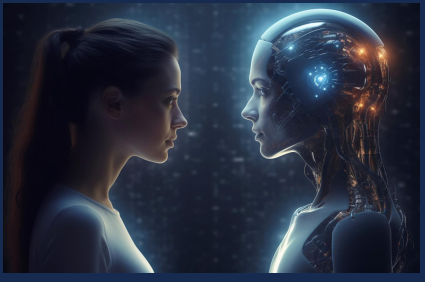
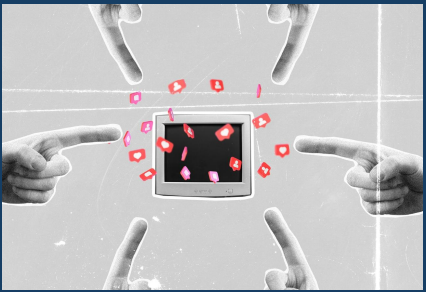


PFinsights 2025

Our bite-sized updates on trends and current affairs will provide you with food for thought and inspiration.



“Dawn Breaks, Which Is No Small Thing”

The sun comes up every day. We make decisions every day, in every moment. Constantly something is happening.

Our daily lives are filled with simple yet significant events. After all, making a decision is undoubtedly an event; a small milestone that shapes our destiny.

We're using the title of the surrealist movie ***Dawn Breaks, Which Is No Small Thing***, directed by José Luis Cuerda (originally known as “Amanece, que no es poco”, to dress up and elevate an act that may seem trivial to us, but which, deep down, isn't: Every decision (like every dawn) is an event.

As in that film, our decisions today are made in a strange context. In **Dawn Breaks, Which Is No Small Thing**, surrealism permeated everything. Our real world and society are undergoing a period of profound transformation. Events are unfolding that we would rarely have predicted some years ago: new technologies, new forms of intelligence, new values, and resurrected political currents. Together, these shape a social framework with pseudo-surrealist overtones, much like in that celluloid tale.

Indeed, this is no small matter. Because each time a consumer chooses a brand, signs up for a service or acts on a message, another chapter in their relationship with the brand is written.

The e-book you are browsing, compiles our PFinsights from 2025, a year which is now drawing to a close. PFinsights are brief yet valuable insights into social trends. We believe that they provide a framework that helps us to read between the lines and make sense of events in consumers' day-to-day lives. These events shine a spotlight on the small aspects of everyday life that make the analysis of our society so stimulating.

Punto de Fuga - Your Research Team

PFinsights 2025

#23



LOYALTY PROGRAMMES

A timeless formula that crosses generations

#24



REMOTE WORK

A reality only for some. However, it is a priority for the younger generations.

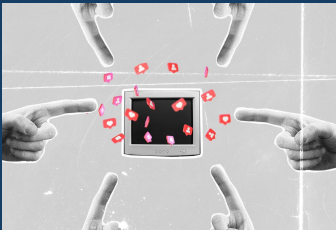
#25



PODCAST MOMENTUM

Authenticity in times of distrust

#26



MEDIA CHANNELS THAT (MIS)INFORM:

Convenience vs Credibility

#27



HOLIDAYS

The thrill of planning and sharing them

#28



MICRO-RITUALS

Simple things that keep us happy and healthy

#29



YOUNG PEOPLE HUMANISE AI

a companion instead of a stranger;
a confidant instead of an engine

#30



SPAIN LOVES COOKING

...yet hates deciding what to eat.

#31



SOLIDARITY IN THE FACE OF THE STATE OF THE WORLD

Acting when it hits close to home.

23



LOYALTY PROGRAMMES

A timeless formula that crosses generations.



Loyalty Programmes:
A timeless formula that
crosses generations.

9 out of 10 people take part in a loyalty programme.

Differences by generation

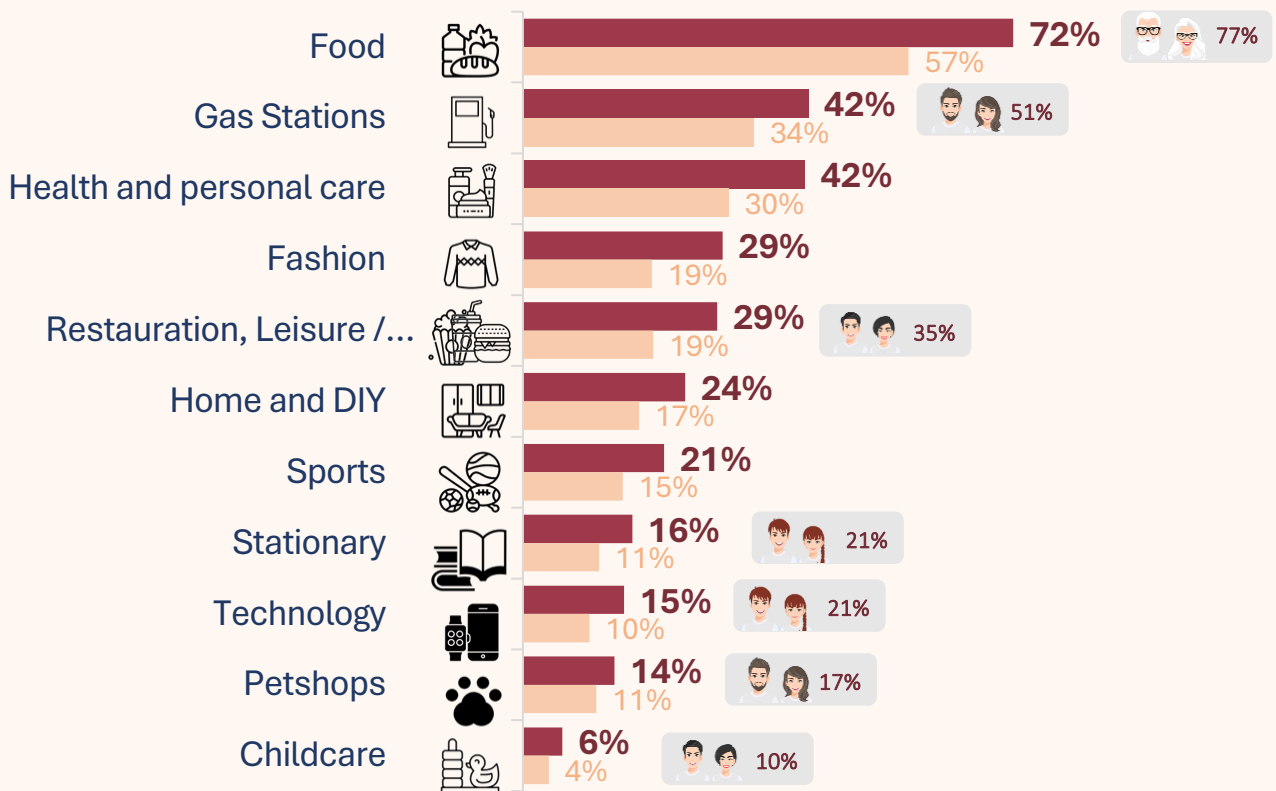


Gen Z	Millennials	Gen X	Boomers
88%	91%	92%	87%



The most common sectors are food, petrol stations and personal care. Among young people, “leisure” is also popular.

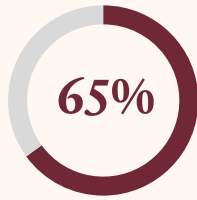
■ Members of Loyalty Programme ■ Using it always



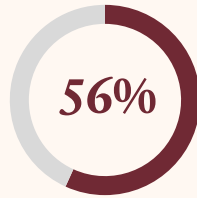
ATTITUDES AND PREFERENCES REGARDING LOYALTY CARDS

70% like loyalty cards

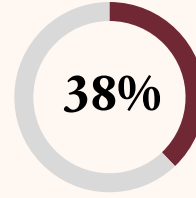
% VERY MUCH + QUITE A LOT



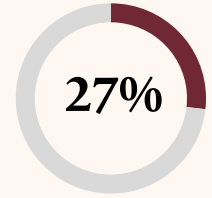
Accumulating credit for discounts on future purchases



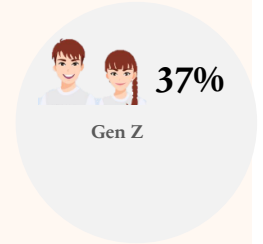
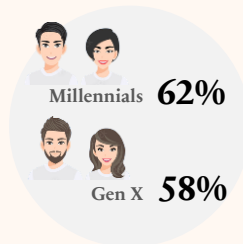
Direct discount



Point programmes to earn gifts



Free products



Accumulating credit and receiving direct discounts are the preferred option. Among Gen Z, direct gifts are also popular.

REASONS FOR HAVING A LOYALTY CARD

Over 70% are receptive and tend to buy more if they have a loyalty card



Technical details

Online survey

n= 1,308 people

Aged 18 and over, living in Spain

Proportional distribution by gender, age and region.



Punto de Fuga
THE VALUE OF PEOPLE INSIGHT

24



REMOTE WORKING:

A reality only for some. However, it is a priority for the younger generations.



Remote working:

A reality only for some. However, it's a priority for the younger generations.

A reality only for some 3 in 10 are currently teleworking

Higher incidence among Millennials (39%)

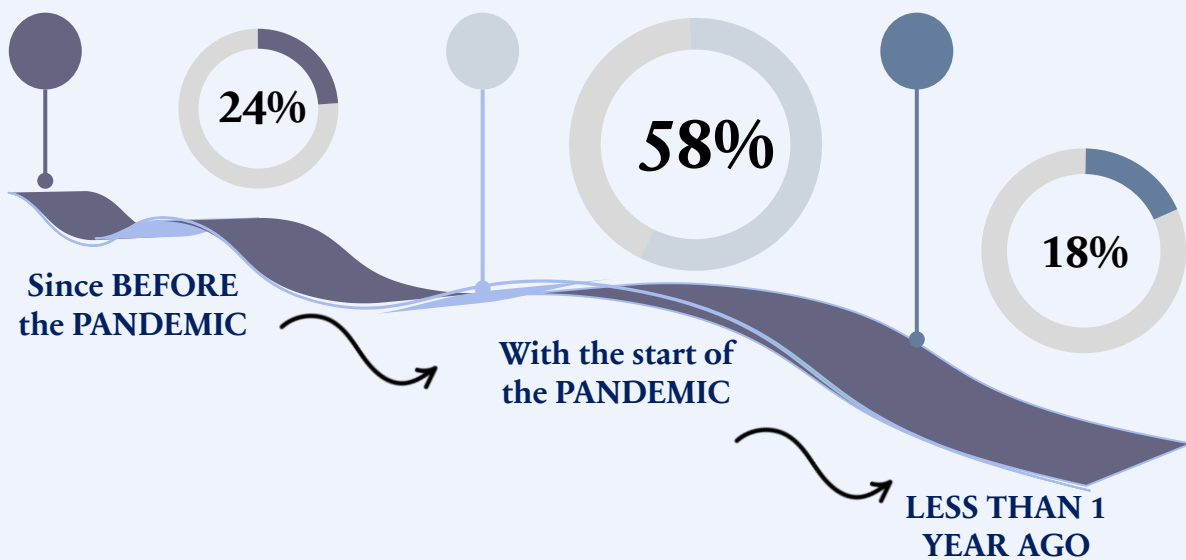


The PANDEMIC as a turning point:

32%

almost 60% of those who now work from home started doing so then

* THIS REMOTE WORK BEGAN...



IS WORKING FROM HOME A PRIORITY?

37% consider it important when looking for a job

37%



Gen Z
(1994-2012)

44%



Millennials
(1981-1993)

46%

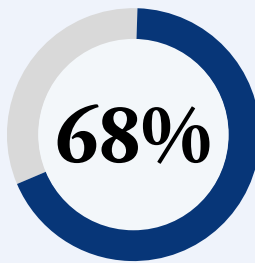
...for 1 out of 2 of the younger, it is a priority.

*Of those currently working from home (n=522)

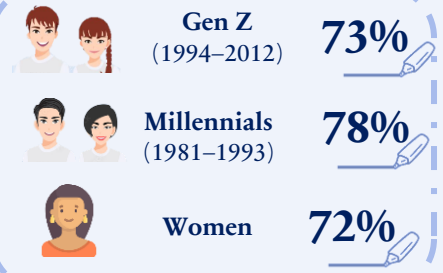
A desire for the majority

7 out of 10 would like to work from home

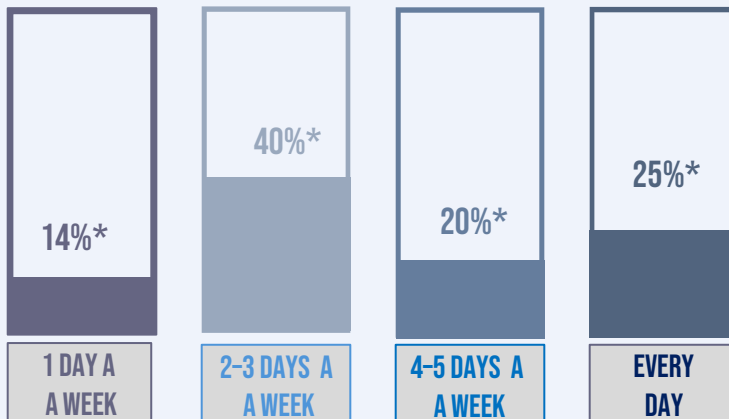
Key among targets prioritising work-life balance



Would like to work from home



The hybrid format is perceived as the ideal arrangement...



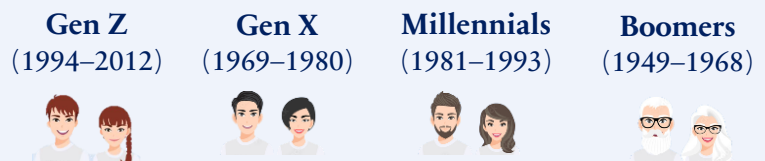
2–3 days a week is the preferred option



BYE

Without remote working...

25% of young people have changed their jobs, to be able to work from home (among other reasons)



	Gen Z (1994–2012)	Gen X (1969–1980)	Millennials (1981–1993)	Boomers (1949–1968)
This has been the main reason	10%	8%	4%	2%
It has been one of the reasons	15%	12%	7%	3%

Have you changed jobs to look for remote working opportunities?

Technical details

Online survey
 n= 1,549 people
 Aged 18 and over, resident in Spain
 Proportional weighting by gender, age and region



#25



PODCAST MOMENTUM: Authenticity in times of distrust

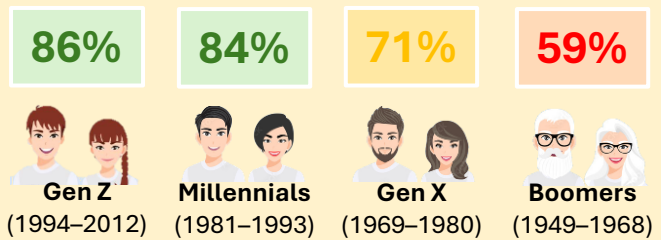


Podcast Momentum: Authenticity in times of distrust

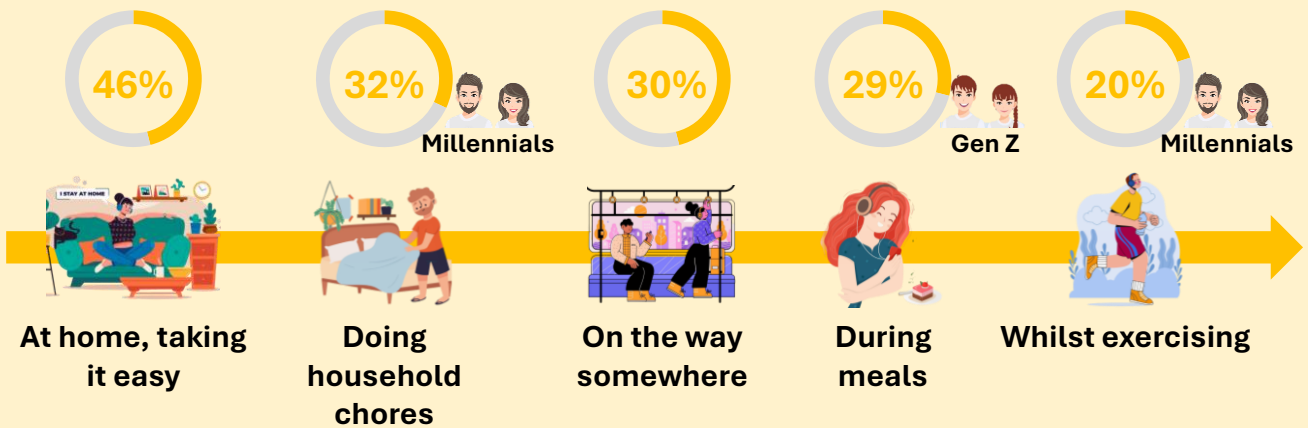
Podcasts are no longer just a fad: they have become a regular feature of everyday life

75%

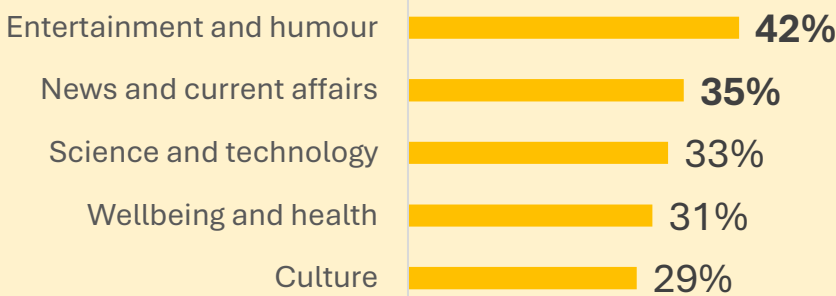
Listen to podcasts currently



Your routines sound better with a podcast



From humour to science: a menu to suit all tastes



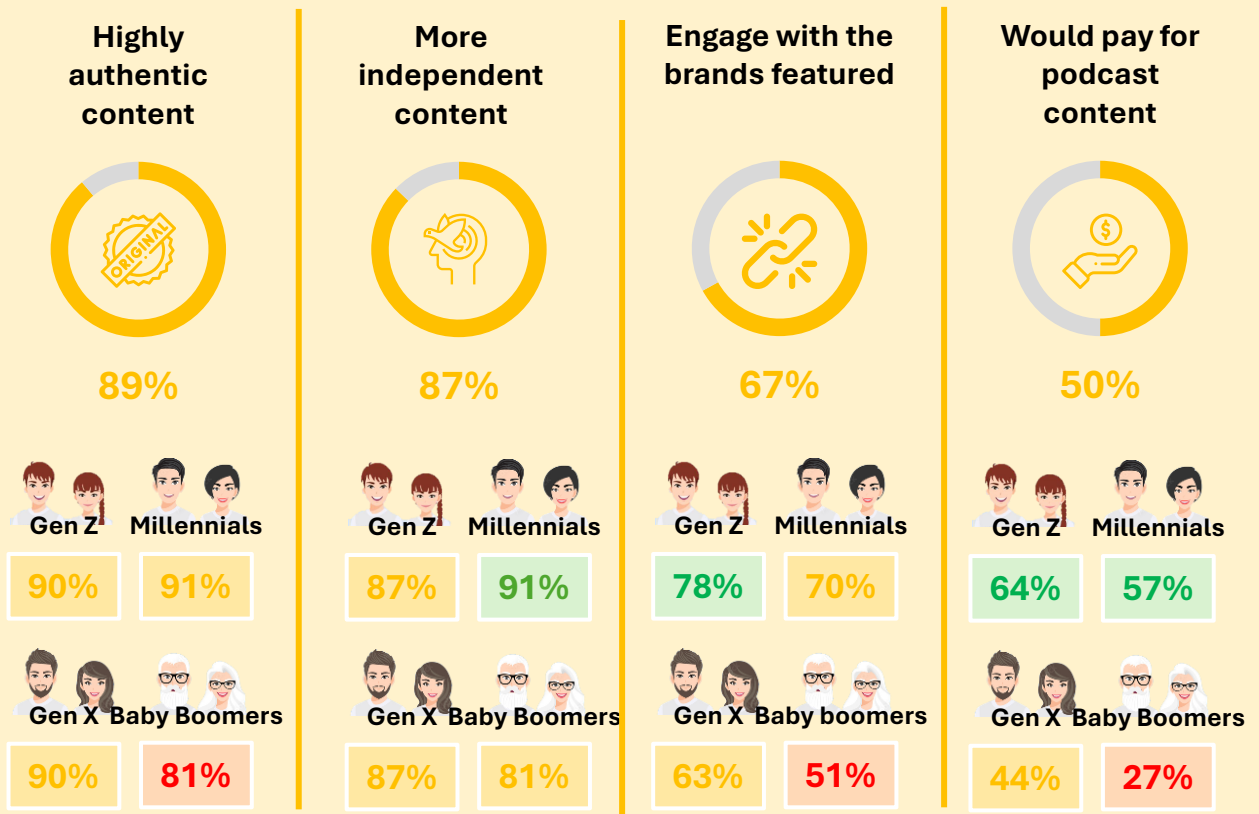
Highlighting **entertainment and humour** as the key connection point



Dominates the podcasting scene with a 58% share.

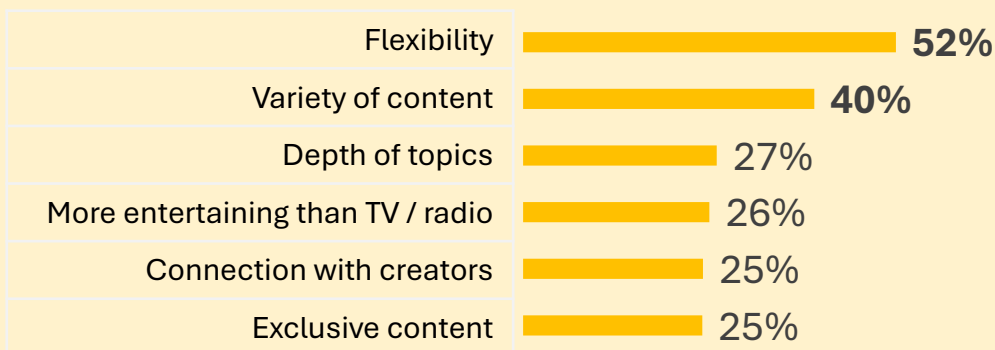
Authenticity and independence as hallmarks of quality

Listeners value the authentic, unfiltered voices of podcast creators.



A format that adapts to you, not the other way round

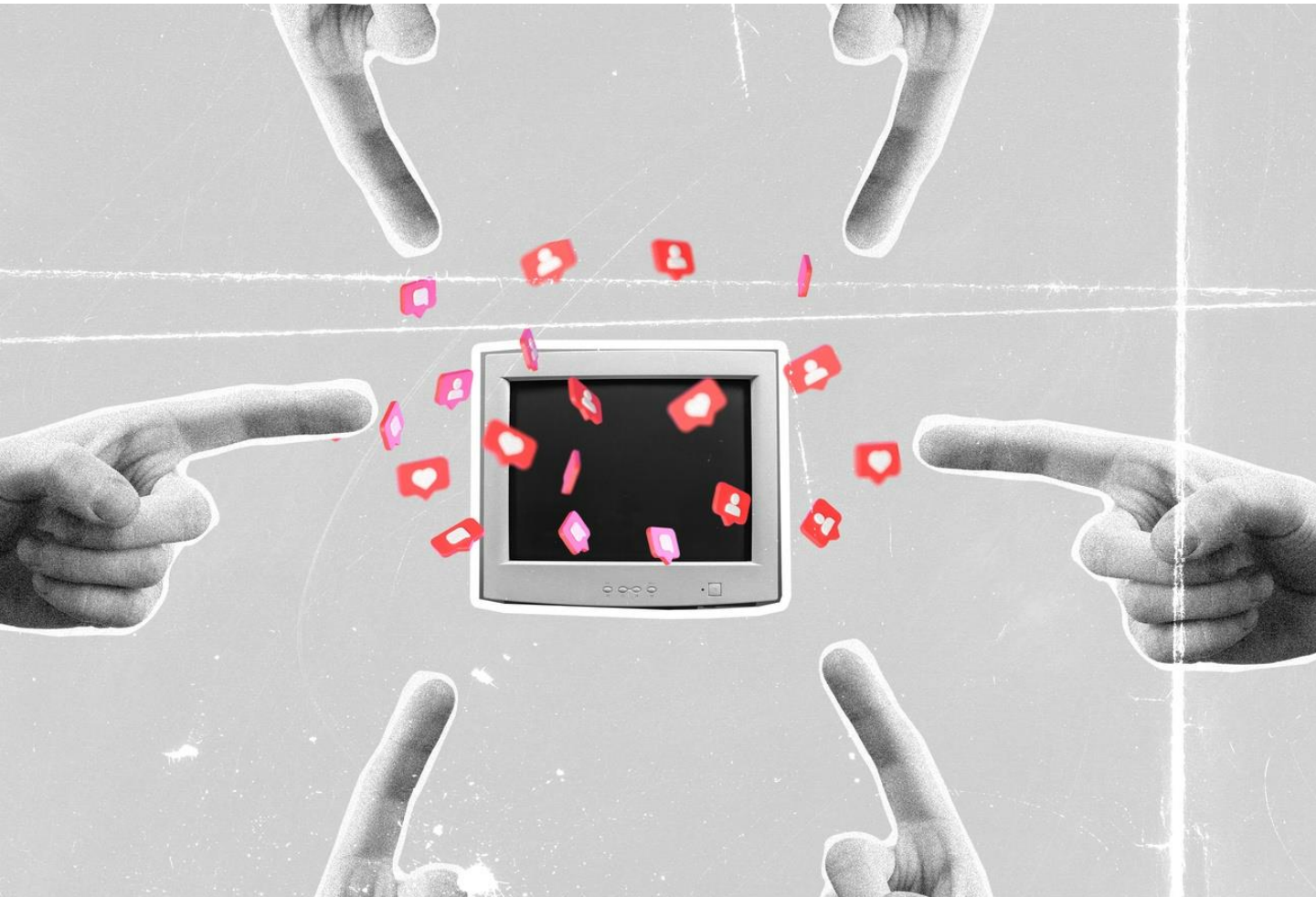
Podcasts win out over other media due to their ability to adapt to each listener's pace, interests and desired level of depth.



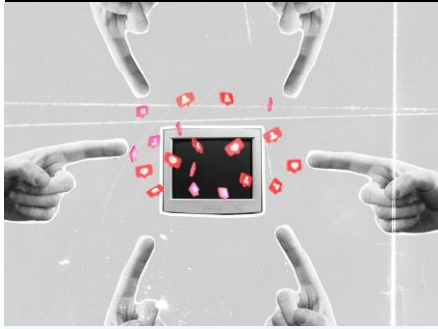
Technical details

Online survey
 n= 1,549 people
 Aged 18 and over, resident in Spain
 Proportional weighting by gender, age and region



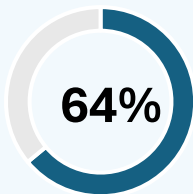


**MEDIA CHANNELS THAT
(MIS)INFORM:**
Convenience vs Credibility



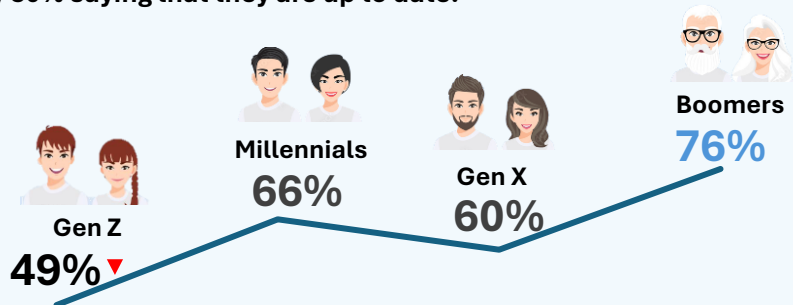
Media Channels that (mis)inform: Convenience vs credibility

Over 60% say they are informed



% consider themselves informed about current affairs

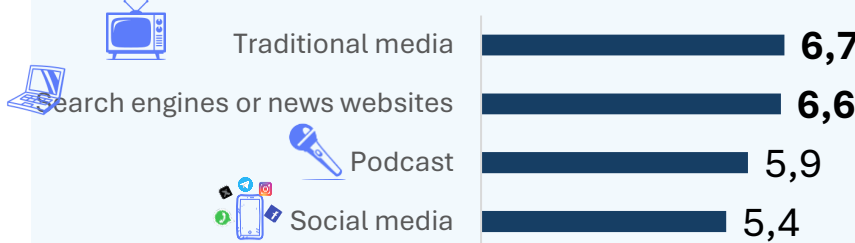
#There is a certain disconnect among young people, with only 50% saying that they are up to date.



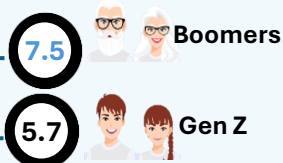
BUT CREDIBILITY OF MEDIA IS AT AN ALL-TIME LOW!

Media credibility falls short of 'good', and only Boomers show greater trust in traditional media. In general, there is scepticism towards all media channels, but particularly digital media

Credibility associated with different media channels



Scale 1-10



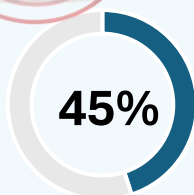
Generational divide:
"Traditional media are the most credible in times of crisis"

Boomers: 77% agree
Gen Z: 54% agree

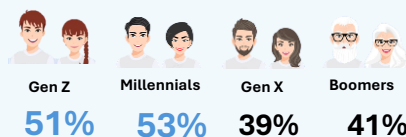
Difficult to discern the TRUTH of news stories: Only 45% believe it is easy to spot fake news

Experts help to establish credibility

Experts help to establish credibility



% Easy to distinguish between real and fake information



vs.



83%

Expert opinion is crucial for credibility

28%

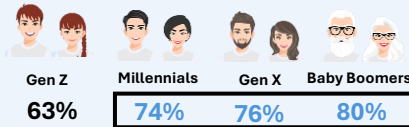
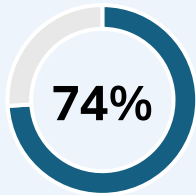
I trust what influencers say more (38% Gen Z and Y)

Social media is losing credibility

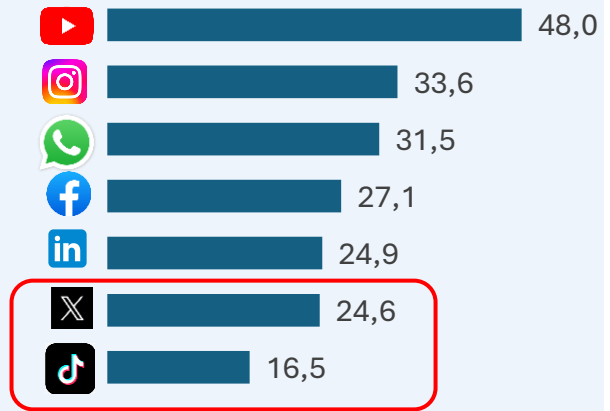
even among the youngest

though not all to the same extent

% of agreement: "Social media has lost credibility in recent times"



% credibility of their information

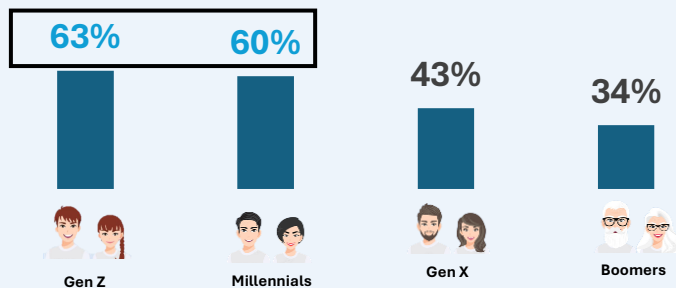


PENALISED

although they remain a mainstream channel



% say "they use social media more than traditional media (TV, press, radio...) to stay informed"



The credibility of the media channel varies depending on the content:



The crisis of trust in social media does not stop people from using it, but it does affect its credibility depending on the content: greater credibility when discussing brands and leisure, less so for news and opinion

Technical details

Online survey
 n= 2,233 people
 Aged 18 and over, resident in Spain
 Proportional weighting by gender, age and region



27



HOLIDAYS:

The thrill of planning and sharing them!



HOLIDAYS: The thrill of planning and sharing them!

Almost 60% prefer to spread out their holidays but summer remains core

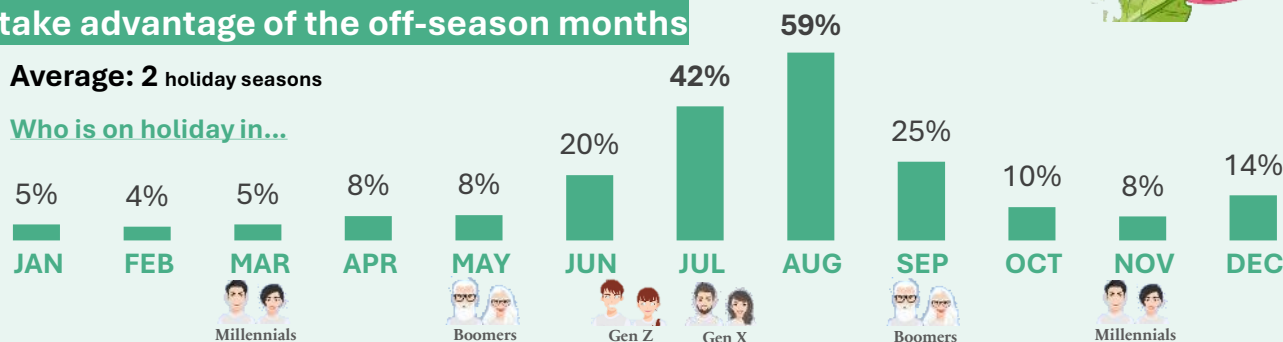
Boomers and millennials are the ones who take advantage of the off-season months

58% distribute
42% bundle



Average: 2 holiday seasons

Who is on holiday in...



PLANNERS

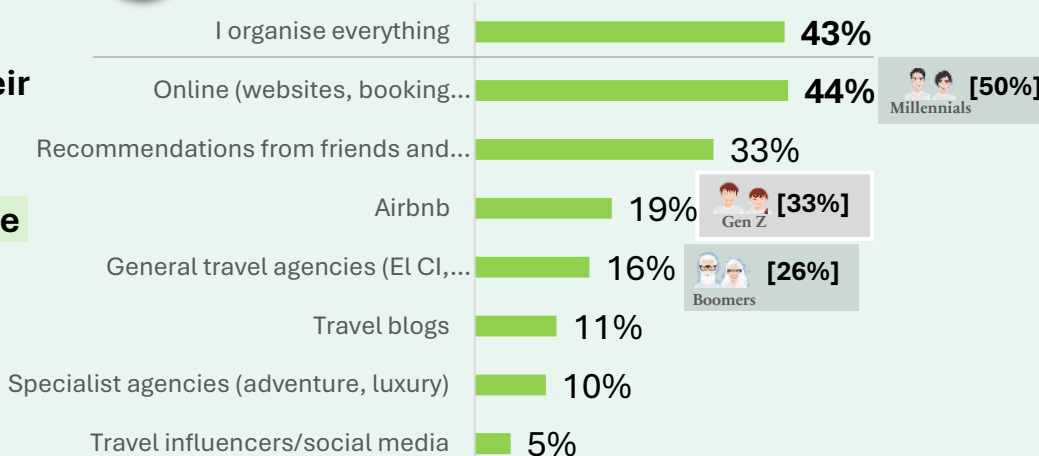
Only 2 in 10 wait until the last month; the rest prepare well in advance



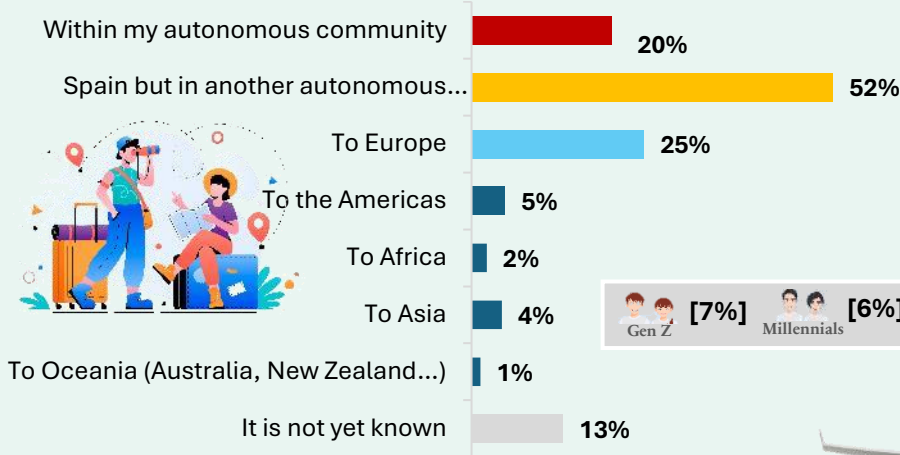
2.0 Ways of planning them

Over 40% organise their vacation: social recommendations are key

Airbnb is gaining ground among Gen Z



10 days on average at the destination, with Asia more popular among young people



TRAVELLING DESTINATIONS VARY BY REGION

Average number of trips last year

THROUGHOUT SPAIN

6.0

average number of trips within Spain last year



ABROAD

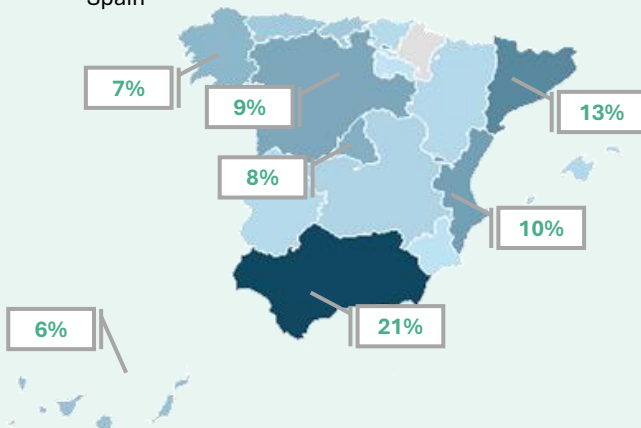
1.9

average number of trips abroad last year



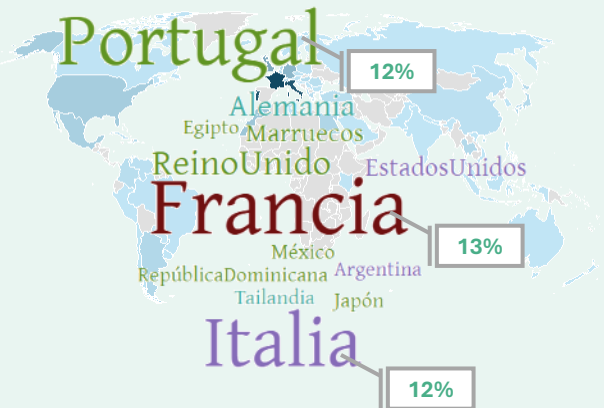
Last destination in SPAIN

Andalusia, the Valencian Community and Catalonia, the most searched-for destinations in Spain



Last destination ABROAD

France (Millennials and Generation X), Portugal and Italy (Gen Z) are the most visited



Technical details

Online survey
 n= 1,148 people
 Aged 18 and over, resident in Spain
 Proportional weighting by gender, age and region



28



MICRO-RITUALS:

Simple things that keep us happy
and healthy

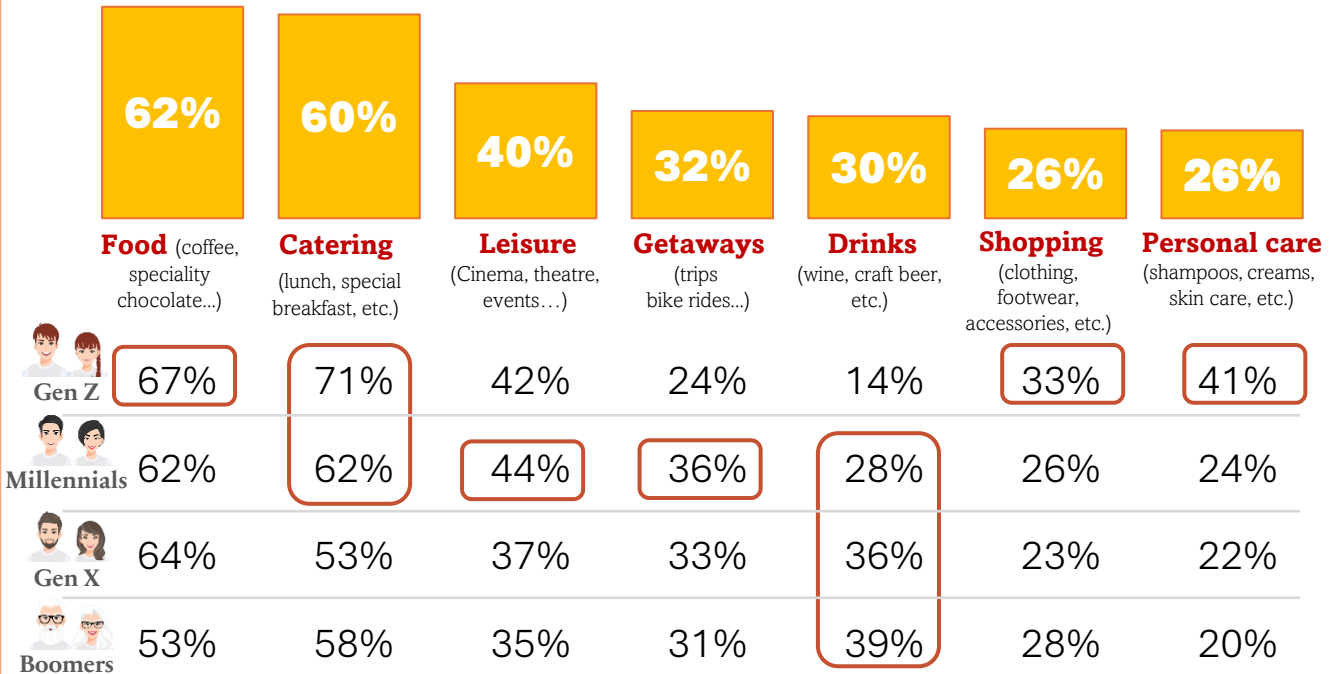
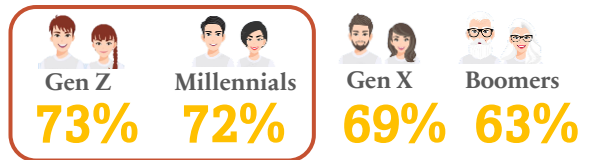


MICRO-RITUALS:
Simple things that keep us
happy and healthy

“I treat myself to little indulgences or personal pleasures every week”



70%



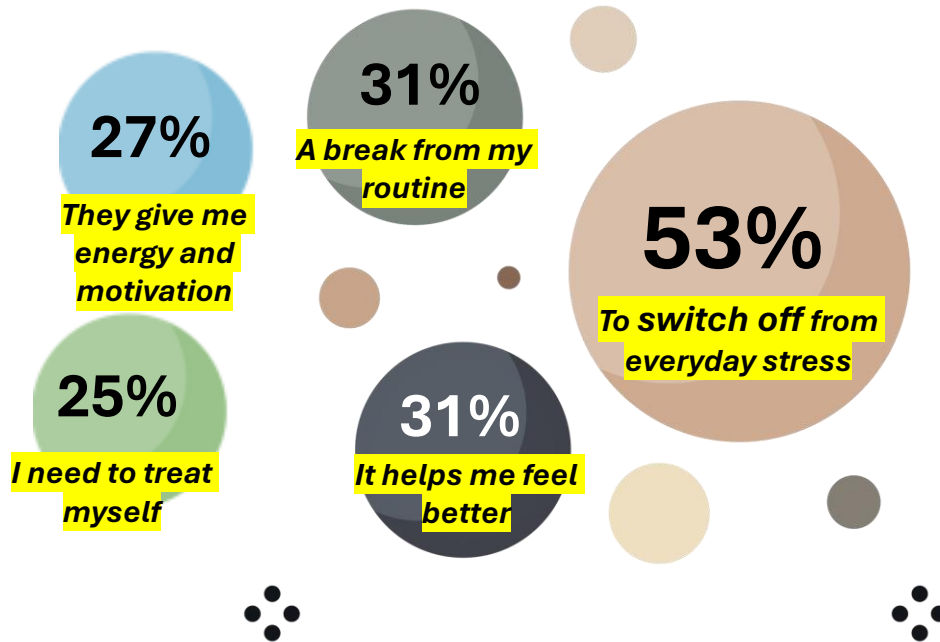
The most common treats are food and drink, followed by days out and short breaks.

1 in 4 like to go shopping (40% of Gen Z like to buy personal care products).



Young people are the ones who look for these little everyday things the most.

To unwind is the main driver of micro-pleasures



Brands can turn these small rituals into memorable experiences



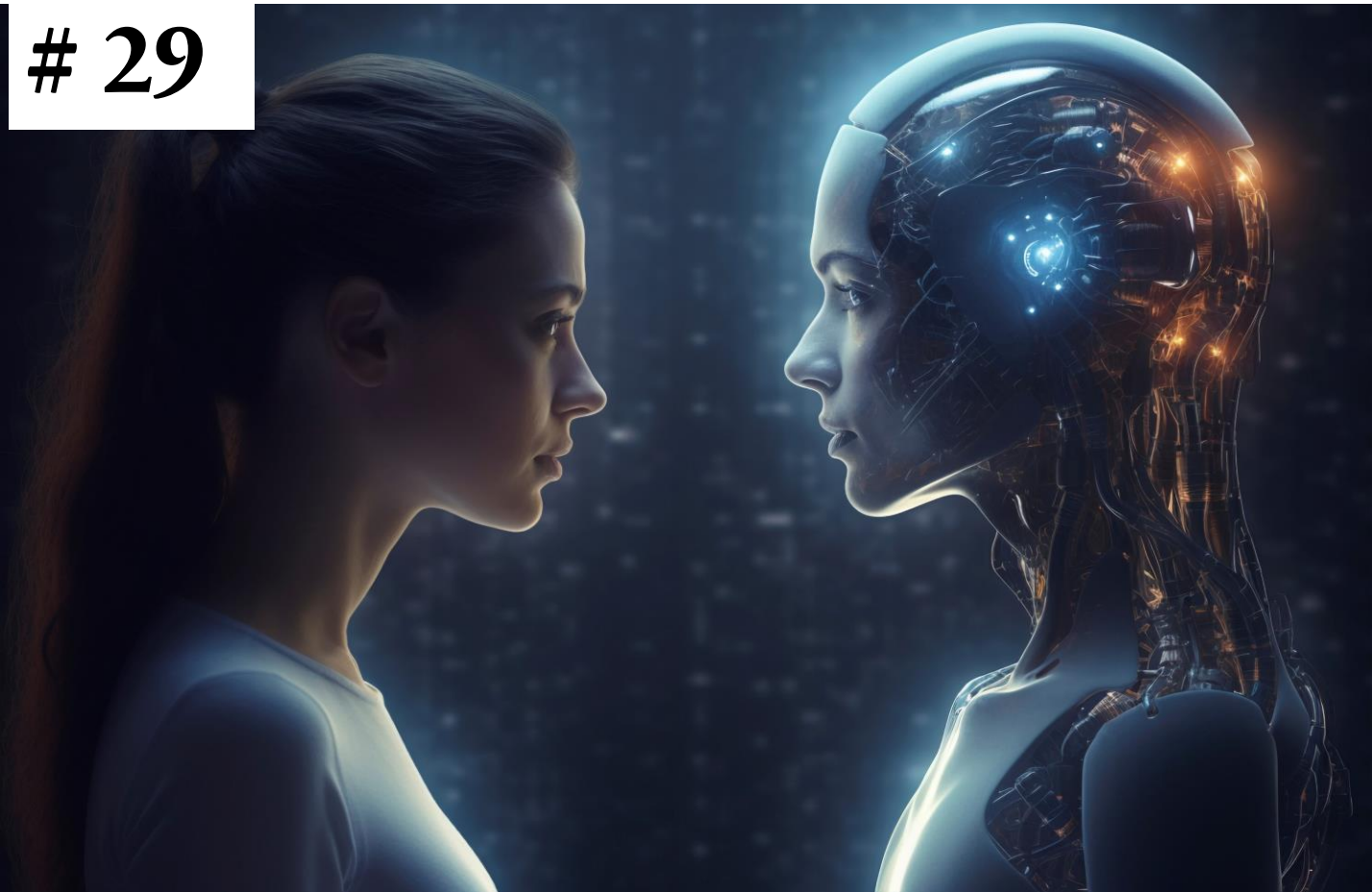
MICRO PLEASURES, an opportunity for brands

Technical details

Online survey
 n= 1,000 people
 Aged 18 and over, resident in Spain
 Proportional weighting by gender, age and region



29



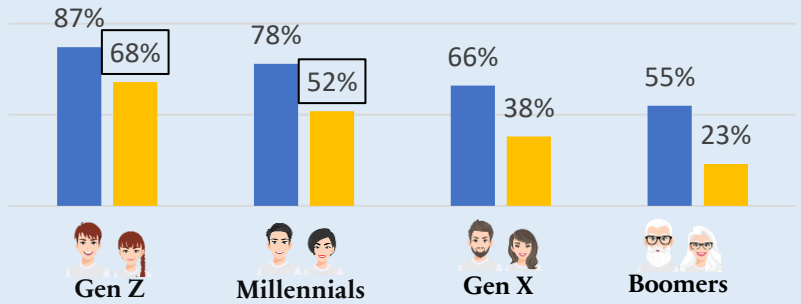
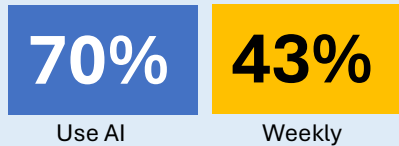
YOUNG PEOPLE HUMANISE AI:
a companion instead of a stranger;
a confidant instead of a search
engine



YOUNG PEOPLE HUMANISE AI:

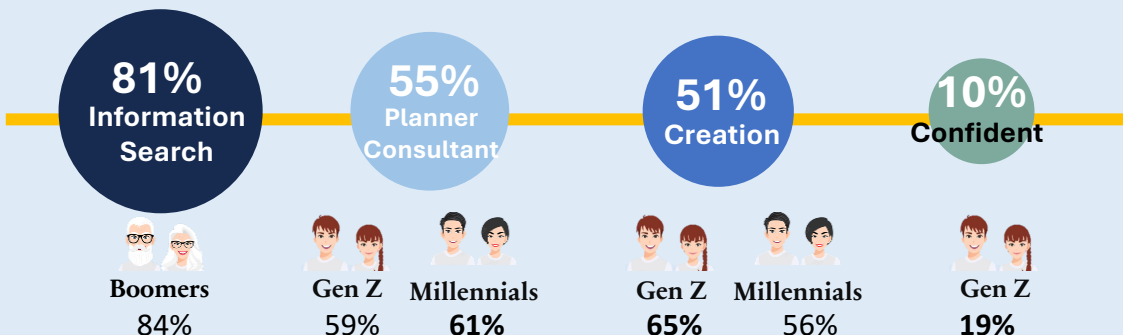
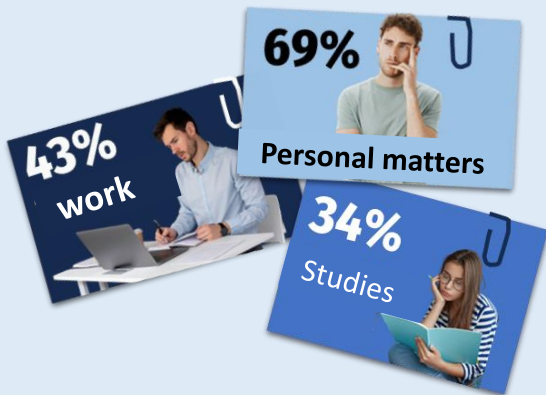
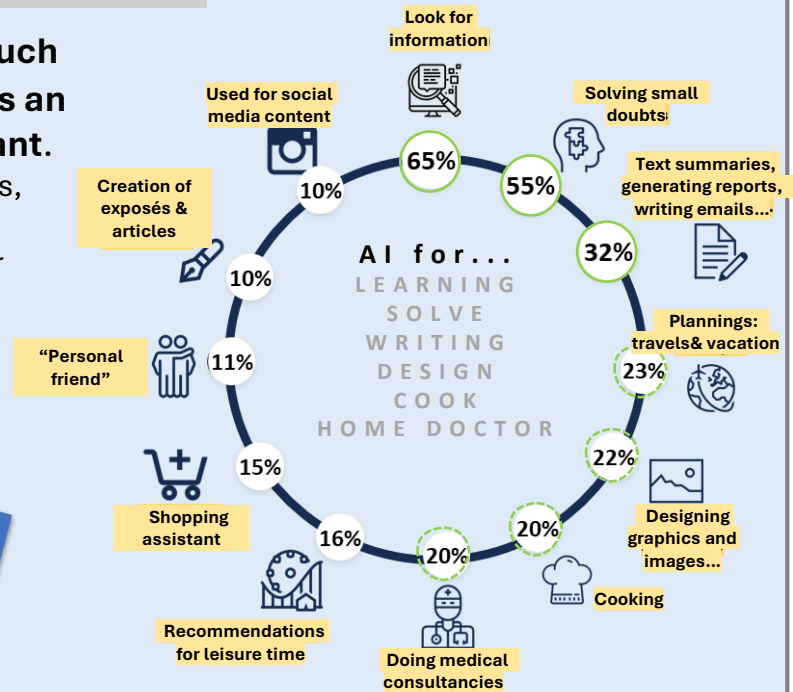
a companion instead of a stranger; a confidant instead of a search engine

The use of AI is growing



AI USAGE ECOSYSTEM

From data to dialogue: much more than a search engine, AI is an advisor, co-creator and confidant. It answers our questions, drafts emails, plans trips and suggests recipes. For 20%, it also acts as a home doctor



55%

More useful than expected

The most common use lies in building bridges with Artificial Intelligence

38%

Less useful than expected

7%

It doesn't work for me

Although there is still some mistrust of AI...



72%

"you shouldn't completely trust what AI says"

A STRANGER to Boomers and Generation X, but for young people it is a COMPANION (40%) and even a FRIEND (20%)

For me, AI is a...



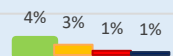
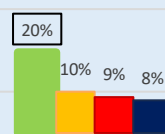
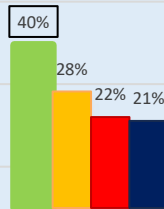
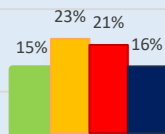
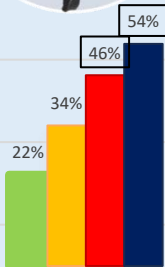
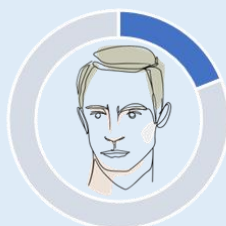
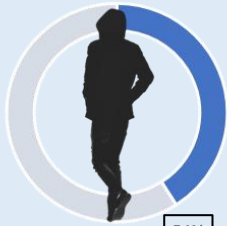
41% A stranger

19% Acquaintant

27% Classmate/colleague (school, work,

11% Friend

3% A relative



Technical details

Online survey
n= 1,001 people
Aged 16 and over, resident in Spain
Proportional weighting by gender, age and region



30



SPAIN LOVES COOKING

...yet hates deciding what to eat.



SPAIN LOVES COOKING ...yet hates deciding what to eat.

COOKING? YES, BUT...

Attitudes towards cooking differ across generations: Boomers & Gen Z see it as a social pleasure, whilst for Millennials & Gen X it's a daily stress



I hate it (1)

6.8

I love it (10)

7.0

6.8

6.6

7.0



Gen Z



Millennials



Gen X



Boomers

59%

67%

62%

59%

70%

54%

57%

63%

76%

66%

63%

61%

I'M TIRED OF THINKING about what we're going to eat every day

I love COOKING FOR FRIENDS and family

I like to be INNOVATIVE in the kitchen

I cook FROM SCRATCH (using fresh ingredients)

Though A CHEF AT HOME would be welcomed in 2 out of every 3 households...

I wish I had a chef at home! **64%**

Particularly among women

69%

58%



Gen Z



Millennials



Gen X



Boomers

68%

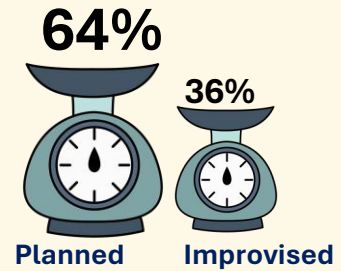
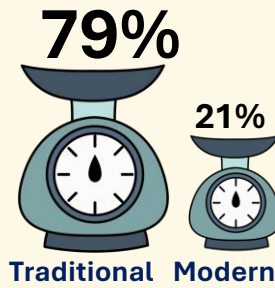
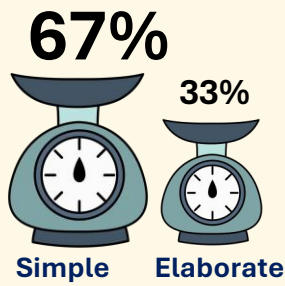
70%

63%

51%



A diet that is preferred to be **simple, traditional and planned**



Gen Z... is breaking the mould!

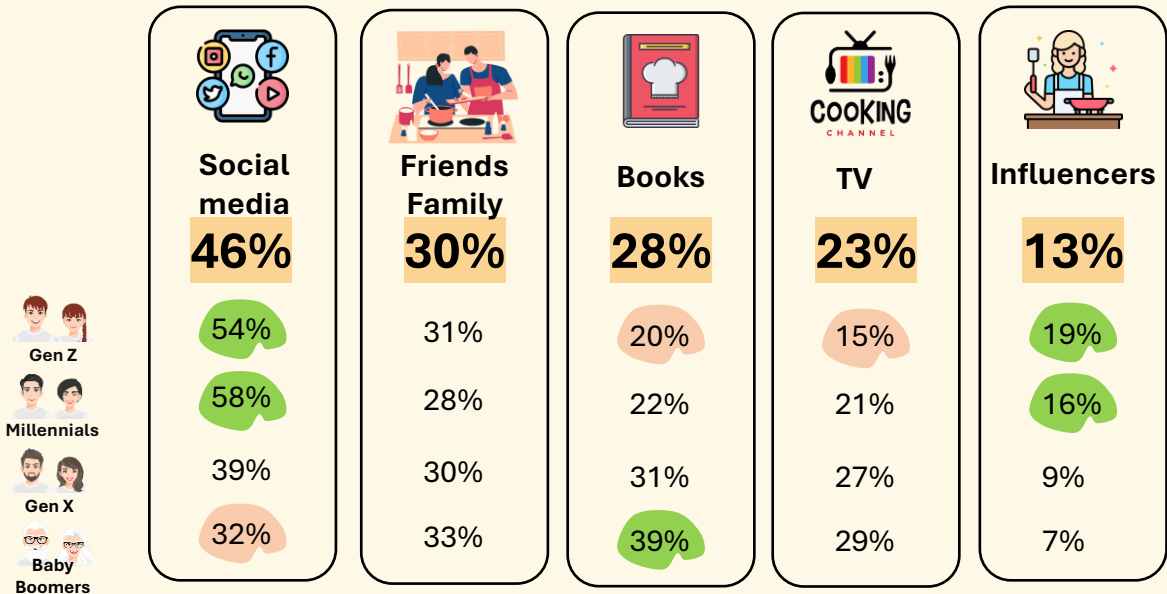
I prefer **MODERN** cuisine **40%** (vs 21%)

I prefer to **IMPROVISE** **45%** (vs 36%)

Generation Z is reinterpreting the kitchen: there is more enjoyment, creativity, digitalisation and freedom to improvise... functionality is very important to them

Culinary inspiration goes digital for **EVERYONE**:

social media is the main source of inspiration, including 1 in 3 baby boomers. Influencers are particularly relevant among younger people.



Technical details

Online survey
n= 1,942 people
Aged 16 and over, resident in Spain
Proportional weighting by gender, age and region



31



**SOLIDARITY IN THE FACE OF
THE STATE OF THE WORLD**

Acting when it hits close to home.



SOLIDARITY IN FACE OF THE STATE OF THE WORLD, Acting when it hits close to home.

I'M DOING BETTER THAN THE WORLD...

Whilst we're doing well personally, we perceive the outside world as 'broken'

I'll manage in the future... even if the situation is faltering

"Current": rating from 0 to 10



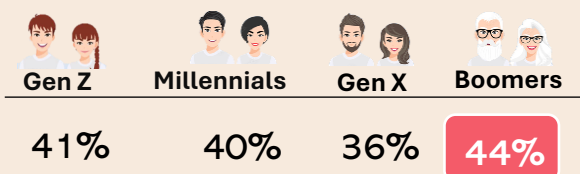
"Future": rating from 0 to 10



...GIVEN THE STATE OF THE WORLD, WE SEE OURSELVES AS VERY UNITED – WHICH WE ARE ABOVE ALL IN OUR DAILY LIVES...



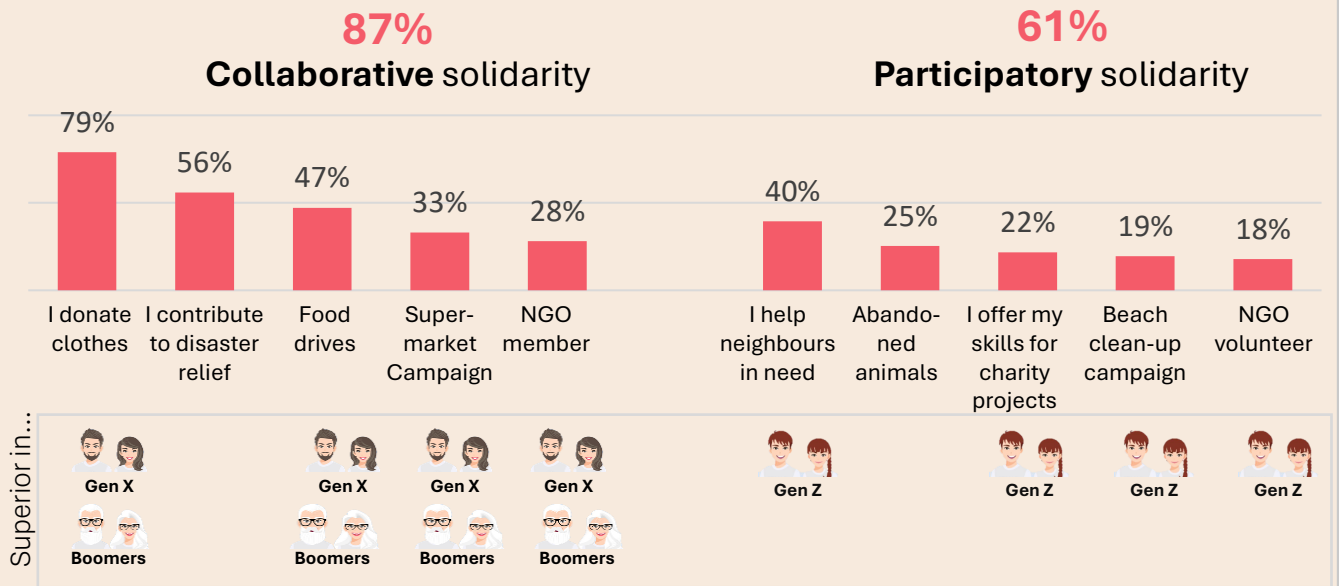
88% consider themselves supportive (very + quite a bit + somewhat)



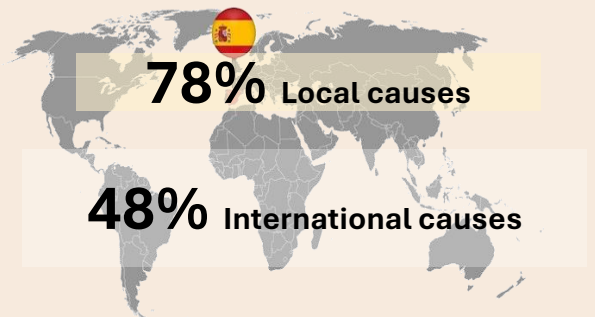
4 in 10 very or quite a bit

Very or quite supportive

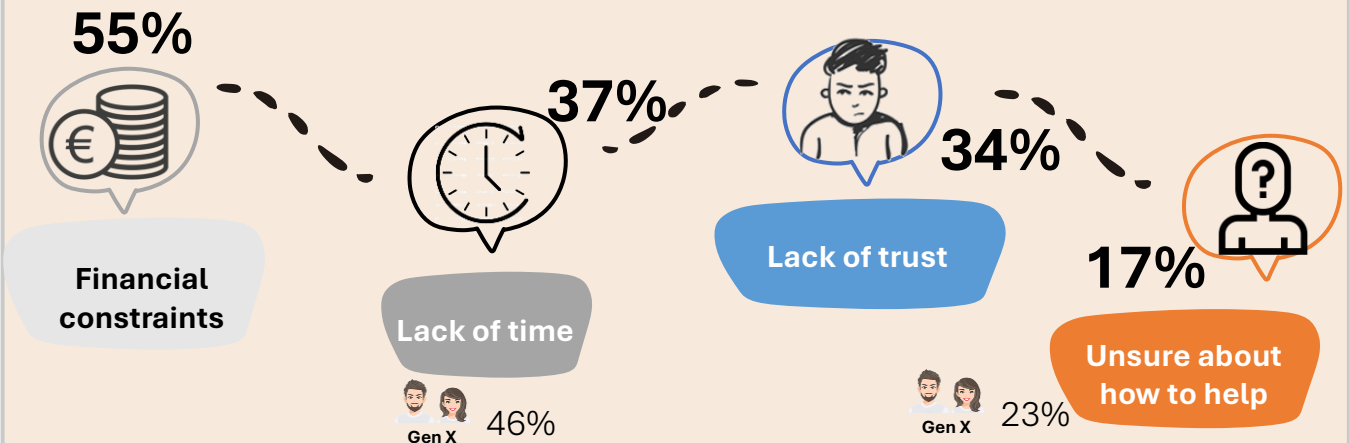
The generation gap reveals differing attitudes: THE ELDERLY DONATE, THE YOUNG GET INVOLVED



Solidarity is activated when we feel **close** to a **cause**; when a cause is distant or **global**, **solidarity fades**



THE WILL IS THERE, BUT FINANCIAL CONSTRAINTS, LACK OF TIME AND MISTRUST PREVENT US FROM BEING MORE SUPPORTIVE



Technical details

Online survey
 n= 4,774 people
 Aged 16 and over, resident in Spain
 Proportional weighting by gender, age and region





Punto de Fuga

THE VALUE OF PEOPLE **INSIGHT**

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