

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

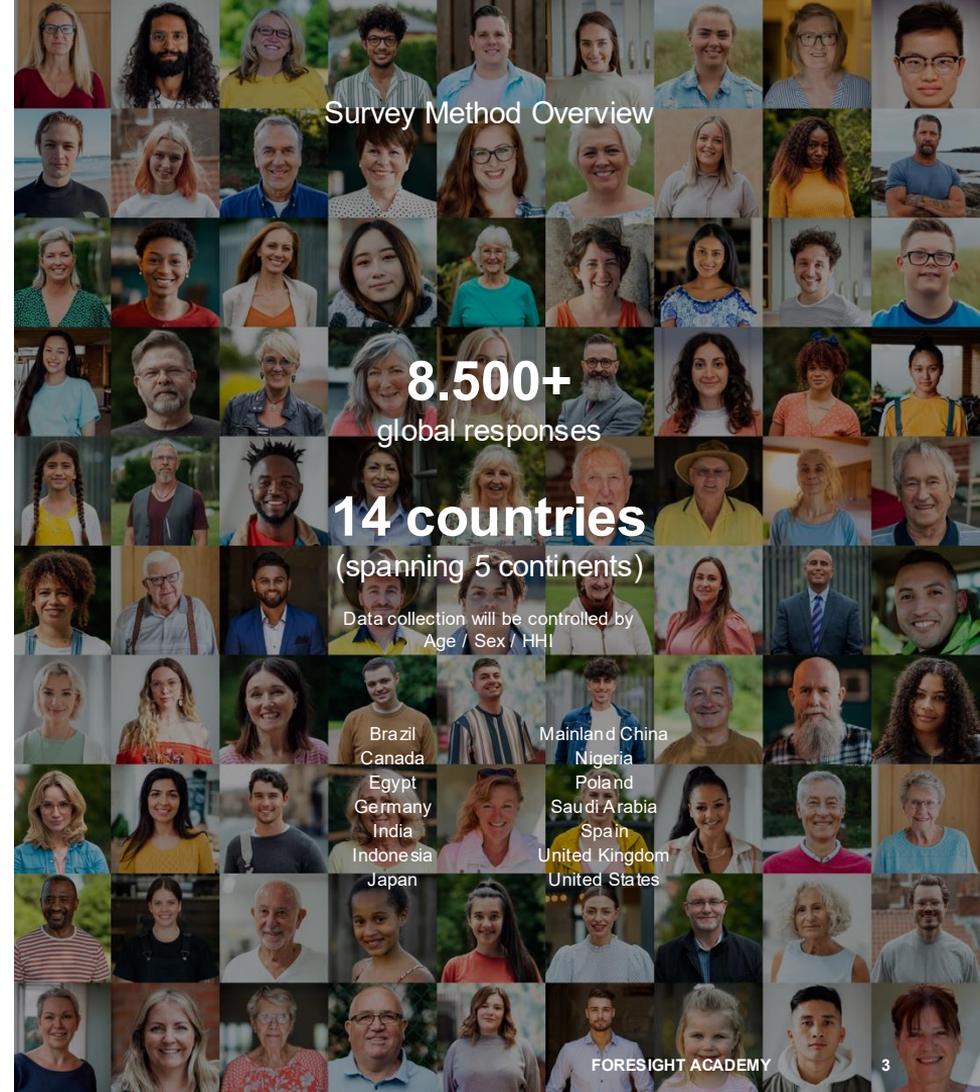
Key Topics

based on Trend Receiver Report 2025

Timing

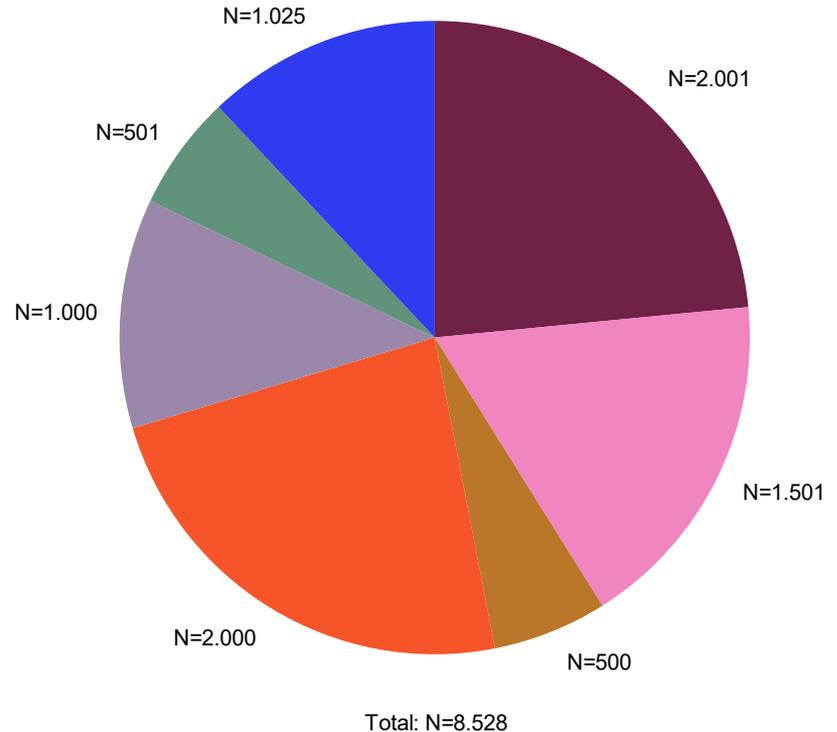
June to July 2025

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

LIFE GOALS

SUSTAINABLE LIFE

HEALTH AND WELLBEEING

BUSINESS ROLE

BRAND ROLE

FUTURE CONSUMERS

ARTIFICIAL INTELLIGENCE

FUTURE WORKFORCE

GLOBAL POWER SHIFTS

DEMOGRAPHICS



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.

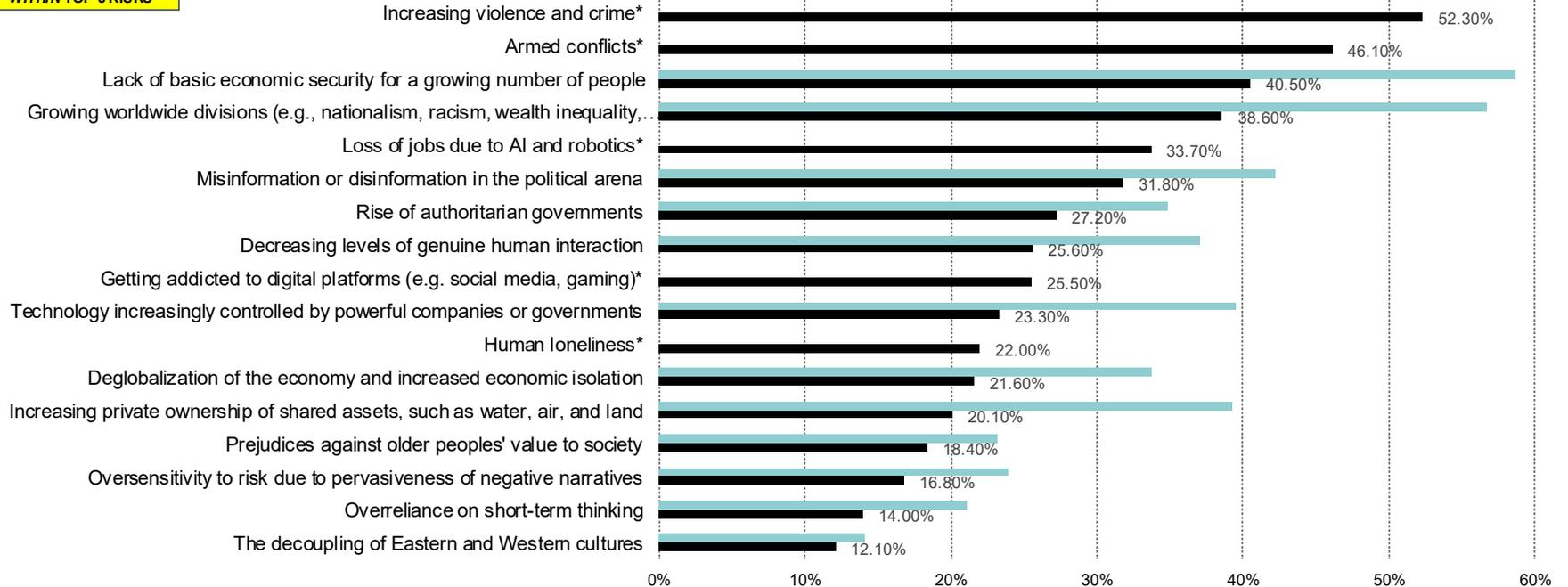
GLOBAL RISKS _ TOTAL _ 2025 vs. 2022

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

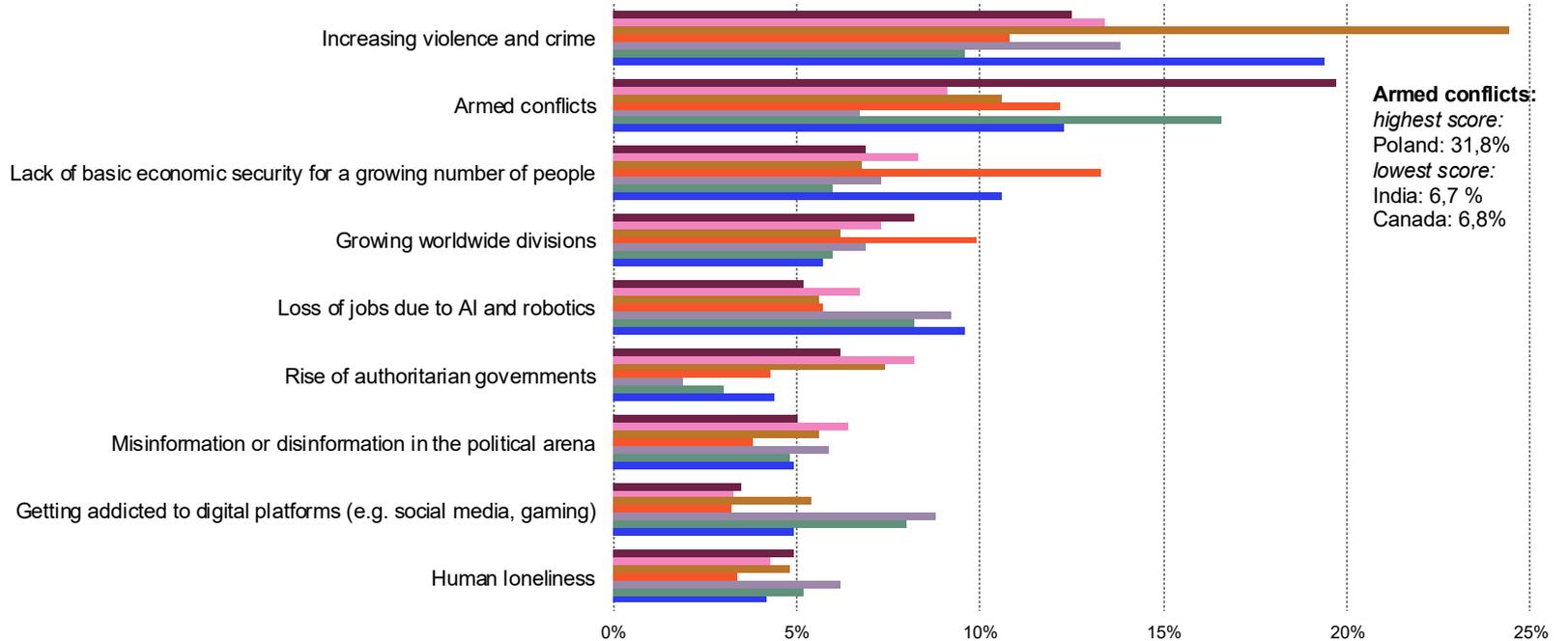
■ QCF 2025: Global
N=7.528 (except China) * NEW STATEMENTS!

GLOBAL RISKS _ 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



Armed conflicts:
highest score:
 Poland: 31,8%
lowest score:
 India: 6,7 %
 Canada: 6,8%

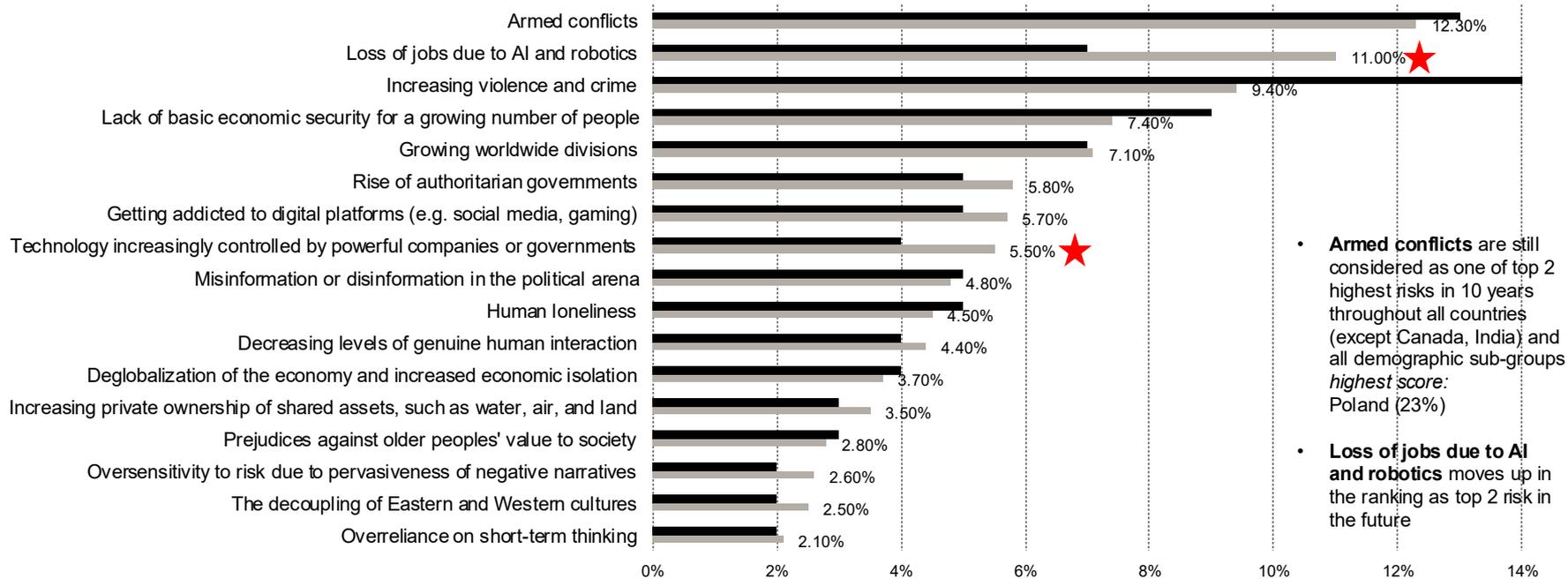
■ Europe ■ North America ■ South America ■ East Asia & Pacific ■ South Asia ■ Middle East ■ Africa

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)

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 fingers are slightly spread. The background is dark and out of focus, with some light rays visible. The overall mood is aspirational and hopeful.

LIFE GOALS

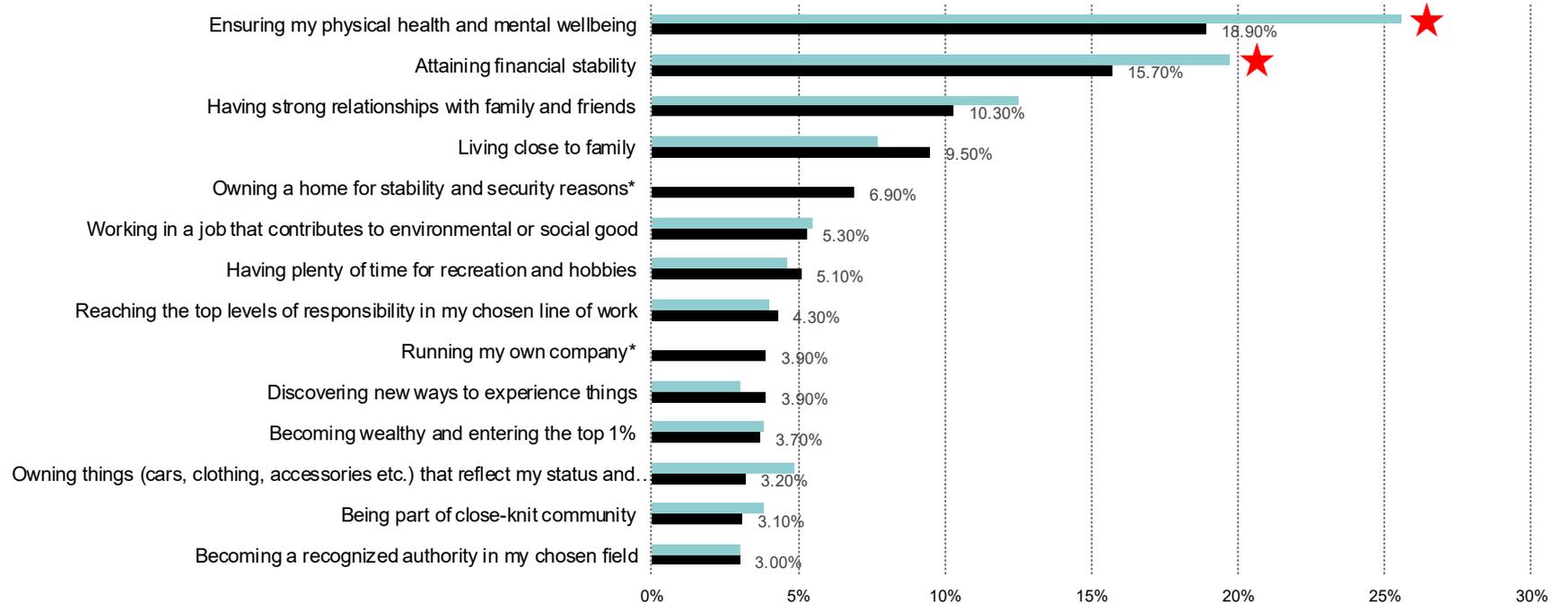
LIFE GOALS _ KEY FINDINGS

- **‘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 _ 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**

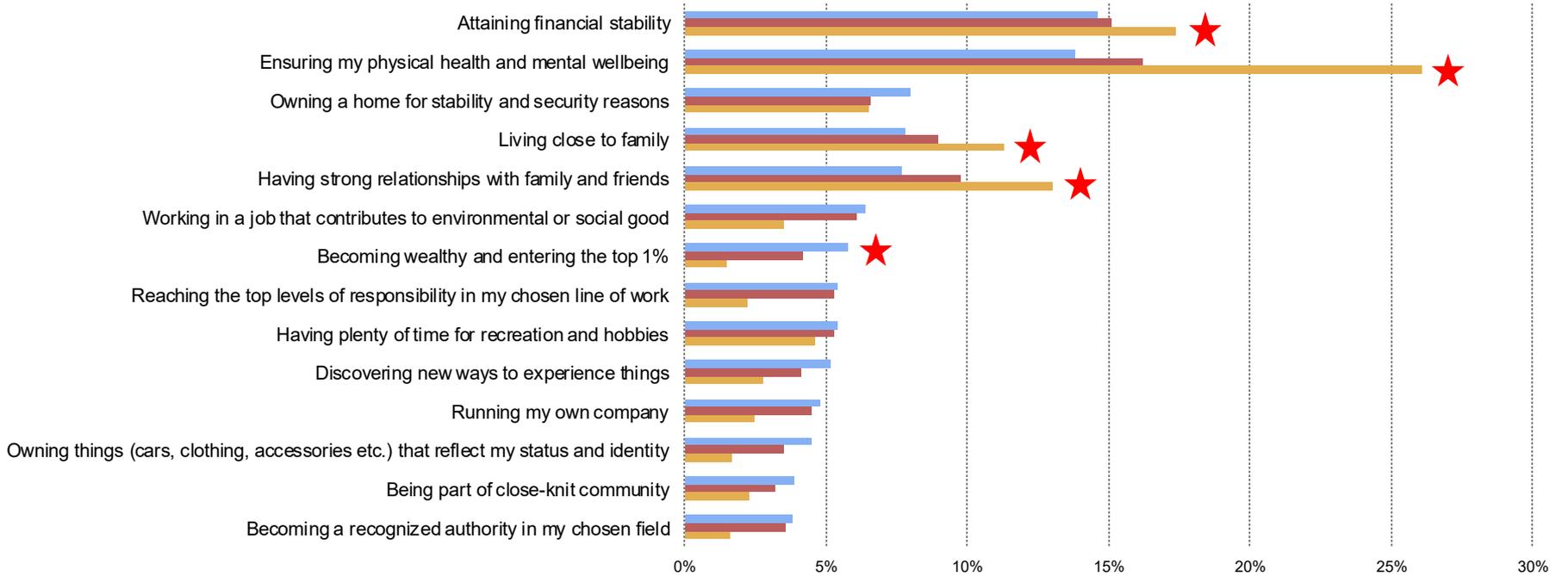


■ MCF 2022: Global N=13.102
 ■ QCF 2025: Global N=7.528 (except China) * NEW STATEMENTS!

LIFE GOALS _ 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



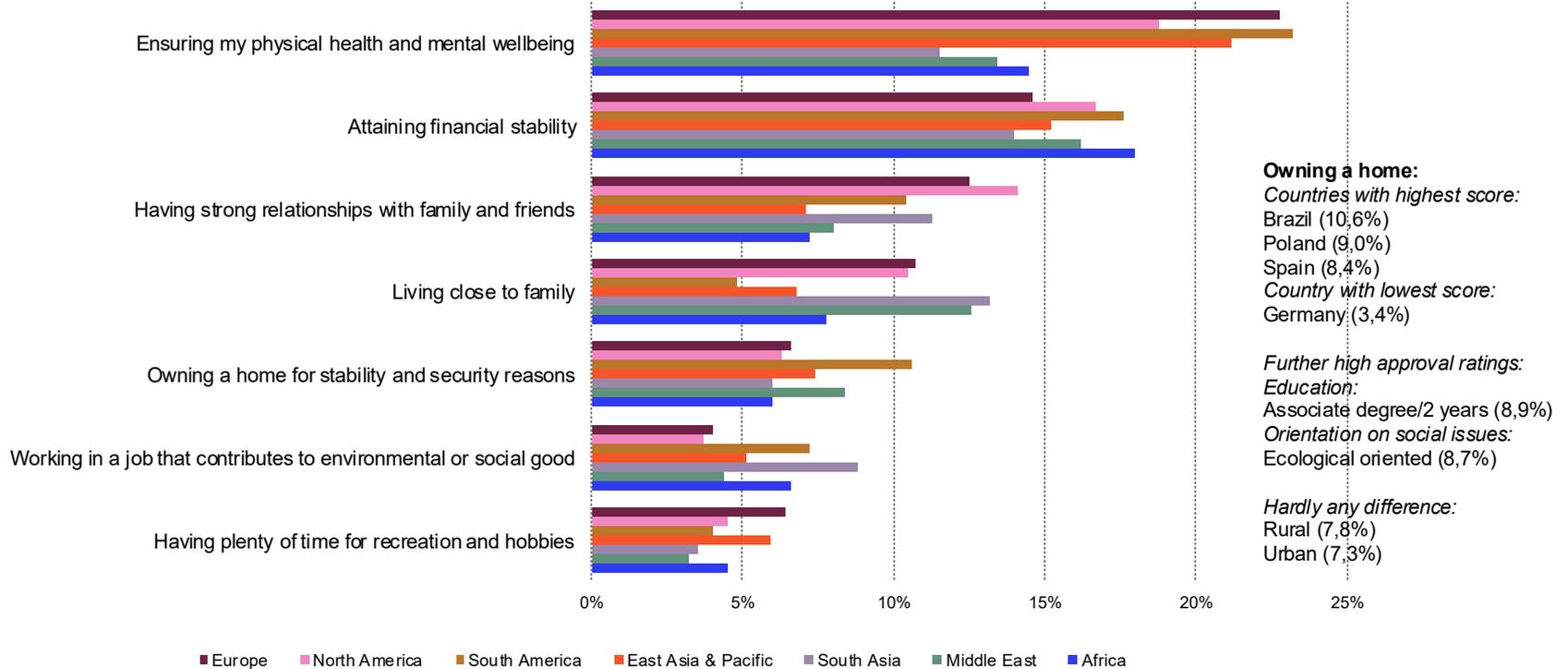
■ 18-29 y.o ■ 30-49 y.o ■ 50-69 y.o

N=2.240 N=3.447 N=2.841

LIFE GOALS _ 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.

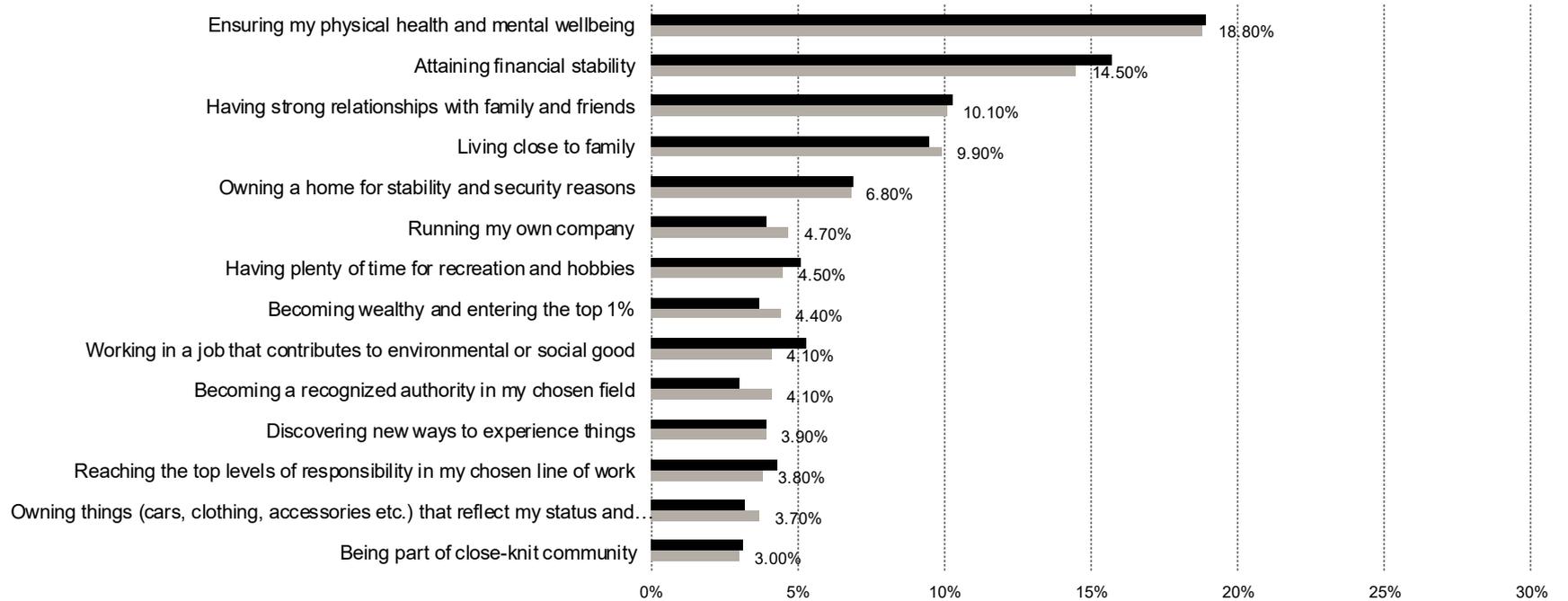
▶ TOP 1 GOAL



LIFE GOALS _ 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

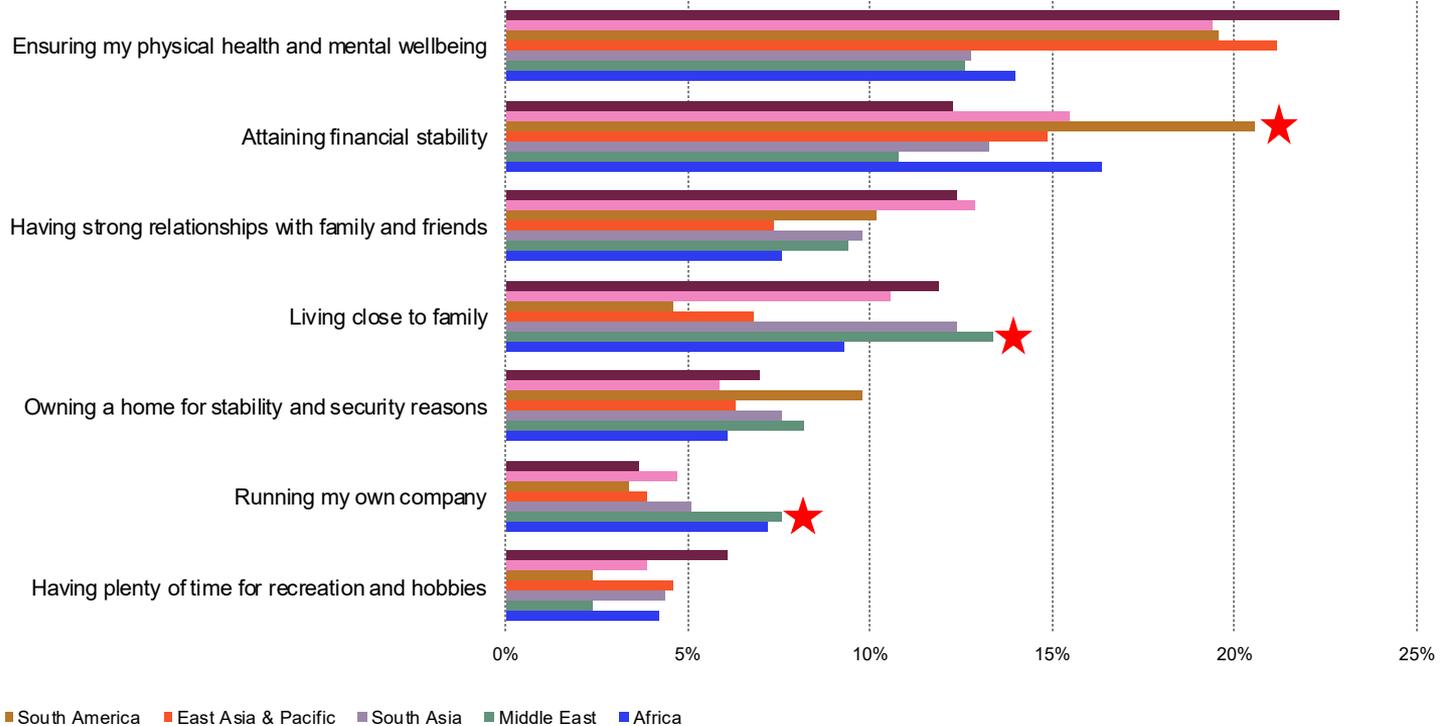


■ Right now: Global ■ In 10 years: Global N=8.528

LIFE GOALS _ 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



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

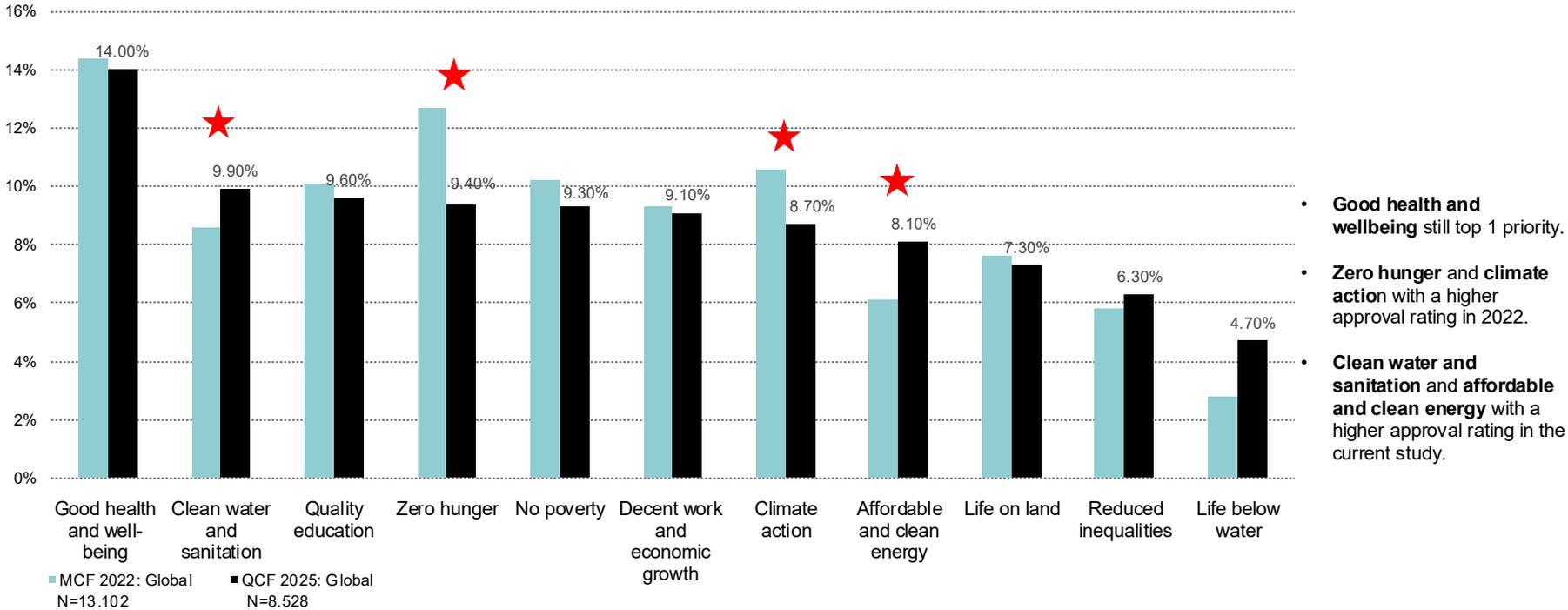
SUSTAINABLE LIFE _ KEY FINDINGS

- 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_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.

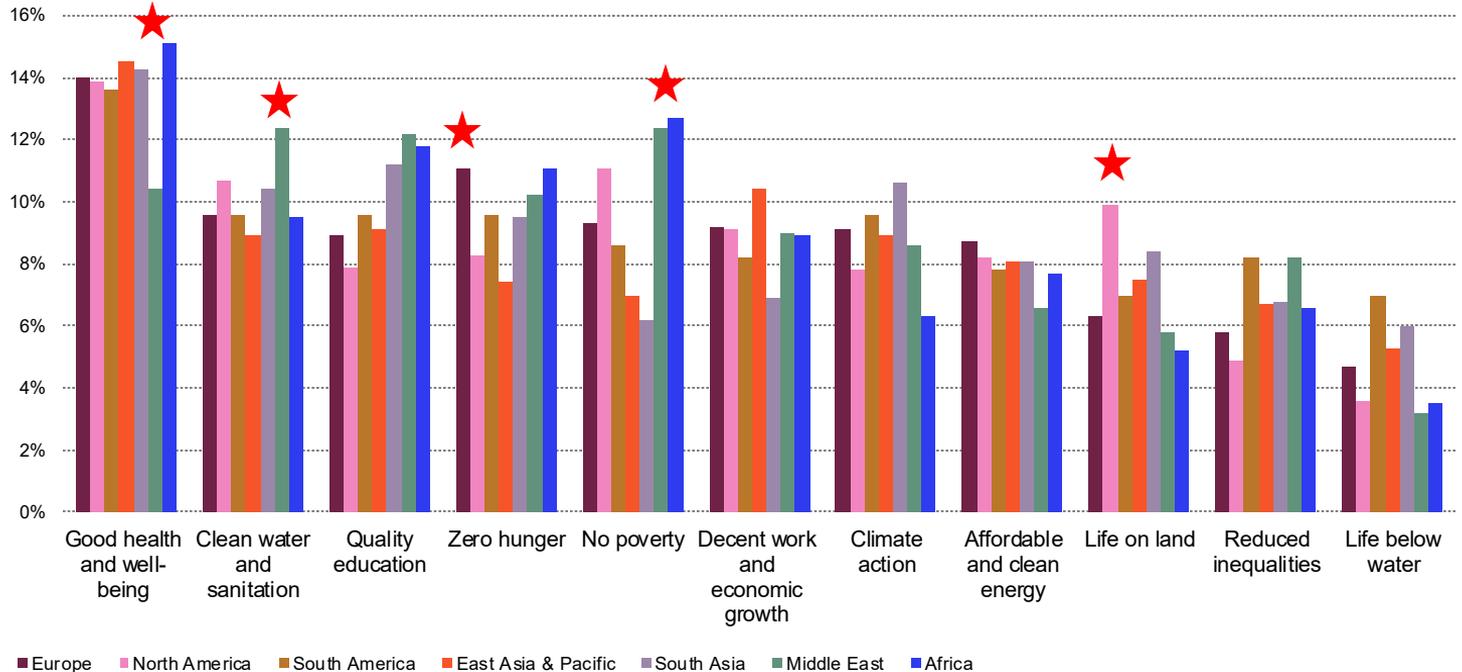
1 RANKING



SUSTAINABILITY _ 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

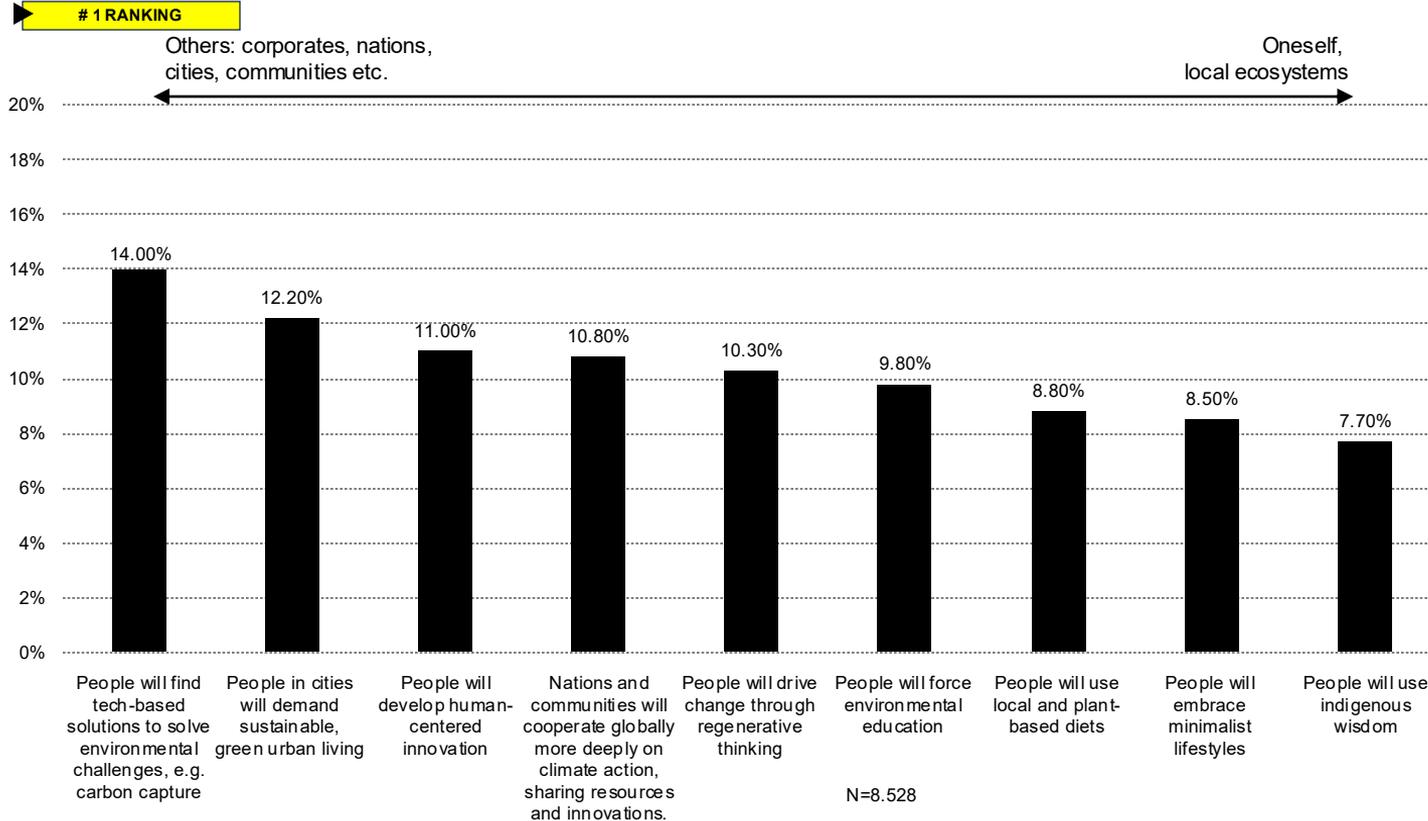


- Africa (12.7%) and Middle East (12.4%) show highest approval for **no poverty**.
- **Clean water and sanitation** highest ranked in Middle East (12.4%).
- **Quality education** regarded as most important in Middle East (12.2%), Africa (11.8%) and South Asia (11.2%).

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.



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).



HEALTH AND WELLBEEING

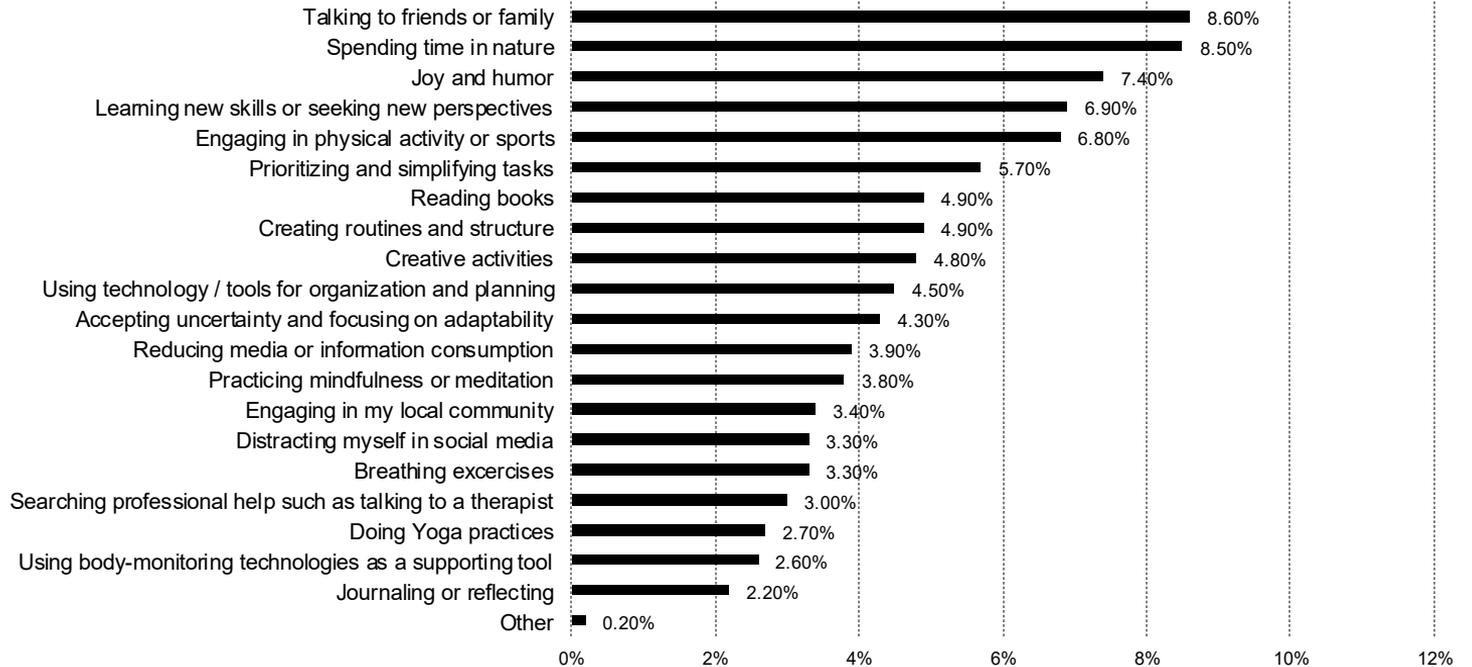
HEALTH AND WELLBEING _ KEY FINDINGS

- **‘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.

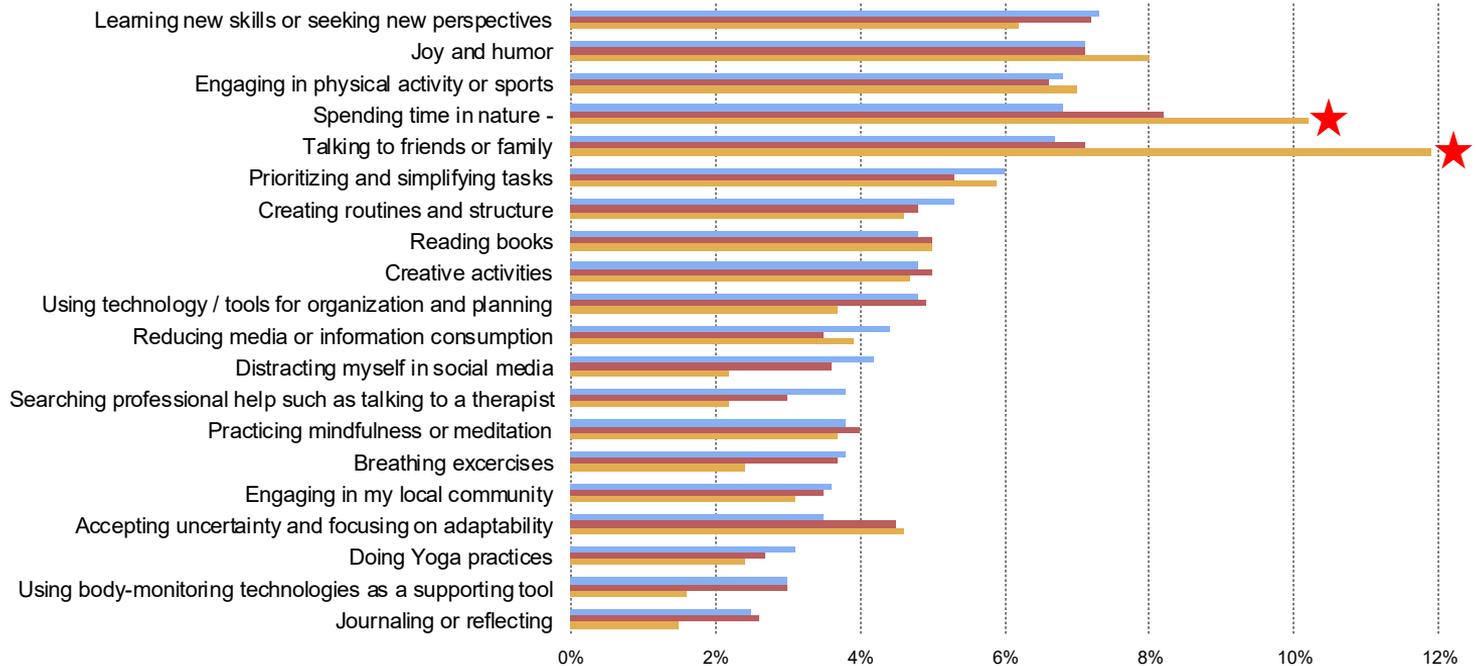
1 RANKING



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



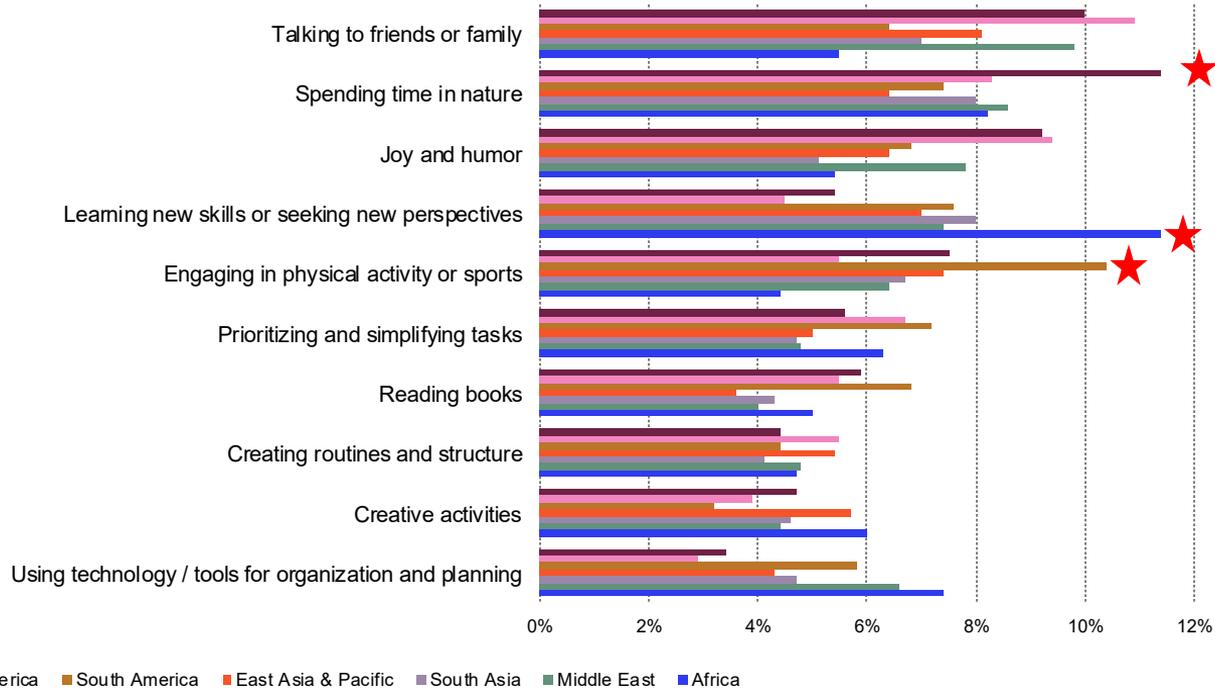
■ 18-29 y.o. ■ 30-49 y.o. ■ 50-69 y.o.

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%)

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

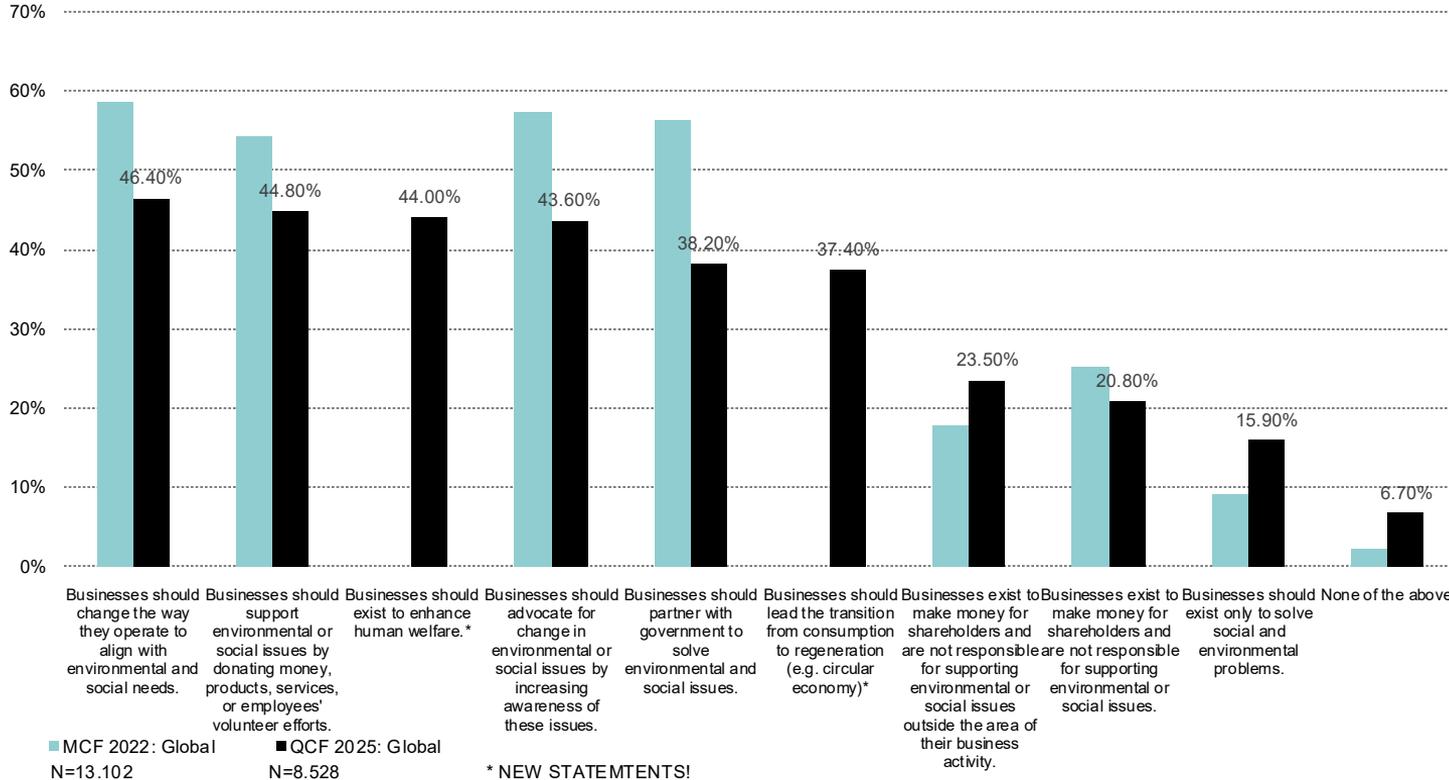
BUSINESS ROLE_ KEY FINDINGS

- 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.
- South Asia and Africa show 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 _ 2025 vs. 2022

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

Select all that apply.



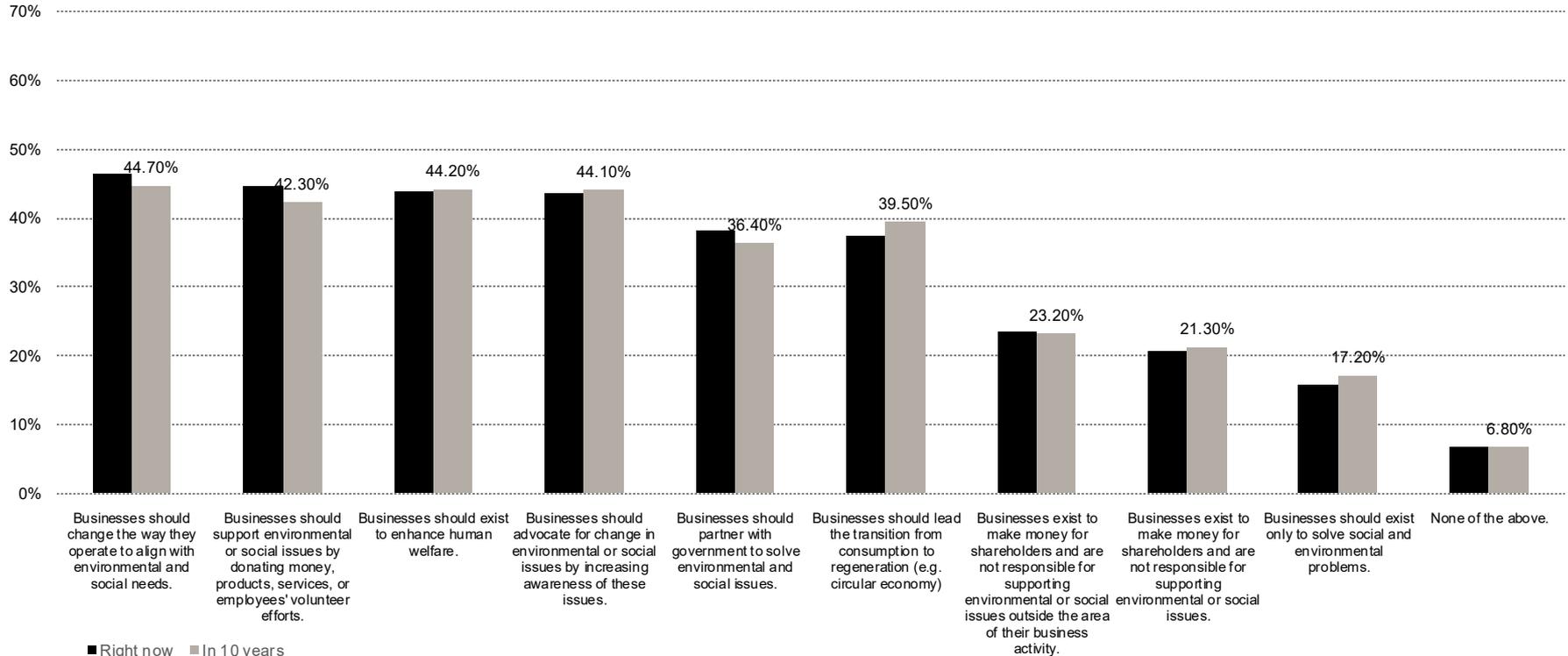
The role of business in tackling environmental and social issues is seen as significantly less important compared to 2022.

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

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

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.

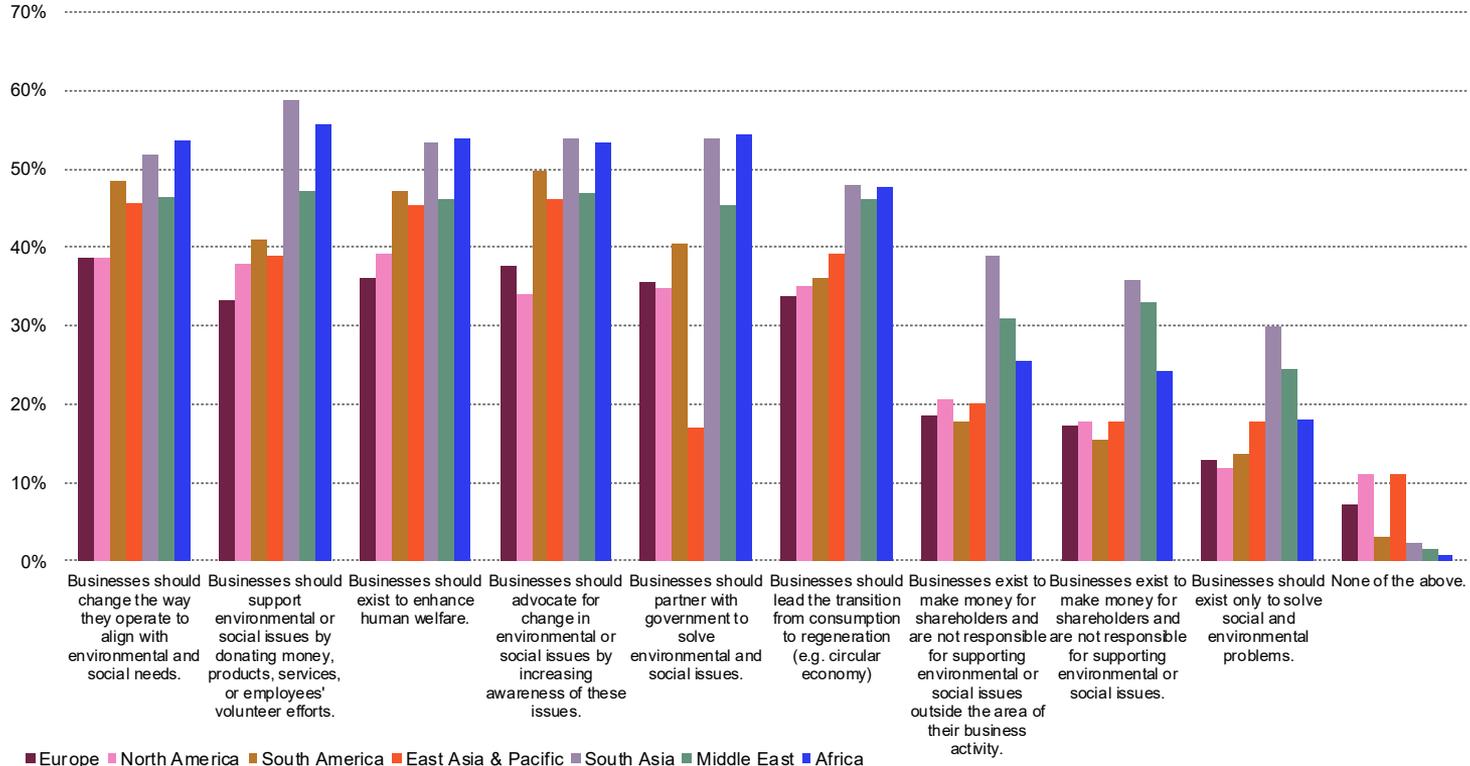


N=8,528

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 in South Asia.

BRAND ROLE

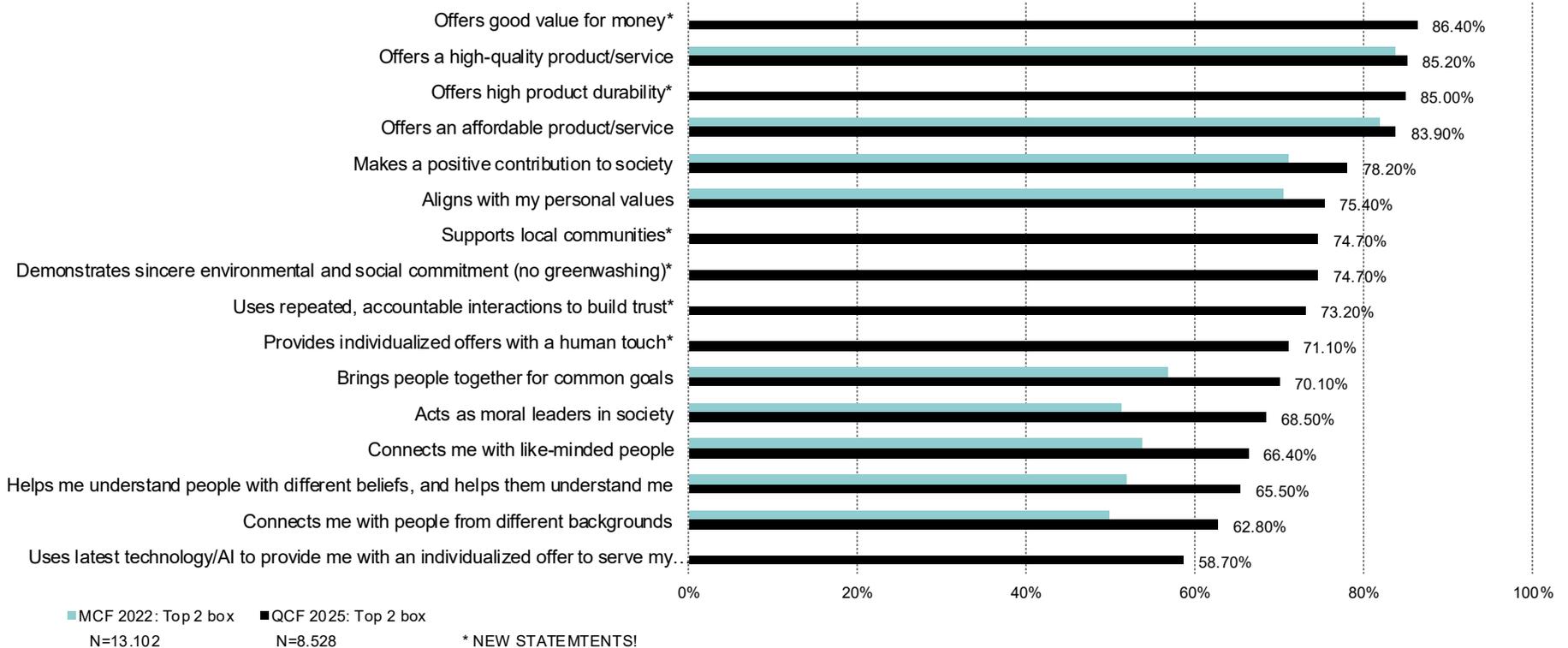
BRAND ROLE _ KEY FINDINGS

- **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 _ 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?

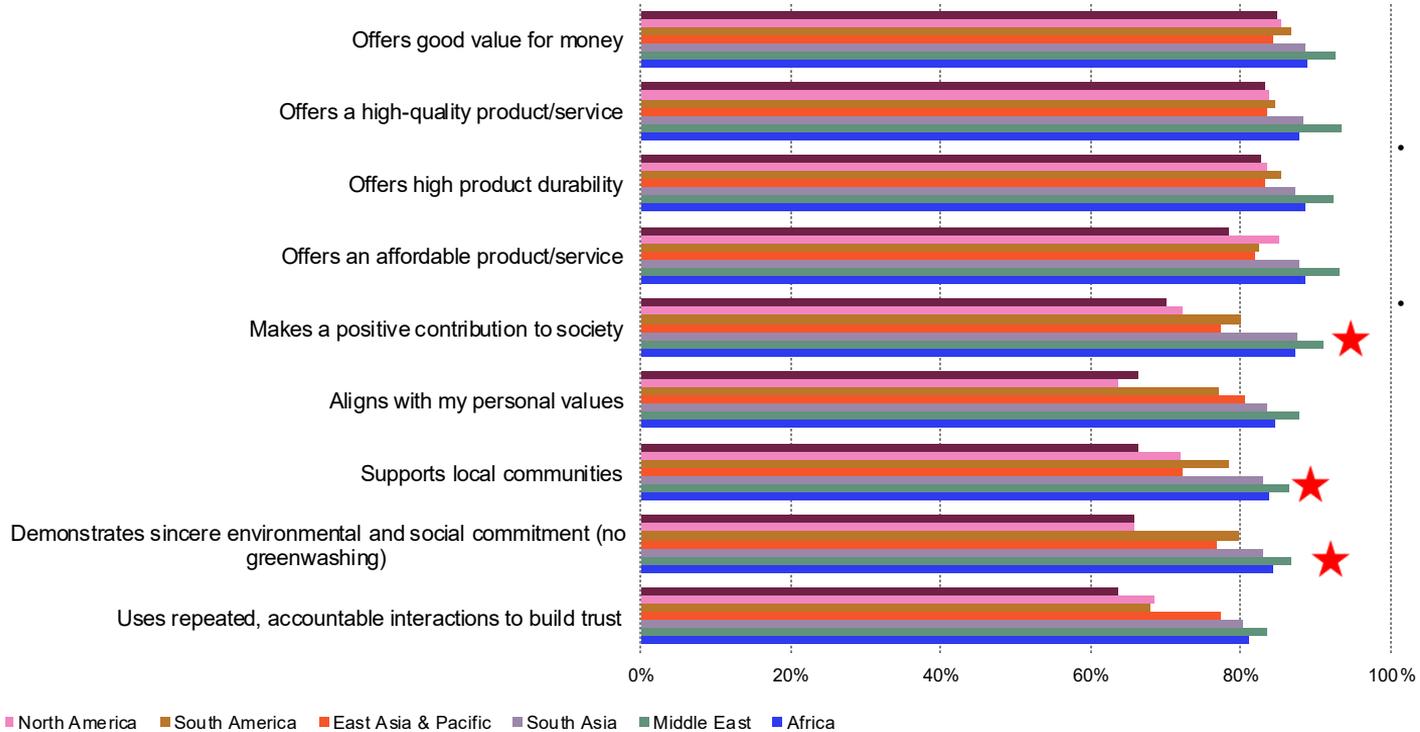
▶ TOP 2 BOX



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

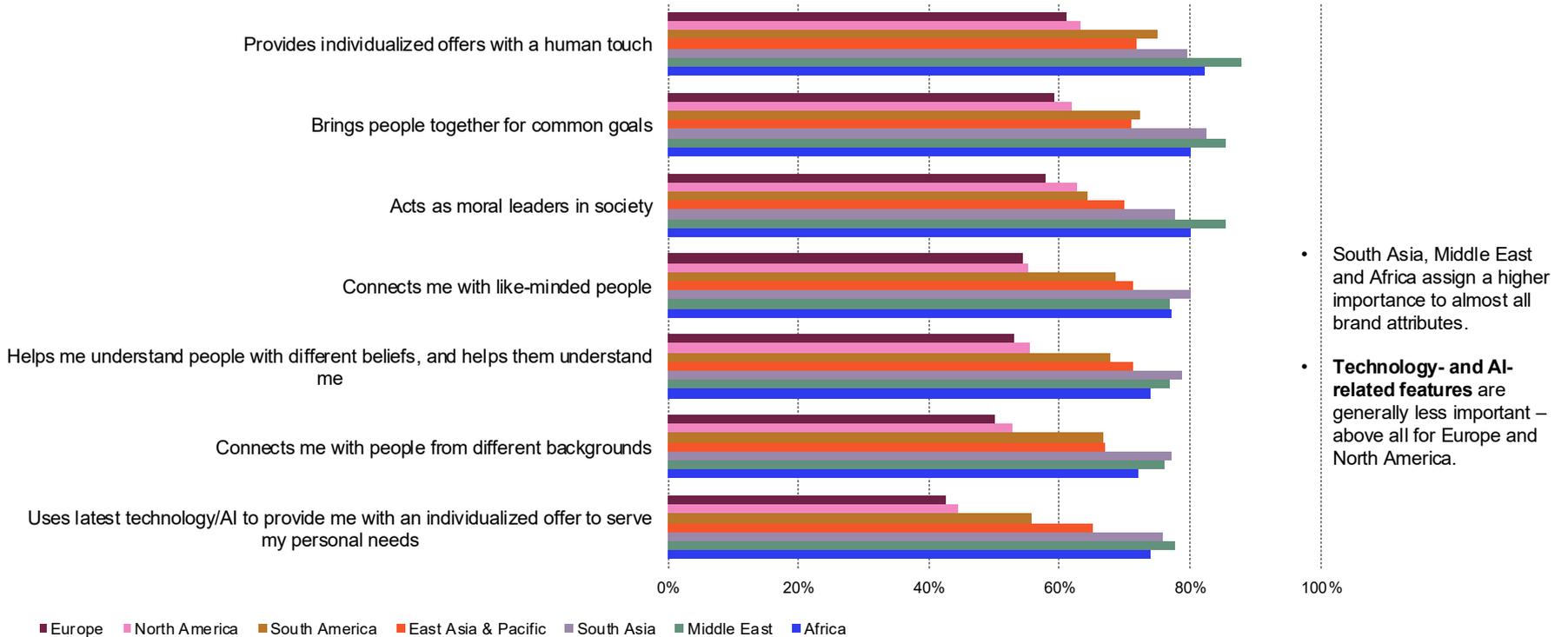


- **Good value for money** and **high-quality product / service** are the most important factors for buyers worldwide.
- In Africa, Middle East and South Asia softer dimensions such as **makes a positive contribution to society**, **aligns with my personal value**, **supports local communities** and **demonstrates sincere environmental and social commitment (no greenwashing)** play a significantly greater role than in other regions.

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





FUTURE CONSUMERS

FUTURE CONSUMERS _ KEY FINDINGS

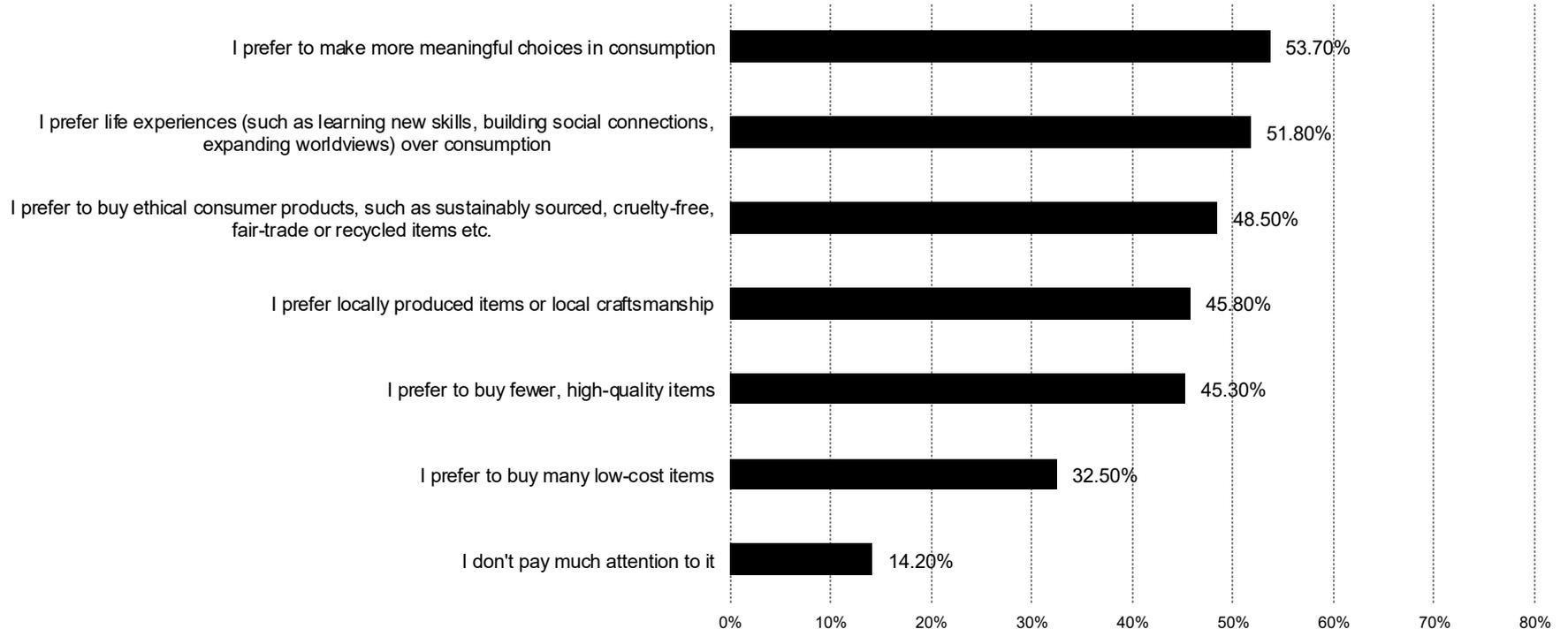
- Globally, the top three consumer preferences are **meaningful choices in consumption, enriching life experiences, ethical consumer products**.
- At a regional level: Europe has a clear focus on **meaningful choices, ethical products, and high quality over quantity**. North America also values **conscious 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



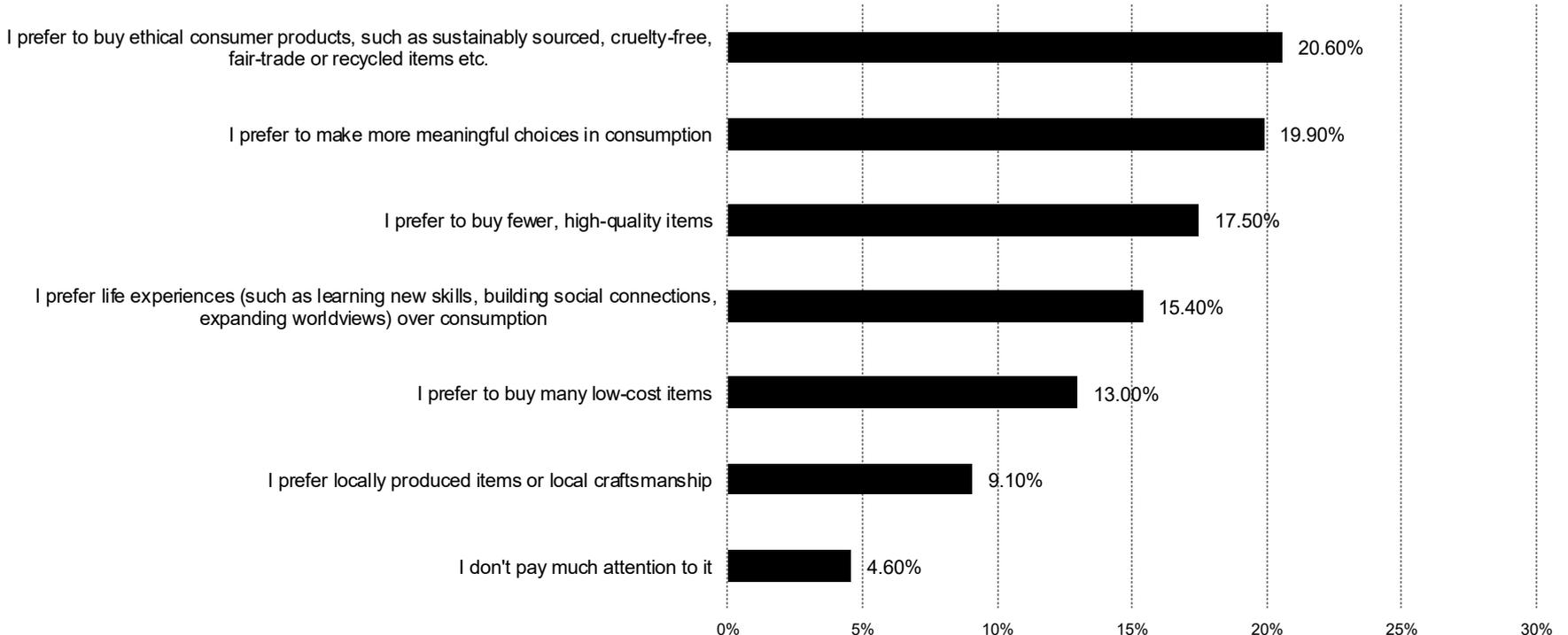
N=8.528

FUTURE CONSUMERS _ TOTAL

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

Please select 1 item.

▶ # 1 RANKING

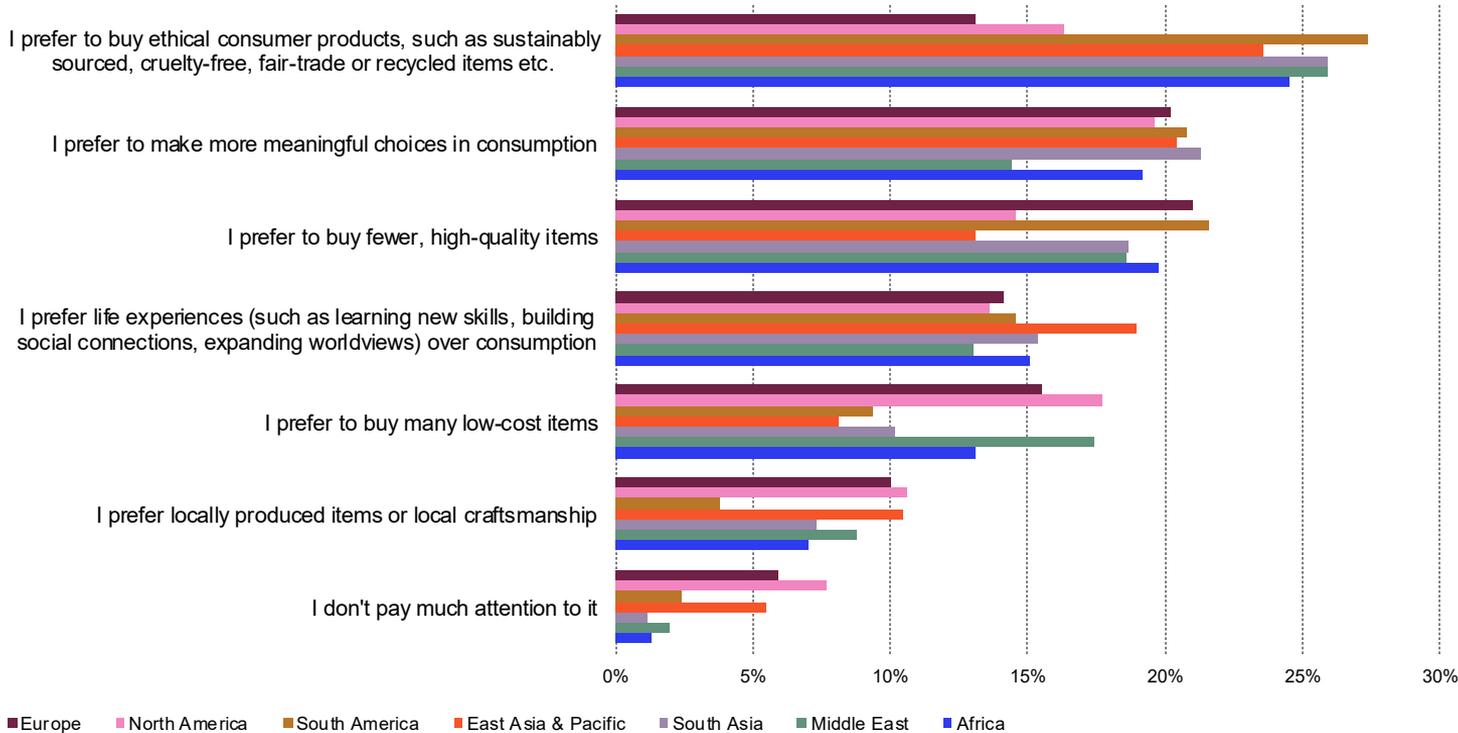


FUTURE CONSUMERS _ REGIONAL

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



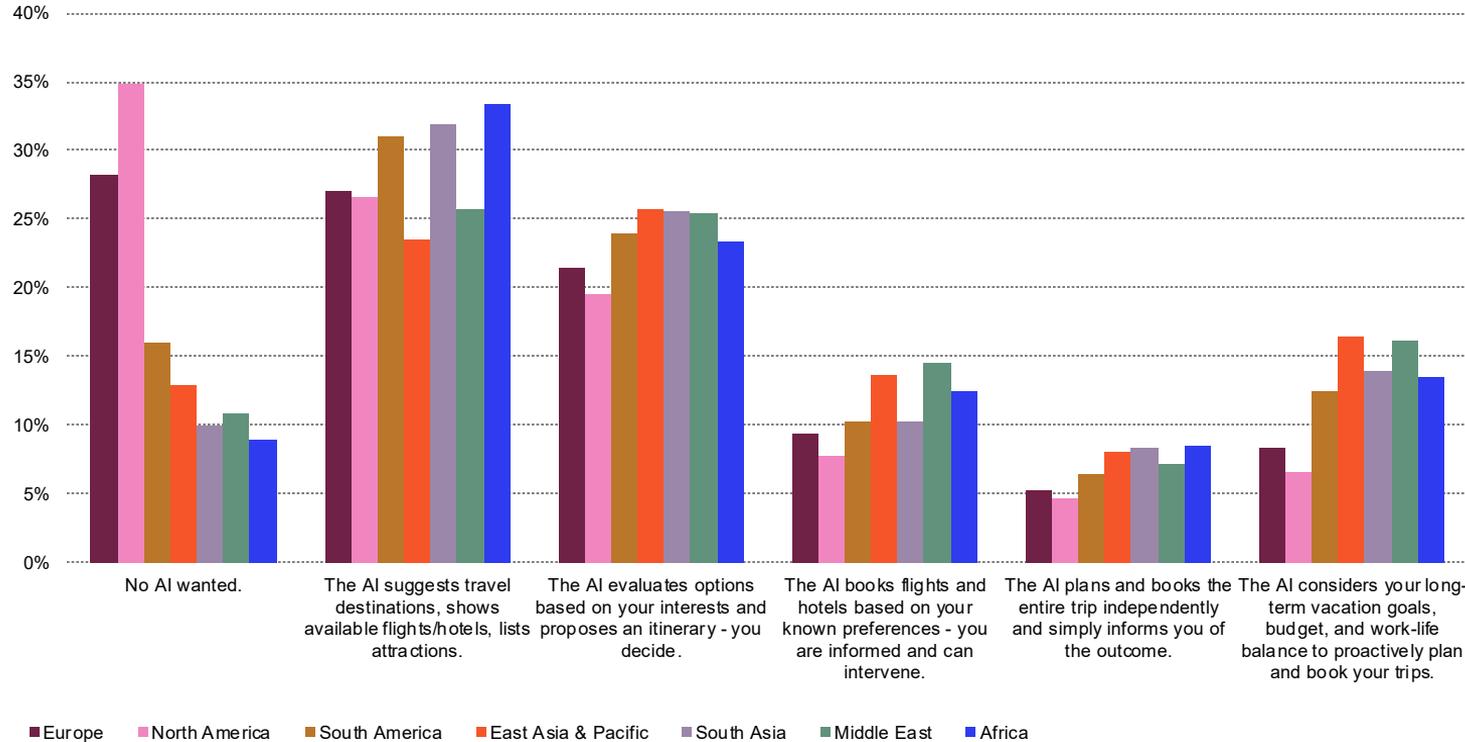
ARTIFICIAL INTELLIGENCE

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 _ REGIONAL

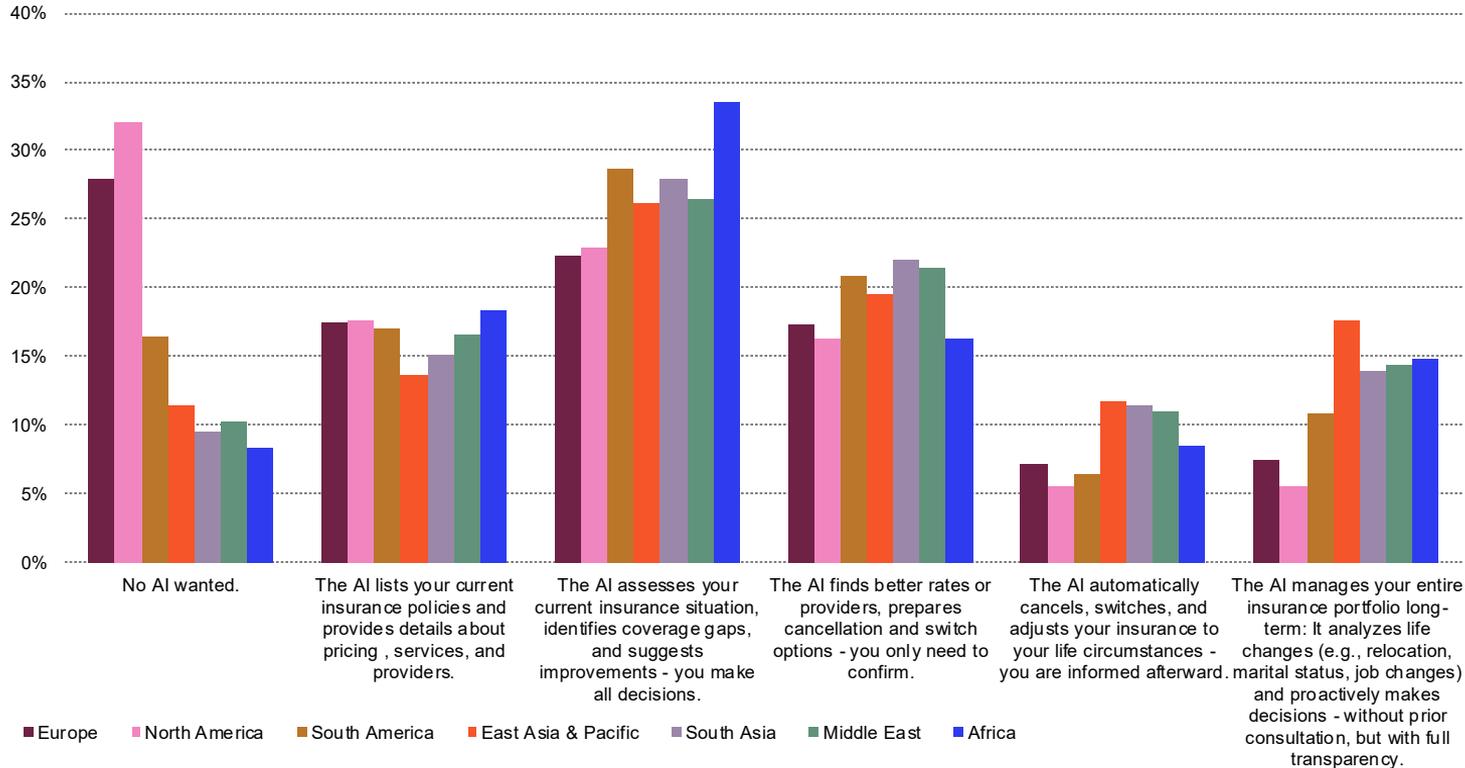
Travel Management _ Please imagine you would like to organize a trip in the future. How deeply will AI be part of it?



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 _ 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.

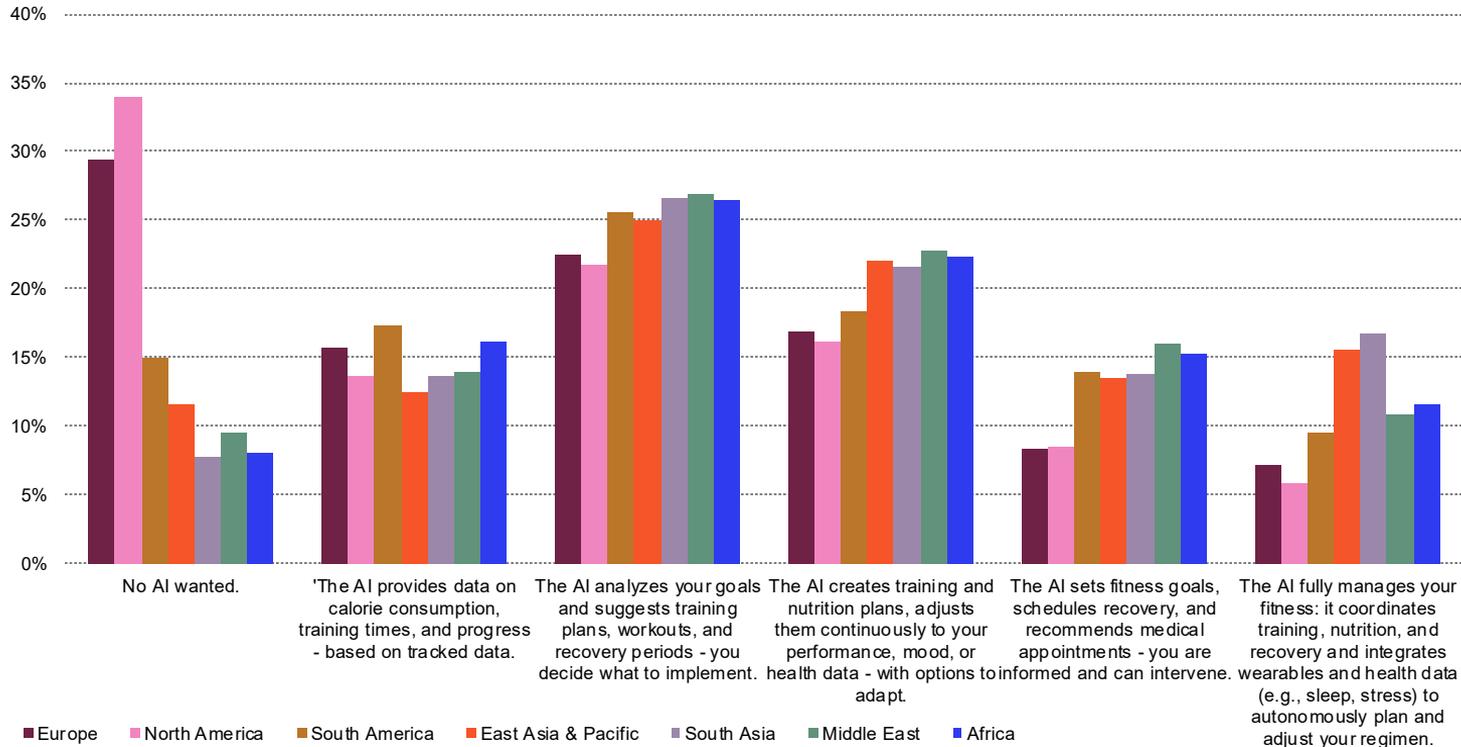
Africa, Middle East, South Asia and South America are open to deeper AI integration. Africa shows the highest interest in AI assessing the individual situation.

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 _ 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.

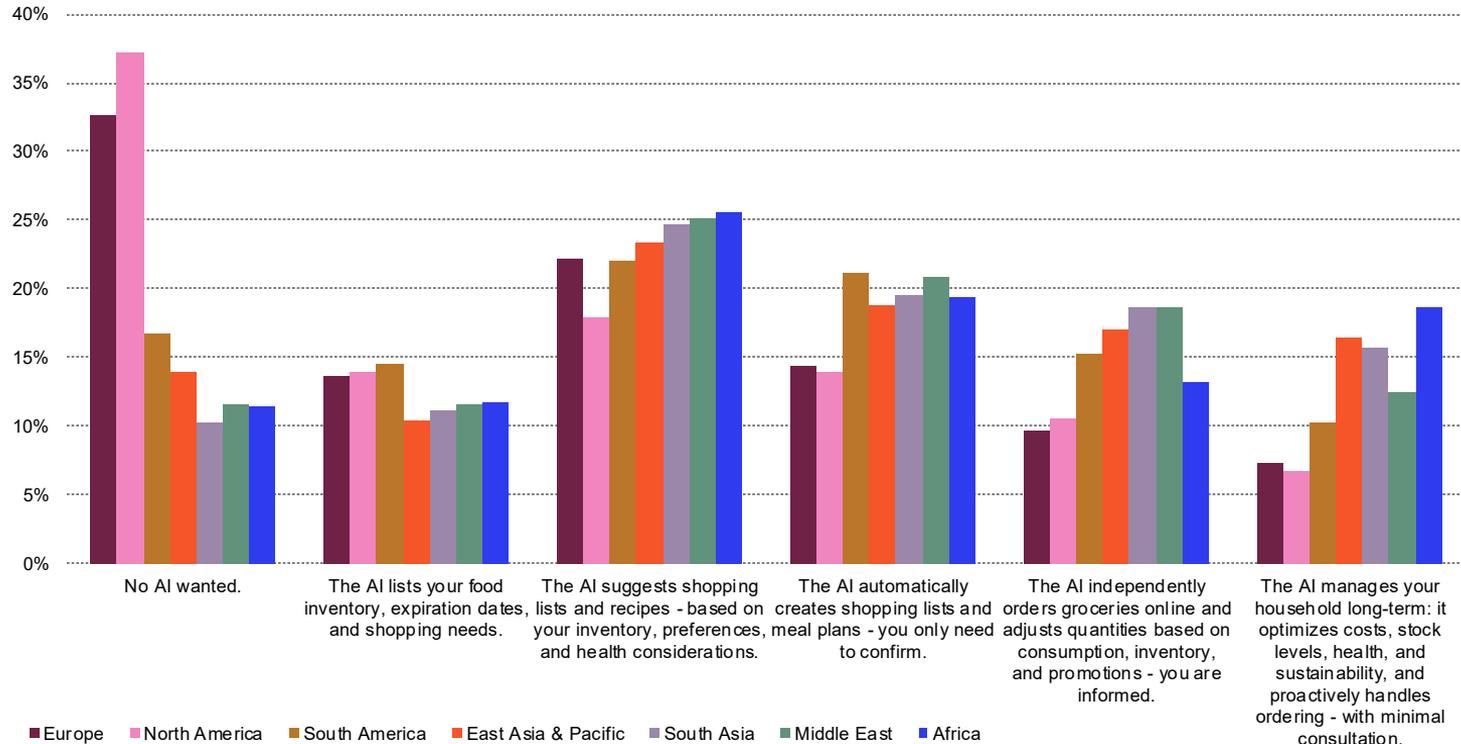
Africa, Middle East and Asia show the highest acceptance of AI in fitness, with a strong preference for autonomous and fully managed solutions. They are most willing to let AI create, adjust, and even fully manage their training and nutrition plans.

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 _ 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

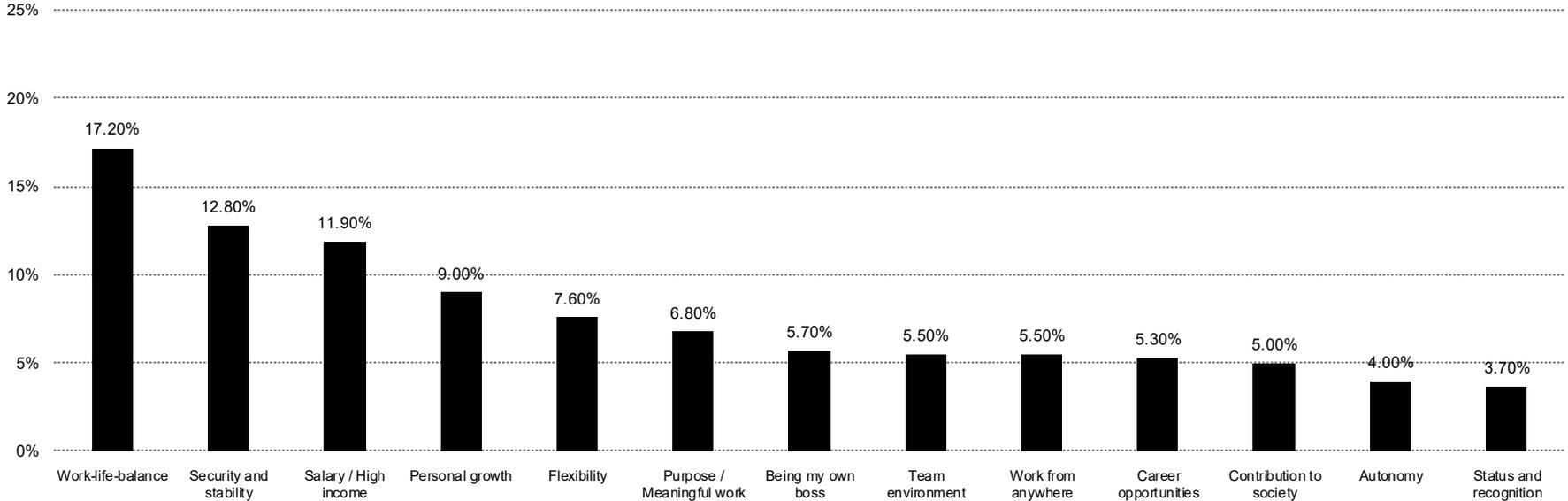
- **Work-life balance** and **security & stability** are the most important aspects of work life across all regions.
- Europe places the highest value on **work-life balance** and **job security**, while South America prioritizes **autonomy** more than other regions.
- Africa place emphasis on **security** 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.

▶ # 1 RANKING



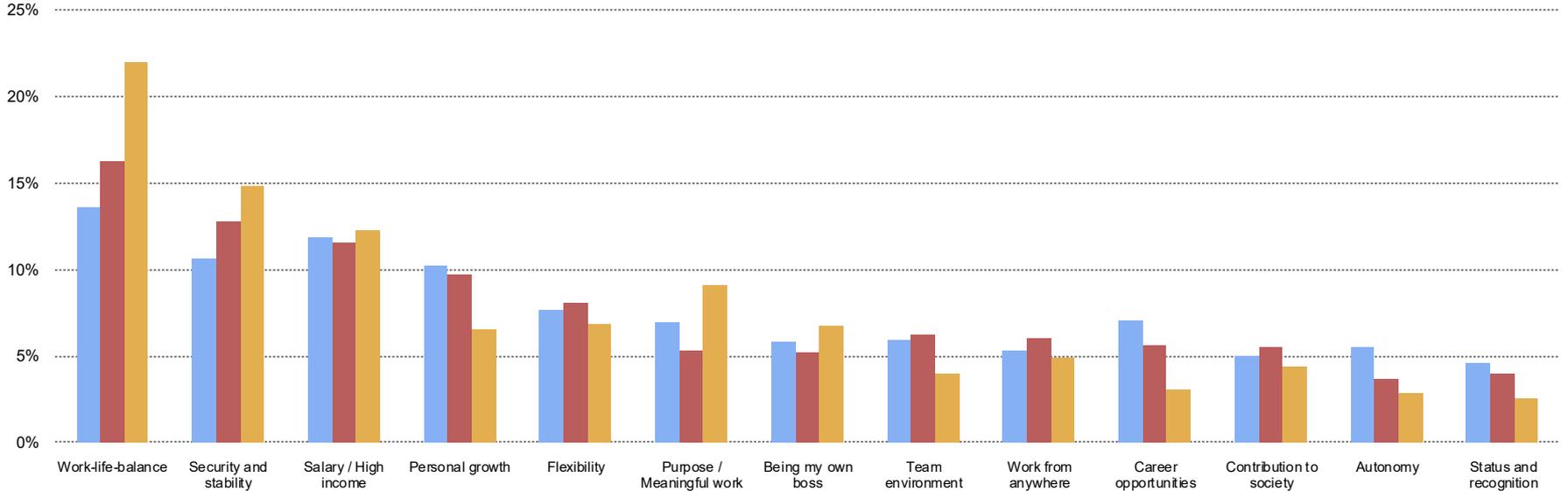
N=6.663 ("I currently work full-time / part-time")

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



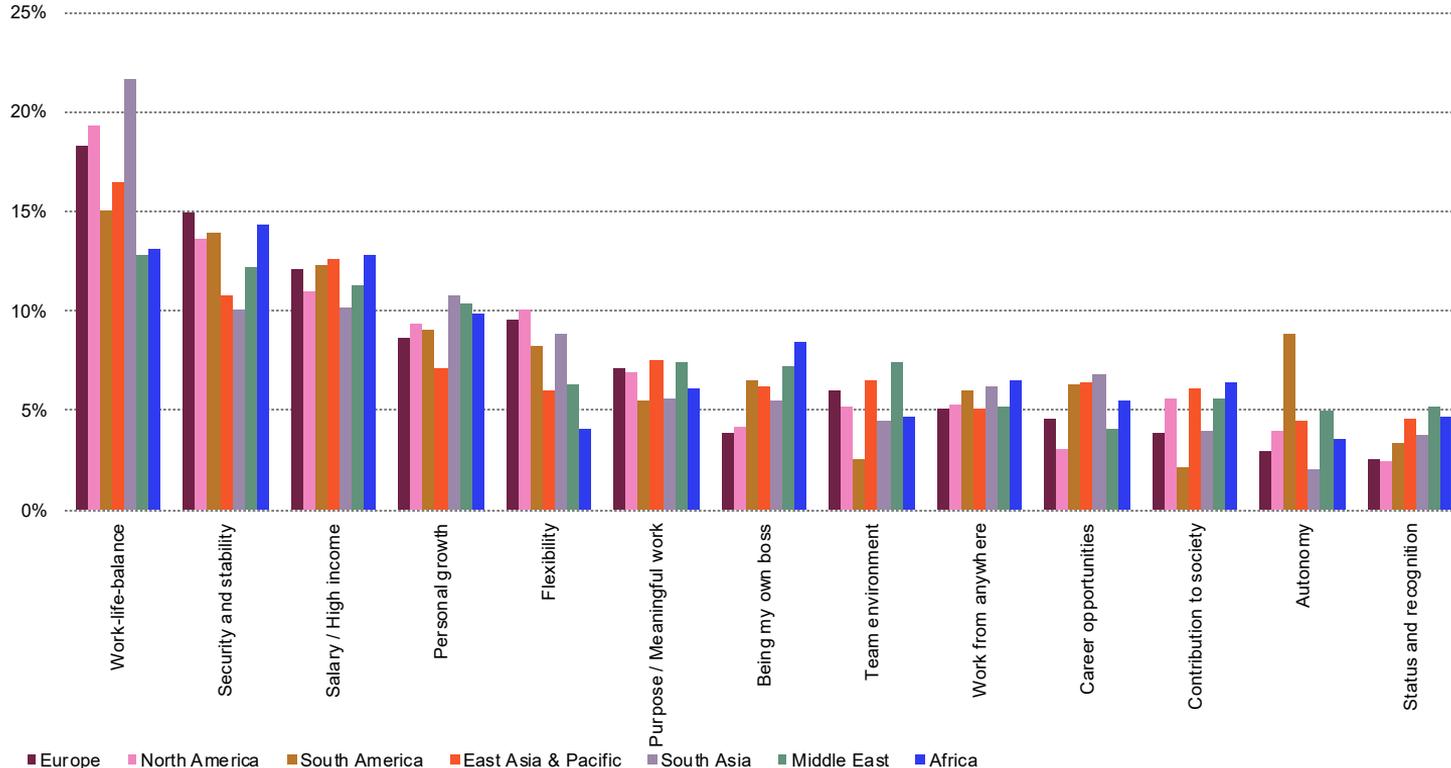
■ 18-29 years old* N=2.240 ■ 30-49 years old* N=3.447 ■ 50-69 years old* * "I currently work full-time / part-time" N=2.841

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.

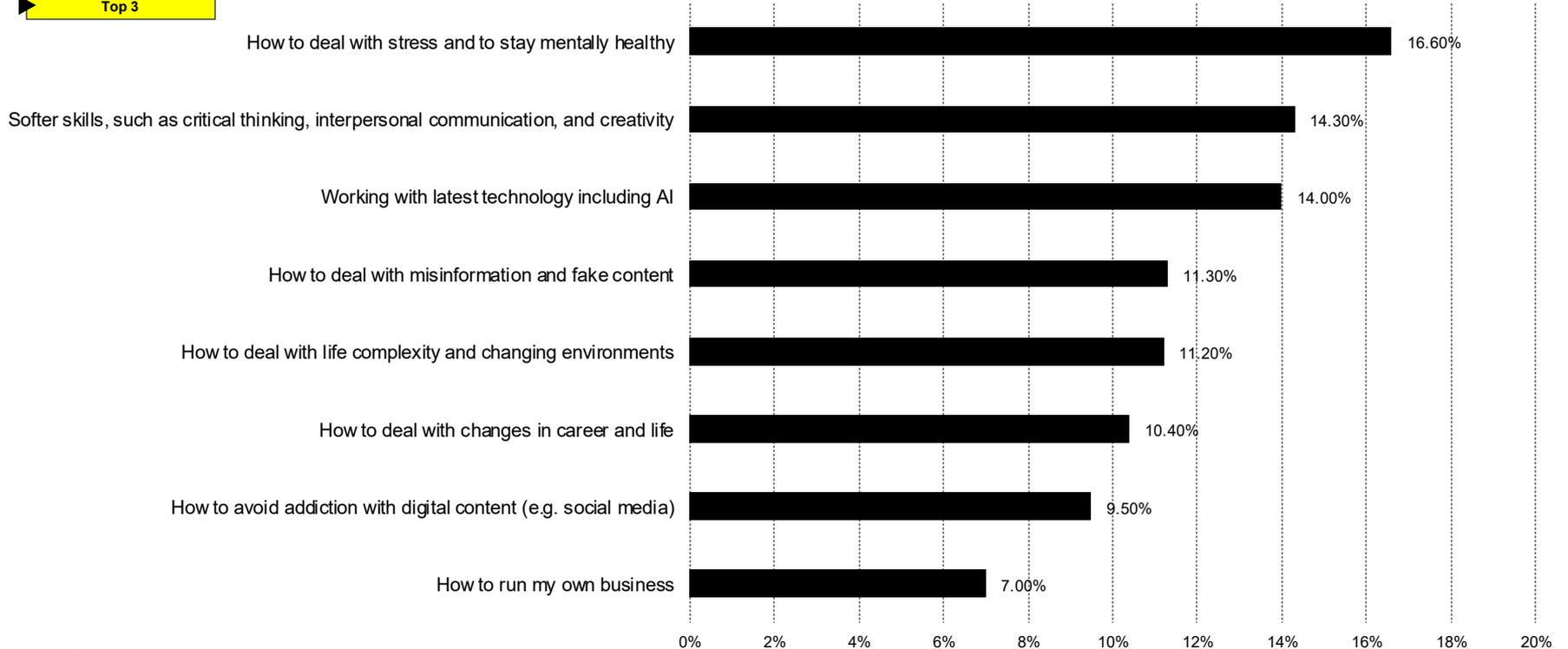
East Asia & Pacific shows a focus on work-life-balance and high income..

FUTURE WORKFORCE _ 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**



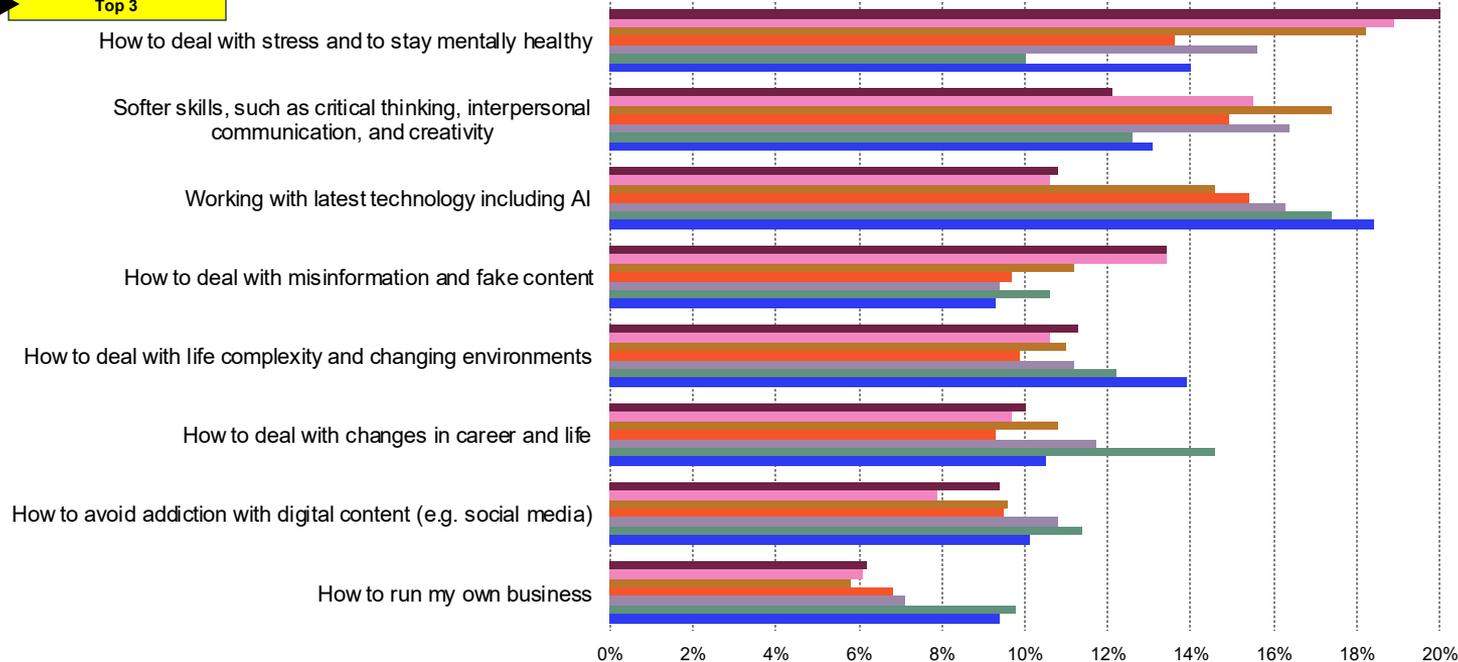
N=8.528

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.

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

A photograph of four diverse young people standing in a row against a light blue background. From left to right: a young man with curly red hair wearing a mustard-colored jacket over a patterned sweater; a young woman with long blonde braids wearing a blue patterned top and high-waisted denim pants; a young woman with dark hair in buns wearing a black vest over a white shirt and a dark denim skirt; and a young man with dark skin and short hair wearing a blue and white patterned hoodie and matching pants. All four have their arms crossed and are looking towards the camera.

GLOBAL POWER SHIFTS

GLOBAL POWER SHIFTS _ KEY FINDINGS

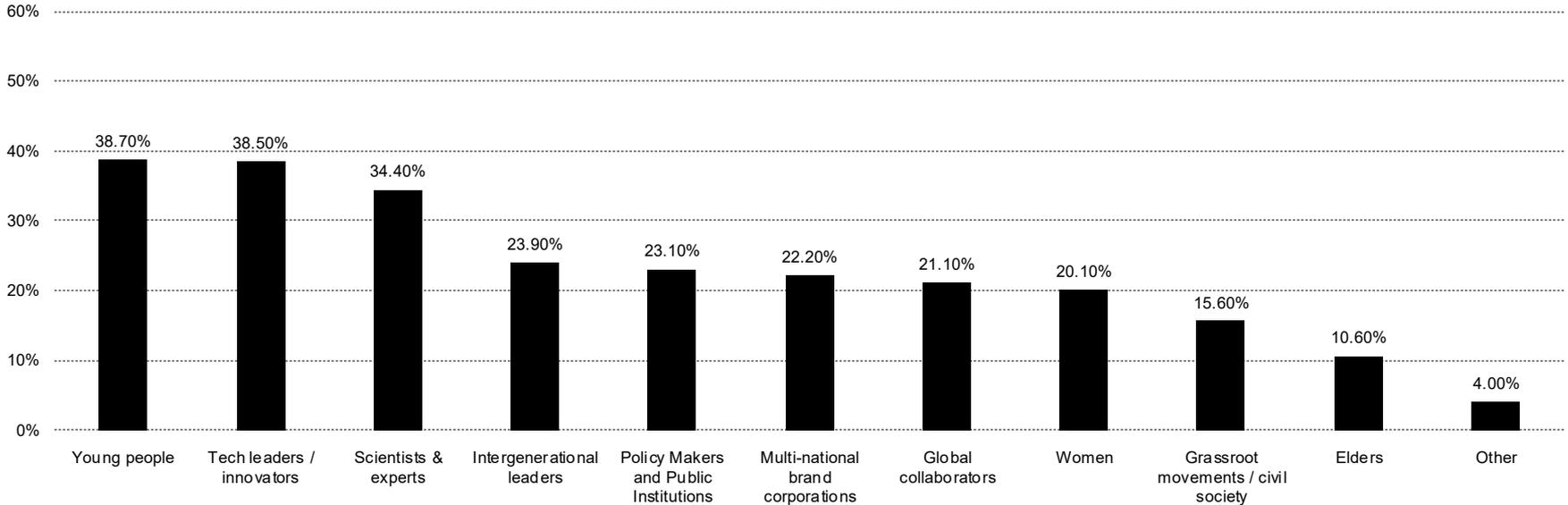
- Across all regions, **'tech leaders / innovators'** and **'young people'** are widely believed to play a key role in future leadership.
- South America also shows stronger belief in **'tech leaders'** but also **'women'** and **'intergenerational leaders'** as well as **'multi-national brand corporations'**.
- 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



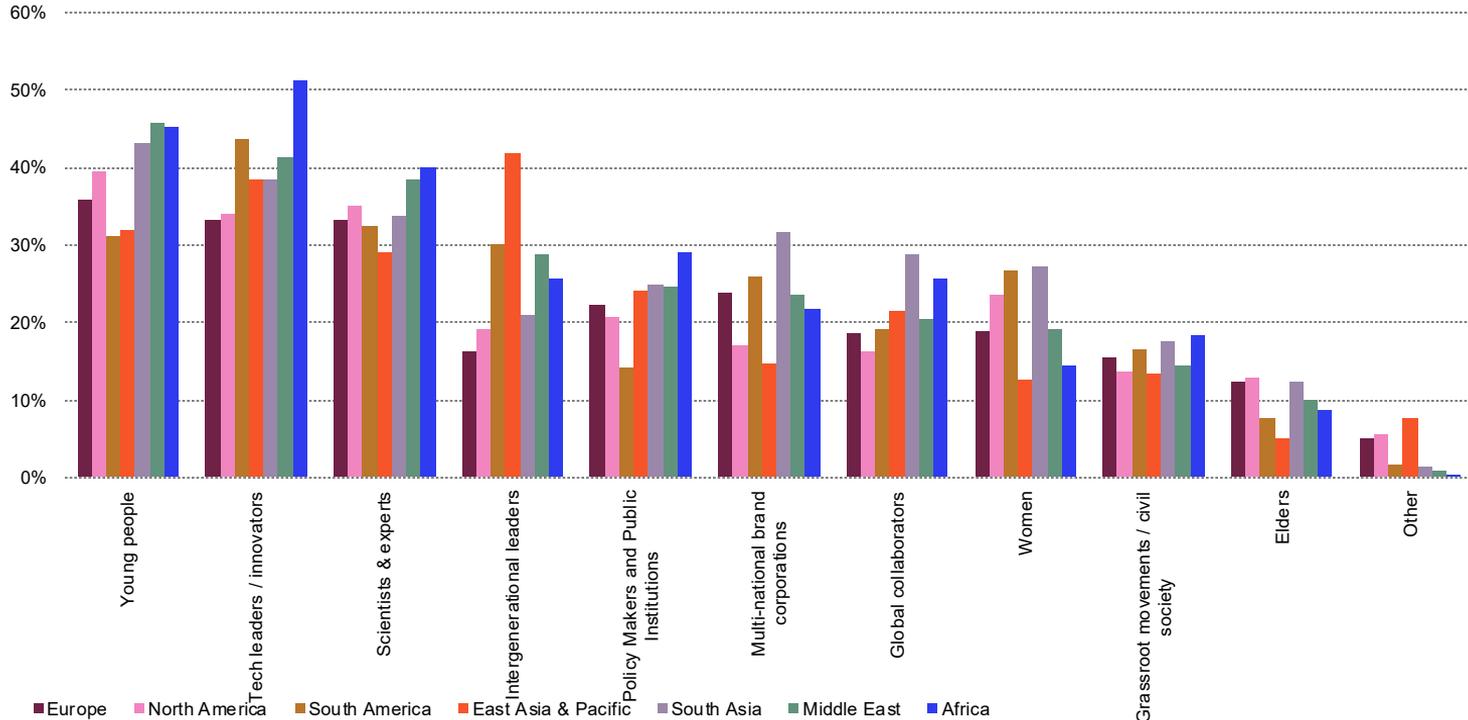
N=7,528 (except China)

GLOBAL POWER SHIFTS _ 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.

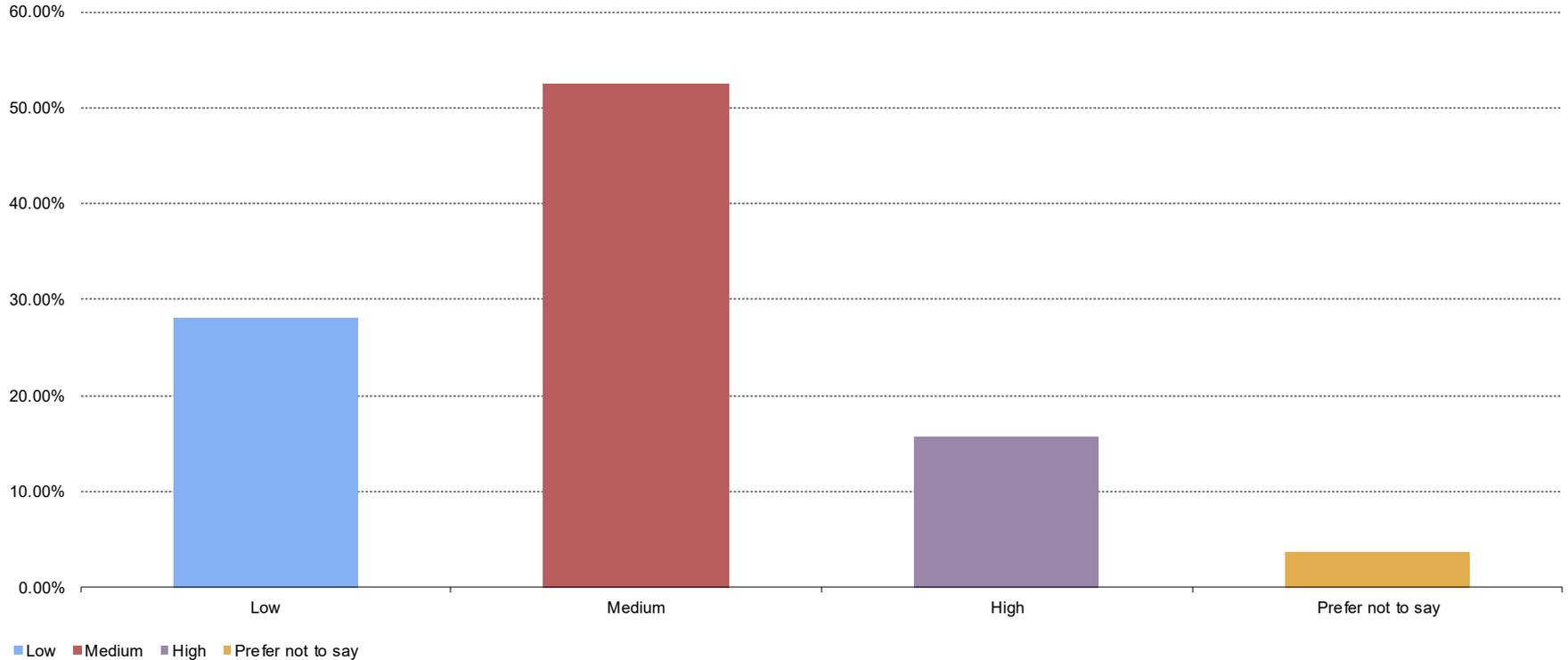
Africa also believes in tech leaders / innovators, young and scientists & experts but also policy makers and public institutions.

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 and a dark backpack. In the center is a Black 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-colored blazer over a blue button-down shirt. The background shows modern city buildings under a clear sky.

DEMOGRAPHICS

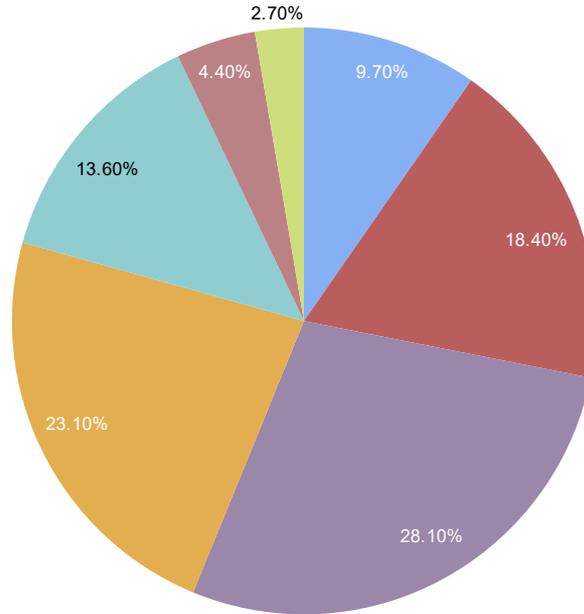
DEMOGRAPHICS_TOTAL

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

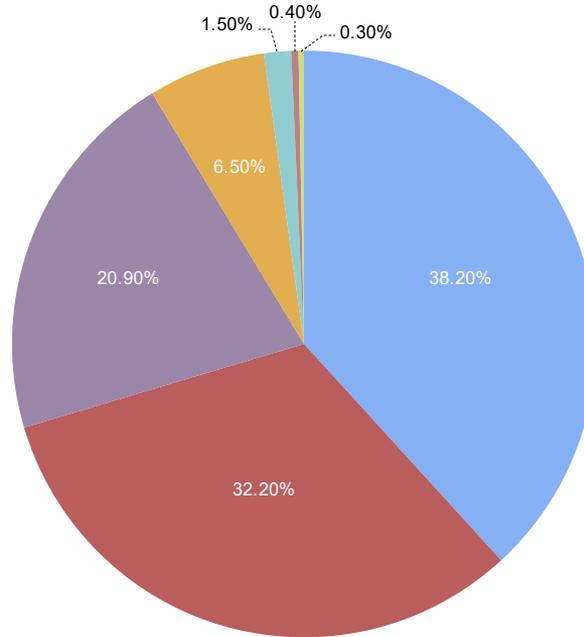
HHpeople _ Including yourself, how many people currently live in your household?



■ 1 ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 or more

DEMOGRAPHICS_TOTAL

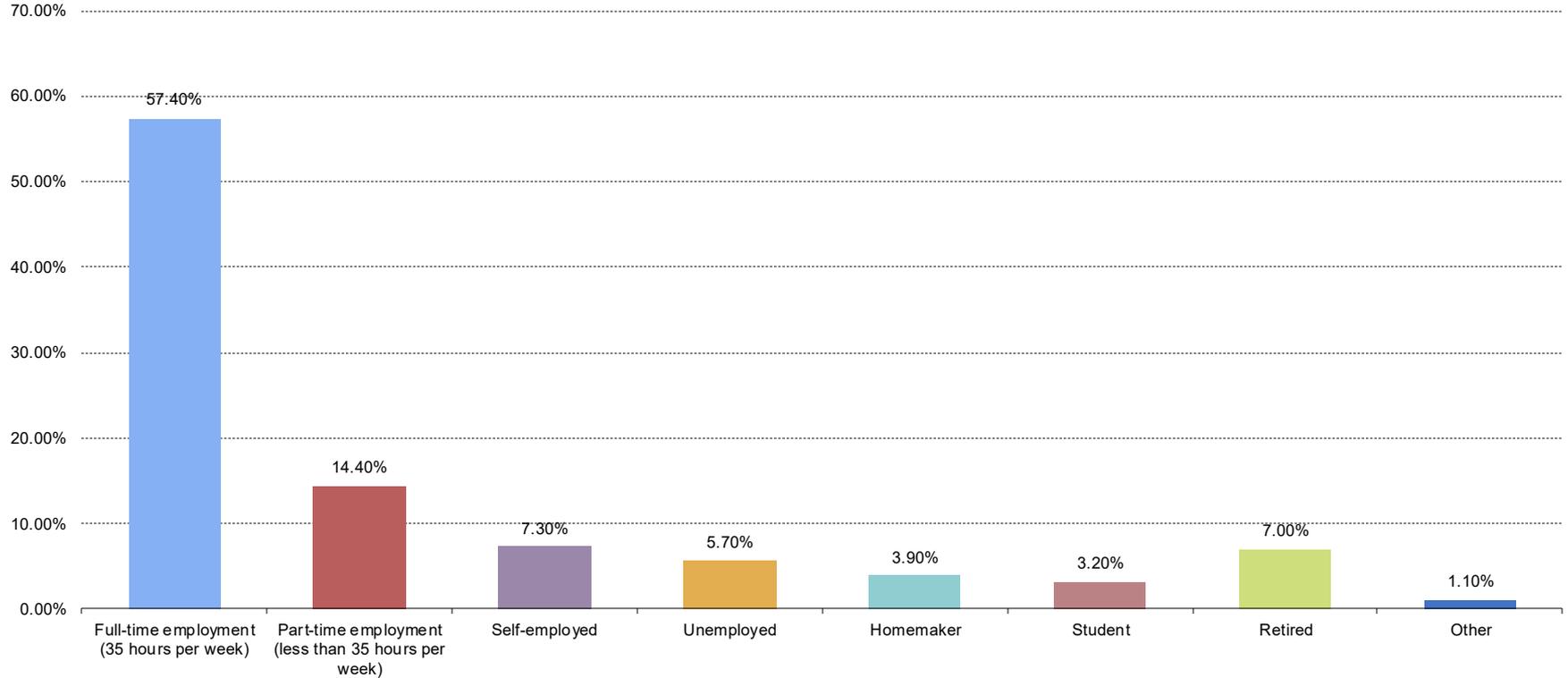
HHkids _ How many of your household members are under the age of 18?



0 1 2 3 4 5 6 or more

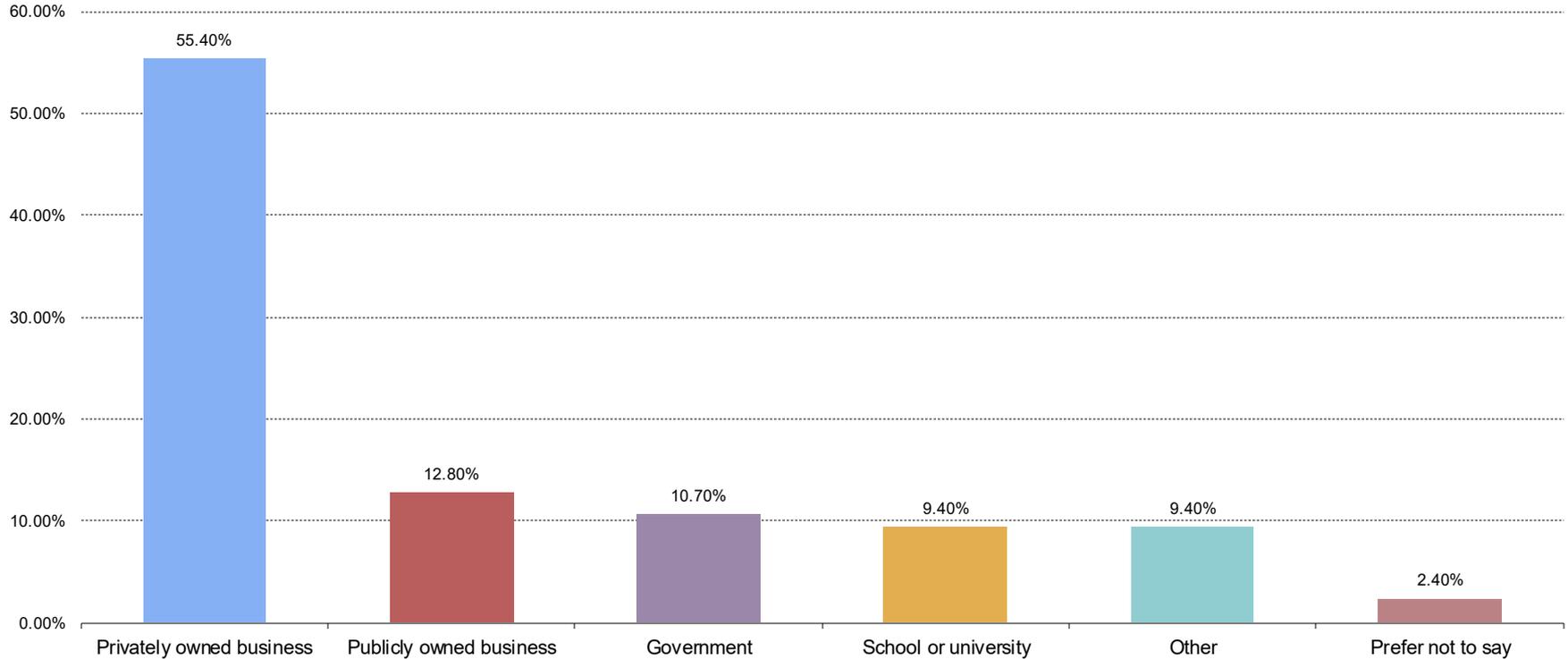
DEMOGRAPHICS_TOTAL

Employment _ What is your current employment status?



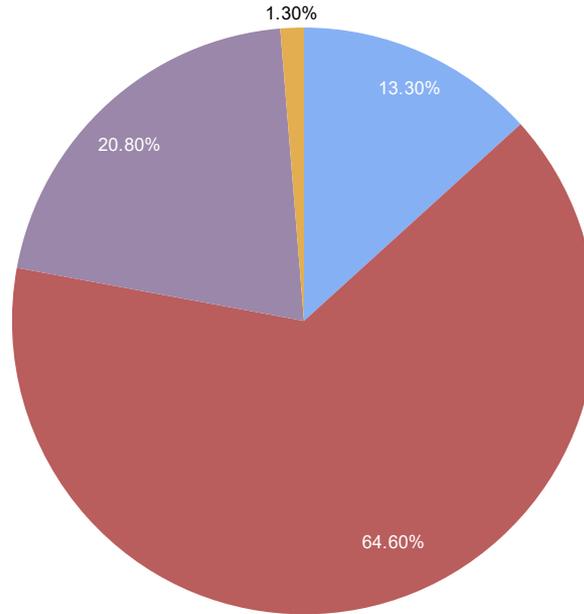
DEMOGRAPHICS _ TOTAL

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



DEMOGRAPHICS_TOTAL

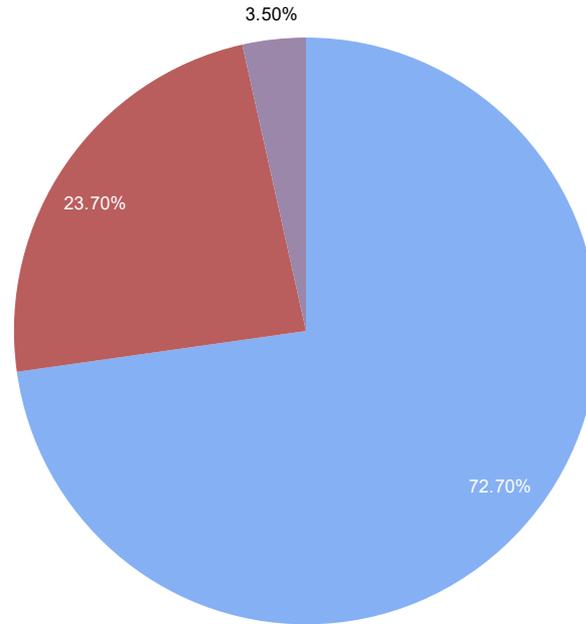
RuralUrban _ Which best describes where you live?



■ Rural ■ Urban ■ Suburban ■ Prefer not to say

DEMOGRAPHICS_ TOTAL

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

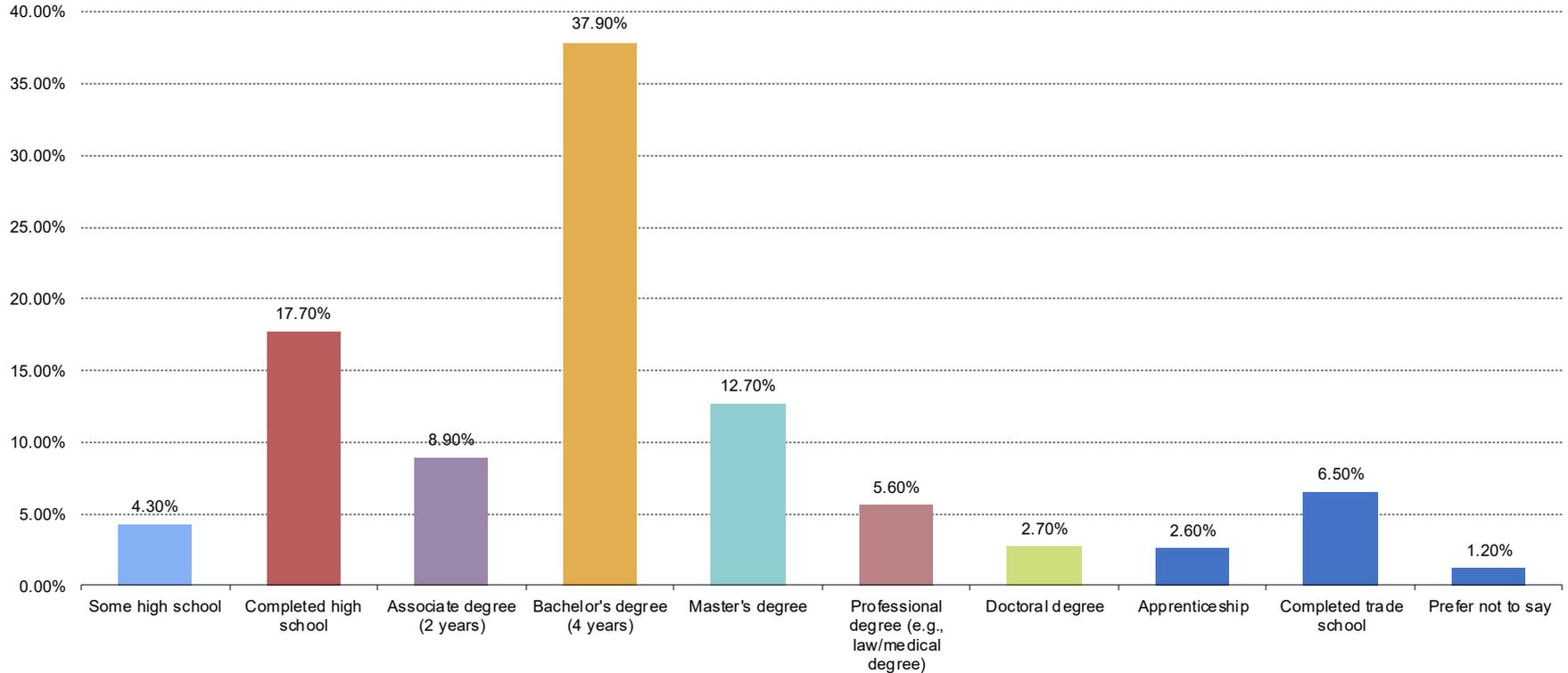


■ Apartment / house is owned by me / family ■ Apartment / house is rented by me / family ■ I use a different living form

DEMOGRAPHICS _ TOTAL

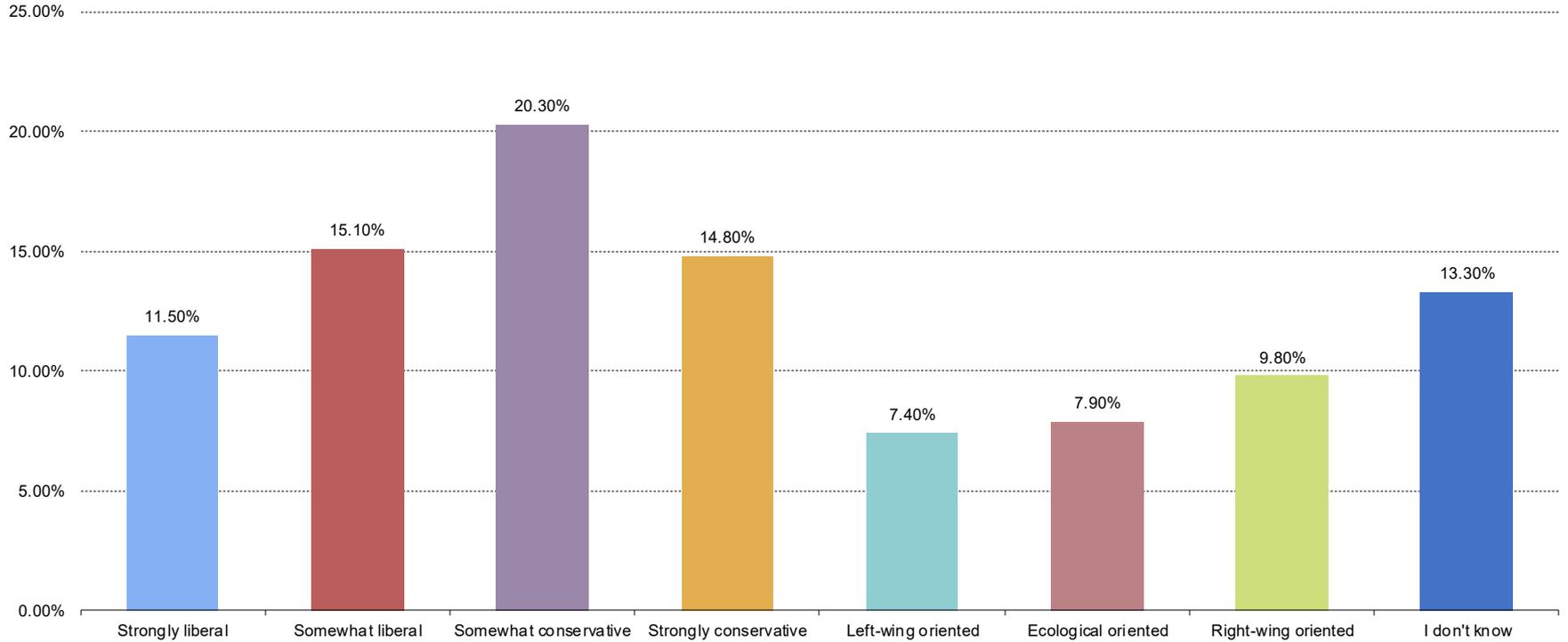
Education _ What is the highest level of school you have completed or the highest degree you have received?

Select one.



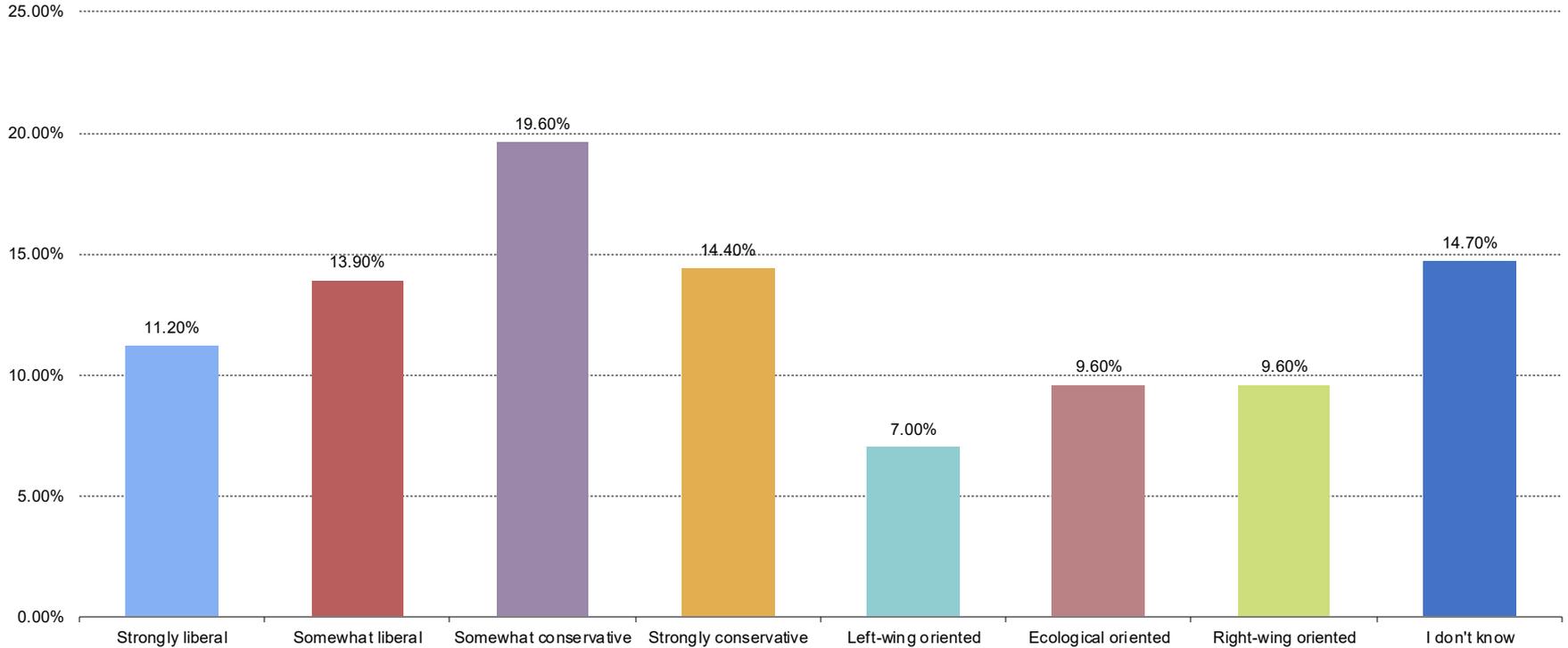
DEMOGRAPHICS_TOTAL

Social issues _ On social issues I am:



DEMOGRAPHICS_TOTAL

Economic issues _ On economic issues I am:



QUANTIFIED CUSTOMER FORESIGHT STUDY 2025

QCF

September 2025

QUANTIFIED CUSTOMER FORESIGHT (QCF) 2025 BY FORESIGHT ACADEMY GmbH

This study is the result of a collaborative effort and was only made possible through the invaluable support of the QCF Team:

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Sofia Jorman, IKEA
Daria-Maria Konopa, Lidl
Michael Rander, SAP
Georg Schotten, Ströer
Carmen Fischer-Seeger, Foresight Academy
Jorin Herrmann, Foresight Academy

Field institute

KANTAR

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Special thanks to



Foresight Academy GmbH

Manfred Tropper | General Manager
Carmen Fischer-Seeger | General Manager,
QCF Study Coordination

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