

GLOBAL TRENDS

THE UNEASY DECADE:

Reshaping society, technology,
and the global economy

9th Edition

September 2025



Executive Summary

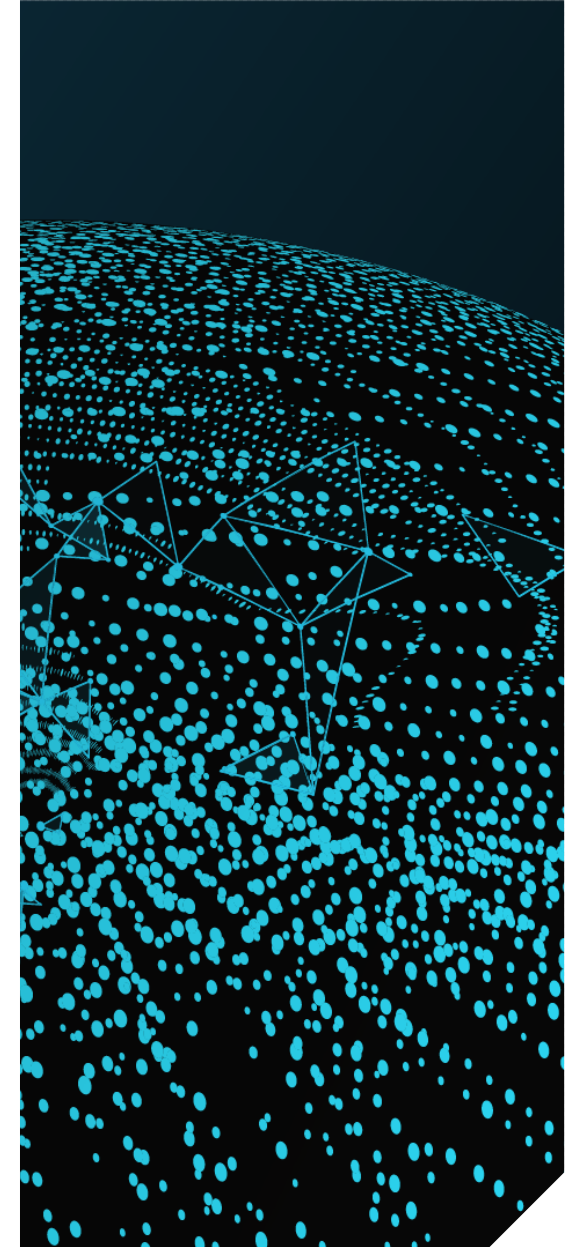
- The biggest evolution in Ipsos Global Trends this year has been in the “Globalism Fractures” trend. In earlier reports, we envisioned a retreat from the international order that dominated the world after 1945. What we didn’t know at the time was **how rapidly that fracturing would unfold** via steps from the Trump administration to reset trade policy, and the resulting market responses and economic uncertainty.
- As trend experts, we’ve been tracking shifts in the global landscape for decades - and it certainly seems that the 2020s are shaping up to be defined by persistent tensions. The foundation of our analysis has always been to look at change from three levels - the long-range impact of **macro forces**; the closer-in **shifts** in society, markets and people; and emerging **signals** that cue a probable future.
- Yet this year, it feels as if the change is intensifying. This year’s report reflects a sharp increase in geopolitical tensions, the rapid mainstreaming of AI, and a broad societal reconfiguration.
- **The global environment of uncertainty is leading to a decline in optimism.** People are usually more optimistic about what’s closer to them - themselves, their family and their community - than they are about things that are farther away, such as their nation or the world. But this year, we have seen a 7-point drop in optimism around you/your family, and in optimism about your city; **both are striking.**
- At the macro level, one of the most significant and immediate changes over the last year has been the **escalation of economic and geopolitical instability**. We’ve seen a trade war sparked by protectionism and nationalism, driven by a desire for control in what is increasingly viewed as a zero-sum global economy.
- In parallel, **technology continues its leap forward in creating a double-edged sword of innovation and apprehension**. AI has moved from a niche concept to a mainstream part of our daily lives. However, this rapid integration comes with significant public worry: questions persist about the long-term impact on our social and practical skills, data security, and the ethical controls to prevent misuse.

Executive Summary

- On a personal level, many people are continuing to express "Nouveau Nihilism", where economic uncertainty and the disappointment in government is hardening into a deep-seated disenchantment with systems of power. Yet it also means they're **finding joy by living more in the present - creating an opportunity for brands to help people balance living for the now with planning for the future.**
- This mentality is also spurring people to turn inward and focus on themselves, as an "Escape to Individualism" attitude continues to emphasise personal freedom, growth and autonomy. They're choosing their own paths toward success, at a time when traditional milestones – owning a home, a stable career - feel so out of reach.
- This is important, as it means that assumptions about **what motivates people is changing; they're seeking new routes to happiness even when it flouts social norms around gender, success, or life stages.**
- The "Power of Trust" trend in this environment has become more critical as trust continues to shift away from institutions toward smaller and closer circles of influence. However, this trust is fragile and can be easily broken by a misstep - especially when it's perceived as part of a system designed to work against you. Yet this also creates an **opening for brands to consider how they're leveraging the personal connections of communities, influencers and individuals.**
- **At the midpoint of the decade, a question looms: how will these trends evolve?** The 2020s may ultimately be seen as a decade of rising tensions and a deeply human response: a retreat inwards.
- Our advice to clients is to recognise and leverage these powerful and often contradictory forces, and to continue to track how they are continuing to evolve over time. Organisations that can navigate these complexities - demonstrating local value in a globalised world, building trust in an era of scepticism, and providing solutions that offer a sense of control - **will be the ones best positioned to succeed in the uneasy decade ahead.**

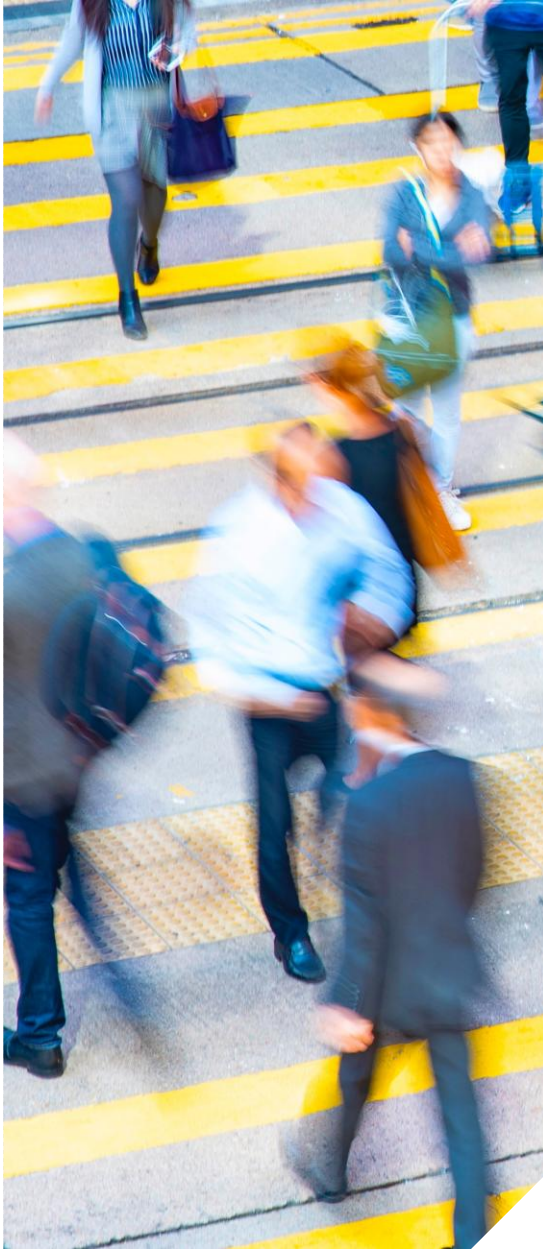
Jennifer Bender

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**GLOBAL
TRENDS**

THE MACRO CONTEXT



Macro Context: Instability, AI, and Identity

Over the past year, several critical developments have solidified and amplified the macro forces we've been tracking, offering a clearer picture of how the world will evolve over the next 5-10 years.

Economic Recalibration: Disparities, politics, and the quest for control

The biggest change over the past year has been a **rise in economic instability and increasing geopolitical tensions**, largely influenced by the Trump administration's efforts to set the global trade agenda. This is in turn linked to growing nationalism, protectionism, and the desire for control in a zero-sum view of global economics and deficits. What happens on the global stage is keenly felt, as these tensions tilt the cost of everyday goods and services, on top of the post pandemic inflation shock, driving politics and consumer behaviour.

Technology's Double-Edged Sword: Innovation and apprehension

From searching for information to assisting us at work, **the integration of AI into our daily lives has gone from niche to mainstream**. Yet questions persist about the long-term effect of technology on our social and practical skills, and the security of our data. Many worry about whether there are sufficient ethical and practical controls in place to protect society from bad actors leveraging AI, or from models going rogue and slipping from our collective and individual grasp.

Societal Reconfiguration: Identity, migration, and diversification

The past year has been one of rolling back diversity and sustainability initiatives, as many organisations and brands seek to protect themselves from public backlash despite calls for more inclusivity and tolerance. The growing mobility and diversity of citizens is sharpening divisions on identity, part of a deepening divide on social issues from immigration to gender. While the US is perhaps the most polarized, we see increasing fragmentation in many nations around these issues.



Detailed reports of all the macro forces behind these changes are available for our clients, as are in-depth analyses of the data beyond what you'll see in this public report.

Ipsos' Macro Forces

The external context, against which people and organisations act, can be distilled into six Macro Forces and related themes. While they do not act in isolation, our framework offers a starting point to integrate the external context into your research.



Societies in flux



Tech-celeration



Economic disparities



Environmental emergencies



Political splintering



Wellness revolution



Population fluctuation



Pervasive technology



Rise & fall of middle classes



Climate change



Rising nationalism & populism



Systemic health inequality



Community migration & immigration



The immersive frontier



Employee power shift



Loss of biodiversity



Technology's dark side



Breakthrough therapies



Life stage & family evolutions



AI & automation advances



Wealth disparity



Sustainable growth



Rethinking institutions



Integration of health & technology



Greater ethnic & religious diversity



Exponential data



Rising cost of living



Resource depletion



Increasing geopolitical conflicts



The next pandemic



Establishing identity



Toll of technology



Alternative value structures



Entrenched inequality

GLOBAL TRENDS



GLOBAL TRENDS

Globalisation Fractures

Splintered Societies

Climate Convergence

Technowonder

Conscientious Health

Retreat to Old Systems

Nouveau Nihilism

The Power of Trust

Escape to Individualism



Globalisation Fractures

Trend: Perceptions of globalisation have improved in many markets around the world over the past decade. While the world remains highly interconnected, the geopolitical environment has grown more contested. Increasingly, political leaders are asserting the primacy of their nation and its allies.

How it's evolved: Many elections in 2024 favoured new leaders over incumbents in a changing of the guard, and a global trade war has sharpened divisions between countries since then. Citizens are questioning the value of globalisation, while political leaders are struggling to navigate rapidly evolving tensions.

Values

Global Outlook
National Pride

Globalisation has taken a hit in the era of trade disputes

- Tensions have been rising amid uncertainty about tariffs and trade policy, but there are larger dynamics which have been forming over many years. For the past decade we have seen a slow rise in positive sentiment around globalisation, and this year **64% still agree that globalisation is good for their country. However, we see that there are fissures forming.** The biggest signal of anti-globalisation this year has been the frequently changing policy announced by the Trump administration, and the impact of this on the global economy.
- While in past years we've suggested we'd reached peak globalisation, last year we penned "Globalisation Fractures" to signal that it has grown more contested, with political leaders increasingly asserting the primacy of their nation above others.
- In part, we see this as the next evolution in nationalism and populism, which have been rising in many countries and was evident in last year's elections around the world. Immigration is linked to this as well, and reflects wealth inequality both within and between countries. The redistribution of power is evident in the shifting of world GDP from traditionally dominant economies like Japan, France, Great Britain, and the US to China and India.
- Technology has an impact too: we are more connected than ever before through 24/7 media, and more influenced by other cultures and new channels. This year we asked about preference for local brands, and found that **70% of global citizens preferred to buy products from their own countries rather than from abroad.**
- This is striking when combined with another new question about whether there should be more trade barriers, with agreement varying considerably by market. Agreement that "globalisation is good for me personally" has remained steady at 60%, but there continue to be **sharp regional differences between emerging and established countries on globalisation.**
- Whether this cooling toward globalisation is a long-term trajectory remains to be seen, but the **impact so far has been wide.** Categories have been destabilised by tariffs, and logistics are being disrupted as buyers try to navigate changing guidance. Global brands are being careful to talk about local value and impact so as not to seem too global, while local brands are scaling up.

70%

of global citizens agree "I prefer to buy products from my country rather than products from abroad"

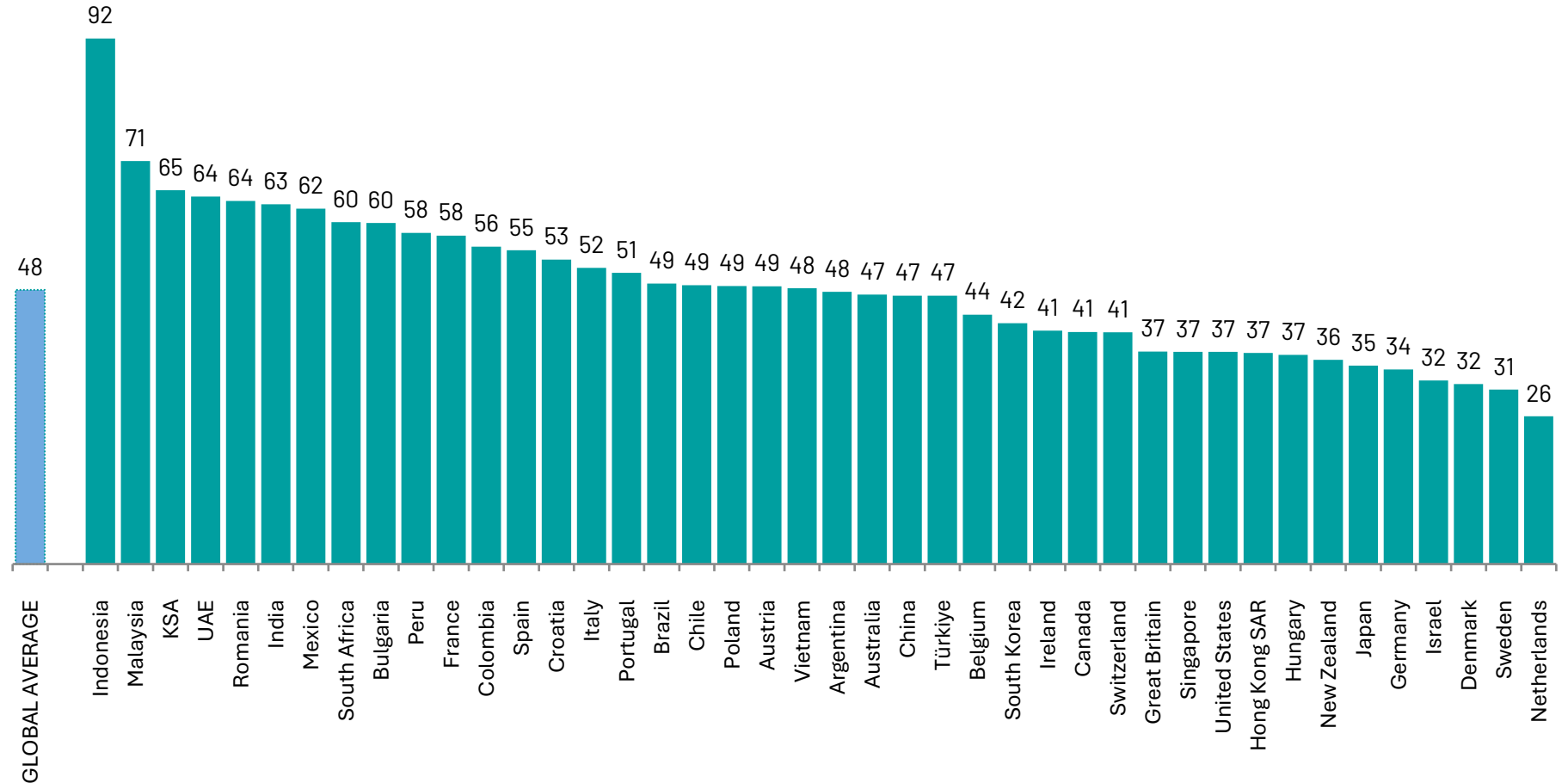
Trade policy impacts

Perspectives on the benefits of globalisation, for oneself and one's country, march in lockstep. Citizens see globalisation as one tide that lifts - or sinks - all boats.

Africans are particularly in favour of trade barriers, seeing these as protection against the flooding or "dumping" of foreign products in their precarious and often struggling local economies.

The opinion in North America is notable. With the US government instituting import tariffs on trade partners, it is notable that only about a third of Americans (37%) are in favour of more trade barriers, followed by 41% of Canadians. Conversely, a majority of Mexicans (62%) are in favour of instituting more trade barriers.

There should be more trade barriers to limit imports of foreign goods and services in my country (% agree)



Base: 32,583 adults surveyed in the markets shown between 23 May and 6 June 2025. For full methodology see [ipsosglobaltrends.com](https://www.ipsosglobaltrends.com).

Source: Ipsos Global Trends 9th Edition

Driving Forces of Globalisation Fractures

Signals of Change



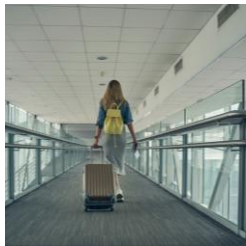
Relaunching “Hecho en México”

Mexico relaunched the initiative in 2025 to boost local manufacturing and reduce import reliance. The iconic label denotes products made locally and aims to help position the country among the top 10 world economies as part of Plan México.



Dialling down global brand legacies

The **US** based and globally well-known brand Coca-Cola is emphasising the local nature of their operations in the face of uncertainty and negativity toward Americans, as geopolitical tensions rise.



Global tourism and travel to the US fall

Tourism from **Germany, the UK, Spain, Ireland** and other markets dropped double digits in the first half of 2025 - a notable pullback from global tourism in reaction to current geopolitics.

Key Macro Force Themes



Increasing geopolitical conflicts



Rising nationalism and populism



Community migration and immigration



Rise and fall of middle classes

Thought starters on what this means for...

Society & Policy

The impact of fractured globalisation is most concerning around the economic outlook, and fears of a global recession still loom. Budgets are being slashed in the corporate world and funding pulled from NGOs, with massive impacts in developing countries, but also more subtle one on equality in western markets.



Are there ways to mitigate the uncertainty of today, while still providing a path to longer-term viability in the future?

Markets & Brands

International relations are affecting how people feel about brands because of their association with a particular country. Rising sentiment against globalisation may drive preference for “local” products, boosting regional economies and supply chain stability, and providing an opportunity to dial up messaging around all local players in the value chain.



Do global brands have a unique story to tell, and can they reposition locally?

Citizens & Consumers

We’re seeing politicisation of more topics than ever before. Staying attuned to how citizens and consumers feel will be increasingly important to know where people stand on a particular topic. Traditional political polling and market research for brands will increasingly overlap.



How well do organisations and brands know their core constituents’ feelings on hot-button issues?



Splintered Societies

Trend: Large income and wealth disparities are widely recognised as detrimental to society, yet in many countries they have widened over the past decade. The intensity of this feeling has resulted in heightened societal stress and a splintering of traditional structures, with new ideologies and political allegiances emerging.

How it's evolved: While all forms of division remain a global concern, immigration is where we see the most year-over-year change. Immigration remains a highly emotional and polarising topic in society, and one where politicians have been able to make persuasive populist cases.

Values

Wealth Inequality
Nativism
Equity

Divisions persist, with immigration a rising concern

- The major drivers of inequality within societies continue to create and extend divisions.
- This is creating an **ever-starker contrast between unjust poverty and the wealth of global elites**. Billionaire wealth rose three times faster last year than the year before. The world is adding 204 new billionaires a year and its [first trillionaire is expected in the next couple of years](#), with some forecasting that they will be [joined by four more within a decade](#). Perhaps it is no surprise then that 78% of the global public feel that **having large differences in income and wealth is bad for society** overall.
- However, it is on the issue of immigration where we see the **most year-on-year change** in public attitudes. 65% of citizens in the markets we surveyed now feel that "there are too many immigrants in my country " (up 5ppts on last year), with particularly dramatic increases in Romania (up 16 ppts), Croatia (up 15 ppts), Japan (up 12 ppts), and Portugal (up 10 ppts).
- Immigration remains a hot topic with many leaders prepared to leverage the issue by offering solutions to what is a very complex geopolitical challenge - and these solutions have increasingly been finding a receptive audience.
- It's true that economic uncertainty, conflict and natural disasters continue to drive rising immigration. [1 in 27 people in the world is now an international migrant](#));
- however, **the levels of concern over immigration don't move in lockstep with the actual numbers** – what we at Ipsos call a [Perils of Perception](#) issue.
- Over seven in ten (71%) feel that the economy of their country is rigged to advantage the rich and powerful.
- There are clear and obvious opportunities for both policy makers and corporations here: over eight in ten (82%) **want businesses to contribute to society, not just to make profits** and feel that they have a duty to do so.

47%

agree that there is more and more conflict within their family between relatives that don't share the same values (up 4ppts on last year)

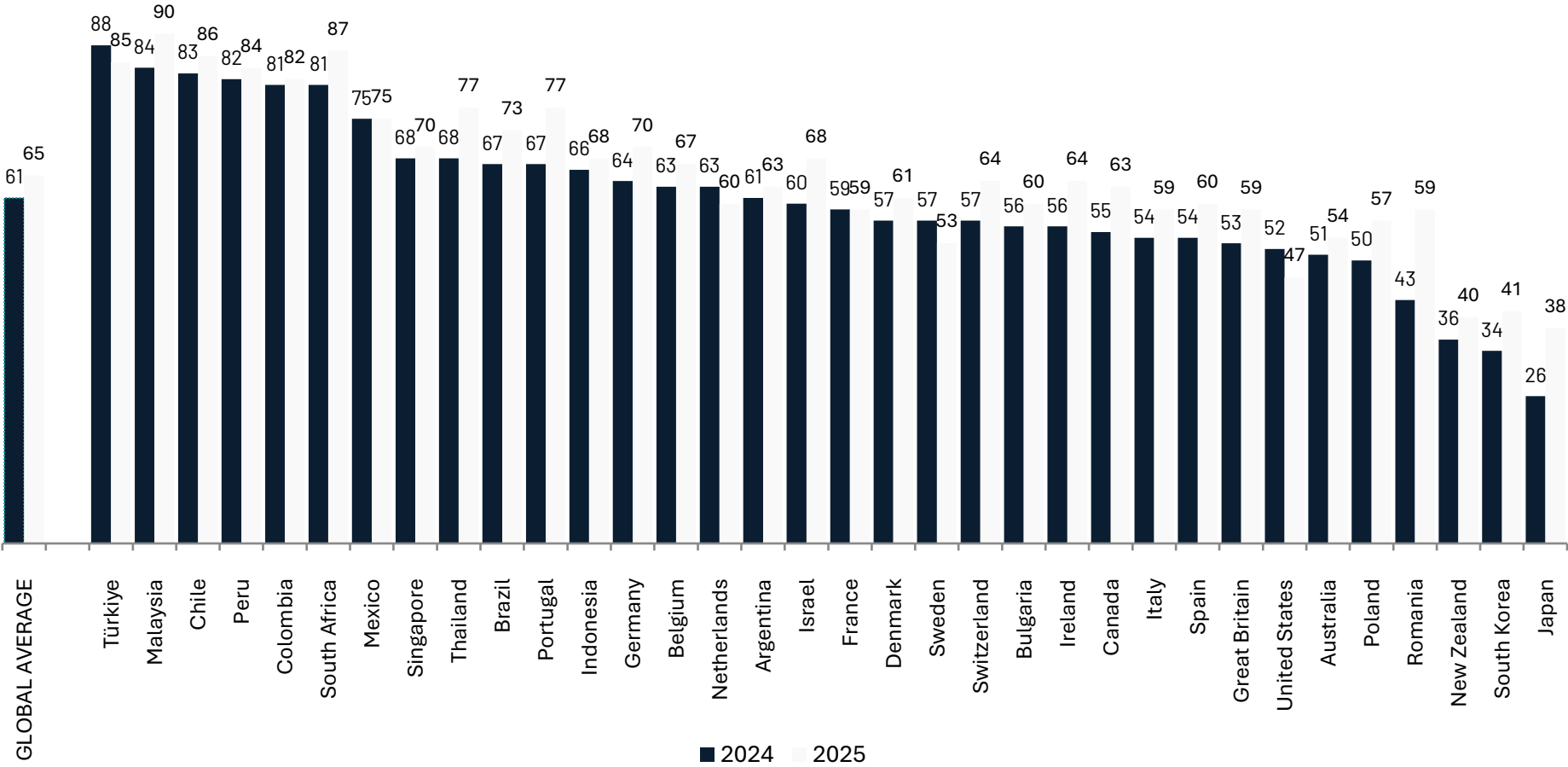
Immigration issues

Immigration is a highly emotional and politically charged issue. Globally, 65% agree there are too many immigrants in their country.

Moreover, we know that levels of concern aren't always related to the actual numbers of immigrants in the population. Other factors, such as the rate of change, coverage in the media and perceptions that immigrants are positively contributing to society (45% agree that this is the case for their nation) play a key role in shaping perceptions.

Our data show particularly dramatic increases in concern about immigration in Romania, Japan, Portugal, and Thailand, all of whom had some form of electoral activity over the past year.

There are too many immigrants in my country (% agree)



Base:
Data shown is based on 34 Comparable Markets that were questioned in both 2024 and 2025. For full methodology see ipsosglobaltrends.com. Comparable markets are shown in the notes.

Source:
Ipsos Global Trends 9th Edition and Ipsos Global Trends 8th Edition

Driving Forces of Splintered Societies

Signals of Change



Promoting financial inclusion

Mama Money, Paymentology and Access Bank have jointly released a [WhatsApp-powered bank card](#) to promote financial inclusion in **South Africa**, particularly aiming to help immigrants who face documentation barriers.



Showing the reality of refugee lives

In the **Netherlands** an organisation called [VluchtelingenWerk Nederland](#) has created a pop-up hotel that aims to provide a real look at how those seeking refuge in the country are living, pushing back against misconceptions that they are being given comfortable hotel accommodation.



Supporting the unbanked population

[Dosh](#) is a prepaid Mastercard account developed by allpay that aims to support the unbanked and underbanked population in the **UK** by removing ID and address checks.

Key Macro Force Themes



Increasing geopolitical conflicts



Greater ethnic and religious diversity



Systemic health inequality



Wealth disparity

Thought starters on what this means for...

Society & Policy

The fracturing of society poses a significant challenge for those policymakers who aim to create inclusive, equitable environments. With deep divisions between various societal groups, policies must address these disparities to ensure social cohesion and stability.



How can legislators create policies that bridge these societal divides rather than exacerbate them?

Markets & Brands

The recognition that divisions in society are harmful is widespread, and all but the most tone deaf can see the damage being done. Cultural moments, events and feelings that unite, rather than divide, provide much-needed common ground and can generate both emotional kudos and measurable ROI for the brands that provide them.



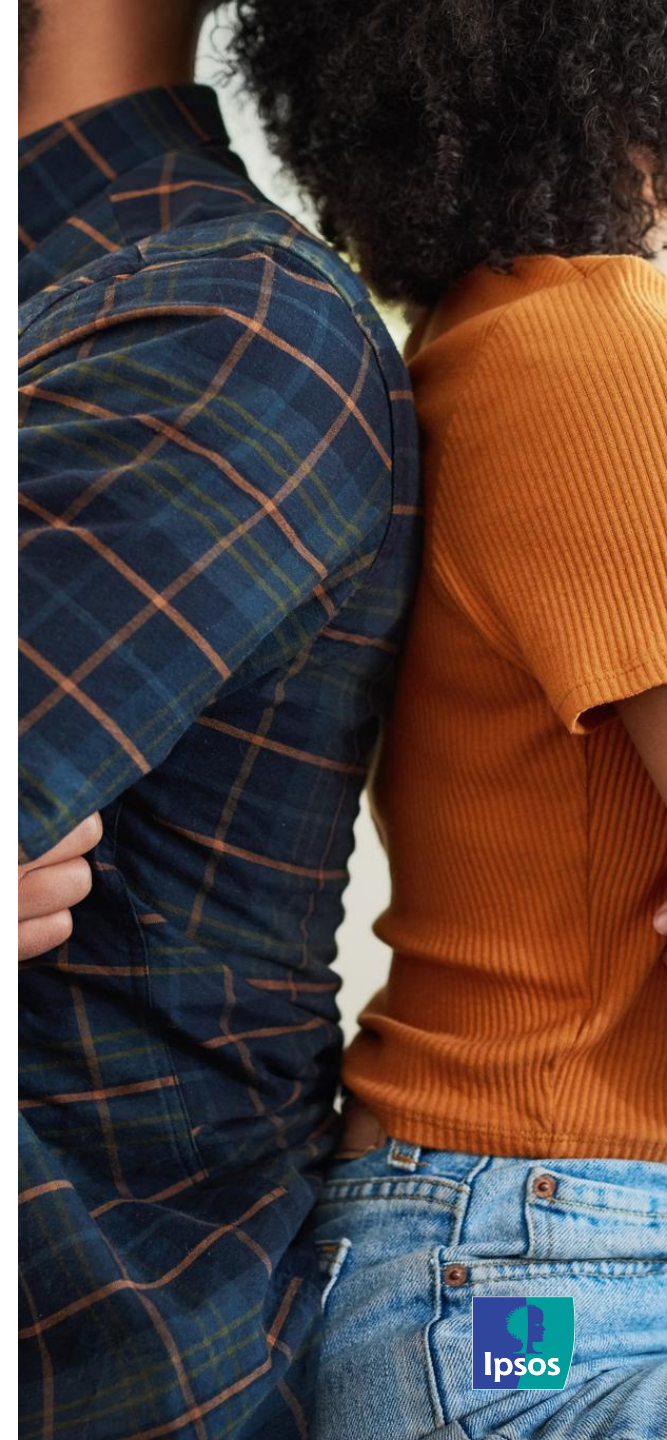
Are brands doing enough to unite rather than divide? What content, platforms, events and individuals can they leverage to bring people together rather than keeping them apart?

Citizens & Consumers

Division highlights the growing importance of understanding the diverse perspectives and values within communities. It encourages individuals to engage more deeply with different viewpoints to foster empathy and understanding.



How can individuals contribute to reducing societal divisions and promoting a more unified community?



Climate Convergence

Trend: The macro environment for climate is changing rapidly as worldwide investment in renewables – especially solar - continues to rise and the impacts of global warming become more evident. Our data reflects this: globally, views on the importance of climate action are converging, and have increased in intensity over the past ten years. The key question now is how far—and how fast—people are willing to change their daily lives to reach shared goals.

How it's evolved: Concern over the impact of climate change remains high and consistent, with a pattern of consensus over the past decade. But financial concerns and arguments about who is really responsible are getting in the way of real action.



Values
Climate Responsibility

Dividing lines emerge in the new climate consensus

- The trend “Climate Convergence” has held steady over the past year, marked by **high public consensus on the reality of climate change, yet a simultaneous decline in the individual urgency to act.**
- There remains a global consensus that **climate change is real and a pressing problem**: the majority of global citizens (78%) still agree that “we are heading for environmental disaster unless we change our habits quickly”. While the measure varies slightly from year to year, it still represents a significant majority of the global population, and a notable increase from 73% in 2014.
- In part, this is driven by real world experiences and data. 2024 was the hottest year on record, and the first to surpass the 1.5C target from the Paris Agreement. [Severe climate-related disasters are increasing in their frequency](#) - from catastrophic typhoons in Myanmar and Vietnam, to deadly heatwaves in Europe - cementing the reality that climate change will affect everyone soon.
- **But, simultaneously, we’ve seen a rise in fatalism and a drop in the individual urgency to act,** suggesting a widespread perception that the responsibility for addressing climate change has shifted from “me” to “we”, acknowledging that systemic causes are beyond individual control. This is reflected in the finding that 71% across the surveyed countries feel they are “already doing all that I can to save the environment.”
- With tariff disputes, fears of a global recession and years of rising prices, affordability concerns are overshadowing the need for sustainable options. This highlights the challenge of balancing sustainability with economic realities for consumers in the short term.
- Despite the growth of sustainable brands, trust remains a significant hurdle for corporations. Widespread “greenwashing” concerns lead to consumer scepticism and a feeling of futility, as seen in the ongoing debate about how much of what citizens recycle is actually put to good use.

78%

agree that we are “heading for environmental disaster unless we change our habits quickly”

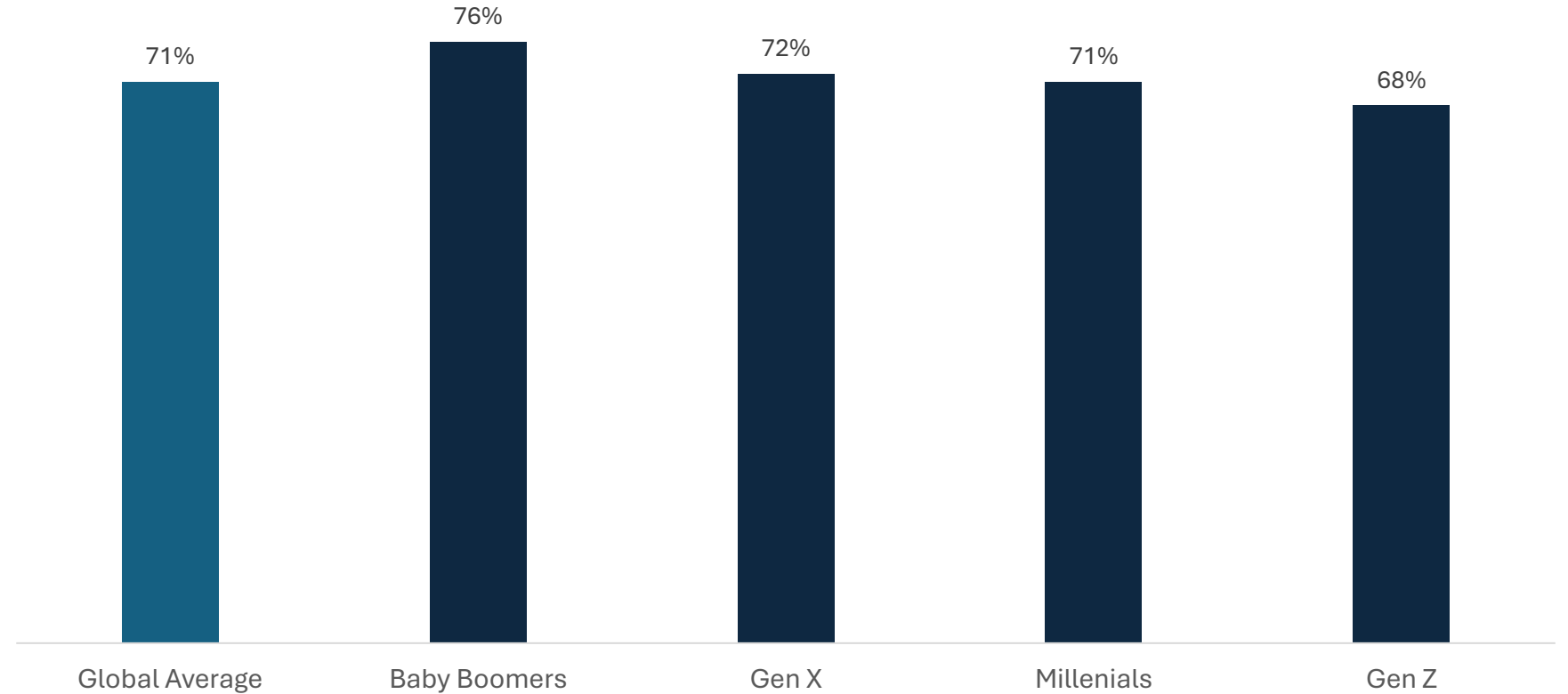
Generational differences on responsibility

The opinions of Baby Boomers are on a par with younger generations when reacting to the statement: "We are heading for environmental disaster unless we change our habits quickly".

However, when looking at taking individual and positive action to combat climate change, the consensus among older generations everywhere is that they are doing enough already.

Gen Z is significantly more likely than Boomers to say believe that they can do more. Marketing sustainable products to this generation and opening the door to climate action organisations will help focus their actions on a more climate responsible future.

I'm already doing all that I can to save the environment (% agree)



Base: 33,083 adults surveyed between 23 May and 6 June 2025. For full methodology see [ipsosglobaltrends.com](https://www.ipsosglobaltrends.com).

Source: Ipsos Global Trends 9th Edition

Driving Forces of Climate Convergence

Signals of Change



The world's first "climate visa" is offered

Australia has created a [climate visa](#) for citizens of Tuvalu, an archipelago in danger of being subsumed by rising seas within the next 80 years.



Slow Fashion Week highlights eco-responsibility

France hosted its first [Slow Fashion Week](#) in 2025 in response to traditional fashion events - highlighting clothing repair, upcycling brands and innovative solutions with an aim to make Marseille a "new capital for conscious fashion".



Making sustainable choices fashionable

United States heat pump startup Quilt has a new take on customer engagement, parlaying their design-centric brand into [clothing and accessories](#). From sweatshirts and stickers, their merch proclaims the homeowner's eco-consciousness.

Key Macro Force Themes



Climate change



Resource depletion



Sustainable growth



Loss of biodiversity

Thought starters on what this means for...

Society & Policy

Policymakers must take into account not just the potential impacts on their environments, but the regional impacts on other nations. While political headwinds around ESG might cause some to pull back, the long-term rationale for investment in sustainability remains strong.



How can policymakers save the environment if everyone is focused on the short term: winning the next election?

Markets & Brands

The burden of action is increasingly on government and business rather than individuals. Brands that can demonstrate a dual focus on serving their customers and the planet will lead, but affordability is still a big factor.



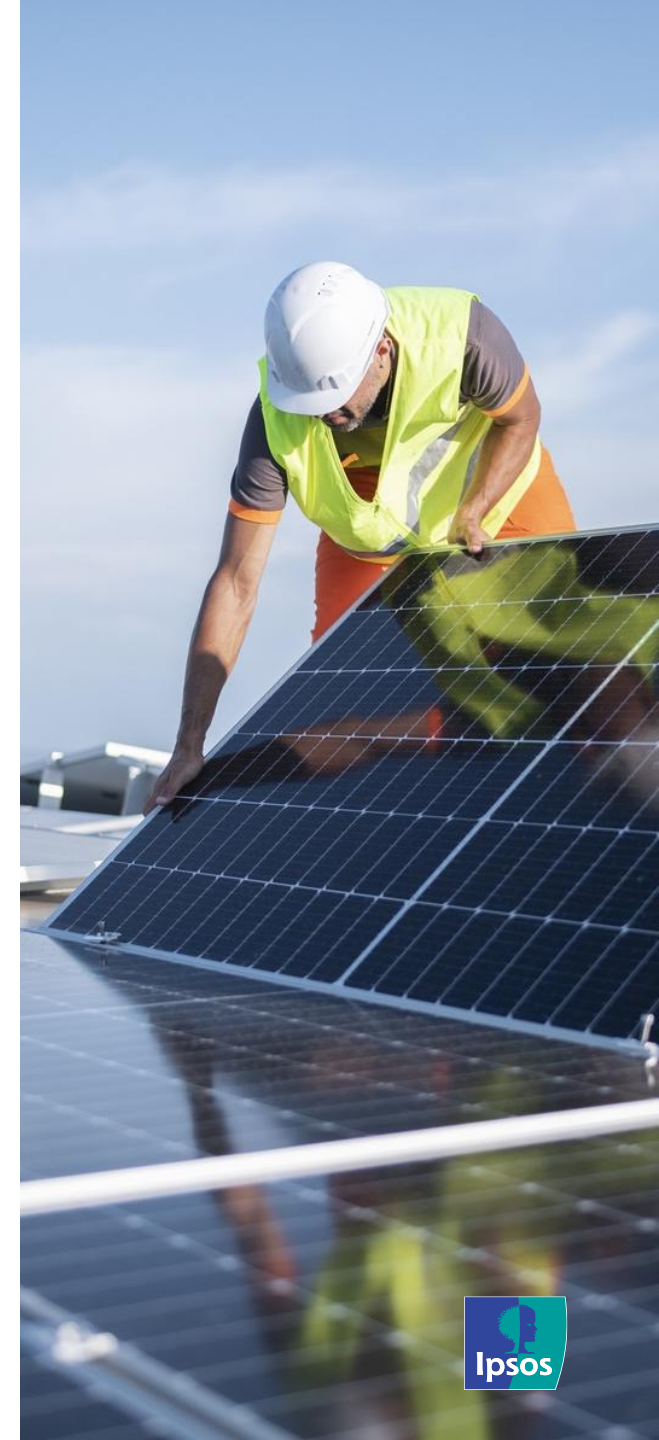
How can brands co-package sustainability benefits with others - such as efficiency or premiumisation - to nudge the right behaviours?

Citizens & Consumers

Climate disasters are having a very real impact on consumers due to their increasing frequency and severity. The challenge for brands and policymakers alike is to bridge the gap between consumer concern and the perceived lack of individual agency.



How can consumers protect themselves, physically and financially, from unpredictable climate disasters?



Technowonder

Trend: We are in awe of the technology around us and the role it plays in our lives. We live in wonder: most agree we need modern technology to solve future problems. But we also worry: 56% think technical progress is destroying our lives - a feeling that has significantly risen over a ten-year period. We have very real concerns about our mental health and careers and don't always see the benefits of technology or tech companies.

How it's evolved: Technology itself has evolved, driven by surging AI investment. Opinion, however, is much slower to move so this trend and its underlying tension persist.

Values

Technological Worry
Technological Fatalism
Technological Optimism

We live in wonder of what technology can do, but we worry that it's gone too far

- Technology feels like it is evolving quickly, as new AI models are released seemingly daily. It's a global race as companies around the world—from the US, to China, Great Britain, India and the United Arab Emirates - all vie for dominance, according to Stanford University. Computers and phones get smaller and faster. TVs get bigger and better.
- Worldwide, people feel all of this. Most (72%) can't imagine their lives without the internet. And in a world with increasing complexity and inter-reliance, 71% think we need technology to solve our problems. Yet, a majority of people (56%) *also* think that "technological progress is destroying our lives".
- Ipsos has long called this tech trend tension **the Wonder and the Worry**.
- But two things are important to note. One is that **for all the movement in the technology space itself, public opinion has been fairly stable**.
- Worry about AI jumped in the tech-themed Ipsos Global AI Monitor after the public launch of ChatGPT several years ago but has been stable since.
- In both Ipsos Global Trends and the AI Monitor, public opinion around technology hasn't moved much in the last year.
- That could change. There's a signal of potential shifts that **perhaps the scales globally are tipping more toward Wonder**. Agreement that we worry too much about privacy, and that AI has a positive impact has increased.
- But the tensions remain.
- There's tension around privacy: three in four (74%) are concerned how their data is used by companies. But now, nearly half (47%) also think that people are too worried about privacy.
- **These tensions are most pronounced in some of the markets that are developing the tech itself** - like the US where only 39% think that AI is having a positive impact on the world.
- As more and more reports are published on the kinds of jobs that could be disrupted by AI, and CEOs take pride in the headcount they can reduce, there are legitimate and real reasons for people to be sceptical.
- And as more use cases are developed and tools get more robust, there is reason for excitement, too.

71%

feel "we need modern technology because only this can help to solve future problems"

Technowonder

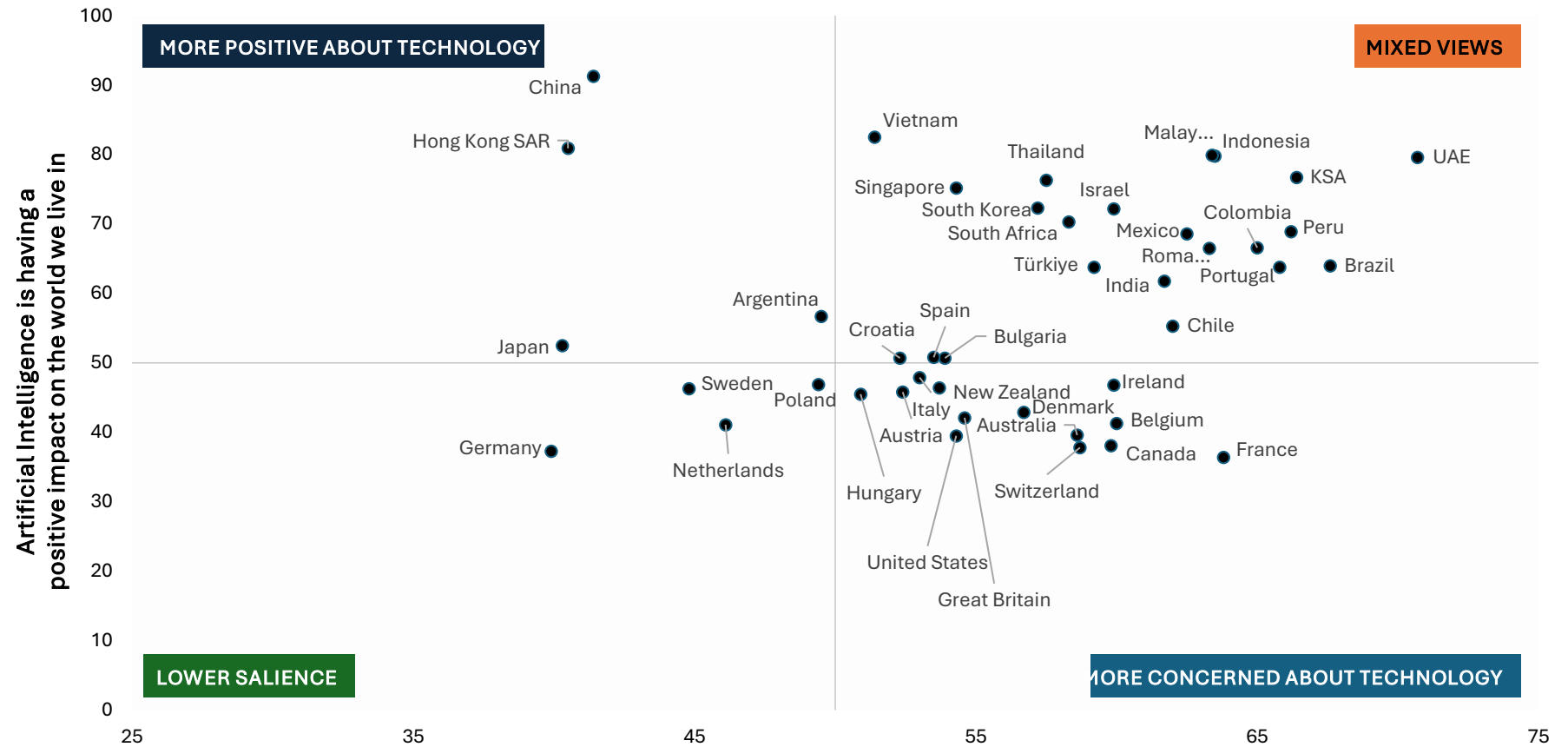
The Wonder/Worry tension is on full display in this chart. The populations of most nations up on the “concerned” side of the ledger when it comes to technology.

Yet many markets also think that the most talked about technology of the day, artificial intelligence, is having a positive impact on the world.

China and Hong Kong SAR are very bullish on AI, which isn't surprising, as leaders in developing the technology... unless you compare them to the other big leader, the U.S., which is in a very different quadrant of opinion.

As noted, opinion on all of this is starting to move, just not as fast as the tech itself.

I fear that technical progress is destroying our lives vs. Artificial Intelligence is having a positive impact on the world we live in (% agree)



I fear that technical progress is destroying our lives

Base: 33,083 adults surveyed in the regions shown between 23 May and 6 June 2025. For full methodology see ipsosglobaltrends.com.

Source: Ipsos Global Trends 9th Edition

Driving Forces of Technowonder

Signals of Change



Wi-Fi can track people's movement

The way bodies block Wi-Fi signals creates a unique “fingerprint” that can be used to track people as they move through the [physical world](#), even if they don't have a device with them.



Brands want to help people unplug

To encourage people to live in the moment, the Danish fashion brand, SAMSØE SAMSØE, is launching the "Pay with screen time" [activation](#). Those who can show they have reduced their screen time will be given discounts.



Many markets caught in the middle of the AI wars

As the markets leading the AI revolution regulate (or don't) the technologies, other markets around the world are often stuck in limbo, [according to the IAPP](#).

Key Macro Force Themes



Pervasive technology



AI and automation advances



Toll of technology



Technology's dark side

Thought starters on what this means for...

Society & Policy

Today, most people (74%) are concerned about the information collected about them. But different markets are taking different approaches to regulating technology.

The regulatory landscape is going to be very important for everyone, as tech companies and platforms look to build trust, and technology continues to be more pervasive in our lives.



How do policymakers balance privacy concerns from the public with concerns about stifling innovation in the private sector?

Markets & Brands

For markets and brands, one key thing to remember is that technology itself generally moves much more quickly than public opinion. Building trust is going to be key (see The “Power of Trust” trend later in this report).

For brands, navigating the current low-trust world will continue to be tricky, especially when one of the leading global markets, the U.S., is among the most sceptical.



How can your company build trust with consumers but also navigate a conflicting, contradicting and ever-changing regulatory landscape?

Citizens & Consumers

For the short term at least, people are going to have to continue navigating the choice between privacy and personalisation often on an app-by-app and site-by-site basis. Tech advances will continue to impact people’s lives in big ways and more mundane, as well as both obvious and behind-the-scenes ways.

The more people have to think about these things, the more friction gets introduced in transactions, and interactions.



What features or messaging (or both) will help people lean into the wonder of technology and reduce their worries?



Conscientious Health

Trend: Health is becoming more holistic, as most of us globally feel that we need to do more for our physical as well as our mental wellness. Despite this, healthy living is a struggle for many, and most people feel they'd like to lose weight. The interconnectedness of health with other systems such as nutrition and technology is also being examined. This is leading to an overall focus not on just living longer but ageing better.

How it's evolved: GLP-1s have undoubtedly stolen the headlines this year, with those able to access them flaunting the impressive results and those excluded by the high costs looking on enviously.

Values

Health Self-reliance
Health Improvement
Longevity

The rise of GLP-1s puts an ever-greater focus on weight loss

- As in previous years, people around the world **focus on their health and feel they could be doing more to maintain and improve it.** The gap between the priority placed on physical and mental health remains small: 84% feel they could be doing more to improve their physical health; for mental health the comparable figure is 81%.
- As global healthcare systems buckle under increasing demand and costs rise, **the desire for self-reliance in health makes increasing sense.** In 2025, 79% want more control over their health and 68% say they look up health information rather than relying on doctors, highlighting a trend toward personal empowerment.
- Without doubt, **the biggest health story of the past year has been the rise of GLP-1 medications** with more social acceptance.
- The **urge** to lose weight is widespread, with 65% agreeing they would like to shed some pounds. And the **need** to lose weight has also never been higher: by 2030, [50% of adult men and women globally may have a high BMI](#).
- Of course, these issues are not independent of each other: those who want to lose weight tend to be the same people that want to do more about their physical health, their mental health and, **crucially, they also want more control over their outcomes**, which is why GLP-1s are so attractive. With the World Obesity Federation warning that most countries do not have policies in place to deal with rising obesity levels, the public are understandably intrigued by what they may see as a magic bullet solution in GLP-1s.
- Of course, magic bullets don't come cheap, and the high costs of GLP-1 medications are a significant barrier to access and affordability for many patients, with fears of systemic healthcare inequality creating a two-tier society.
- Moreover, the adoption of GLP-1 medications is causing a [ripple effect throughout the food industry](#), influencing consumer preferences and demand, and prompting adaptation from food manufacturers and retailers. Reduced calorie intake and portion sizes, changed snacking patterns, and rebound weight gain are all evident now and raising long-term questions about the future.

65%

agree "I would like to lose weight"

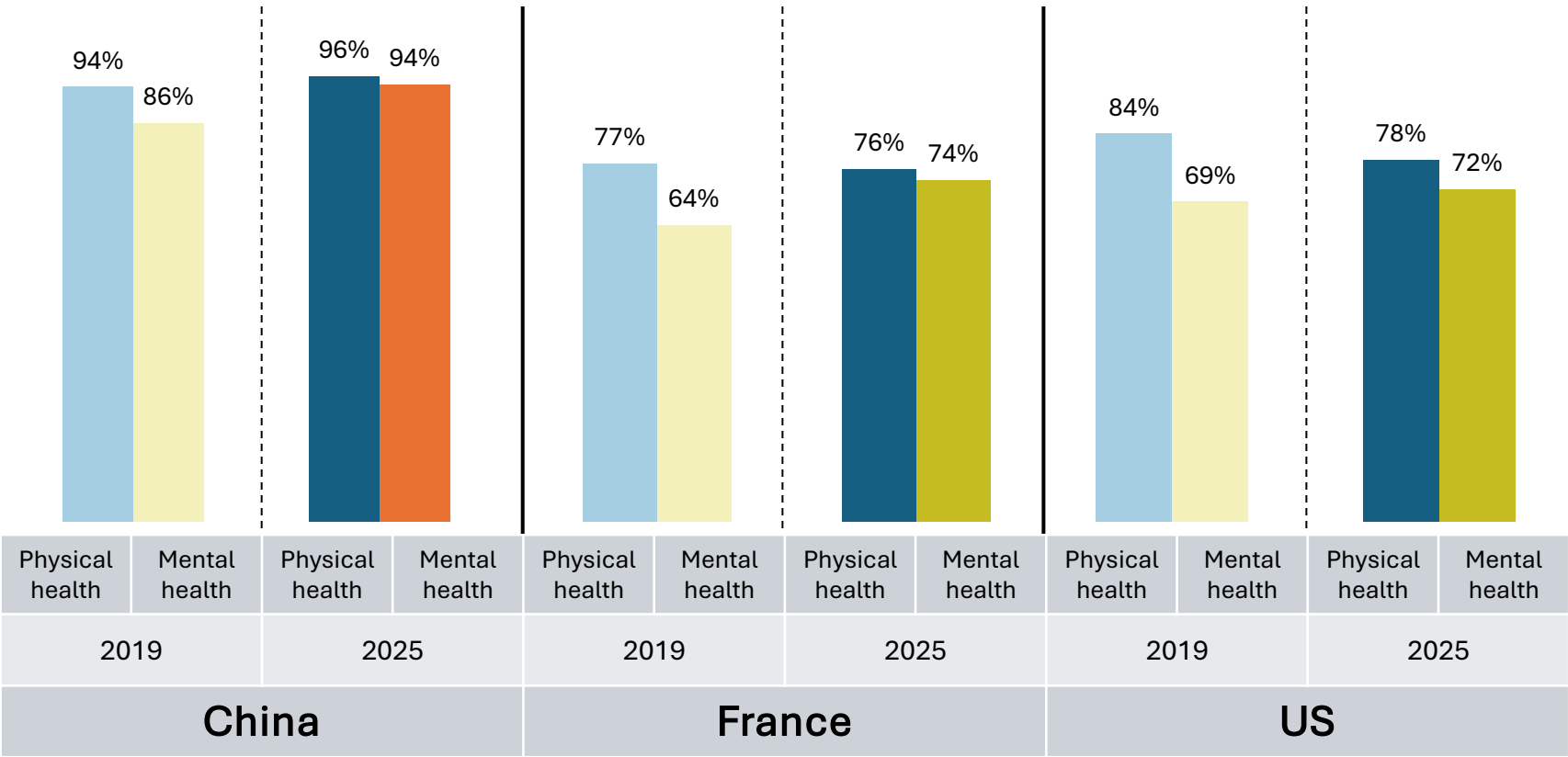
Health becoming more holistic

Over recent years we have seen the gap in importance between physical health and mental health close, so that the former is now nearly as important as the latter. You can see how the gap has closed up in diverse markets such as China, France and the US.

Millennials and Gen Z have been - and will continue to be - at the forefront of this change. While there is a 9ppt gap between physical and mental health for Boomers (80% vs 71%) there is no gap at all for Millennials or Gen Z (both at 84%). The growing focus on "total health" will include holistic approaches to health and healing using not just traditional medicines to fix illness but shoring up a patient's mental wellbeing.

The more holistic definition of health is driving increased use of natural supplements, healthier eating, and therapies like massage for stress and me-time.

I need to do more to look after myself physically vs look after my mental well being (% agree)



Base: 500 - 1,098 adults aged 16-75 (18-75 in US) per market in the 9th Edition. 1000-1007 adults aged 16-74 (18-74 in US) per market in the 3rd Edition
Source: Ipsos Global Trends 9th Edition and Ipsos Global Trends 3rd Edition

Driving Forces of Conscientious Health

Signals of Change



An emerging support system for GLP-1 users

US-based supplements manufacturer [SoWell](#) have introduced the GLP-1 support system, a nutritional blend designed to help combat common side effects of GLP-1 use, like nausea, fatigue, muscle loss and digestive issues.



Recognising sleep as a health frontier

Canada's [Sleep or Die](#) have deliberately chosen a provocative brand name in order to highlight the huge importance of sleep in driving positive health outcomes.



Growing demand for Slow TV

[Slow TV](#) is attracting viewers with hits such as a knitting marathon, burning firewood and swimming salmon. One of the surprise hits is Den stora älgvandringen (translated as The Great Moose Migration) . 9 million people followed the livestream on **Sweden's** SVT public broadcaster.

Key Macro Force Themes



The toll of technology



Integration of health and technology



Systemic health inequality



Break-through therapies

Thought starters on what this means for...

Society & Policy

GLP-1 drugs have the potential to significantly lessen the immense burden of obesity-related conditions on healthcare systems. At the same time, they raise significant concerns about equity and access. Without strong oversight and policy intervention this has the potential to exacerbate existing health disparities.



How can policymakers meet the the challenge of balancing the promotion of these potentially life-changing treatments with the need to prevent the widening of social and health inequalities.

Markets & Brands

The increasing prominence being placed on mental health represents a call to action for the corporate world, who have an opportunity, indeed some would say an obligation to be part of the solution. Their involvement should include marketing and communications, product development and employee welfare.



How intrusive is your marketing to consumer down time? How are you ensuring mental wellbeing amongst your employees? Can you bring new products to the marketplace that help with stress, anxiety, depression or loneliness?

Citizens & Consumers

The immense popularity of these drugs, fuelled by [social media algorithms](#) and celebrity endorsements, especially (but not only) in the West, has created a cultural phenomenon. Awareness is up as a result, but a new form of stigma is emerging, with some users feeling judged for taking a "shortcut" to weight loss.



Will a focus on a pharmacological solution to obesity divert attention from the importance of systemic changes, such as addressing food deserts and promoting holistic healthy lifestyles that give equal importance to physical and mental wellbeing.



Retreat to Old Systems

Trend: An escape to nostalgia appeals to many people around the globe. An increasing majority would like their country to be the way it used to be. Even if the past we are nostalgic for is imagined as a sanitised one, this can lead people to push back against trends that challenge existing systems. This can be a clamour for a "return" to historical power structures, religious practices, employment patterns and gender roles.

How it's evolved: The 2024 U.S. election is just one salient example of this trend in action, as nostalgia continues to be a pull politically and a trope in marketing. The question becomes: what period are we yearning for?



Values

Nostalgia
Traditionalism

The comfort of old structures and systems has mass appeal – but which old structures do we want?

- 2024 was the biggest election year in history, with half of the world's population winding up under new management as [incumbents got trounced](#). Interestingly, there wasn't a clear global ideological shift: both more liberal and more conservative parties saw gains in different places. Instead, **the trend was to punish incumbents**.
- The “Retreat to Old Systems” trend is driven by macro forces around rising populist and nationalist sentiment as well as by rising diversity in many markets, by tensions around immigration, and by ongoing wealth disparity.
- Agreement that “I would like my country to be the way it used to be” was mostly flat from the first edition of Ipsos Global Trends over a decade ago until it jumped after the pandemic to 56% by 2022) and continues to climb (now six in ten).
- That discontent with the present can lead to a yearning for a time people believe was better, or simpler. **The challenge is that times that are perceived as better for some, were at the time often worse for others.**
- For instance, one of the largest shifts year-over-year in this edition of Global Trends is a 7-point rise in agreement that there are only two genders: male and female.
- Sometimes the signal on a trend comes from when it starts being a tracked data point. This is a pretty new conversation globally, so we began asking this in 2019.
- Fear of population loss as birthrates decline also runs into anti-immigration sentiment, leading markets around the world to push toward having more kids (in “traditional” family units).
- But despite the movement on the question of gender, agreement that transgender men and women should be free to live their lives as they wish has remained stable and high over time.
- **That leaves gender just one of many potential nuances to understand.** Leaning into a more progressive version of gender roles could aggravate traditionalists, and vice versa, as more men (43%) than women (31%) think that “the main role of women is to be good mothers and wives”.

37%

agree the main role of women in society is to be good mothers and wives – but agreement varies from 43% of men to just 31% of women.

Retreat to Old system

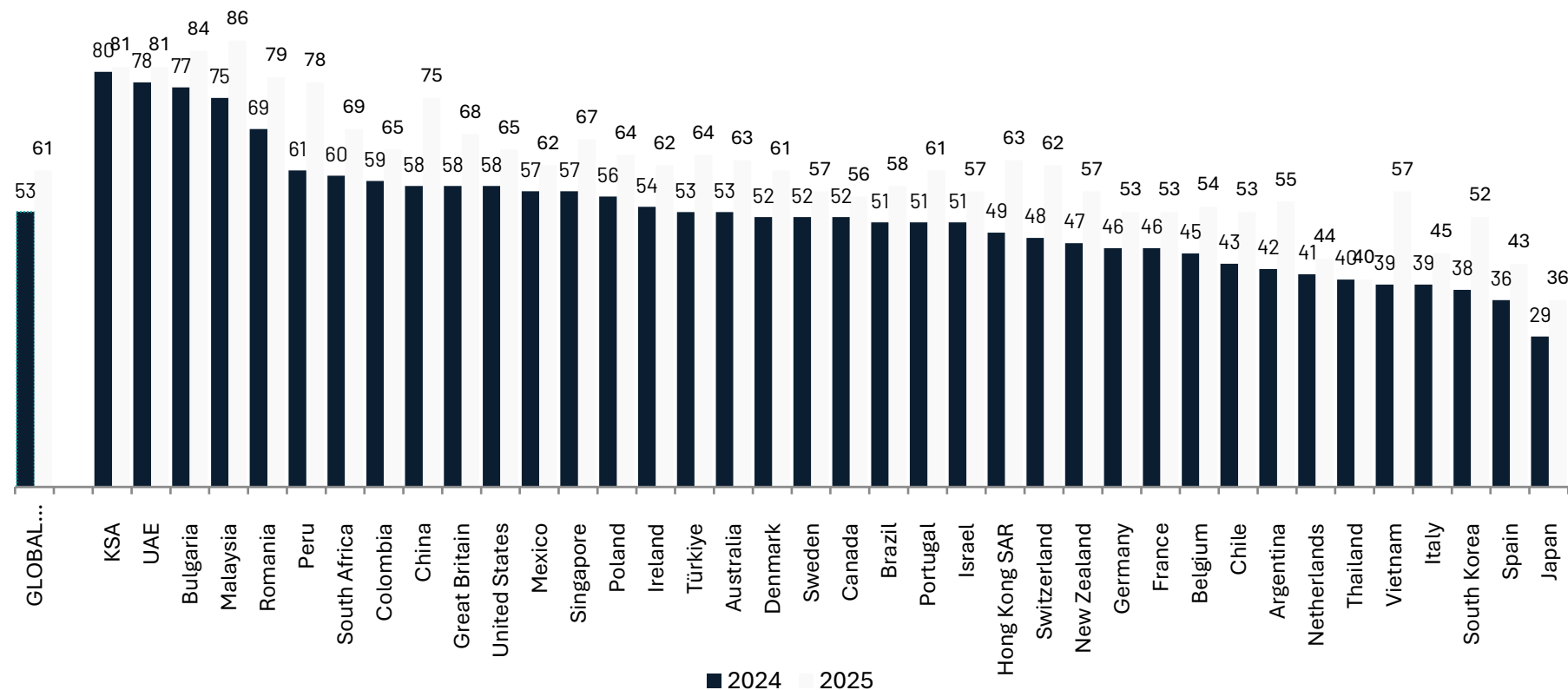
It is clear that belief in a gender binary increased in 2025.

Nearly every market posted an increase in agreement that there are only two genders, not a range of gender identities.

KSA, UAE, Malaysia and Bulgaria had the highest number of two gender believers.

This comes as anti-trans (or pro-traditional gender norms) rhetoric has been employed by both secular and non-secular regimes as an anti-democratic wedge issue, according to the *Journal of Democracy*, though agreement that transgender men and women should be free to live their lives as they wish has remained stable and high.

There are only two genders - male and female – and not a range of gender identities (% agree)



Base: Data shown is based on 38 Comparable Markets that were questioned in both 2024 and 2025. For full methodology see ipsosglobaltrends.com.

Comparable markets are shown in the notes.

Source: Ipsos Global Trends 9th Edition

Driving Forces of Retreat to Old Systems

Signals of Change



Women in sports, reimagined

In a special issue dubbed [Sports \(RE\)Illustrated](#), the magazine (in partnership with Dove) put the focus on female athletes and especially the pipeline of girls' youth sports.



More deaths than births in France

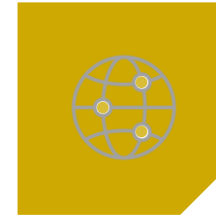
Between May 2024 and May 2025, there were [more deaths than births](#) in **France**, a first in 80 years that could lead to an increase in the already heavy burden on pensions and the healthcare system.



The U.S. declares two genders as policy

In one of his first acts upon retaking office in 2025, **U.S.** President Trump issued an Executive Order that declared that there are [only two genders, reversing a policy from former President Joe Biden](#).

Key Macro Force Themes



Rising nationalism
and populism



Wealth disparity



Community migration
and immigration



Greater ethnic
and religious diversity

Thought starters on what this means for...

Society & Policy

When a majority feel that they would like the country to be the way it used to be, that is a set-up for turbulence. That sentiment also begs the questions of “used to be.... when?” and who were the winners and losers in whatever system was in place in the time we hearken back to?



For policy makers, how do you keep an agenda on track as new leadership is pressured to undo whatever previous leadership did?

Markets & Brands

This trend and its related tensions opens all kinds of opportunities and pitfalls for brands. Both messaging and products run the risk of alienating entire swaths of people.

If a brand leans into a more progressive version of gender roles, it could run afoul of traditionalists, and vice versa as more men (43%) think that “the main role of women is to be good mothers and wives” than women (31%) do.



To what degree is nostalgia still a uniting value for marketing messages?

Citizens & Consumers

The push and pull of progress is a rhythm seen throughout human history. The book, “The Fourth Turning,” by William Strauss and Neil Howe posits that an 80-year cycle repeats and that we are currently in the “Crisis” phase of the cycle.

For people, this trend is all about tension at the governmental and big “system” level down to the household level as gender norms continue to be explored and continue to shift.



How much progress and innovation are people willing to give up in order to return to something more “comfortable or familiar”?



Nouveau Nihilism

Trend: There is now a generational disconnect when it comes to milestones like buying homes, getting married, and starting families. Financial realities are keeping those dreams out of reach for many. This is feeding widespread sentiment that it's better to live for today - either because tomorrow is uncertain, or because it will simply take care of itself, as individuals feel powerless to take personal control.

How it's evolved: Disappointment over the ability of governments to improve the lives of ordinary people is hardening into an entrenched disenchantment about political systems as a whole, to create a hardening mood driven by deep-rooted future angst.

Values

Living in the Moment
Anti-establishment

What's new about nihilism in 2025?

- Another year forward, but **what has really changed?** The combination of current distress and future uncertainty continues to create the combination of disengagement in the political process and a “live for now” mentality that we characterised last year as “Nouveau Nihilism”.
- Much of the world went to the polls in 2024, but it seems like **few have seen the changes they were hoping for** when they placed their X in the box. Large numbers of the public (70%) still feel that their government does not prioritise the concerns of people like them, or that the government and public services in their country will do too little to help people in the years ahead (77%). Indeed, these attitudes are rising very slightly (though not in statistically significant terms) when viewed globally. They are, however, rising sharply when viewed through diverse local lenses where highly local issues ranging from climate to conflict are likely at play. In Israel, Portugal, Mexico, Sweden and the Netherlands, for example, we’ve seen significant upticks in either or both of these sentiments.
- Conversely, in Great Britain, fewer people now feel the government isn’t addressing their needs, although local tracking on the rumblings of discontent with the new administration suggest this pattern may be a short-lived one.
- Brat summer may have [come and gone](#), but around two in three of the **global public continue to focus on the present day because of uncertainties about the longer-term future**. The fast moving and frequently changing policy decisions emanating from the U.S. administration, the global reactions to tariffs, the disturbing geopolitical landscape and the continuing climate crisis continue to dominate newsfeeds and there seems little chance of stability breaking out any time soon.
- We characterise **two subtly different styles of nihilism**. Firstly, an out-and-out nihilism expressed as dissatisfaction both with current political incumbents and also with political systems; secondly, a more hedonistic “live life to the full, in the moment” mentality. Roughly equal numbers of citizens are driven by these two styles. But this also hides some fascinating local nuances: there are particularly noteworthy increases in Portugal, Indonesia, Ireland, and the UAE for both styles of nihilism.

66%

say “I live for today because the future is uncertain”

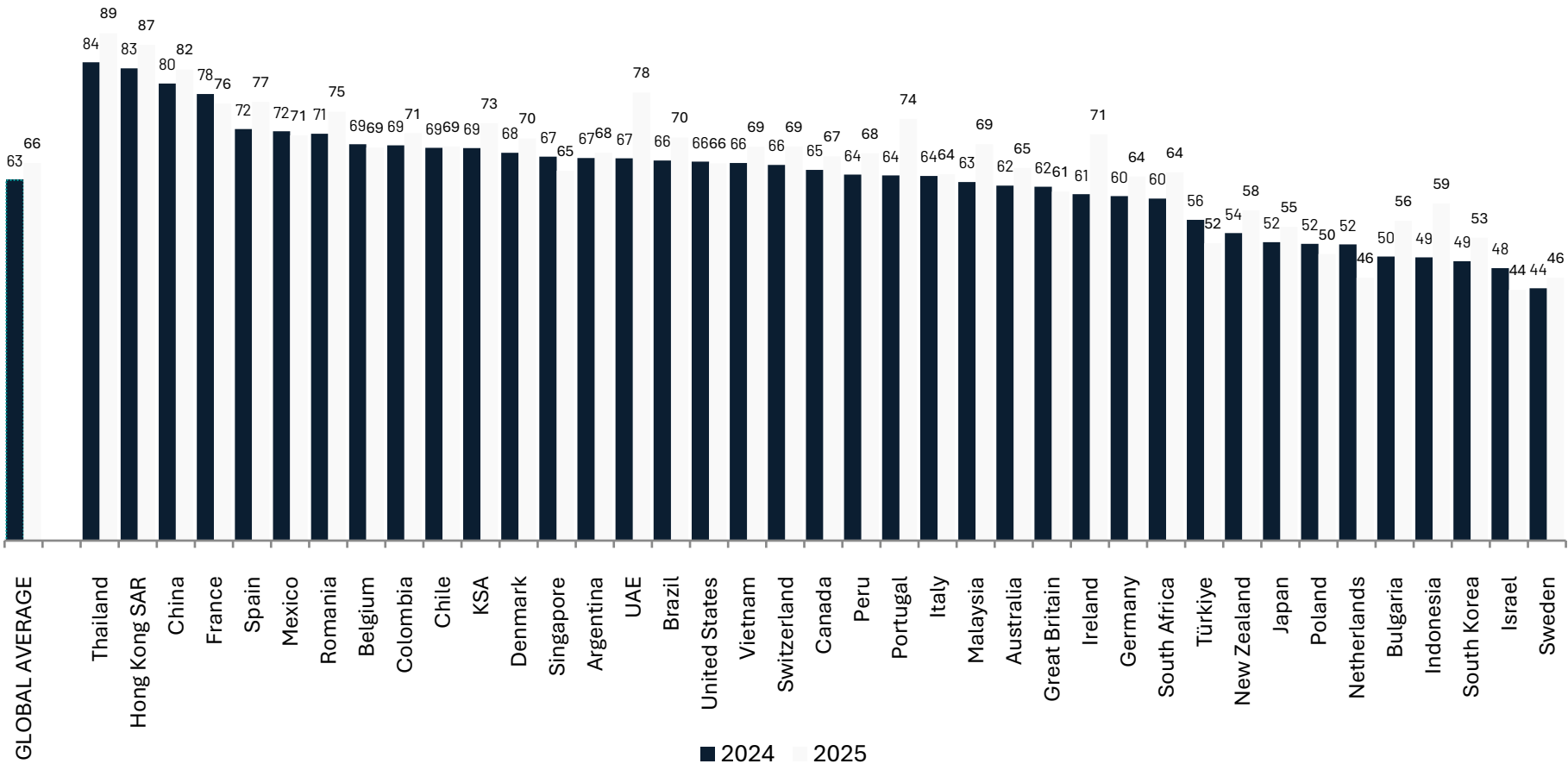
Nouveau Nihilism

Two thirds across global markets are prioritising living for today because the future is uncertain. Overall, there is a modest, non-significant, increase at the global level but we see significant increases in this sentiment in the UAE, Ireland, Portugal and Indonesia.

Indeed, the desire to live for today is now a majority sentiment in all but three markets – Israel, the Netherlands, and Sweden.

As the public prioritises today, policy makers and corporations must ask themselves about the impact on both the short- and longer-term future. How much of the future is being spent today and what will happen if and when consumers arrive in the world of tomorrow without sufficient resources to dip into?

I live for today because the future is uncertain (% agree)



Base: Data shown is based on 39 Comparable Markets that were questioned in both 2024 and 2025. For full methodology see [ipsosglobaltrends.com](https://www.ipsosglobaltrends.com). Comparable markets are shown in the notes.
Source: Ipsos Global Trends 9th Edition and Ipsos Global Trends 2024

Driving Forces of Nouveau Nihilism

Signals of Change



The rise of soft saving

In **South Africa**, Digital platforms such as [RainFin](#) and [Stokvel apps](#) are helping young people build savings collectively and invest in their futures in accessible ways.



Making the partying immediate

In the **US**, [Instacart's new Fizz app](#) focuses on the rapid delivery of food and snacks, with group ordering and payment options to allow for budget friendly, spontaneous celebrations.



Encouraging political participation

In **Czechia**, the [Your Choice, Your Voice](#) initiative is aiming to encourage higher levels of voting among the young in the upcoming parliamentary elections.

Key Macro Force Themes



Rethinking institutions



Increasing geopolitical conflicts



Entrenched inequality



The next pandemic

Thought starters on what this means for...

Society & Policy

The continuing focus on living for today puts elements of the social contract into question, potentially storing up long-term pain in favour of short-term gain.



When people feel it is pointless working hard or saving, because the system is stacked against them, how do politicians and brands give them hope?

Markets & Brands

The desire to live in the moment has obvious implications for spending patterns and represents both opportunity and barrier. The opportunity lies in feelgood sectors like socialising, vacationing, clothing and beauty while those selling long-term, higher ticket items like cars, pension plans and mortgages will likely be struggling.



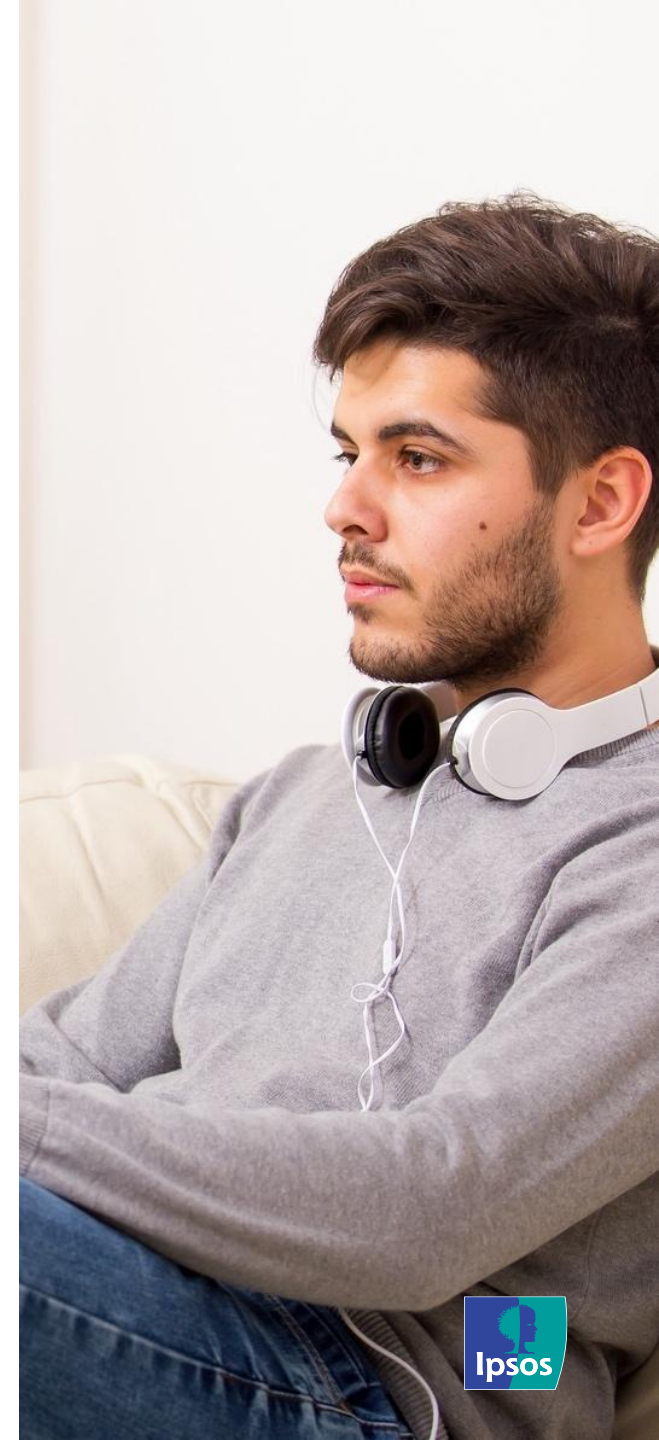
How long will this mentality persist? When will reality start to bite? In short, when does tomorrow begin?

Citizens & Consumers

While we are tracking a global shift in emphasis to the shorter-term, there are inevitable differences by culture, by geography, or by individual personality type.



Where do your customers sit on the short-term, long-term spectrum? Should you capitalise on spending today, even if it casts doubt over the longer-term?



The Power of Trust

Trend: In a world flooded with information, misinformation and even disinformation, we crave authentic messages from trusted sources. In this context - and more dramatically so than in 2013 - brands assume greater importance, becoming extensions of our own worldview and values. But greater uncertainty now comes from changes in how and why we choose to trust some organisations and not others.

How it's evolved: The values and beliefs around this trend haven't changed since last year. But the world around them has become more complicated.

Values

Informed Consumerism
Brand Worship
Experience

A changing world creates growing opportunity for success or failure

- The values that drive and define the “Power of Trust” trend are related to the relationship between consumers and brands. Two in three (67%) say they tend to buy from brands that reflect their personal values.
- But **public trust is endangered**. The [Ipsos Global Trustworthiness](#) report shows that trust in government and business leaders is low. In the [Ipsos Global Populism](#) report, most (56%) people think the “system is broken,” which aligns with a macro force of “rethinking institutions”.
- **People’s trust grows closer in**. They might not trust *the government*, but they trust their local elected officials more. They might not trust the medical profession, but they trust their own doctors. Mostly they trust their friends,
 - family and their chosen relationships
- for recommendations and information.
 - But among close relationships are those people have with the brands and companies they are loyal to and intrinsically trust. Most (77%) say they are “more likely to trust a new product if it’s made by a brand I already know”.
 - So while brands often enjoy trust, and that trust often buys some level of forgiveness for small missteps, it’s also fragile. **It’s imperative, then, for brands to continue building on that trust.**
 - The tricky bit is the “aligning with values” part. Many of the Ipsos Global Trends come back to trust and values, and all of them have internal tensions. This makes it hard to demonstrate a brand’s values without risk.
- Understanding customers on a fairly fundamental level then becomes very important. People, as the saying goes, contain multitudes. If a brand understands what its customers’ values are and what drives them, that puts the brand in a position to align authentically and with empathy (as long as the brand chooses the right stances to take).
 - And **people do expect brands to take a stand**: 81% say is possible for a brand to support a good cause and make money at the same time.
 - Value alignment isn’t the only risk. The customer experience is a big component of the relationship and a factor experiencing its own fragility, as 75% say customer service is getting too automated and impersonal. One big wildcard in this, and in so many trends, is the role AI will play in it going forwards.

67%

say they tend to buy brands that reflect their personal values.

Brands vs Value

This upward trendline in people's willingness to align their spending with their values is important for two reasons.

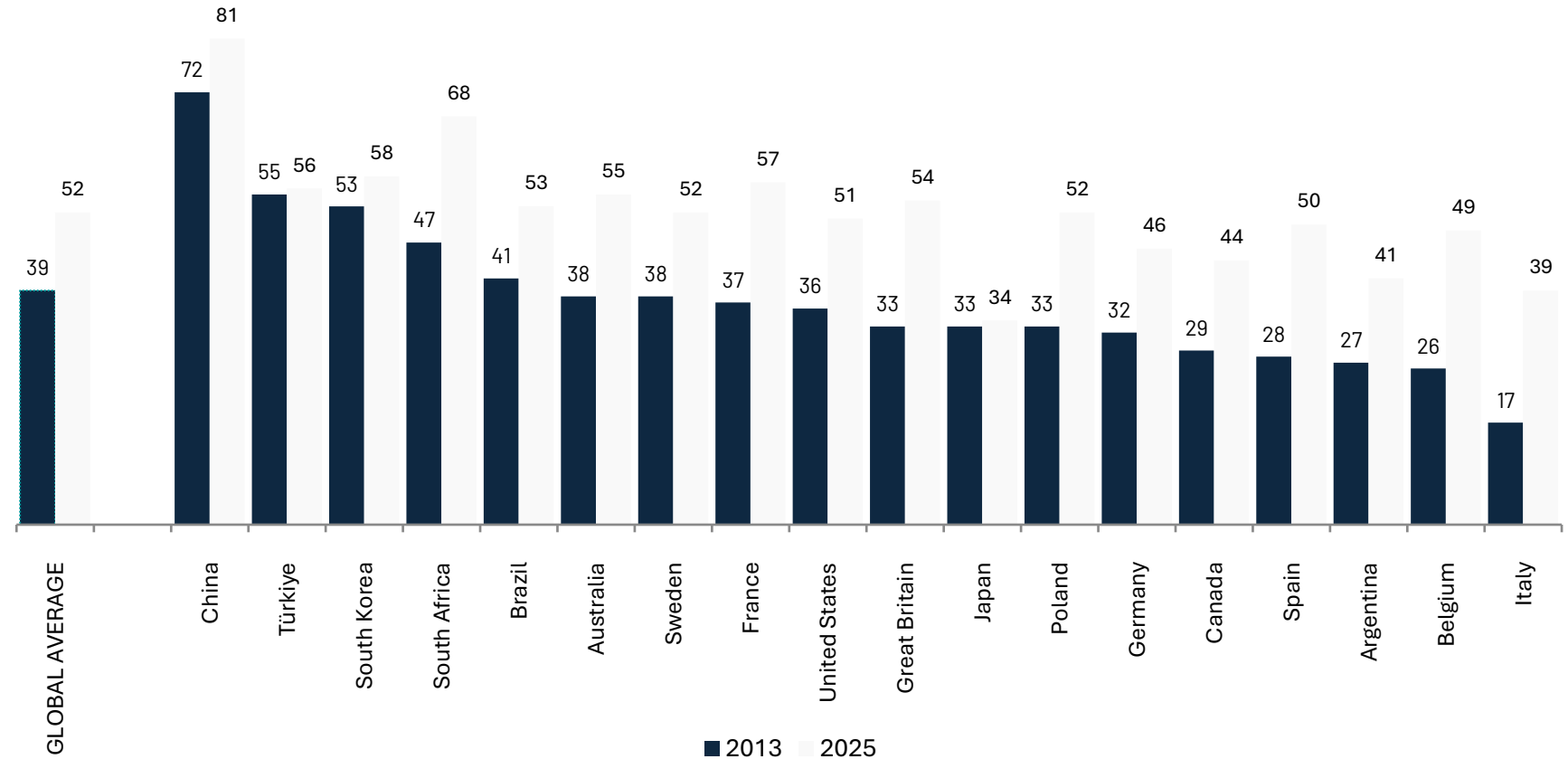
First, it demonstrates the need for brands to align with their consumers' values and identity, which requires a deep understanding of what those values and signifiers are.

But more importantly, it ties consumerism to our next trend, "Escape to Individualism".

As people look to form and control their identities, the brands they buy become part of that.

The trends around brands, personal values and identity are some of the biggest changes since 2013 when Ipsos began Global Trends.

I am generally willing to spend extra for a brand with an image that appeals to me (% agree)



Base: Data shown is based on 18 Comparable Markets that were questioned in both 2013 and 2025. For full methodology see ipsosglobaltrends.com.

Comparable markets: Argentina, Australia, Belgium, Brazil, Canada, China, France, Great Britain, Germany, India, Italy, Japan, Poland, South Africa, South Korea, Spain, Sweden, Türkiye, United States.

Source: Ipsos Global Trends 9th Edition and Ipsos Global Trends 2013

Driving Forces of The Power of Trust

Signals of Change



Using local connections to drive trust

Mexico Independent influencer [@lasenoradecostco](#) has become a trusted voice for Mexican consumers, **reviewing Costco's wellness products**. Her authentic, family-oriented style resonates with Mexico's community-driven culture. While not a formal partnership, Costco México has acknowledged her impact by sharing her content.



Unfavourable data is fake data?

U.S. President Trump fired the head of a non-partisan governmental statistics agency after accusing her without evidence of releasing data with a political motive ([CNN](#)).



French grocery chain gets in a beef with Brazil

Supermarkets in **Brazil** owned by French conglomerate Carrefour were threatened with a boycott, [according to LeMonde](#), after the grocer announced it wouldn't sell Brazilian beef in its French stores.

Key Macro Force Themes



Rising cost of living



Technology's dark side



Establishing identity



Rethinking institutions

Thought starters on what this means for...

Society & Policy

In the [Ipsos Global Populism](#) report most (56%) people think the “system is broken.” Trust in government officials is low and trust in business leaders is only slightly better. That’s not a great environment for those making policy decisions in The System itself.



In a digital world, awash with conflicting opinions, building trust is a tricky imperative. To what extent is transparency part of the solution, and to what extent is it the antithesis of trust?

Markets & Brands

Trust continues to be a driving force in business, and one that will likely only continue to grow in prominence.

Trust is key for building relationships with customers. And as people continue to struggle with trusting institutions and systems they have historically relied on for “truth,” brands have an opportunity to fill that void, if they can do so authentically and with empathy.



How far can a brand go before it loses its new fans? Or its most ardent?

Citizens & Consumers

One of the biggest changes in Ipsos Global Trends since its inception more than a decade ago is the rise in people saying they trust brands that align with their values.

For consumers, that can lead to a greater sense of connection with brands that support their values on the positive side. On the negative side, it can lead to purchases used as “virtue signalling.”



How do customers react when a brand does something they don’t approve of? When does it matter – and when don’t they care?



Escape to Individualism

Trend: In the face of a world that feels threatening and overwhelming, people are focusing on one thing they can control — themselves. While this focus on individualism has been high over the past decade, this year personal autonomy is the most powerful value. But this is, by definition, a multifaceted trend. We see the draw of simplicity, social status and seeking new experiences as ways of developing ourselves.

How it's evolved: Individualism remains strong, especially in the era of AI. We're seeing more of a focus on carving your own path in life, while pushing back on the boundaries and limitations set by society.

Values

Autonomy
Seeking Curiosity
Simplicity
Social Status

Amidst chaos, a continued focus on what we can control

- **Individualism has evolved in the past year, becoming more pronounced and complex.**
- Individualism is increasingly linked to autonomy and personal control in an ever more overwhelming and uncertain world. The past year has seen a continuation of the "polycrisis" environment - geopolitical instability, economic anxieties, and accelerating climate impacts. This pervasive sense of external chaos has amplified the individual's desire to focus on what they can control.
- **Such an inward turn is a primary driver of the intensified "Escape to Individualism":** People are seeking ways to find stability and meaning within their personal spheres when the larger world is unpredictable.
- Within this context, it's notable that several measures have stayed steady: we saw a consistent share of citizens who feel that "it is up to everybody to work out their own set of principles to guide their decisions", a large and steady indicator that the focus is on individual perspectives.
- We also saw sustained sentiment (86%) that "it is more important to have a good work-life balance than to have a successful career", **highlighting that autonomy isn't just a desire for freedom.** It's about people demanding the ability to define their own path, make their own choices, and shape their lives according to their unique preferences and identities. The notion that success is always tied to societal norms is fading, replaced by personal metrics of fulfilment and control.
- The demand for personalised experiences has moved from a premium offering to a baseline expectation. It extends beyond products to personalised recommendations, tailored content, and services that truly cater to individual needs. AI is playing a crucial role in this hyper-personalisation at scale, which both allows users to cut through the clutter, and demands that brands optimise for algorithms.
- **While many still seek social status through material gain, there's a growing movement toward simplicity and away from hustle culture.** Understanding target audiences requires moving beyond broad demographics to deep psychographic segmentation, recognising that different individuals will define and express their identities in vastly different ways.

84%

agree globally that "it is up to everybody to work out their own set of principles to guide their decisions"

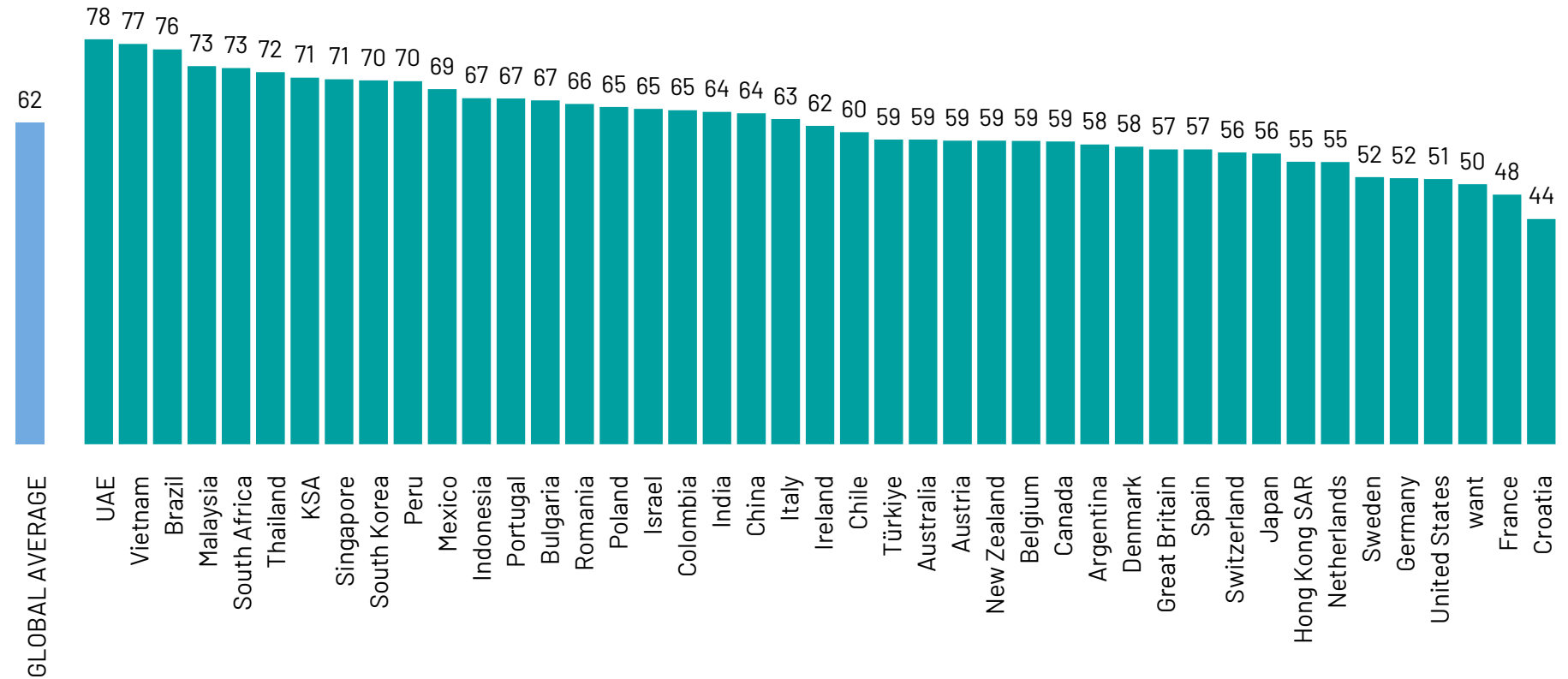
Escape to Individualism

A major portion of the world is consistently feeling overwhelmed by too many choices in life.

Developments like the proliferation and immediacy of news media, increasing channels of communication such as social media, myriad choices when it comes to products and services, and even new ways of earning money have created choice overload.

The adoption of AI for search and navigating questions at work, at home and everywhere in between, reflects citizens' need to simplify and make sense of an increasingly complex world.

I often feel overwhelmed by too many choices in life (% agree)



Base: 33,083 adults surveyed in the regions shown between 23 May and 6 June 2025. For full methodology see [ipsosglobaltrends.com](https://www.ipsosglobaltrends.com).

Source: Ipsos Global Trends 9th Edition

Driving Forces of **Escape to Individualism**

Signals of Change



Conscious unbossing & rejection of careerism

A recent study found that 72% of US Gen Z would prefer to find an individual route to progression rather than manage other workers, suggesting that they're rejecting the corporate ladder - however, they are increasingly taking on management roles as they age up.



Child free as a lifestyle flex

Around the world, influencers like [Tamsen Fidal](#) are part of a movement on TikTok celebrating being child-free by choice, highlighting their freedom and celebrating their part in the declining birth rate.



Entrepreneurism on the rise

Youth in **South Africa** are more interested in [entrepreneurism](#) despite economic hurdles: 71% say they plan to start a business in the next 5 years, reflecting a global movement toward alternative paths to success.

Key Macro Force Themes



Identity
acceptance



Life stage & family
evolutions



Rise and fall of
middle classes



Wealth disparity

Thought starters on what this means for...

Society & Policy

The evolution of individualism is driven in large part by how identity is expressed in increasingly diverse ways - from growing acceptance of changing life stages, to an increasingly diverse range of family structures and gender identities.



With more diverse populations and values, how can policymakers unite citizens around a common purpose - especially if it involves sacrifices?

Markets & Brands

Taken together, “Escape to Individualism” and the “Power of Trust” mean that as individuals turn inwards and prioritise their own autonomy, they may become more sceptical of external influences - which can include institutions as well as media and brands.



How can you take a more authentic and transparent approach to instil trust and help consumers make decisions based on their diverse personal values?

Citizens & Consumers

The focus on autonomy, demand for hyper-personalisation, and diverse expressions of identity all mean a more discerning consumer. Add to that the fact that not everyone defines success in the same manner and it can be hard to know how to serve your customers.



Do you know what makes each group of your constituents feel successful – and the path they need to follow to achieve it?





Ipsos Global Trends 9th Edition: At a Glance

• *Globalisation Fractures*

- While the world remains highly interconnected, globalisation is being questioned. Recent elections favoured a changing of the guard, and a global trade war has sharpened divisions between countries. Citizens are questioning the value of globalisation, while political leaders are struggling to navigate rapidly evolving tensions.

Technowonder

As technology becomes more pervasive, there is a tension between excitement for all the problem-solving tools, connection and entertainment technology can bring us and concerns about privacy, job loss and potential for misuse. Technology has evolved, driven by surging AI investment, but opinion is much slower to move.

Splintered Societies

A splintering of traditional structures with new ideologies and political allegiances is emerging. While all forms of division remain a global concern, immigration remains a highly emotional and polarising topic in society, and one where politicians have been able to make persuasive populist cases.

Conscientious Health

Health understanding is more holistic, tied to both our physical and our mental wellness. Tensions persist in terms of who has access to care, which has heightened in the era of GLP-1s—with some flaunting the results and others looking on enviously.

Climate Convergence

Worldwide investment in climate resilience and mitigation is rising, as the impacts of climate change become more evident. Concern over the impact of climate change remains high and consistent, with a pattern of consensus over the past decade. But financial concerns and arguments about who is responsible get in the way of action.

Ipsos Global Trends

9th Edition: At a Glance

• *Retreat to Old Systems*

- As an escape to nostalgia is widely appealing, some people also yearn to revert to historical power structures around religion, politics, gender and more. As nostalgia continues to be a pull politically and in marketing, the question is: what are we yearning for.

Escape to Individualism

As the world feels overwhelming, people are focusing on one thing they can control – themselves. We're seeing more of a focus on carving your own path in life, while pushing back on the boundaries and limitations set by society.

Nouveau Nihilism

As economic stresses are preventing many from realising their long-term dreams, a fatalistic “live for the moment” attitude is rising. Disappointment over the ability of governments to improve the lives of ordinary people is hardening into an entrenched disenchantment about political systems as a whole, to create a hardening mood driven by deep-rooted future angst.

The Power of Trust

We crave authentic messages from trusted sources but have a harder time figuring out who and what to believe. The values and beliefs haven't changed, but the world around them has become more complicated.



**GLOBAL
TRENDS**

HOW TO USE THE TRENDS

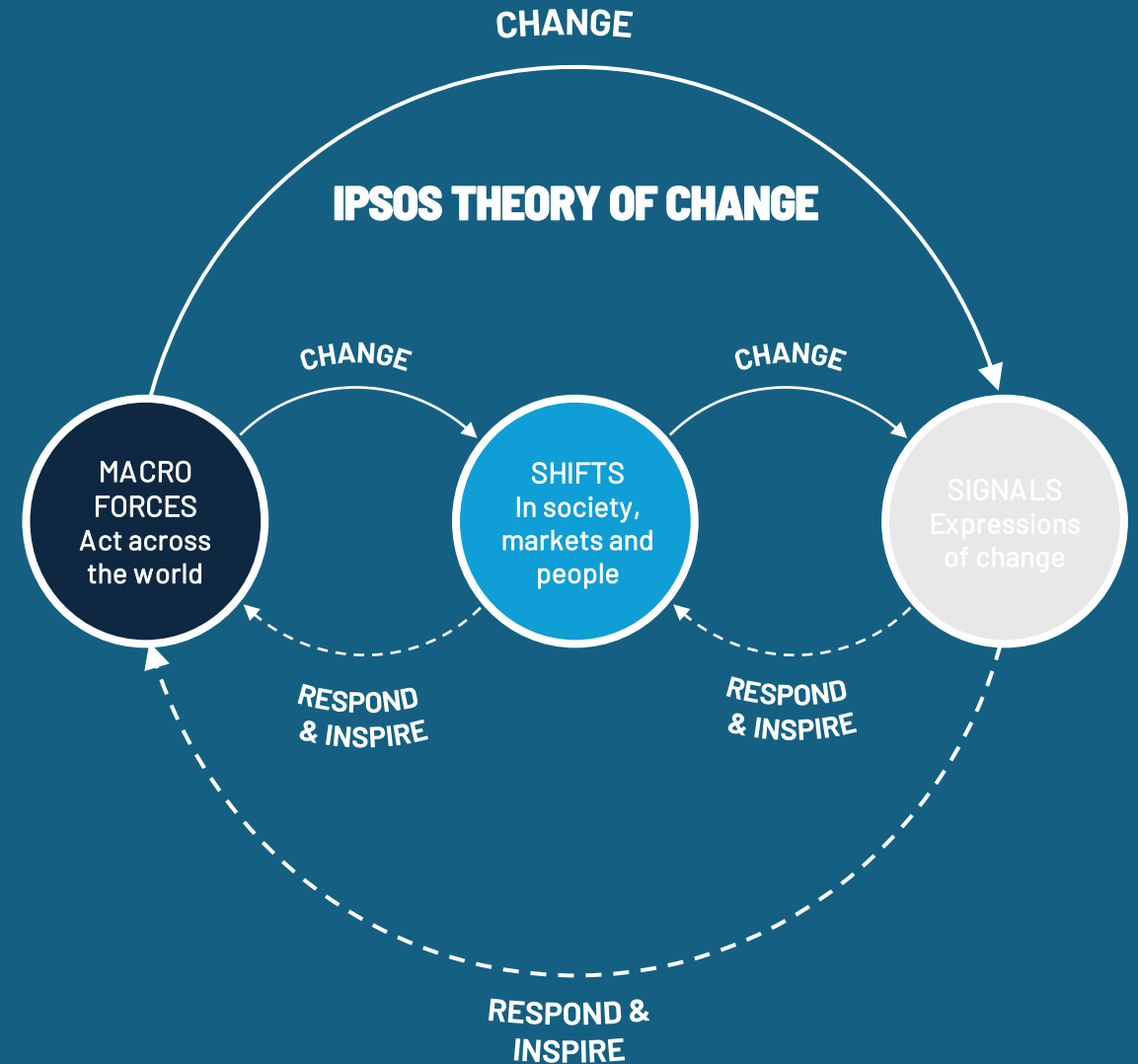


Each Trend you've seen in this report highlight change at different levels

We used the Ipsos Theory of Change model to develop our trends framework, building nine trends from an analysis of each level of change.

- **Macro Forces** are the “known knowns” that operate at a planetary level. They work over a longer time horizon and have far-reaching impacts. They are the context against which people and organisations act.
- At the other end of the scale, **Signals** are localised expressions of change. They are things that we can observe occurring at the level of a single country or a community within a specific area, such as a new product launch in India, or a new cultural phenomenon in Japan.
- In the middle, we have **Shifts** in society, markets and people, including opinions, attitudes and values. Shifts can emerge, enter mainstream culture, and fall out of practice in response to macro forces and signals.

Our model acknowledges the role of feedback loops in understanding the complexity of our world, recognising the circular nature of change and tension within this ecosystem allows us to develop robust trends. **Tracking changes in this way can also help your teams anticipate change ahead.**



HOW TO ACTIVATE: THREE PATHS TO IMPACT IN JUST WEEKS

- Activation Workshops
- Consultative trends support
- Applying our data and insights to your own trends framework

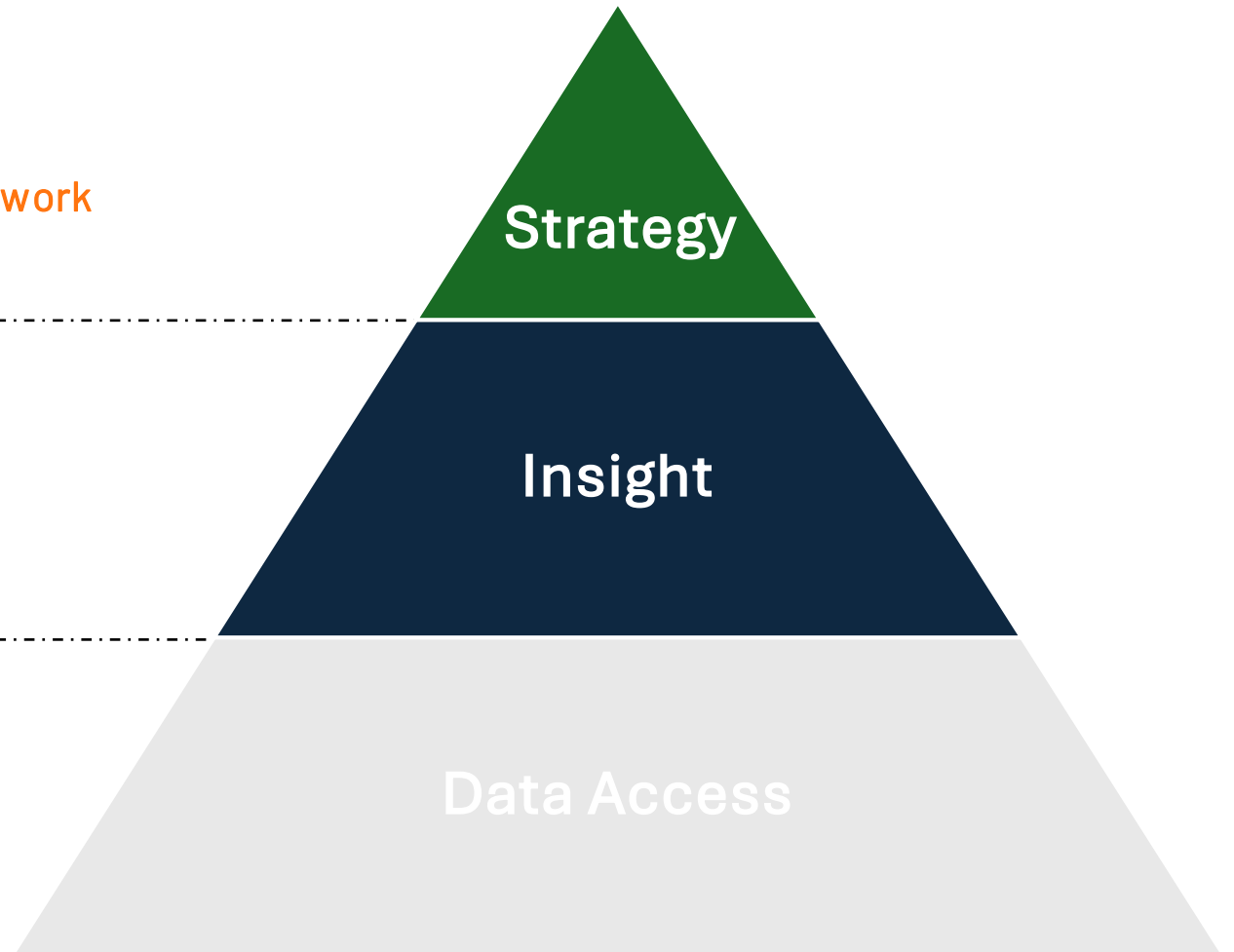
Best for: Foresight and mid-term strategy

-
- Executive briefings tailored to your business
 - Bespoke trend reporting
 - Sector level social data deep-dive

Best for: Upcoming planning cycles and category reviews

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- Always-on signals dashboard
 - Access to this year's data portal
 - Access to our full historic data portal

Best for: Self-serve teams needing quick data pulls



GLOBAL TRENDS

Connecting values to trends

- The Ipsos Global Trends are unique in the market in that they are rooted in a detailed analytical model which looks at the relationship of longer-term human values to closer-in trends.
- What makes this particularly fascinating is the ability to **tease apart how values differ by market**, and how they are impacted by local history and cultural nuances. What makes the American Dream so appealing and unique? Why do some cultures value autonomy more than others? Those differences in values will affect people's attitudes, behaviour and preferences.
- Our framework is a product of collaboration between Ipsos colleagues across nearly 90 markets using Ipsos' Theory of Change – a model for exploring how **Macro Forces** (the external context against which people and organisations act), **Shifts** (changes in attitudes and values across society, markets and people) and **Signals** (visible real-world expressions of change observed at local and more surface levels) pull and push one another, interact and cause tension, and ultimately allow us to identify trends.



Ipsos Global Trends: 9th Edition

Many of the questions we ask can be cut by these measures, depending on base size.

Markets in this wave:

Argentina	Hong Kong SAR	Portugal
Australia	Hungary	Romania
Austria	India	Singapore
Belgium	Indonesia	South Africa
Brazil	Ireland	South Korea
Bulgaria	Israel	Spain
Canada	Italy	Sweden
Chile	Japan	Switzerland
China	KSA	Thailand
Colombia	Malaysia	Türkiye
Croatia	Mexico	UAE
Denmark	Netherlands	United States
France	New Zealand	Vietnam
Germany	Peru	
Great Britain	Poland	

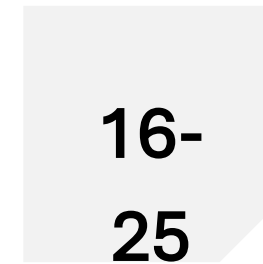
Demographics Available:



Gender



Household
Income



Age Ranges



Generations



Education
Level



Employment
Status



Marital Status

Survey Methodology in detail

These are the results of a 43-country survey conducted by Ipsos on its Global Advisor online platform between Friday, May 23, and Friday, June 6, 2025. For this survey, Ipsos interviewed a total of 33,083 adults aged 18-74 in Canada, Republic of Ireland, South Africa, Türkiye, and the United States, 20-74 in Thailand, 21-74 in Singapore, and 16-74 in all other countries

The sample consists of approximately 1,000 individuals each in Australia, Austria, Belgium, Brazil, Bulgaria, Canada, mainland China, France, Germany, Great Britain, Hong Kong, Italy, Japan, New Zealand, Spain, Switzerland, United Arab Emirates, the U.S., and Vietnam. And 500 individuals each in Argentina, Chile, Colombia, Croatia, Denmark, Hungary, Indonesia, Ireland, Israel, Malaysia, Mexico, the Netherlands, Peru, Poland, Portugal, Romania, Saudi Arabia, Singapore, South Africa, South Korea, Sweden, Thailand, and Türkiye. The sample in India consists of approximately 2,045 individuals, of whom approximately 1,800 were interviewed face-to-face and 400 were interviewed online.

Samples in Argentina, Australia, Austria, Belgium, Canada, Denmark, France, Germany, Great Britain,

Hungary, Italy, Japan, the Netherlands, New Zealand, Poland, South Korea, Spain, Sweden, Switzerland, and the U.S. can be considered representative of their general adult populations under the age of 75. Samples in Brazil, Bulgaria, Chile, China, Colombia, Croatia, Hong Kong, Indonesia, Ireland, Israel, Malaysia, Mexico, Peru, Portugal, Romania, Saudi Arabia, Singapore, South Africa, Thailand, Türkiye, UAE, and Vietnam are more urban, more educated, and/or more affluent than the general population. The survey results for these countries should be viewed as reflecting the views of the more "connected" segment of their population.

India's sample represents a large subset of its urban population social economic classes A, B and C in metros and tier 1-3 town classes across all four zones.

The data is weighted so that the composition of each country's sample best reflects the demographic profile of the adult population according to the most recent census data. "The Global Country Average reflects the average result for all the countries and markets in which the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

When percentages do not sum up to 100 or the 'difference' appears to be +/-1 percentage point more/less than the actual result, this may be due to rounding, multiple responses, or the exclusion of "don't know" or not stated responses.

The precision of Ipsos online polls is calculated using a credibility interval with a poll where N=1,000 being accurate to +/-35 percentage points and of where N=500 being accurate to +/- 5.0 percentage points. For more information on Ipsos' use of credibility intervals, please visit the Ipsos website.

The publication of these findings abides by local rules and regulations.

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While the report authors are shown on this page, Ipsos Global Trends is a team effort.

Hundreds of Ipsos experts from throughout the business and our nearly 90 markets provided input on survey design and methodology; sourced sample; conducted translations, fieldwork and quality control; collected signals from their regions; ran analysis, proofed, designed, amplified, produced events, presented to clients, workshopped and more.

Thanks to the Global Advisor team; Data Liberation for building a fantastic data portal; the Data Processing team and the Healthcare Global Modelling Unit for running the analysis; the UK and US Design Studios; the Ipsos Knowledge Centre; and the global and local market marketing and event teams around the world.

And thank you to the more than 33,000 people whose voices are central to creating this report.

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GLOBAL TRENDS