Mental wellbeing and sociability, the game wine can still play

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The Ipsos Global Trends survey, covering 38 markets, omits wine entirely, yet offers two insights for the sector. Pride in local products is growing in emerging markets, while wellbeing now includes mental and social dimensions. Here wine can draw on its historic role in conviviality, provided exporters adapt to local cultures.

We read the latest edition of the Ipsos Global Trends, now in its tenth edition, and we read it with pen in hand even though wine is not mentioned even once. **Yet, among the pages of the study, more than a few insights for the sector can be found,** if one has the patience to look for them.

The research is based on a survey conducted in 38 markets, with 29,542 interviews collected between 22 May and 5 June 2026. The reference framework generally includes four categories of trends: transformation, acceleration, consolidation and reversal. **This year, however, the reversal box, that of trends losing momentum, is empty.** Three categories therefore remain, each with three trends.

Among the trends in transformation are **Climate Convergence** (from preventing climate change to living with its effects), **Conscientious Health** (technology changing the way health is understood and maintained) and **The Power of Trust**(trust shifting from institutions toward people and communities).

In acceleration we find **Technowonder** (the attitude toward artificial intelligence becoming more skeptical), **Nouveau Nihilism** (a weaker conviction that hard work is rewarded, with a push to live in the present) and **Escape to Individualism** (the search for solutions within the self, with more materialism).

Finally, among the trends in consolidation are **Globalisation Fractures** (local and national pride growing in emerging markets), **Splintered Societies** (fractures over inequality and immigration, to which new ones are added) and **Retreat to Old Systems** (nostalgia as a widespread expectation, more aesthetic than political).

But what use is all this to a sector like wine? **Reading with this question in mind, we tried to understand which elements were useful and found essentially two.** Let us try to make the case for them.

Globalisation Fractures: pride in the product from home

The first insight concerns Globalisation Fractures. Contrary

to what geopolitical news would suggest, the research does not reject globalisation: the conviction that it benefits one's own country remains surprisingly resilient, with an increase of 8 percentage points in China and the United States and of 14 in Great Britain and France compared with 2013. **What changes is the way it is understood, and Ipsos speaks of a rebalancing between global influence and local identity, not of a rejection.**

The clearest signal concerns brands. On the statement that global brands make better products than purely local ones, the balance between those who agree and those who disagree in China went from +10 in 2019 to -13 in 2026. In Brazil it drops from +17 to +3, in Turkey from +36 to +21, in Saudi Arabia from +39 to +26. **In emerging markets, in short, trust in home-grown products is growing.**

It should be clarified that "local", in the study, means mainly national, as confirmed by another figure in another section of the report: 70% say they prefer products from their own country to foreign ones. **And Ipsos suggests that companies turn provenance into an advantage,** telling the story of local heritage, craftsmanship and contribution to the territory.

For Italian wine the question arises naturally: what product is more "of one's own country" than a bottle of wine? With a necessary caution, however. On this point the research offers no specific data on Italy; therefore, **what we propose is a way of reading the data and not a measurement.**

Then there is the flip side. The same push that can favour Italian wine in its domestic market, in a market where the foreign product is precisely the Italian one, risks becoming a brake. **If in China trust in global brands is falling in this way, and if 70% prefer the home product, those who export have some reason to ask themselves questions.**

The direction indicated by Ipsos is to be capable at a global

level but relevant at a local level, **showing knowledge of the culture of individual markets instead of relying on scale alone** and the universal appeal of the brand.

Conscientious Health: from years lived to the quality of time

The second insight is more delicate. The Conscientious Health trend describes above all a view of health as a system to be measured, monitored and optimised, with GLP-1 drugs as an example of a more interventionist approach. The research does not speak of alcohol or wine, and it is reasonable to think that a similar model is more likely to place them among the things to reduce than among those to be valued. **No one at Ipsos claims that wine is an ally of wellbeing, and we will not do so in their place.**

There is, however, a passage that deserves attention. In seven markets (Brazil, China, France, Germany, Great Britain, Italy and the United States) **the share of those who feel they must do more for their mental wellbeing has risen from 72% in 2019 to 79%,** a level reached in 2024 and maintained since, approaching the 83% of those who say so for physical health.

Ipsos also recalls that mental health has for some years been the main health concern globally and that the gap with physical health has closed since 2022. Ambition has also changed: more than a third of respondents expect to reach one hundred years of age (75% in China, 14% in Japan and France), but the goal is no longer just to live long, so much as to live well. **It is called healthspan, and it is the ability to preserve physical autonomy, cognitive functions and quality of life** in the final part of existence.

If wellbeing expands to the mental dimension, however, it also expands to the social one. In the chapter on fragmented societies, Ipsos observes that, while traditional spaces of sociability are shrinking, **brands can become platforms of**

connection, capable of creating communities and moments of belonging.

And it is here, in our view, that wine can re-enter the conversation: not as a healthy product, but as a historic player of conviviality. **The shared table, the toast, the winery open to guests are among its oldest assets,** and they sit in a dimension of wellbeing that the research itself indicates as growing.

Ipsos titles its research “The search for silver linings” (the search for the positive sides), specifying that opportunities arise from problems and not from their absence. **With this article, we wanted to look for the silver linings for the wine sector as well.**

Key points

1. **Wine is absent** from the Ipsos Global Trends, yet the study holds useful insights for the sector.
2. **Local pride grows** in emerging markets, where trust in global brands declines, and 70% prefer domestic products.
3. **Exporters must stay relevant locally**, showing knowledge of each market’s culture beyond brand scale.
4. **Mental wellbeing matters more**: 79% in seven markets feel they should do more for it.
5. **Wine can claim conviviality**, a social wellbeing dimension where it holds a historic role.