future?

TOP 3



The survey directly validates that the young generation is seen as central to future leadership, alongside scientists and tech leaders. Whereas female leadership does not rank among the top priorities—even among women themselves. At the same time, there is a clear expectation for businesses to collaborate with government.

10.2 EVOLVING CAPITALISM



TREND RECEIVER REPORT 2025

Forward-thinking businesses will lead the shift from extraction to regeneration through investment in human capital and circular practices.

Our systems aren't necessarily wrong – the metrics are. Transforming systems means replacing growth-at-all-costs with measures for wellbeing, regeneration, and long-term value creation.

“We need to adjust and upgrade capitalism. I think it'll be improved in a different direction, a different capitalism that we know of today.”

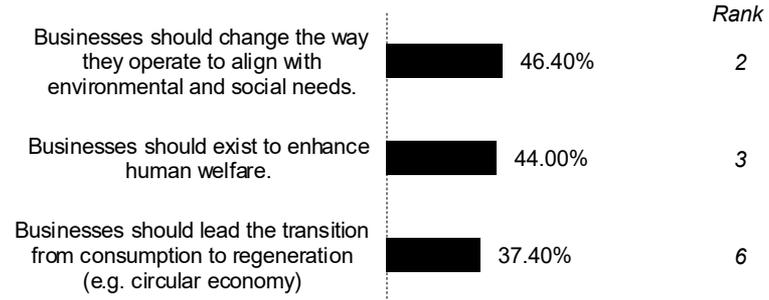
David Dao, Switzerland

QUANTITATIVE CUSTOMER FORESIGHT 2025

BusinessRole3a

Which of the following statements about the purpose of business **today** do you agree with?

TOP 5 BOX



Consumers want businesses to evolve from growth-only models toward regeneration and human capital investment. A clear majority reject profit-first thinking. This validates the Trend Receiver insights.

10.5 EVERYBODY HAS A COMPANY

TREND RECEIVER REPORT 2025

Entrepreneurship will become a primary aspiration, as more people seek to create their own work path rather than look for employment.

Technology will act as a catalyst for grassroots entrepreneurialism and bottom-up innovation, especially across emerging markets like India and Africa.

"People want to be business owners. They want the opportunities and also have the security and ability to bounce back."

Brian Hioe, Taiwan

QUANTITATIVE CUSTOMER FORESIGHT 2025

LifeGoals2a

Thinking about your most important life goals today...

▶ TOP 5 / RANK 12

Running my own company 20.20%

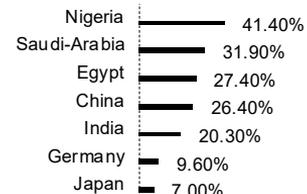
HardWork11

Which aspects of your work life are most important to you?

▶ TOP 3 / RANK 11

Being my own boss 15.70%

Country list (exemplary):



NewSkills10

Please rank the following skills according with top 3 being the most important for people (young & old) to develop?

▶ TOP 3 / RANK 8 (last)

How to run my own business 20.80%

Entrepreneurship is undeniably significant in certain regions such as Africa, the Middle East and on a lower level also in India. However, this has not yet become a global standard, and the development of entrepreneurial skills and the aspiration to be one's own boss still play a relatively minor role.

QUANTIFIED CUSTOMER FORESIGHT STUDY 2025

QCF

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