



THE NEXT NORMAL 2025



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THE NEXT NORMAL HAS BEEN MEASURING THE **THOUGHTS, FEELINGS, HOPES & FEARS** OF PEOPLE AROUND THE WORLD SINCE **2012**

2012

The Next Normal:
*An Unprecedented Look at
Millennials Worldwide*

2017

The Next Normal:
Rise of Resilience

TODAY

The Next Normal 2025

AN IN- DEPTH INSIGHT INTO...

...changing attitudes about happiness, stress, definitions of success, sources of identity and personal relationships among adults aged **18-64** across **10 countries**:



USA



Canada



Australia



UK



Germany



France



Italy



Sweden



Mexico

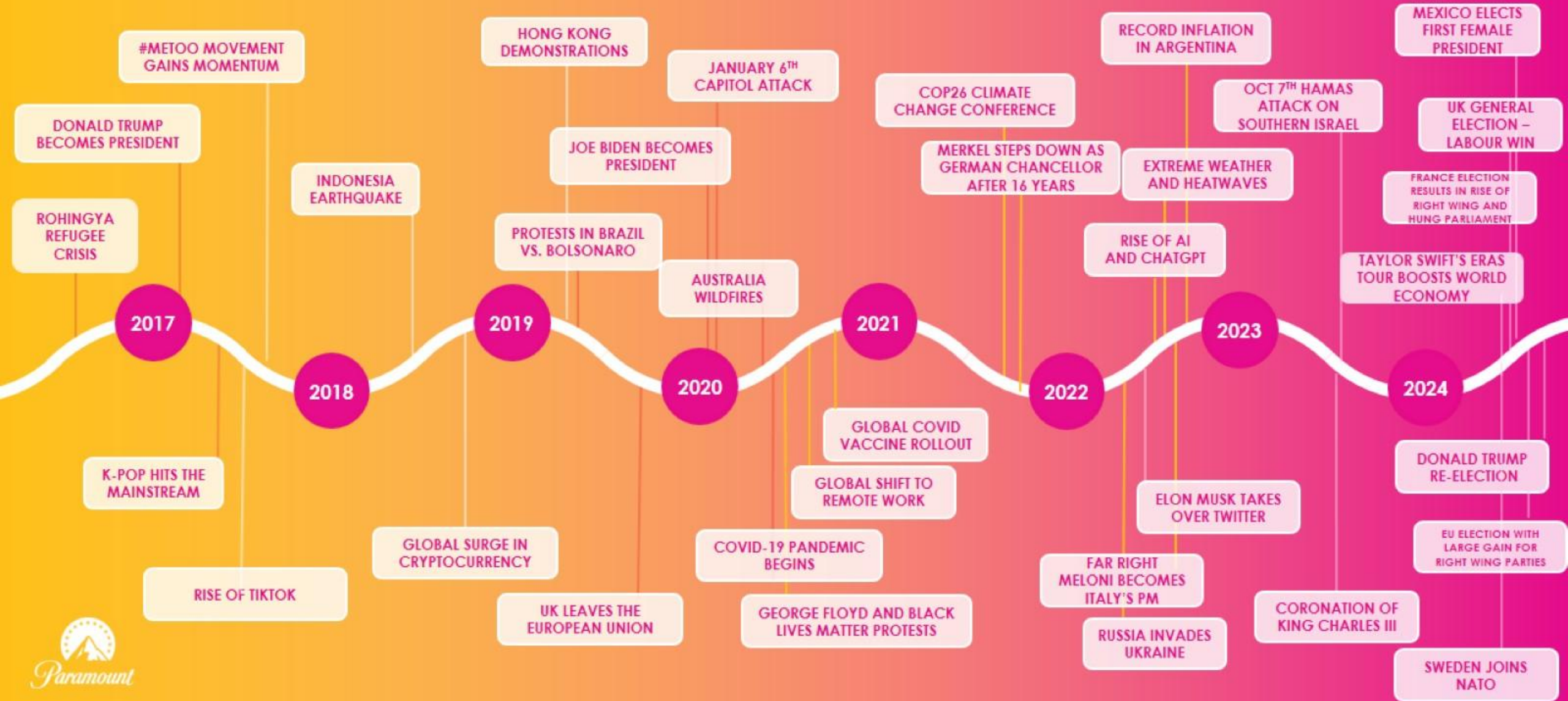


Brazil

Conducted among a nationally representative sample of **9,260** adults across all markets via an online study. Fieldwork took place in September 2024

This deck also makes use of data from *GenX Today: My Life, My Way*, a 2016 study among 18-49s

A LOT HAS HAPPENED IN THE PAST FEW YEARS, WITH MANY EVENTS CREATING UNCERTAINTY



HOW THIS UNCERTAINTY IS AFFECTING PEOPLE

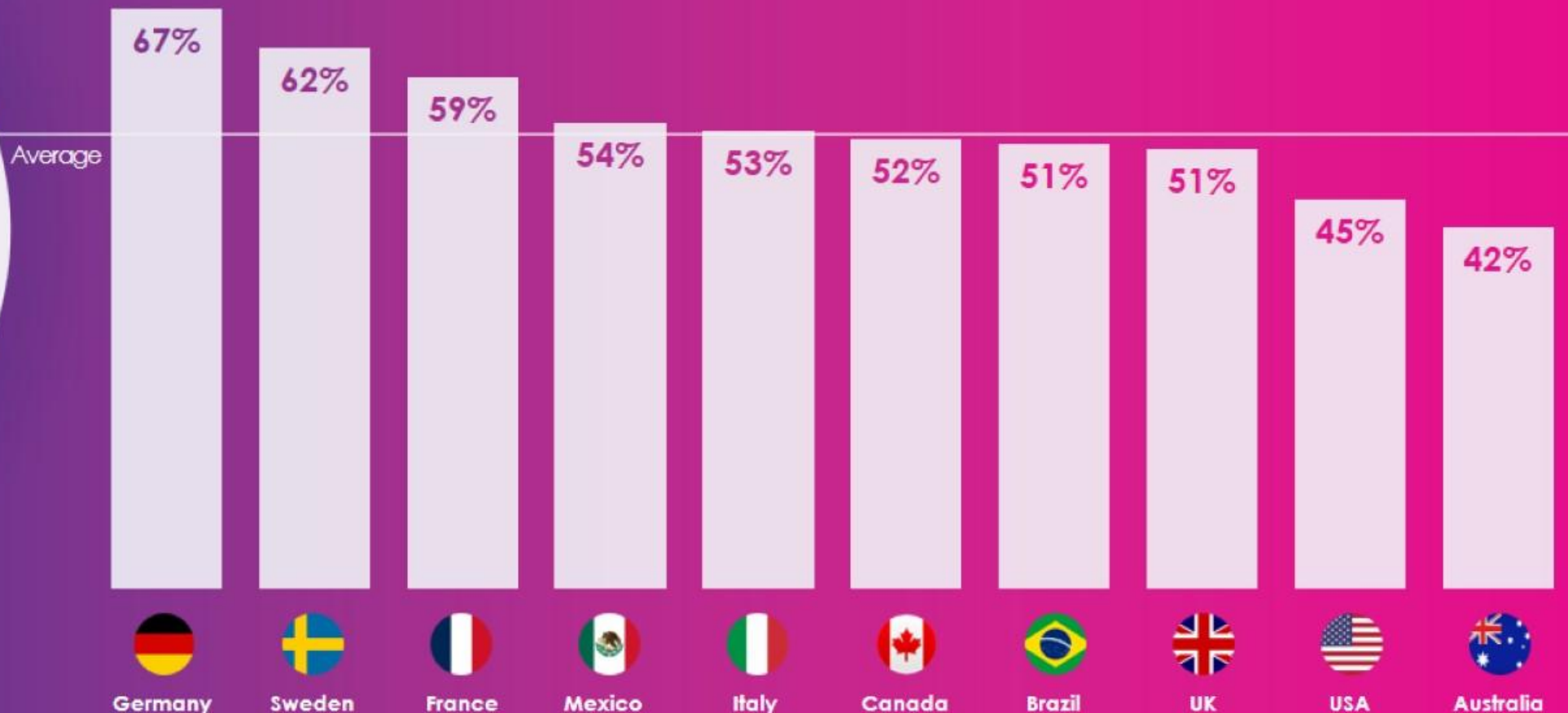


PEOPLE FEEL LESS SAFE THAN 5 YEARS AGO

53%

adults 18-64
globally **feel living
in their country is
less safe than 5
years ago**

% feeling that living in their country is 'less safe than 5 years ago'



MONEY IS THE #1 CONCERN, FOLLOWED BY PARENTS' HEALTH, PERSONAL MENTAL HEALTH, AND SAFETY

Top 5 worries: % worrying 'a lot' or 'a little'



1 in 2

adults 18-64 globally **do not**
feel comfortable financially



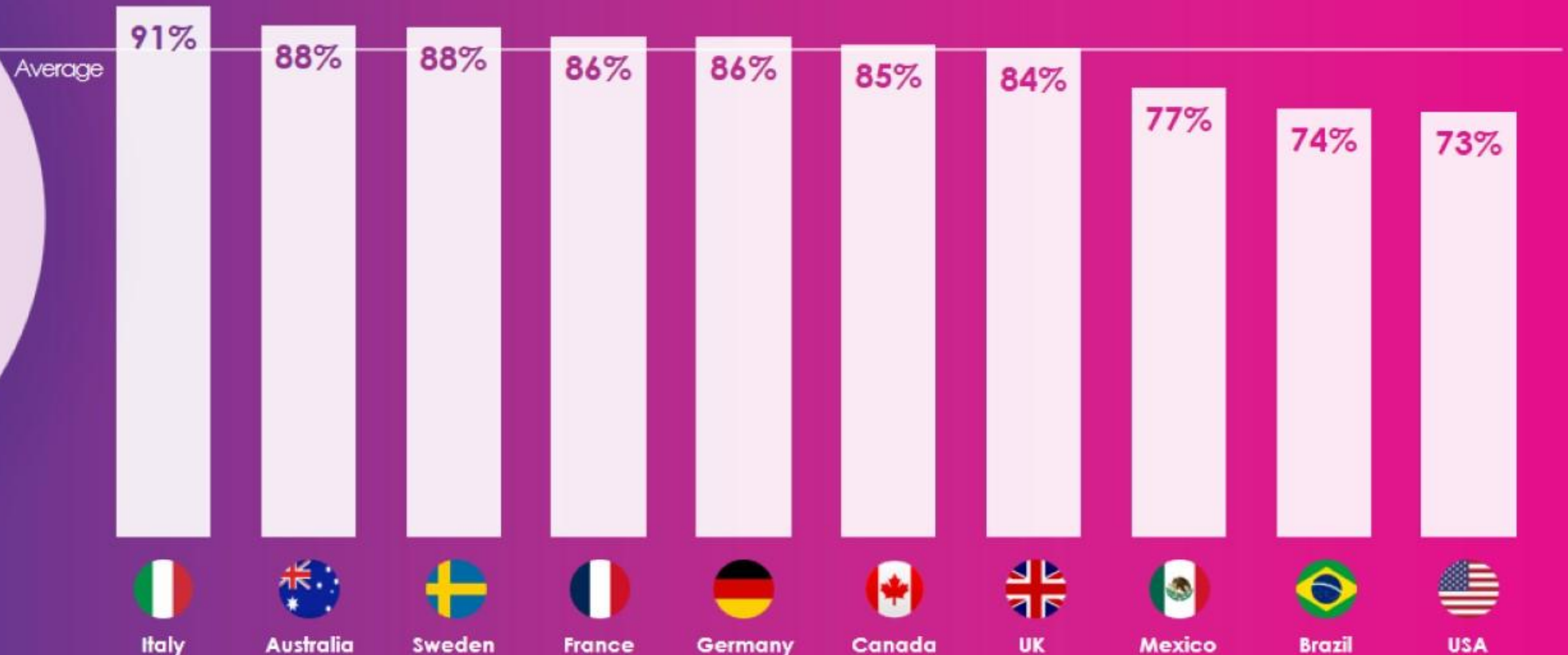
A7a: How much do you worry about each of the following things?
G1: How do you feel currently about your personal financial situation?
Base: 9,260 adults aged 18-64

8 IN 10 **FEEL ANXIETY** ABOUT THEIR FINANCIAL FUTURE

84%

adults 18-64
globally express
some **anxiety**
about their
financial future

% Claiming to have some anxiety about their financial future



WORK INSTABILITY FEEDS INTO THIS FINANCIAL ANXIETY, WITH RISING CONCERNS ABOUT **JOB INSECURITY**

%s among those in full or part time work...

I worry about
redundancy/getting laid off...

50%

I worry about **technology**
making my job obsolete...

43%

I fear **my job is at risk from the**
younger generation of recruits...

36%

All have increased significantly vs. 2016



All are significantly higher than in 2016 at 95% C.I., among 18-49s;
G3. [AGREE NET] To what extent do you agree with each of the following statements?
Base 2024: 7,081 adults working full or part time aged 18-64

FOCUS ON OUR FINANCIAL SECURITY HAS INCREASED WHILE FOCUS ON JOB SATISFACTION IS GOING DOWN



In 2024, these are
both now important to around

35%

of adults 18-64 globally



All are significantly higher/lower (as indicated by arrow) than 2017 at 95% C.I., among 18-54s

A2. Looking at the following list, which are the top 5 most important sources of happiness for you? Please rank them 1, 2, 3, 4, 5 starting with the most important one for you.

2024 vs 2017 trend data is among 18 to 54s: 2024: 7,373 adults aged 18-54 | Base 2017: 6,355 adults aged 18-54

WITH SO MUCH
HAPPENING IN
PEOPLE'S LIVES
AND AROUND
THE WORLD,
**STRESS IS
ON THE
RISE**

45%

of adults 18-64 globally
**feel high levels
of stress**

+29% vs. 2017



A5: On a scale from 1 to 10 where 10 equals extremely stressed out and 1 equals not at all stressed out, how stressed out are you in general?

Base 2024: 9,260 adults aged 18-64

2024 vs 2017 trend data is among 18 to 54s: 2024: 7,373 adults aged 18-54 | Base 2017: 6,355 adults aged 18-54

ALTHOUGH STRESS LEVELS ARE UP, PEOPLE THINK THEY ARE MANAGING THEIR ANXIETY FAIRLY WELL

7 in 10

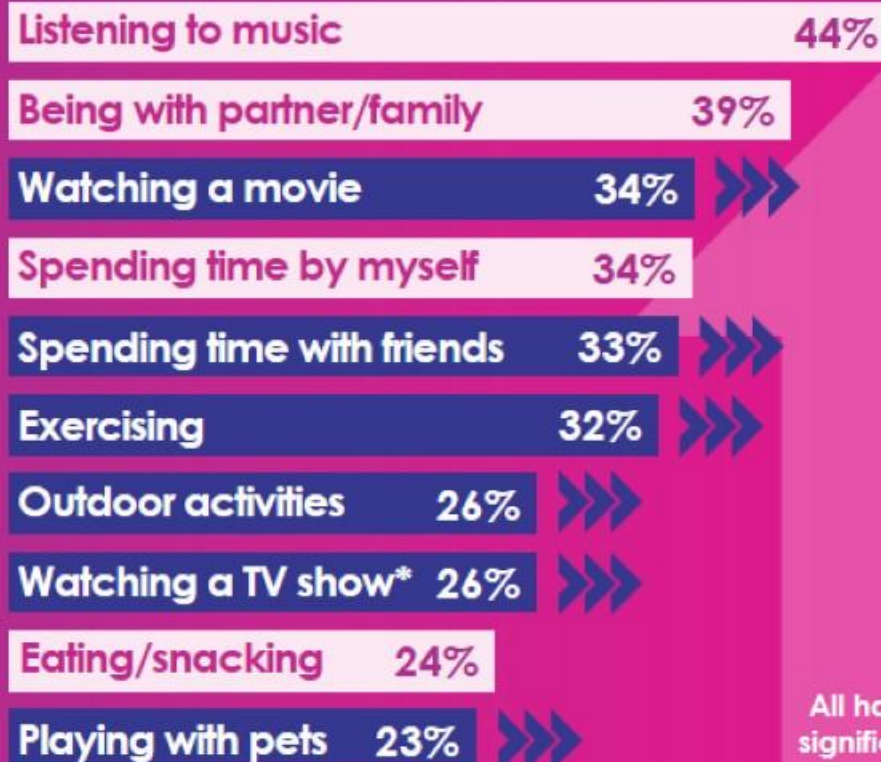
adults aged 18-64
globally claim to be
**good at dealing
with stress**

% Claiming to be 'very' or 'somewhat good' at dealing with stress



TO MANAGE STRESS, PEOPLE TAKE COMFORT IN MUSIC, LOVED ONES, SOLITUDE, CONTENT, AND STAYING ACTIVE

Top 10 mood boosters



»»» Denotes mood boosters that have moved into the top 10 in 2024

*In 2016, this was referred to as 'watching a funny TV show'

A11. When it comes to your everyday life, which of the following activities improve your mood and make you feel good? Please select the 5 activities that most improve your mood and make you feel good. Base 2024: 9,260 adults aged 18-64. 2024 vs 2016 trend data is among 18 to 49s: Base 2024: 4,980 adults aged 18-49 | Base 2016: 4,647 adults aged 18-49

ACTIVITIES LIKE SMOKING, WATCHING MUSIC VIDEOS, ENTERTAINING AND READING ARE NOT THE MOOD BOOSTERS THEY USED TO BE



Mood boosters that have dropped
out of the top 10 vs. 2016

Smoking

Watching music videos

Entertaining at home

Reading a book or
magazine

Online shopping

Playing with my kids



A11: When it comes to your everyday life, which of the following activities improve your mood and make you feel good? Please select the 5 activities that most improve your mood and make you feel good.

Base 2024: 9,260 adults aged 18-64

2024 vs 2016 trend data is among 18 to 49s: Base 2024: 4,980 adults aged 18-49 | Base 2016: 4,647 adults aged 18-49

THROUGH ALL THIS ANXIETY, PEOPLE REPORT FEELING **LESS EXCITED** **ABOUT THE** **FUTURE**

37%

of adults 18-64 globally
feel 'very' or 'mostly excited'
about the future

-14% vs. 2016



A10: When you think about the future in general, how do you feel?

Base 2024: 9,260 adults aged 18-64

2024 vs 2016 trend data is among 18 to 49s: Base 2024: 4,980 adults aged 18-49 | Base 2016: 4,647 adults aged 18-49

HOW PEOPLE ARE RESPONDING

MORE OF AN **INNER FOCUS**

MORE SHORT TERM

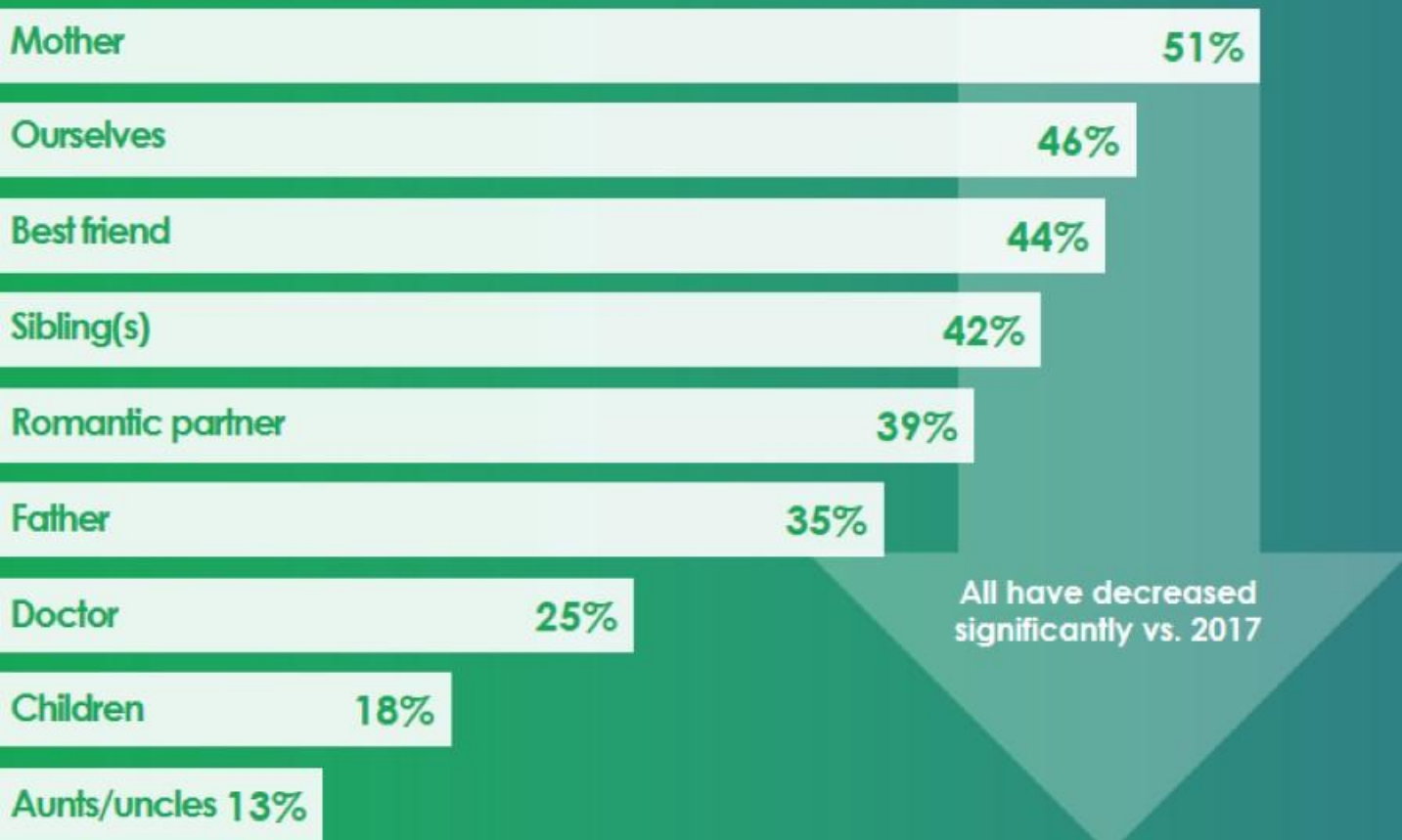


MORE OF AN INNER FOCUS



TRUST IN OTHERS HAS BEEN SHAKEN IN RECENT YEARS

% trusting each of the following...



People are also **less trusting of institutions** such as the police

15%

-28% vs. 2017



All are significantly lower than in 2017 at 95% C.I., among 18-54s
B5a. Which of the following do you trust? Please select all that apply.
Base 2024: 9,260 adults aged 18-64

IN KEEPING WITH THE DECLINE IN TRUST, PEOPLE ALSO NOW HAVE FEWER CLOSE FRIENDS

Average number of best friends...



B3a. How many people would you say are your best friends? B3b. How many people would you say are friends, but not best friends?
2024 vs 2017 trend data is among 18 to 54s: 2024: 7,373 adults aged 18-54 | Base 2017: 6,355 adults aged 18-54

PEOPLE ARE WORRYING LESS ABOUT WHAT OTHERS THINK

I worry about **what other
people think of me...**

58%

I worry about **making my
parents happy...**

46%

I worry about **making my
partner happy...**

44%

All have decreased significantly vs. 2017

All are significantly lower than in 2017 at 95% C.I.

A7a. How much do you worry about each of the following things? E1. Looking at the list of words or phrases below, please rate how well you believe each one describes you personally.

Base 2024: 9,260 adults aged 18-64



MAINTAINING GOOD MENTAL HEALTH IS SEEN AS ESSENTIAL

93%

adults 18-64 globally agree it's
vital to take care of mental health



E4: To what extent do you agree with each of the following statements?
Base: 9,260 adults aged 18-64



GOOD PHYSICAL AND MENTAL HEALTH, AND STABLE FINANCES ARE MOST IMPORTANT RIGHT NOW

Top 3 most important things in life

▲ #1 Health, 51%

▲ #2 Financial security, 42%

#3 Mental health*, 36%

▲ ▼ Significantly higher or lower than 2016 at 95% C.I., among 18-49s;

* Mental Health was only asked in 2024

E3: Which of these are the most important in your life right now? Please select up to 5 responses that are most important

Base 2024: 9,260 adults aged 18-64



FOLLOWING CLOSE BEHIND, FINDING A **GOOD WORK-LIFE BALANCE** AND HAVING **TIME TO RELAX** ARE INCREASINGLY IMPORTANT

% saying this is the most important thing in life...

Work-life balance

26%

+42% vs. 2016

(moved from #12 in 2016 to #5 in 2024)

Time to relax

27%

+45% vs. 2016

(moved from #17 in 2016 to #6 in 2024)



All are significantly higher than 2016 at 95% C.I., among 18-49s;
E3. Which of these are most important in your life right now? Please select up to 5 responses that are most important.
Base 2024: 9,260 adults aged 18-64
2024 vs 2016 trend data is among 18 to 49s: Base 2024: 4,980 adults aged 18-49 | Base 2016: 4,647 adults aged 18-49

MORE SHORT TERM



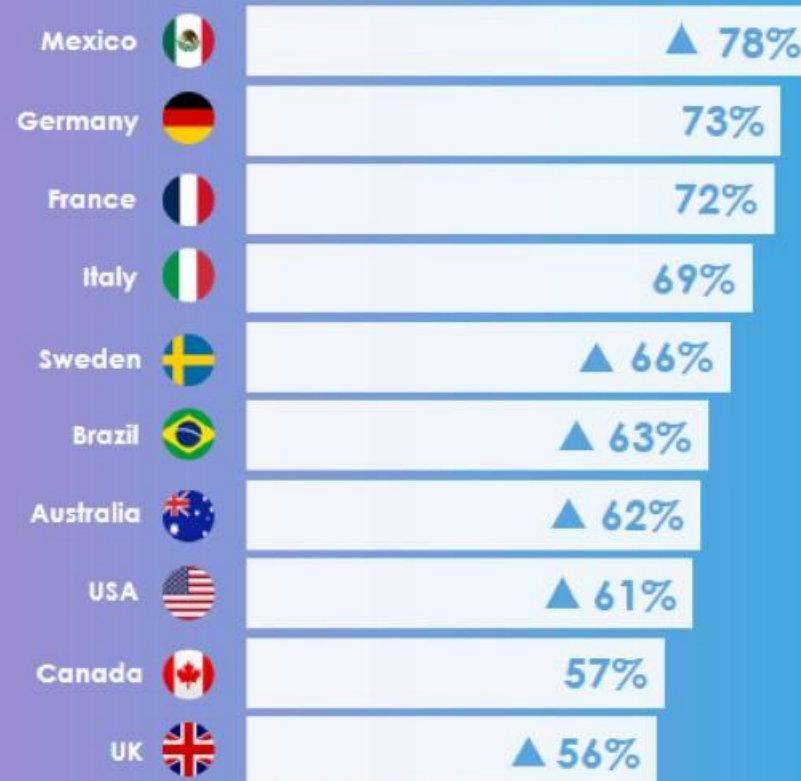
PEOPLE ARE MORE FOCUSED ON THE PRESENT THAN THE LONG-TERM

66%

adults globally agree
**I care more about living
for the moment than
planning for the future**

+22% vs. 2016

% agreeing



▲ ▼ Significantly higher or lower than 2016 at 95% C.I., among 18-49s (+22% overall is significantly higher)

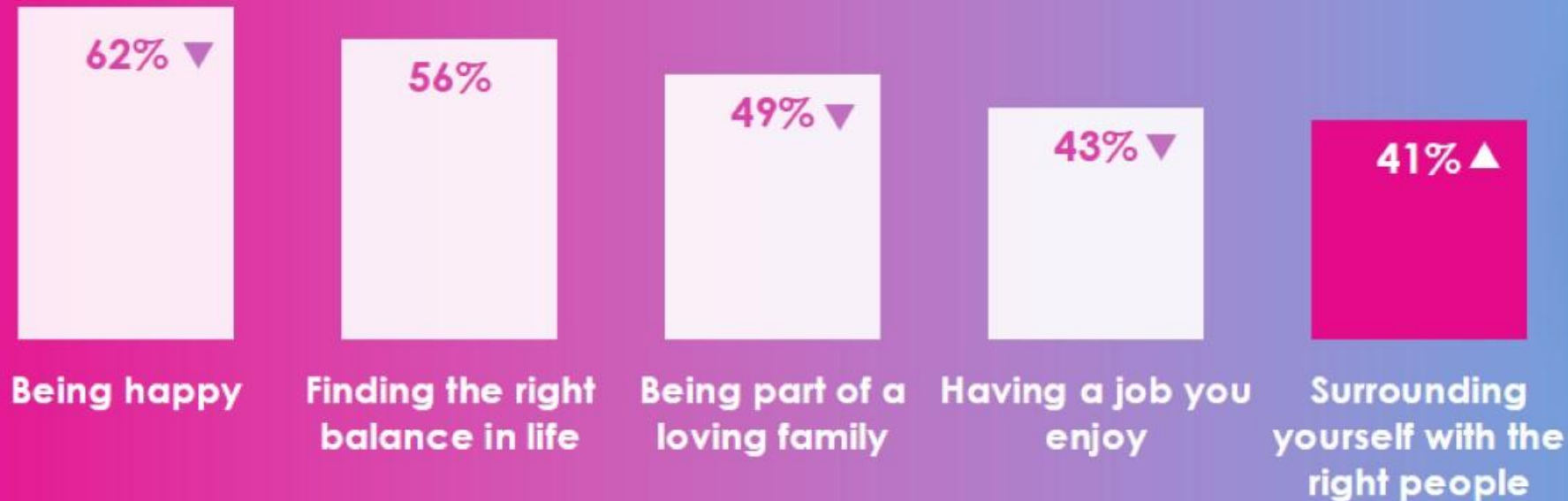
E4 [AGREE] To what extent do you agree with each of the following statements?

Base 2024: 9,260 adults aged 18-64

2024 vs 2016 trend data is among 18 to 49s: Base 2024: 4,980 adults aged 18-49 | Base 2016: 4,647 adults aged 18-49

SUCCESS IS ABOUT HAPPINESS AND BALANCE IN LIFE - BEING SURROUNDED BY THE RIGHT PEOPLE HAS BECOME MORE IMPORTANT TO PEOPLE TODAY

Top 5 signs of success



'Surrounding yourself with the right people' has replaced 'being in a happy romantic relationship' in the top 5



▲ ▼ Significantly higher or lower than 2017 at 95% C.I., among 18-54s

A4. [Ranks 1-5] From the following list what do you consider to be the top five signs of success? Please rank them in order from 1-5 starting with the most important sign for you.

Base 2024: 9,260 adults aged 18-64

BEYOND THE TOP 5,
SUCCESS IS
INCREASINGLY
DEFINED BY
**AUTONOMY AND
CONTROLLING
WHATEVER YOU CAN**

Owning your own home (+9%)

Being well-travelled (+11%)

Being in control (+17%)

Being rich (+30%)

Having a nice car (+25%)

Signs of success increasing vs. 2017
(ordered on overall level of importance)



All are significantly higher than 2017 at 95% C.I., among 18-54s

A4. [Rank 1-5] From the following list what do you consider to be the top five signs of success? Please rank them in order from 1-5 starting with the most important sign for you.

Base 2024: 9,260 adults aged 18-64

2024 vs 2017 trend data is among 18 to 54s: 2024: 7,373 adults aged 18-54 | Base 2017: 6,355 adults aged 18-54

EVEN MORE THAN IN THE PAST, **HOME IS A SAFE HAVEN** THAT IS CENTRAL TO PEOPLE'S IDENTITIES

% strongly agree Home is a **sanctuary**
from the outside world



% strongly agree Home is an
essential part of who I am



Both +15% are significantly higher than 2020 at 95% C.I., among 25-64s

C14. We would like to understand, generally, what feeling 'at home' means to you. Please let us know how much you agree or disagree with the following statements.

Base 2024: 9,260 adults aged 18-64

2024 vs 2020 trend data is among 25-64s: Base 2024: 5,578 adults aged 25-64 | Base 2020: 4,600 adults aged 25-64

IN A WORLD FULL OF TURMOIL, HOME IS A PLACE OF REFUGE

Top 5 things MOST represent the feeling of home

- #1 I feel **safe**
- #2 I can **relax**
- #3 I feel **comfortable**
- #4 I feel **loved**
- #5 I feel **at ease**

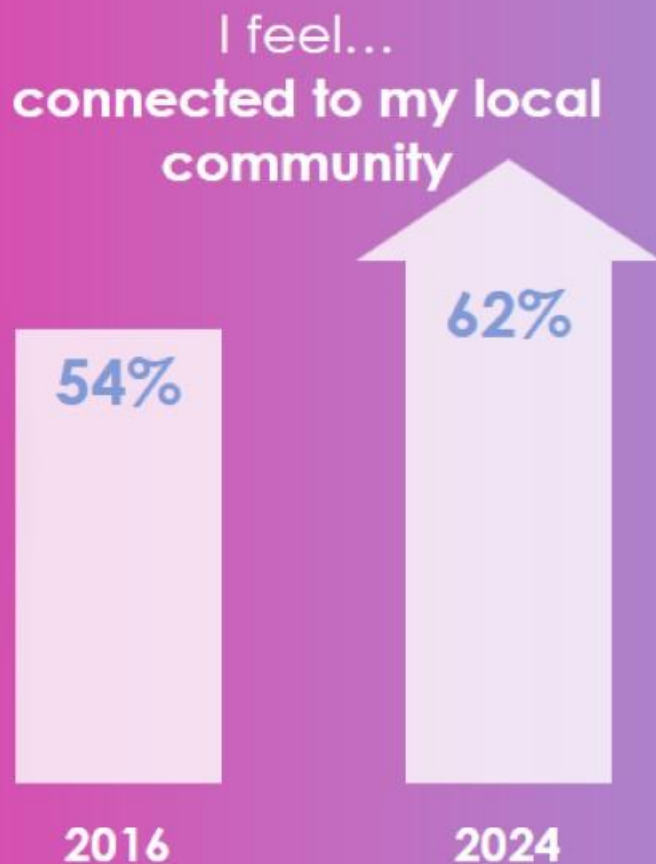
The top 4 are significantly higher than 2020 at 95% C.I., among 25-64s C13b. From the options you just selected, which of the following MOST represent the feeling of home? Please select 3 responses from most to least important.
Base 2024: 9,260 adults aged 18-64



AS PEOPLE FOCUS MORE ON THEIR HOME LIVES, THE **BOND WITH THEIR LOCAL COMMUNITIES** HAS GROWN

Helping people in
my community has
increased by

+13% vs. 2017
as a driver of
happiness



▲ ▼ Significantly higher or lower than 2016 at 95% C.I., among 18-49s
E4. To what extent do you agree with each of the following statements?
2024 vs 2016 trend data is among 18 to 49s: Base 2024: 4,980 adults aged 18-49 | Base 2016: 4,647 adults aged 18-49

ALONGSIDE THIS MORE LOCAL FOCUS IS A DECLINING INTEREST IN THE REST OF THE WORLD

It's important to...
follow world events

-79% vs. 2016

It's important to...
make a difference in the world

-47% vs. 2016



Both are significantly lower than 2016 at 95% C.I., among 18-49s
E3. Which of these are most important in your life right now? Please select up to 5 responses that are most important.
2024 vs 2016 trend data is among 18 to 49s: Base 2024: 4,980 adults aged 18-49 | Base 2016: 4,647 adults aged 18-49

IMPACT ON PEOPLE'S HAPPINESS AND SELF- PERCEPTION



BY FOCUSING INWARD AND ON WHAT'S IMMEDIATELY
IN FRONT OF THEM, REPORTED LEVELS OF **HAPPINESS**
REMAIN HIGH AND UNCHANGED FROM 2017

7 in 10

adults 18-64 globally
rank their happiness as 7+ out of 10



No change vs. 2017

A1. On a scale from 1 to 10 where 10 equals extremely happy and 1 equals not at all happy, how happy would you say you are in general?

Base 2024: 9,260 adults aged 18-64

2024 vs 2017 trend data is among 18 to 54s: 2024: 7,373 adults aged 18-54 | Base 2017: 6,355 adults aged 18-54



THEY'RE ALSO FINDING AN INNER STRENGTH, WITH THEIR SELF-CONFIDENCE AND ADAPTABILITY INTACT

I feel confident in
making decisions

84%

I feel comfortable
with who I am

84%

Describe myself as 'flexible,
adapt to change quickly'

85%

All have increased significantly vs. 2016*

All are significantly higher than in 2016 at 95% C.I., among 18-49s; *vs 2017 among 18-54s
E4. To what extent do you agree with each of the following statements? / E1. Looking at the list of words or phrases below, please rate
how well you believe each one describes you personally.
Base 2024: 9,260 adults aged 18-64



PEOPLE ARE FINDING THEIR OWN VOICE AND STANDING UP FOR THEIR BELIEFS

90%

agree, people should
stand up for what they believe in



F1: Looking at the statement below, please tell us how much you agree or disagree with what is being said
Base 2024: 9,260 adults aged 18-64

PEOPLE INCREASINGLY BELIEVE THAT NO ONE'S GOING TO STOP THEM FROM ACHIEVING THEIR LIFE GOALS



70%

agree if I want to do
something no one's
going to stop me

A3. How much do you agree or disagree with each of the following statements...

Base 2024: 9,260 adults aged 18-64

2024 vs 2017 trend data is among 18 to 54s: 2024: 7,373 adults aged 18-54 | Base 2017: 6,355 adults aged 18-54

Significant increase vs. 2017

SUMMING UP



**AMIDST GLOBAL UNCERTAINTY AND
RISING STRESS, PEOPLE ARE INCREASINGLY
FOCUSING ON THE PRESENT**

**THEY'RE PRIORITIZING THEIR WELL-BEING,
MENTAL HEALTH, FINANCIAL SECURITY**

**AND FINDING STRENGTH IN SELF-
CONFIDENCE AND ADAPTABILITY**

PEOPLE ARE FOCUSING ON:



Maintaining **good physical**
and **mental health**



Making practical career
choices – **prioritizing higher
pay and work-life balance**
over career fulfillment



Their **home** as a **place of
emotional safety**



Standing up for what's right
and worrying less about what
others think



**Finding connection in their
local community**, rather than
the world at large



Surrounding themselves with
the **right people**

THANK YOU

