



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.

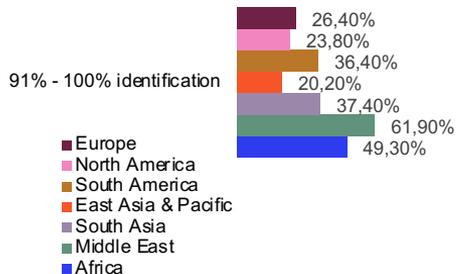
“We never looked up to ‘Made in India’ with respect and love, but now we do that.”

Priyanka Lohiya, India

QUANTITATIVE CUSTOMER FORESIGHT 2025

FutureConsumers8b:

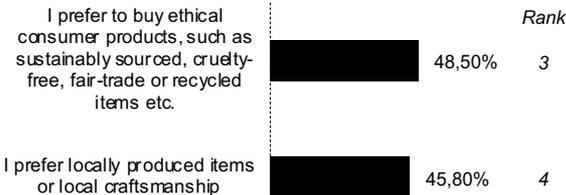
To what extent do you feel a sense of identification with your culture and heritage?



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.

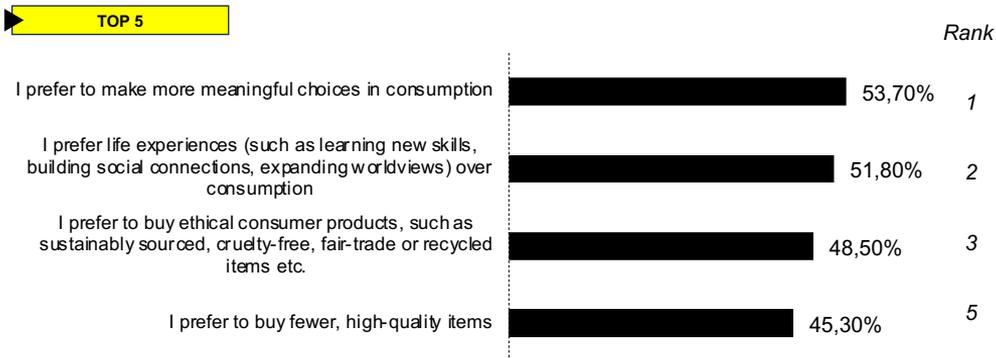
"Yes, we need to care about the future and sustainability, but we also need to live. We only live once, and we should be happy. That's part of well-being."

Hiba Alshareef, Jordan

QUANTITATIVE CUSTOMER FORESIGHT 2025

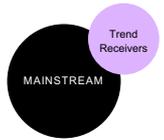
FutureConsumers8a

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.

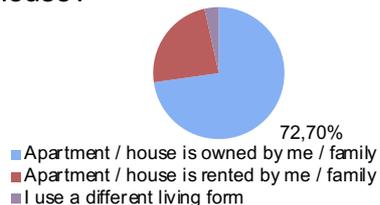
“People want homes.”

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

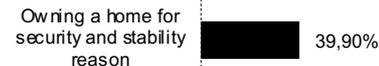
Other sub-groups with high scores:

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

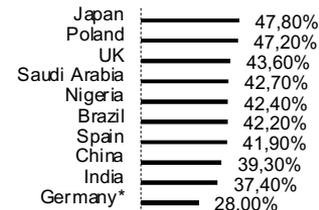
LifeGoals2a

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.

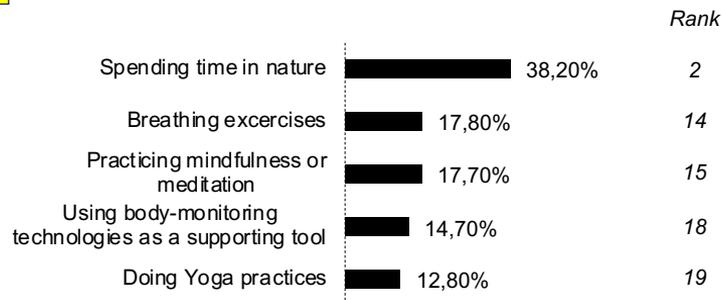
Emerging technologies and apps may help translate bodily signals into actionable self-care, reintroducing self-healing as a daily practice.

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.”

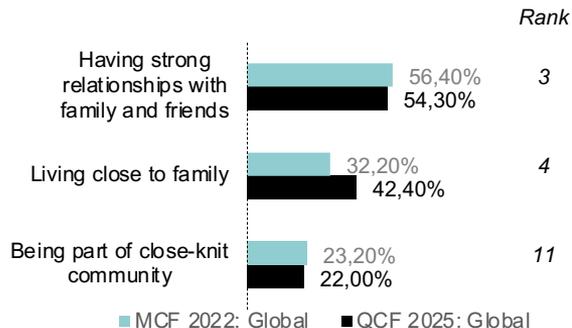
Yasmin Datta, USA

QUANTITATIVE CUSTOMER FORESIGHT 2025

LifeGoals2a

Thinking about your most important life goals today...

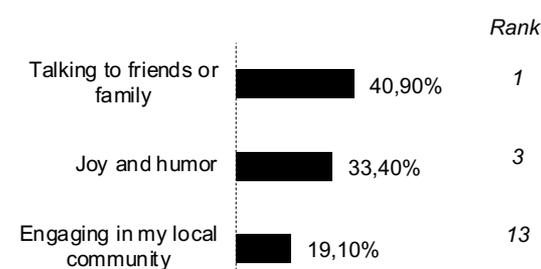
▶ TOP 5



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.”

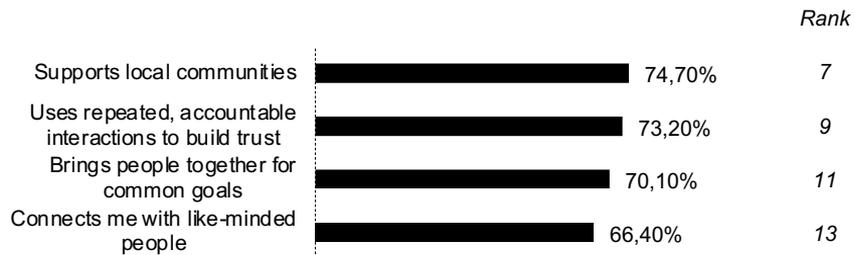
David Dao, Switzerland

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.

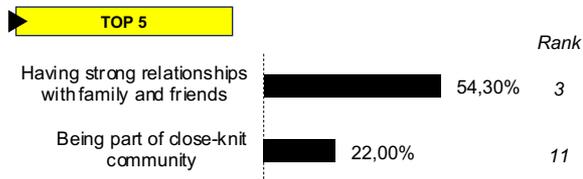
"As the world becomes more individualistic, having a sense of community would help us face all the difficult situations together."

Sujatro Ghosh, India

QUANTITATIVE CUSTOMER FORESIGHT 2025

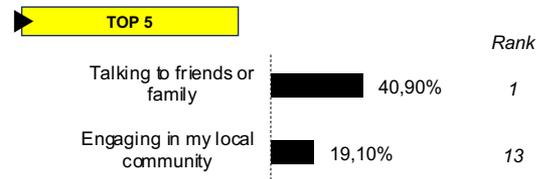
LifeGoals2a

Thinking about your most important life goals today...



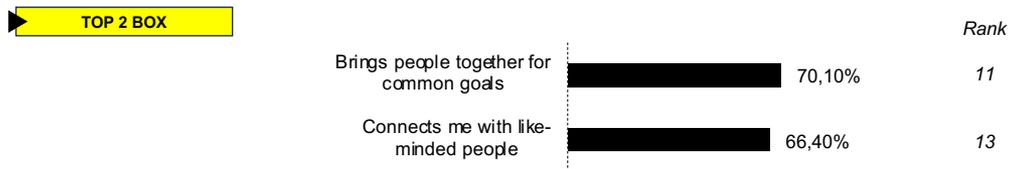
HealthWellbeing7

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.”*

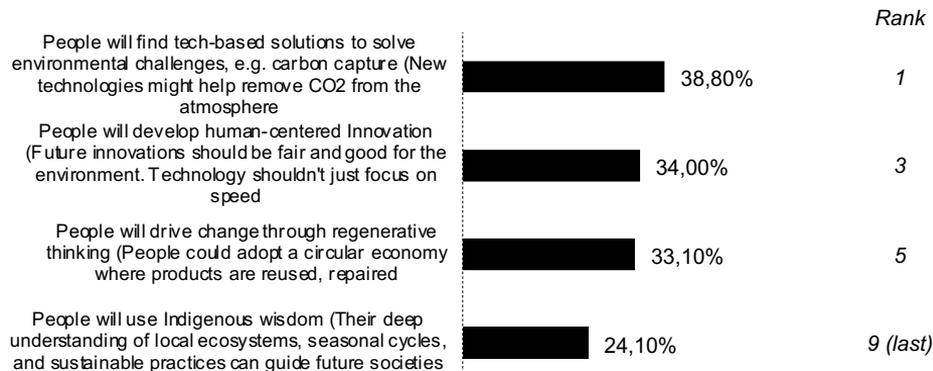
Jasmin El-Mahny, Germany

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 – needs to come from within. If three brands do it, others will be inspired to follow.”
 Tanisha Arora, India

QUANTITATIVE CUSTOMER FORESIGHT 2025

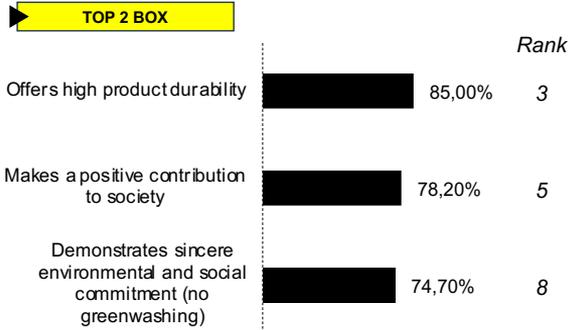
BusinessRole3a

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

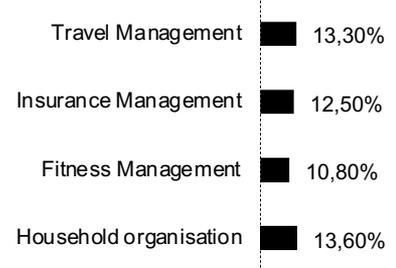
AI is viewed as a predetermined force shaping the future, with no credible alternative to full engagement.

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

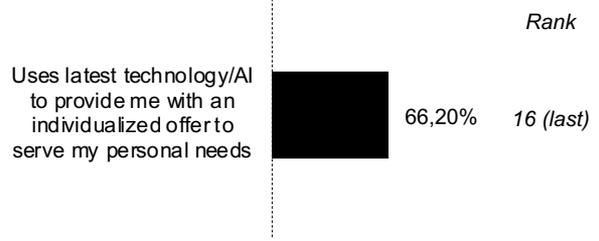
QUANTITATIVE COSTUMER FORESIGHT 2025

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

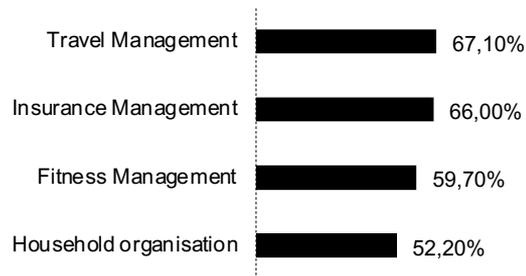
QUANTITATIVE CUSTOMER FORESIGHT 2025

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

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.”

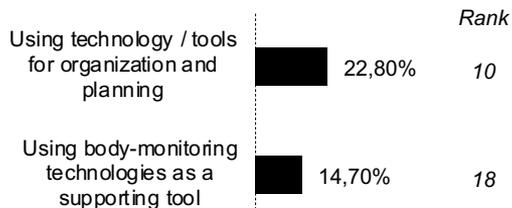
Jamie Nonis, Singapore

QUANTITATIVE CUSTOMER FORESIGHT 2025

HealthWellbeing7

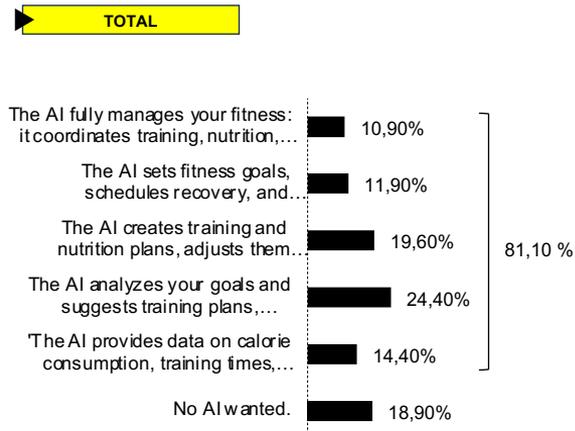
What are your preferred ways of coping with increased complexity in life?

TOP 5



AI

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



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.”

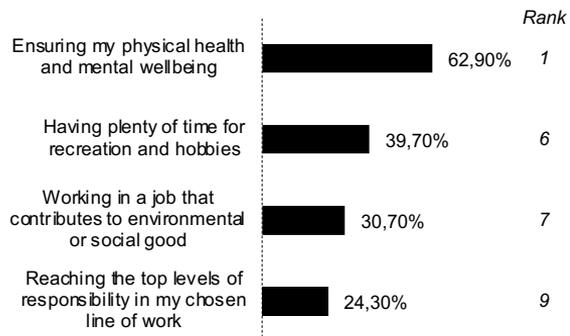
Yasmin Datta, USA

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.”

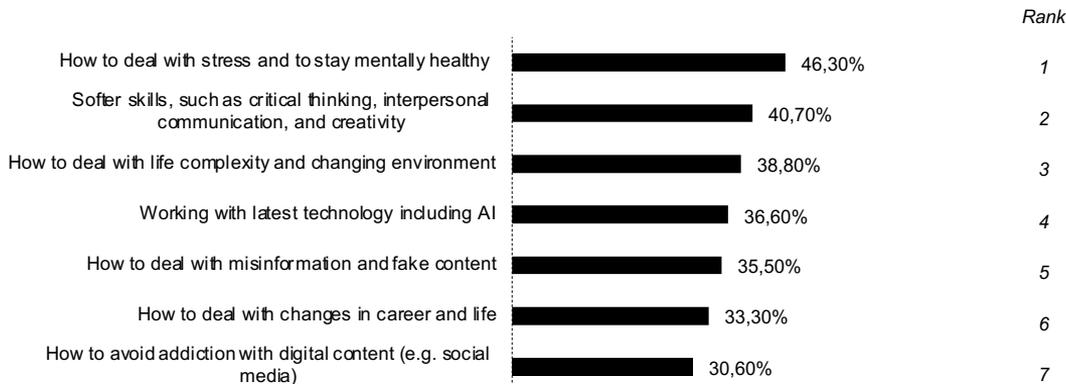
Tendai Pasipanodya, USA / Senegal

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

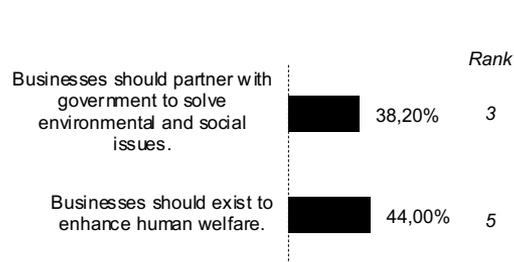
Amidst an unravelling geopolitical order and widening governance gap, rising economies will lead with transformative models of governance. Youth and women might set a direction towards restoring trust in government through inclusive, values-based leadership. A new generation will challenge old power 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



Sub-group "Female":
Women 26,5%

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.

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.”

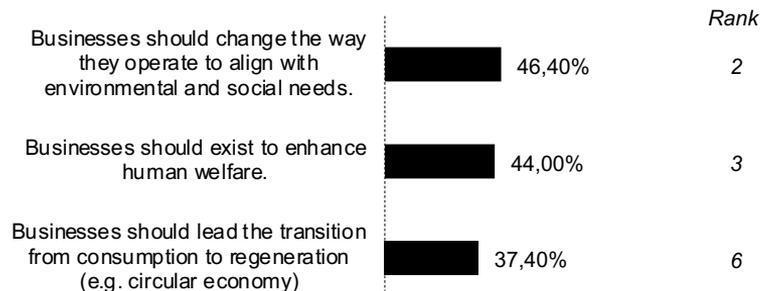
David Dao, Switzerland

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%

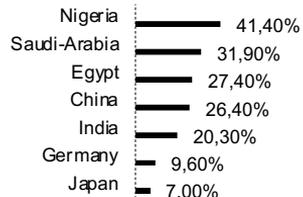
HardWork11

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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