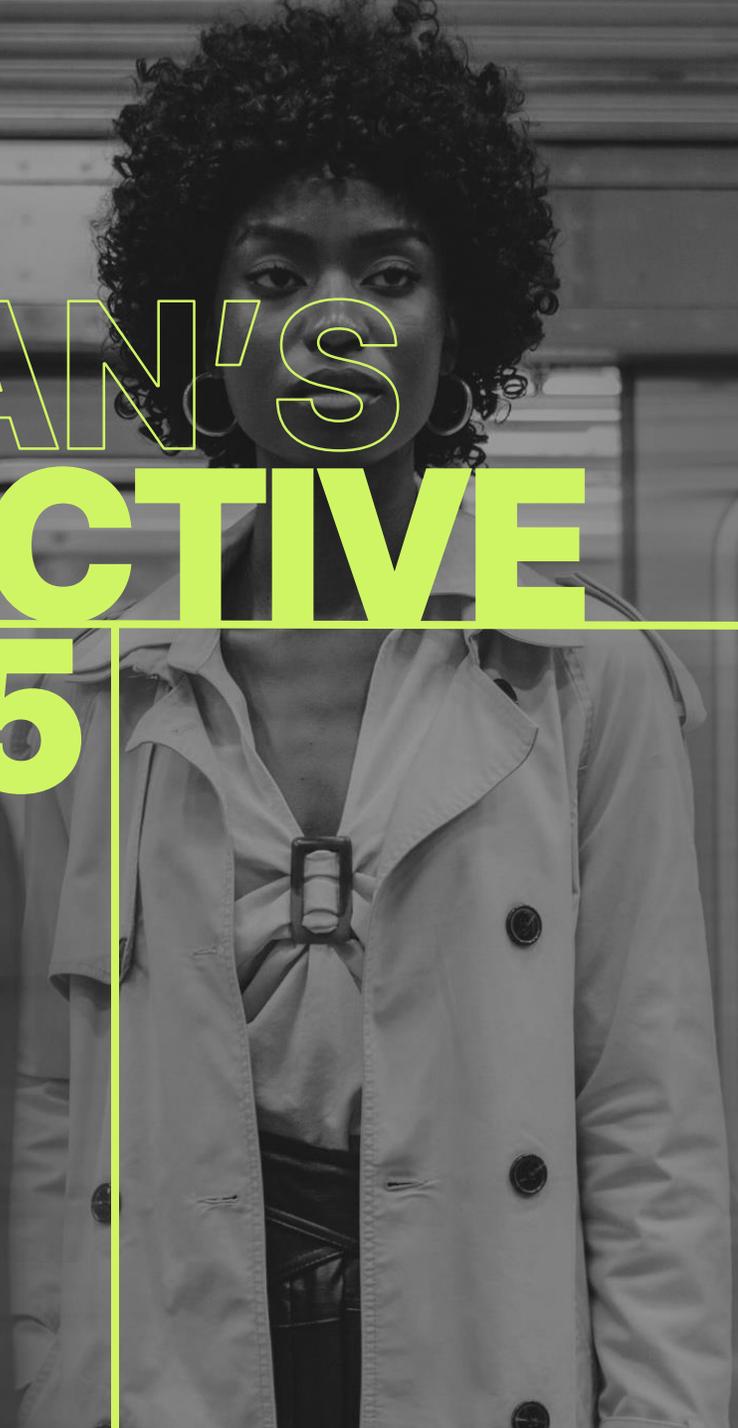




EDELDMAN'S PERSPECTIVE ON 2025

TIPPING POINTS





FINDING THE MEANS TO ACT

In what is likely to be a dynamic and volatile environment, communicators have a critical role to play in helping business and society navigate 2025.

As a bridge with the outside world, the insight and knowledge communicators bring to business empowers leaders with the means to act. Doing so successfully in 2025 will mean looking beyond short-term trends and crises to identify deeper cultural forces nearing their tipping points.



THIS IS OUR FOURTH YEAR TRACKING THE MEGA-TRENDS **IN COMMUNICATIONS**

2022

The Road Back to Hope

The role for business in rebuilding hope as we build back from COVID-19.

2023

The Search for Stability

How brands and business can help people find stability in an age of constant disruption

2024

Reasons to Look Forward

How brands and business can help people find the optimism they need to move forward.

2025

Tipping Points

In volatile times, advantage comes from understanding what's at the tipping point.



OUR PERSPECTIVE ON 2025: TIPPING POINTS

In this report, we will investigate six cultural forces that we believe are approaching a tipping point* that will transform the relationship that brands and business have with their stakeholders.

By understanding how these forces are reshaping our world, communicators can help business drive trust and find growth.



* ***Tipping point***: a critical juncture at which unstoppable change takes place
Merriam Webster



TRACKING THE TIPPING POINT



Trends to watch as they gather force



Trends to act on in 2025



Stay alert for reaction and backlash

nascent

New forces
to culture

emerging

Gathering
momentum

tipping point

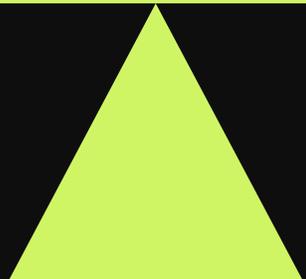
Approaching mass
knowledge or awareness

mainstream

At level of
mass adoption

backlash

Time for
something new





1

ANTI- HYPERSTIMULATION

For several decades, our culture of consumption has been about more, more, more. Our media lives have become richer, our lives fuller of stimulation and concerns over the welfare of people's attention spans have grown exponentially.

There are signs, however, that in some places we are reaching the outer limits of what it's possible to pay attention to and are seeking a more choiceful relationship with the media we consume.

A woman with her hair styled in a bun, wearing a blue and white patterned shirt and brown pants, is seated at a dark table. She is looking towards the left. On the table in front of her is a white mug and a microphone on a stand. The background is dark with some greenery visible on the left. The overall scene is lit with a warm, studio-like light.

THE NEW PLAYBOOK FOR EARNED

The 2024 US Presidential election was a watershed moment that finally up ended the established playbook for earning attention and trust. This will be a challenging environment for brands to navigate, but a huge opportunity for earned to show what it does differently – and better – than advertising.



← **Trend 1**
NICHE IS THE NEW MAINSTREAM
 (mainstream)

↑ **Trend 2**
ULTRA-LONG TRUMPS SHORT-FORM
 (tipping point)

↑ **Trend 3**
DOING IT FOR THE ALGORITHM
 (tipping point)

Joe Rogan crowns Presidents, The Observer might be owned by a podcast company, and South Africa's debates exist thanks to a comedian-turned-YouTuber. Niche media is mainstream and understanding this is vital when 4 in 10 people avoid news altogether.

Advertisers fight for attention in a second, but streamers, YouTubers, and podcasters thrive as audiences seeking depth turn to their ultra-long content. Cutting through in a multi-hour era will involve rethinking messaging and media training.

Whether or not they do upweight content, algorithms now actively shape creation. From photodumps to 'flexing for the algorithm' or chasing ever faster content production through AI, creators now see their primary audience as a piece of code.



THE POWER AND VALUE OF BOREDOM

When everyone is connected and stimulated all the time, being bored has become both a luxury and a social flex. Brands have an interesting role to play in helping consumers find stillness and reset their relationship with media.



→ **Trend 1**
DOPAMINE FASTING
(nascent)

Dopamine fasts and extreme meditation are new wellness trends that detox people from 'junk' stimulation. While the science behind them is shaky, their popularity captures a yearning to reset our relationship with stimulation and pleasure

[Why's everyone so obsessed with dopamine?](#)

→ **Trend 2**
LET KIDS BE BORED
(emerging)

Boredom is character forming again, and childhood development experts are positively advocating for boredom as a phenomenon within children's lives that parents should embrace rather than avoid.

[Let kids be bored: it's good for them](#)

↑ **Trend 3**
REAL MEN RAWDOG
(tipping point)

The ultimate flex for men in 2024 was rawdogging long-haul flights. It's ironic that many did it just to post it online, but rawdogging is a signal that men want to demonstrate the strengths of their minds as well as their bodies.

[No films, no music, no sleep: Is 'raw-dogging' long flights heroic or foolish?](#)



2

FROM EXPLORATION TO PROTECTION

The era of discovery and openness that connected the world and created phenomena like the digital nomad is in retreat. In a world of low growth, job insecurity and increasing doubt in the benefits of innovations such as AI, people are looking for security, protection and limits. The brands and business that help provide these will find trust and growth.



GLOBAL CULTURE PASSES ITS PEAK

In his book 'Filterworld', cultural commentator Kyle Chayka put his finger on technology's role in creating a global aesthetic that makes going into a café in Bologna or Bogota an oddly similar experience. However, this long-term trend for homogenisation and borderless commerce is now going head-to-head with anti-globalisation and the desire to return to a slower, less tech-intermediated way of living.



→ **Trend 1**
**CLICKTIVISM
TO ACTIVISM**
(emerging)

→ **Trend 2**
**AGAINST
GENTRIFICATION**
(nascent)

↑ **Trend 3**
**GRIMY BEATS
SHINY**
(tipping point)

Lending your support is no longer a matter of sharing a meme, it's about showing up. From the growth of mutual aid networks to widespread support for unions among Gen-Z, a new generation is putting the action back into activism.

Summer 2024's anti-tourist protests in Europe are just the latest wave of action pushing back against gentrification. This will intensify in 2025, putting pressure on global brands to show they appreciate the dynamics of the markets where they operate.

In a world where Charli XCX's is challenging Taylor's cultural relevance, and London's hottest restaurant is a Londis selling Gujarati curry it's hot to be messy. Standing out in 2025 means acknowledging the collapse of boundaries between high and low production.

EMBRACING LIMITS

Whether they're spending more intentionally or limiting their children's screen time, people today are increasingly proud of their ability to show constraint. They will reward the brands who help them live these more disciplined lives with their loyalty.





Trend 1

**LET KIDS BE
(PHONELESS)
KIDS**
(emerging)

Digital native parents are rejecting tablet parenting in favour of movements like Smartphone Free Childhood. While brands haven't yet activated here, EE's UK intervention shows room for tech and communications to act as allies.

[A growing number of parents are refusing to give their children smartphones — and the movement is going global](#)



Trend 2

**ALCOHOL IN A
NEW AGE OF
TEMPERANCE**
(tipping point)

From Stoptober to 'sober curious' trends and blunt health studies, drinking habits in the global west are shifting from routine to intentional. This is an opportunity for drinks brands to rethink their role in consumers' lives.

[Millennials drive no alcohol gains in the US](#)



Trend 3

**GEN-Z'S WORK
PRAGMATISM
SPREADS**
(nascent)

Gen-Z's pragmatic approach to work is gaining traction. With retirement prospects fading and job security uncertain, their preference for long careers with breaks, side gigs, and portfolio roles is becoming the new normal.

[The most annoying thing about young people at work is they are very often right](#)



3

LIVING IN AN OLD WORLD

We need only look at our leaders to see how important older people now are. In politics, Donald Trump, Lula and Nancy Pelosi are all power brokers into their 80s, while the presence and importance of older women in culture has never been higher. This shift raises question about our future when youth – the traditional engine of production and consumption – is in short supply. Where are the opportunities in managing the needs of an ageing world?



AGEOVATION

There are now more people over 55 alive today than there are children under five. This changes the commercial landscape for everything from FMCG to fashion and tech. Smart businesses have already started reconfiguring products and categories that targeted younger consumers to the needs of older populations.





Trend 1

**MATURE TECH
FOR MATURE
USERS**
(emerging)

Smart businesses are already innovating with older consumers in mind. FDA-approval for AirPods as hearing aids adds a new use case for headphones while T-Mobile's updated 55+ plans shows how older consumers' needs from tech are varied and dynamic.

[Apple gets FDA authorization to turn the AirPods Pro into hearing aids](#)



Trend 2

**NPD TO NOURISH
AN AGEING
WORLD**
(tipping point)

As demand for formula milk slides, companies ranging from Nestle to China's domestic dairy giants are reformulating their products to deliver optimal nutrition to older adults, targeting growing needs such as higher GI control.

[Nestlé CEO says feeding ageing populations a priority as birth rates fall](#)



Trend 3

**MAKING OLDER
LIFE A WORK
OF ART**
(nascent)

The bare functionality of 'accessible' products often evokes a care home vibe, clashing with people living their best lives. This is changing with accessible yet stylish designs like Remsen's homewares or Arc'Teryx's assistive hiking trousers.

[Meet the Design Company Taking the Stigma Out of Aging](#)



THE FIGHT AGAINST AGEING

An ageing world doesn't mean the stigma attached to being or seeming old has disappeared. If anything, anti-ageing is back.

Pharmaceutical tweakments make it easier than ever to defy gravity, while popular culture is turning on the concept of ageing as a fact of life to be embraced, reframing it as an unfairness to be resisted at all costs.



Trend 1

THE MANOPAUSE MAINSTREAMS (tipping point)

Driven by the growing comfort with anti-ageing therapies for erectile dysfunction and hair loss, the andropause market is booming. The testosterone replacement therapy market in the US alone is set to reach \$2.59 billion by 2031.

[Testosterone therapy market snapshot](#)



Trend 2

DEFYING THE AGEING EXPERIENCE (nascent)

Cult hit 'The Substance' did more than revitalise Demi Moore's film career. Its portrayal of a woman at odds with her age and herself revealed deep cultural anxieties about ageing, which companies like Bryan Johnson's \$333-a-month diet service seek to avert.

[Bryan Johnson's anti-ageing Blueprint is now available](#)



Trend 3

THE AGE OF INEQUALITY (emerging)

While wealthy consumers hope to avoid ageing, the picture is different for those with fewer resources. Without action from government and business, millions face old age in poor health.

[The state of ageing 2024: Centre for Ageing Better research](#)



4

MIDLENNIALS

As the world's first totally online cohort ages out of their youth, the golden glow that surrounded millennials is fading. What this cohort does next as age and experience challenges the values that were supposed to define their generation will have far reaching consequences for everyone from employers and governments to brand marketers.

LIFE AFTER THE GREAT UNBOSSING

High layoffs in tech, consulting, finance and creative business that defined the aspirational working culture of the 00s and 10s have hit millennial workers hard. This brings professional, financial and psychological reckonings to a generation who believed they could find their purpose through meaningful work.





→ **Trend 1**
**MIDDLE
MANAGEMENT
LOSES LUSTRE**
(emerging)

The safe, well-paid middle management roles many millennials aspired to are increasingly vulnerable to AI. This is discouraging Gen Z from pursuing management and prompting 79% of AI-savvy millennials to consider less automatable jobs.

[Millennial managers are getting axed](#)

↑ **Trend 2**
TRADLIFING
(tipping point)

Millennials were set to achieve double-income equality, but trends like the tradwife ideal and the grim 'your body, my choice' meme revive regressive gender norms. In 2025, brands have a chance to build trust by showing how they support women.

[Why are we drawn to the tradwife fantasy?](#)

→ **Trend 3**
**WIDENING
THEIR
NETWORKS**
(nascent)

At a time when their parents' worlds were shrinking, millennials are growing their personal and professional networks. 47% are LinkedIn users, while brands tap into the 'making friends in your 30s' trend with 'Tinder for friends' tech and group holidays.

[How to make friends in your 30s](#)

LIVING MIDDLE LIFE THEIR WAY

As millennials reach the point in life typically dominated by parenthood and long-term relationships, it would be easy to see the life stage not the person. Yet the delicate balance of caution and optimism that made them such an interesting challenge for communicators and marketers is still there, just showing up in different places.





→ **Trend 1**
THE UNEXPECTED STABILITY OF MILLENNIAL MARRIAGE
 (emerging)

Delayed marriage due to financial pressures and shifting priorities may explain millennials' lower divorce rates. When marriages do end, services like [Amicable](#) show a preference for conscious uncoupling over messy divorces.

[Seeking amicable divorce](#)

→ **Trend 2**
OPTIMISING EVERYTHING
 (emerging)

Millennials' belief that tech drives self-improvement persists. From rings that turn a sleep score into a status symbol to services that help them helicopter parents to their own mums and dads they're looking for ways to optimise and automate their responsibilities.

[Millennials helicopter parenting their own parents](#)

↑ **Trend 3**
THE EAST-WEST DIVIDE IN MILLENNIAL HEALTH
 (tipping point)

Obesity may have peaked in the US, with treatments like Ozempic tackling middle-aged spread and future health risks. Among Chinese and Indian millennials, however, heart disease and diabetes are growing risks thanks to stress, smoking, alcohol and western diets.

[Indians Experiencing Heart Attacks 10 Years Earlier Than the West](#)



5

ALTERNATIVE GROWTH

Growth is the preoccupation that keeps politicians, economists, and CEOs up at night. While business has managed to engineer some successfully out of challenging conditions for several years, a sombre macroeconomic picture questions whether their tried-and-trusted approaches are effective or sustainable in the longer term.

This has prompted a deeper philosophical discussion about growth itself. What kind of growth should the world be pursuing?



THE END OF PREMIUMISATION

(for now)

Revenge spending in the Covid era prompted brands and business worldwide to premiumise. This, and the cost-of-living crisis that followed, pushed the profitability of everything from eggs to Glastonbury tickets to unprecedented heights. There are signs, however, that businesses who find growth in 2025 will be those that pull carefully on the premiumisation lever.



↑ **Trend 1**
GROWING
AFTER
'GREEDFLATION'
(tipping point)

↑ **Trend 2**
THE SWEET SPOT
BETWEEN VALUES
AND VALUE
(tipping point)

→ **Trend 3**
SECOND-HAND
NEWS
(emerging)

In 2024, inflated prices hit everything from festivals to luxury fashion. As price sensitivity grows, brands must communicate value. Hermès sets the standard, justifying the expenses behind each price tag and which make its products a mark of discrimination not consumption.

Mass brands thriving in this environment position themselves as 'trade-down' options for people with disposable income. Chipotle excels here, backed by smart comms that highlight its value for money and its shared values with customers and Gen Z employees.

Buying vintage is how you flex thrift, taste, and ethics in 2025, with growth from Ebay and Vinted driving this to a \$350bn market by 2030. Designers are now even taking cues from trends in the secondary market, as seen in Takashi Murakami's return to Louis Vuitton.

[Hermès defies downturn in luxury shopping to outshine rivals](#)
[Hermès CEO challenges notion of expensive](#)

[How Chipotle thrives in a downturn](#)

[Second-hand style will make up 10% of market in 'seismic shift' for sector](#)

ENTERING AN AGE OF ABUNDANCE

Whether it concerns the planet, the economy or government, it's striking that the dominant narrative of the past century is scarcity. This may be about to change as technological developments usher in an era where we have more of hitherto scarce resources than we know what to do with.

How we choose to spend this abundance will have important implications for our future.



→ **Trend 1**
**SELLING
LIMITLESS
ENERGY**
(nascent)

As renewables floods the grid, producers have an interesting challenge: selling price-negative energy. What economies do with 'excess' energy could spur a new wave of innovation in energy storage and reframe our relationship with energy itself.

[Electricity storage is the next play for AI investors](#)

→ **Trend 2**
**WORKING
WITH INFINITE
INTERNS**
(emerging)

Fifty years ago, accounts staff worked like cells in a spreadsheet. Now AI handles admin-heavy 'email jobs,' freeing workers from thankless admin while raising a question: how do you prove your value when AI does the busywork?

[Why AI is like infinite interns](#)

→ **Trend 3**
**THE RIGHT
WAY TO
GROW**
(nascent)

Every industrial revolution has its Karl Marx. Today's may be emerging through the philosophies of de-growth, green growth, and post-growth. These once marginal ideas are starting to influence policymakers and businesses.

[Slow down to save the planet, says Japanese philosopher Kohei Saito](#)



6

INTO THE MEATAVERSE

Contrary to what we were led to expect in 2021, the metaverse is not quite here yet. This doesn't mean that the digital and physical are not continuing to converge, however. They're just mostly going in the opposite direction into 'meatspace', with AI and social media increasingly working to take the online offline.



AI INFLUENCING HUMAN CREATIVITY

While the artistic community's fears over what AI means for their future remain, there are signs of a more dynamic, playful relationship between AI and human creativity than many predicted.



→ **Trend 1**
IS IT FASHION
OR AN AI
HALLUCINATION?
 (emerging)

Fashion designers mining their archives are blurring the line between catwalk creations and AI hallucinations. Prada's Spring Summer 2025 collection at Milan Fashion Week celebrated this with airbrushed effects, filters, and 'impossible' garments.

[Enter the doomscroll: Prada SS25 is preparing you for life by algorithm](#)

↑ **Trend 2**
NEW RULES
 (tipping point)

Creators sound and act different these days. That slow, flat tone they use now helps game the algorithm amid a sea of AI-voiced content. And those 'how to' videos they've started posting – a landgrab for eyeballs as social networks become search engines

[Gen Z Dumping Google For TikTok, Instagram As Social Search Wins](#)

→ **Trend 3**
THE ARTIST'S
MODEL
 (nascent)

While many artists remain suspicious of AI, others are using it to push the boundaries of what art could be. Ai Da, a humanoid robot, paints with a robotic arm and camera eyes, while London's Serpentine exhibition The Call turns AI training into a musical collaboration.

[Painting by an AI robot sells for more than \\$1 million](#)

TAKING THE ONLINE OFFLINE

In every sphere of culture from fashion to food and fragrance, the aesthetics and experiences of digital life are coming to meatspace, where they can be explored with the full range of sensory pleasures.





Trend 1

THE SMELL OF SUCCESS
(emerging)

Fragrance has moved from the margins to centre stage with 40bn views on PerfumeTok. Now that they have 'decoded' the category online, perfumiers and creators are using this buzz to draw consumers into immersive, sensory brand experiences.

[PerfumeTok and the fragrance renaissance](#)



Trend 2

GAMING INVADES MEATSPACE
(tipping point)

For a generation raised on gaming, real-world fun looks like experiences that bring gaming into meatspace. Just like at Super Nintendo World, where visitors collect coins, battle baddies, and explore the park as though they were Mario.

[TNT Sports plans video game-inspired alternative broadcasts for NBA Cup knockout rounds](#)



Trend 3

THE NEW TASTEMAKERS
(emerging)

Pandan is the new vanilla, chocolate gets a Middle Eastern twist, purple yam reshapes confectionery, and karak chai and boba are coming for coffee. Treats are shifting east, with Dubai emerging as an entrepot for global food trends.

[The Sweet, Colourful Curse of Instagram and TikTok in London's Chinatowns](#)



NAVIGATING THE TIPPING POINTS IN 2025

What 2025's Tipping Points mean in practice depends on the needs of your organisation. But as you enter 2025, here are a few starting thoughts as to whether you're ready to seize the opportunities they bring

INSIGHTS

Do you feel equipped to navigate the tipping points we expect in 2025?

Do you have the insights you need to identify, track, and pre-empt the tipping points that are around the corner?

Are your leaders informed of the new media environment they are going into?

AUDIENCES

Do you recognise your audiences in these trends?

Do you have the insights you need on how your audiences are experiencing their own tipping points?

How can your brand show it understands where a product's value intersects with consumers' values.

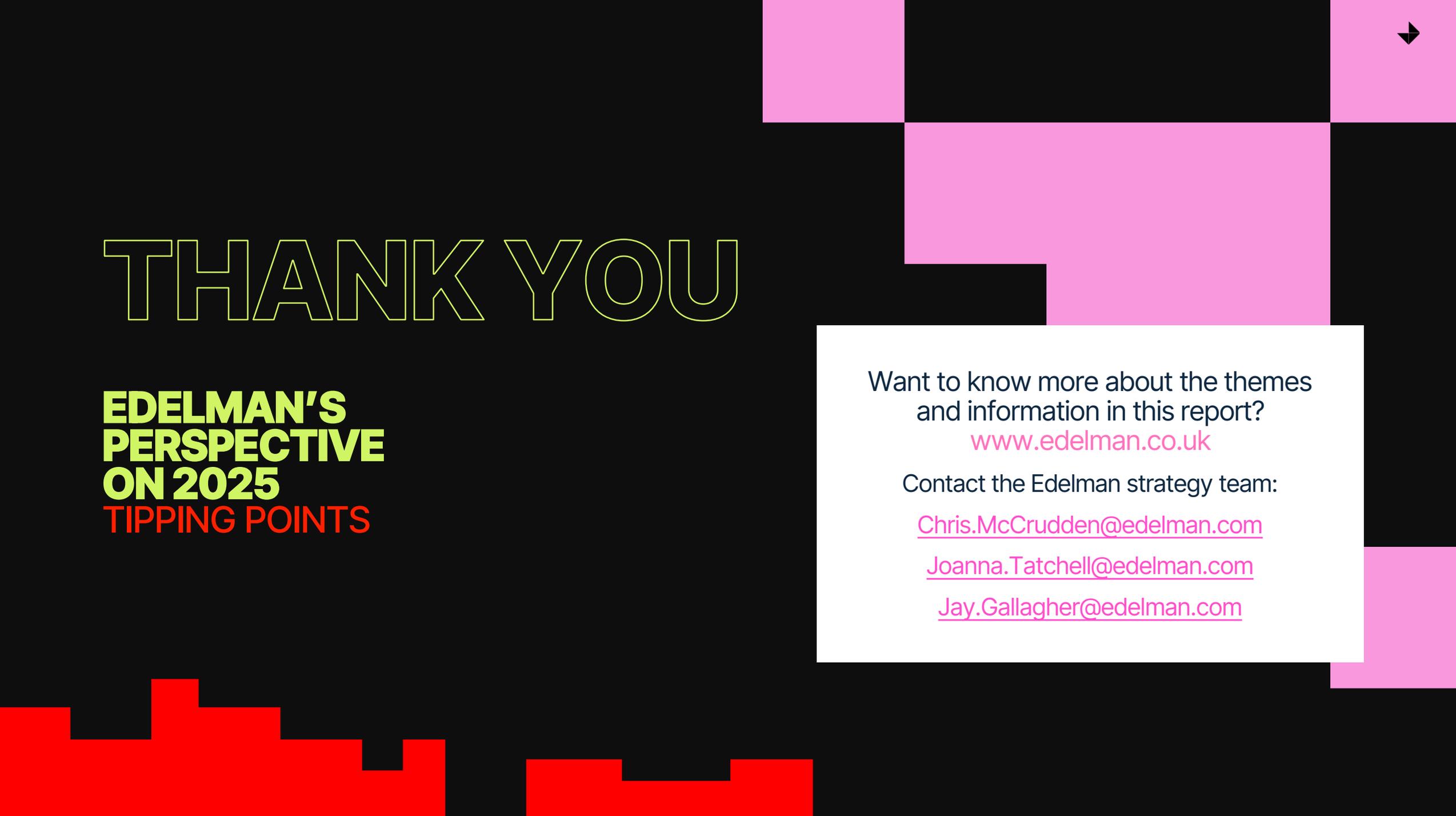
CULTURAL RELEVANCE & INNOVATION

How are you ensuring cultural relevance?

How are you assessing the actions you take as a company, and as an individual?

How well defined is your permission space?

Do your innovation stories have a point of view on how they help people get the most out of their longer, fuller lives?



THANK YOU

**EDELMAN'S
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TIPPING POINTS

Want to know more about the themes
and information in this report?

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