LS:N GLOBAL

THE : FUTURE : LABORATORY

New Codes of Value

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Front cover: Fluz. Identity by Koto, US; Above: Ragged Edge's rebranding for foreign exchange fintech Wise, UK

At a Glance

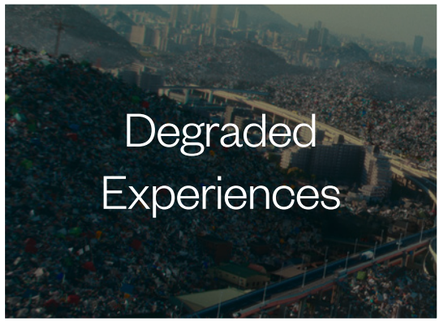
Key topics and takeaways from the report



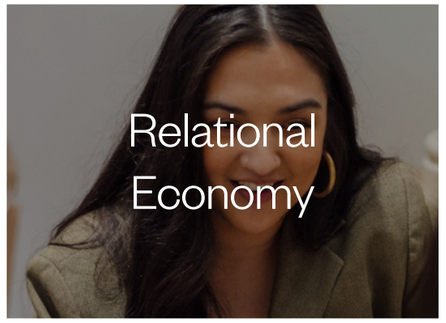
Widespread dissatisfaction has created a catalyst for consumers to re-evaluate their consumption choices. They feel like they are being taken for granted – exploited, even. It's creating a contempt for the system.



The cost of living crisis, a perception of product quality in decline, a sense of life on fast forward eroding human relationships – all combine to create a brewing sense of unfairness that life is not delivering what it should.



Consumers are getting wise to 'enshittification' – a slew of ever-degrading services and brands blinkered on profit-making at the expense of customer value. Consumerism becomes skewed ethics with extremes of waste to match.



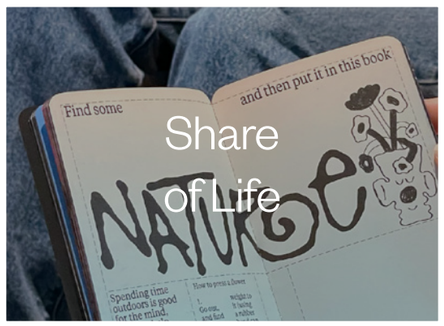
People want brands to be less transactional and more relational – both between brand and consumer, and consumer to consumer. These are relationships that leave the customer feeling better post-purchase than before.



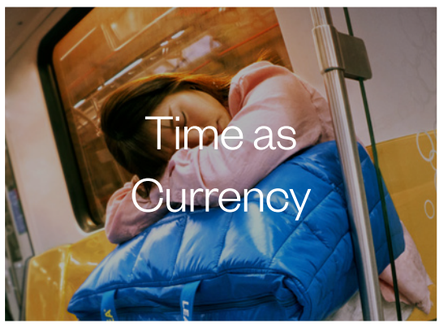
In these times of scarcity, richness is expressed through rituals, re-assessment and consideration, while abundance is found in regenerative pursuits and deeper connections – empowering businesses to set new standards.



Resourcefulness and savvy are becoming the new badges of honour for consumers of all backgrounds, partly doing it because money is tight and partly on principle; they simply don't think goods are worth their full price.



In the face of instant online retail gratification, an emerging desire to slow down, savour and regenerate is leading consumers to question the value a brand can bring. If the answer isn't clear, they've already devised an alternative.



Consumers are making time for what counts, awakening to the more destructive maxims of our digital age that posits time as infinite when, in fact, it is a precious and limited resource for consumers, who are pulled in multiple directions.



People are turning to resale and #underconsumptioncore, seeking alternatives to what they consider to be overpriced products and underwhelming services. Meanwhile, the credibility and acceptance of dupes continues to grow.



The changing value mindsets of consumers – demanding that brands deliver Care, Connection, Resourcefulness, Enoughness and Transformation – are giving way to new codes of value.

Key Statistics

: **82%** of Britons say prices are rising faster than their incomes and they struggle to afford basics like food. **43%** expect their finances to worsen in 2025 (source: **YouGov December 2024 survey**)

: **31%** of Americans say customer service frustration is causing emotional distress (source: **The National Customer Rage Survey**)

: Overall inequality in the US has increased by more than **25%** since 1975, and by up to **50%** when comparing the 90th and 10th percentiles (source: **Institute for Fiscal Studies**)

: **40%** of Gen Z say they feel stressed and anxious all or most of the time (source: **Deloitte**)

: **75%** of employees in the US and Australia wish they felt more valued at work (source: **Canva**)

: In the US, the second-hand market grew seven times faster in 2023 than overall fashion retail where sales were flat compared to a year earlier (source: **ThredUp and GlobalData**)

: In a recent **survey cited in The Guardian**, half of US adults say they buy dupes for the savings, while **17%** say that even if they could afford the genuine article, dupes are a great alternative

: #deinfluencing has **233m** views on TikTok (as of January 2025)

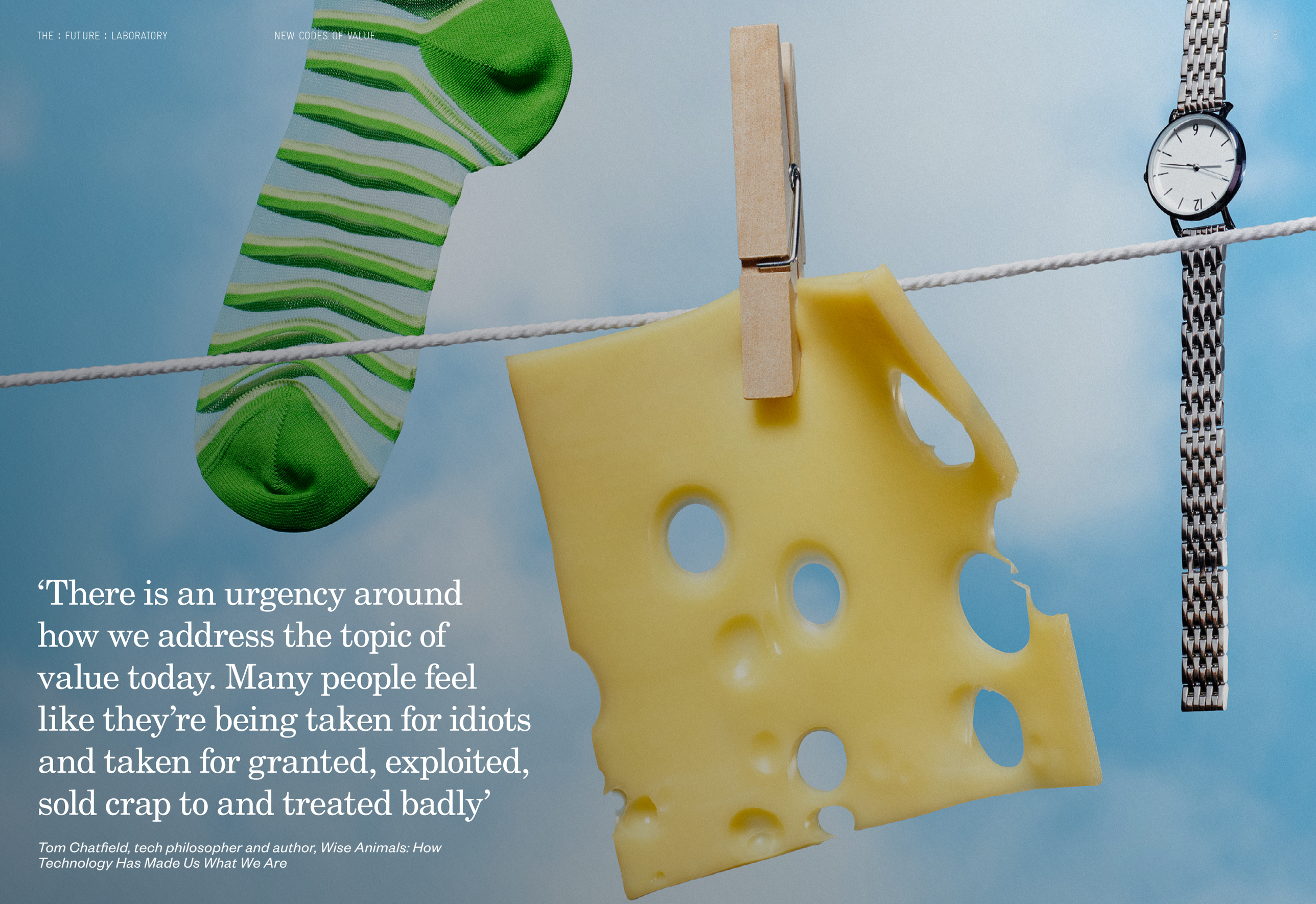
: Affluent families now constitute **54%** of budget supermarket chains Aldi's and Lidl's customers, according to **Kantar**

: **70%** of consumers are very, or somewhat, open to adopting new rituals (source: **WARC**)

: Only **38%** (UK) and **48%** (US) of respondents think financial service companies serve the interests of everyone equally and fairly (source: **Edelman report**)



Ragged Edge's rebranding for foreign exchange fintech Wise, UK



‘There is an urgency around how we address the topic of value today. Many people feel like they’re being taken for idiots and taken for granted, exploited, sold crap to and treated badly’

Tom Chatfield, tech philosopher and author, Wise Animals: How Technology Has Made Us What We Are

Introduction

Value serves as a gauge. It's an intuitive, highly subjective – some might say chaotic – assessment of one's personal, economic and social health. Right now, that gauge is faltering. Readings are shaky, the needle is plummeting and people are struggling to get the answers.

A mass re-adjustment is taking place

Lead analysts

Fiona Harkin, *director of foresight*
Alice Crossley, *senior foresight analyst*
Simar Deol, *foresight analyst*
Emily Rhodes, *creative forsight analyst*
Miriam Rayman, *consultant analyst*

Consumer Foresight and Trends Intelligence, powered by LS:N Global

Three out of four people globally now say what they value has changed (source: **Weber Shandwick**).

'There is an urgency around how we address the topic of value today,' Tom Chatfield, tech philosopher and author of Wise Animals: How Technology Has Made Us What We Are, tells The Future Laboratory.

'Many people feel like they're being taken for idiots and taken for granted, exploited, sold crap to and treated badly. And it's creating a contempt for the system. People want to feel valued in their lives and their work and their communities; they want to feel that what they do has value and that they themselves have value.'

The processes by which people attribute value are being challenged by a perfect storm of sociocultural, economic and technological forces: the cost of living crisis; a perception of product quality in decline; a sense of life on fast forward eroding human relationships. All combine to create a brewing sense of unfairness that life is not delivering what it should.

Some 82% of Britons say prices are rising faster than their incomes and they struggle to afford basics like food. And 43% expect their finances to worsen in 2025 (source: **YouGov December 2024 survey**).

According to the behavioural economics of Daniel Kahneman's Prospect Theory and Loss Aversion, people notice what they've lost more than what they've gained. So even when someone might be doing okay, if overall things are worse this year than last year, pessimism sets in.

In the US, this 'vibecession' meant that despite two years of economic growth, 63% of Americans say the economic situation is getting worse (source: **Gallup**).

'The way people assess if their lives are on track is whether they are making positive progress or not. The cost of living crisis feels like there's no forward momentum,' says Andy Gibson, psychologist and founder of UK public mental health charity MindApples.

Meanwhile, customer service frustration is at an all-time high in the US, with almost a third (31%) saying it is causing emotional distress (source: **The National Customer Rage Survey**). It is a dehumanising downward spiral that is also showing up in the workplace too.

Some 82% of employees say it is important for their organisation to see them as a person rather than just a human resource, but only 45% believe their organisation does view them as such (source: **Gartner**). Not only that, 75% of employees in the US and Australia wish they felt more valued at work (source: **Canva**).

So how do we make people feel valued? How do we ensure it is genuine value that adds to people's lives and gives them a sense of forward momentum – not pretend value that detracts from their lives and stalls their growth?

Widespread dissatisfaction has created a catalyst for consumers to re-evaluate their consumption choices. The emerging new codes of value demand that brands deliver care, connection, transformation, resourcefulness and enoughness. People want brand relationships that are less transactional and more relational, ones that leave the customer feeling better post-purchase than before.

In these times of scarcity, richness is expressed through rituals, re-assessment and consideration, while abundance is found in regenerative pursuits and deeper connections. Resourcefulness and savvy are rewarded and paying full price most definitely is not.



Methodology

Strategic foresight is the most valuable tool you can adopt to identify future prosperity. Despite our reputation for getting it right, we can't predict the future. There is no crystal ball.

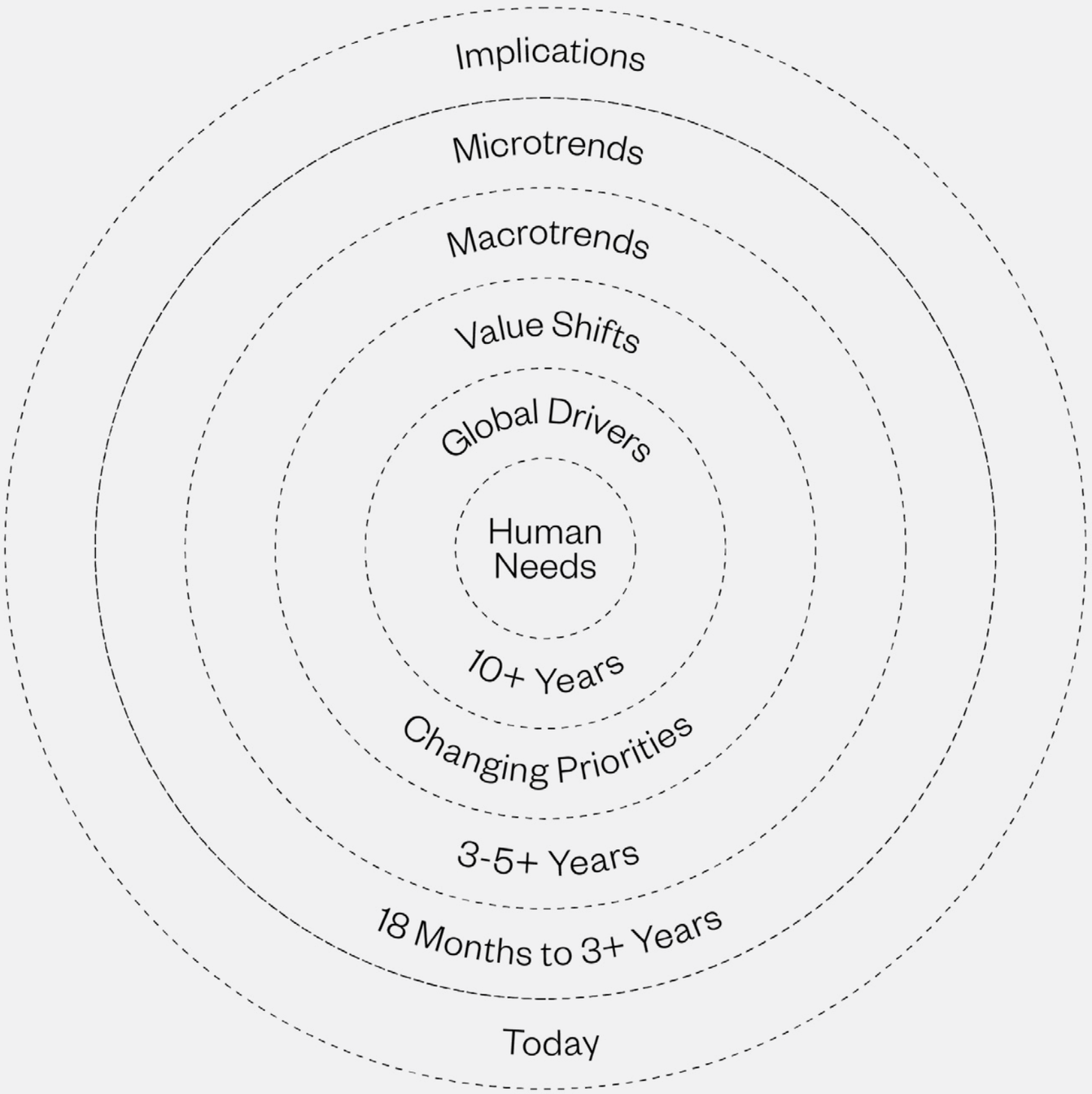
However, our methodology enables clients to interpret and frame all their decisions about future risk within a brand, consumer or organisational context that is **provable, practical** and **minimises uncertainty**.

We do this by understanding the influence of **six global drivers** causing profound, consistent – and therefore relatively predictable – change.

Their impact is assessed against seven core human needs and the ensuing value shifts that change consumers' attitudes and behaviours.

This leads us to identify emerging **macrotrends** and **microtrends**, and ascertain what their implications are for the future landscape.





The Future Laboratory's proprietary foresight methodology

Methodology: Foresight Process

At the heart of The Future Laboratory is a unique proprietary methodology that allows us to determine, define and track the key drivers of change affecting the future. We do this by tracking:

Human Needs : Universal

The foundation of our society based on a value system that supports human nature's physical and emotional programming.

Global Drivers : 10 year+ Horizon

Key global drivers represent the cultural, social, economic, political, technological and environmental eventualities reshaping the world we live in.

Value Shifts : Ever-evolving

The new ways in which we strive to meet these human needs, shaped by our contemporary context.

Macrotrends : 3–5 years+ Cultural and Societal Shifts

The cultural manifestations of new and emerging attitudes worldwide as shown by the behaviours of innovators and early adopters.

Microtrends : 1–3 years+ Lifestyle

Specific and tangible business innovations already emerging across key lifestyle categories.

Global Drivers



Accelerating Technologies

For billions of people around the world, technology has become enmeshed with their humanity – often clashing as we adjust to this new Synthocene Era. Adoption and innovation continue to accelerate, specifically AI, and increasingly, quantum technology.



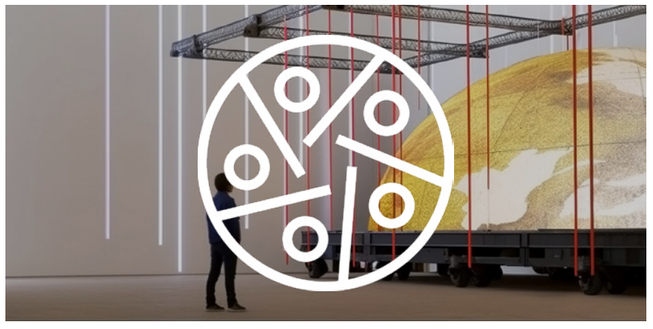
Climate Crisis and Resource Scarcity

We are at a climate tipping point, with increasing disruption and devastation across the globe. Urgency has turned into emergency, existentially threatening humanity and industry. But a growing sense of pragmatism over doomerism is clashing with industry roll-backs on sustainability commitments.



Evolving Demographics

Over the next decade the shape of our global population will change dramatically. Global economic instability due to falling fertility rates and ageing populations in some regions may be rebalanced by a growing youth workforce in others – with far-reaching repercussions for societies and industries.



Fragmenting Societies

Fractious inequalities and divisions are being exposed in a fast-changing, unstable world. The deterioration hinges on the increasing fragility and fragmentation of social, political and environmental ideologies, driving factions into isolated silos and societal polarisation, with apathy and misinformation clouding the way forward.



Micro-globalisation

The liberalised world we live in is inextricably interconnected but it has left us in a state of co-dependency rather than cooperation. Without equitable alignment, resilience may never come from an integrated and interdependent global economy, championing a renewal of localism and national pride.



Urbanising World

Despite the repercussions of a global pandemic, cities remain the epicentres of society. Priorities for living, working and playing in these urban environments are being redefined, with liveability, connectivity, sustainability and health and wellbeing becoming expectations rather than aspirations.

Drivers

The future looks bleak for anyone seeking stability. Naturally, people are taking a step back to question whether their efforts are worth it; are those wants, needs and desires well placed?

What are Drivers?

Drivers are fundamental shifts and external forces that have the potential to reshape the future trajectory of a brand or business, also sometimes referred to as mega-trends or global forces of change. They differ from trends in that they are long-term structural forces that are pervasive, powerful and transformative



The Shopping Conspiracy

Consumers are rejecting profit-focused brands that have deprioritised value. Ethical concerns, hyper-consumerism fatigue and renewed interest in physical stores shape retail's future



Safety Net Self

Social mobility has stalled. Young people, lacking safety nets, commodify their identities as a survival strategy. These pressures set the stage for social unrest and a redefinition of value



Finitude: Devaluing Time

Time feels infinite yet is increasingly scarce, leaving people overstimulated and exhausted. As endless digital distractions dull the senses, many now seek to embrace limitations and prioritise what truly matters



Values All Change

Shaped by crisis, young consumers demand equality, transparency and regenerative business models, rejecting brands that fall short. As Gen Z gain power, their values will reshape industries

The Shopping Conspiracy

Enshittification has been coined Macquarie Dictionary's 2024 **word of the year**. 'We're all living through the enshittocene, a great enshittening, in which the services that matter to us, that we rely on, are turning into giant piles of shit,' writes journalist Cory Doctorow who first coined the term (source: **Craphound**).

Consumers are getting wise to brands blinkered on profit-making at the expense of customer value. Even challenger brands supposedly 'for the people', such as fintech firm Revolut, are losing their shine. Revolut was named in more fraud complaints than any other UK bank in 2023 (source: **This Is Money**).

Netflix's 2024 documentary Buy Now! The Shopping Conspiracy highlights the skewed ethics baked into the consumer industry – and the extremes of waste to match. Like any compulsive behaviour, hyper-consumerism stops working and dopamine resistance sets in.

'That experience of seeing it on Instagram, ordering it, having an idea in your head and it not being as you imagined it is highly frustrating. The lag time with online retail exacerbates the disappointment,' says Vicky Payne, author of High Street: How Our Town Centres Can Bounce Back from the Retail Crisis.

Payne has observed renewed zeal as British youth rediscover the joy of the physical store while online retailers like Boohoo struggle with excessive returns. 'At least in a store you know immediately if it's not right,' she says.

Buy Now! The Shopping Conspiracy on Netflix, US

Global Driver
Accelerating Technologies

The promise of rapidly evolving technology is met with a gradual degradation in quality of services and products. Brands and businesses find new ways to monetise each technological development at the expense of meaningfully enhancing their customers' lives



The Shitthropocene
Outdoor clothing brand Patagonia released a satirical short film entitled The Shitthropocen' exploring humanity's evolving consumption habits, US



Above: Revolut's Your Way In campaign shows consumers how they can break into the previously closed off world of money, UK

Safety Net Self

Social mobility has stalled across Western nations. Some say it is time for a system change. At the very least, it requires a values change. Overall inequality in the US has increased by more than 25% since 1975, and by up to 50% when comparing the 90th and 10th percentiles (source: **Institute for Fiscal Studies**).

'Young people haven't had the safety nets previous generations have had. So they have to project themselves, commodify their own identity and leisure time, their own brand as a work-around. That's their safety net,' explains Annie Auerbach, co-author of the upcoming book on the art of collaboration, Collab.

Viewing the self in financial terms and orientating life entirely around that can be fun to a point, and then it's dehumanising. 'It's about constantly mining your own experience of life in the pursuit of projecting an image, seeking opportunity. All this is possible. But it's exhausting,' says Auerbach.

According to Gallup's **World Happiness Report** 2024, global happiness levels fall with each year of age for those born after 1980. Whereas for those born before 1965, known as the Boomers, life evaluations rise with age.

Peter Turchin describes these diminishing prospects in relation to 'elite overproduction' in his 2024 book, cheerfully entitled End Times: Elites, Counter-Elites and the Path of Political Disintegration. We read that there simply aren't enough positions for the well educated to go around. A graduate role today earns the equivalent of the minimum wage, £20,000 ($24,500, €23,670). This, Turchin posits, lays the conditions for social unrest and – as we will go on to show – a dramatic re-evaluation of what society deems is valuable and worth striving for.

Global Driver
Evolving Demographics

Falling fertility rates and ageing populations in many Western and developed nations are met by a growing youth workforce in others – but the youth in these Western nations are facing a radically different future from those of just one or two generations ahead of them

'The services that matter to us, that we rely on, are turning into giant piles of shit'

Cory Doctorow, journalist, blogger and author



Depop, Cash App and Sha'Carri Richardson partnered on a campaign to highlight how second-hand selling can lead to financial freedom, UK

Finitude: Devaluing Time

Time is such a precious and limited resource for consumers today, who are pulled in multiple directions and constantly connected to a technology optimised to drain time as if it were infinite.

In Oliver Burkeman's latest book, Meditations for Mortals, he notes how people distract themselves from the uncomfortable truth that time is finite through 'procrastination or hyper-optimisation'. The popularity of Burkeman's book (a UK Sunday Times best-seller) shows the need for more intentionality about how to allocate time on a quest to improve quality of life.

'When people feel something is finite there is more of an energy or a firelight,' says Auerbach. 'Our cultural norms and prompts are infinite, Netflix queues up the next thing, scroll is continuous. Leisure space feels infinite and sucks us in. It's like a casino, where there's no daylight or sense of time passing. The pandemic was also a period of timelessness and blur,' she says.

But when the lights are back on, life feels more harried than ever. Instead of personal growth and a sense of progress, people have switched off, their senses dulled. Some 40% of Gen Z say they feel stressed and anxious all or most of the time (source: **Deloitte**). The Sandwich generation in their 40s–60s (see **Gen X: Now and Next**) are now more like a club sandwich, caring for ageing parents with declining health, supporting teenagers struggling with anxiety and sometimes still housing adult children. Time to care is scarce.

Faced with this scarcity, no one wants to be rotting in bed. Instead, like Burkeman, they want to, in his words, 'embrace the limitations and make time for what counts' to 'reconsider some of the more destructive maxims of our age' and question consumer relationships.

Global Driver
Fragmenting Societies

BANI (brittle, anxious, non-linear and incomprehensible) has become an apt acronym for capturing the fractious inequalities and divisions of a fast-changing world – and the same applies on an individual level as consumers face daily management of meaningful time



'Young people haven't had the safety nets previous generations have had'

Annie Auerbach, author, Flex, and Collab

Ikea re-imagined its iconic blue Frakta bag as a padded pillow to question society's restless lives, Singapore



Above: Patagonia's founder Yvon Chouinard signed away ownership of the company to a specially made trust and non-profit organisation, US; Right: Kikin is a financial start-up dedicated to sustainability. Identity by Koto, UK

Already, **6,000** Gen Zers are CEOs in the US

Source: ***The Economist 2024***

Values All Change

Youth values have been formed through crisis: climate change, resource scarcity, volatile geopolitics, fragile supply chains, and the inequalities and injustice embedded in overconsumption. They will reject even long-established brands that don't operate to equality, transparency and regenerative business models.

'We're at a point where there will be a generational shift and a transition of power that will happen in the next decade,' says Andi Davids, global strategic business director at US-based brand agency Bulletproof. 'If a lot of Gen Z can hold onto those values as they move into positions of power in business and politics, the impact will be pronounced.' Already, 6,000 Gen Zers are CEOs in the US (source: The **Economist 2024**).

Some 86% of Gen Z and 89% of Millennials say having a sense of purpose is very, or somewhat, important to their overall wellbeing (source: **Deloitte 2024**).

'At some point we're going to get to an inflection point,' Christopher Marquis, author of The Profiteers: How Business Privatizes Profits and Socializes Costs, tells The Future Laboratory. 'Governments and institutions are going to hold companies accountable for the external costs they are pushing onto society.'

'Plastic recycling doesn't really work,' says Marquis, illustrating one example of this shift. 'Less than 10% actually gets recycled due to contamination. And yet today we see brands like Pepsi running ads about its recycling achievements but what they really should be doing is rethinking the product.'

Global Driver
Micro-globalisation

As the climate crisis faces a tipping point, the values of younger generations are being galvanised by tangible climactic events. Yet globally, we are co-dependent not cooperative in action, leading governments to hold more brands and businesses accountable



Insight

An emerging desire to slow down, savour and regenerate is leading consumers to question the value a brand can bring; if the answer isn't clear, they've already devised an alternative

What is Insight?

Insights explore the nascent consumer behaviours, attitudes and trend responses emerging today that will evolve or gain traction in the near future through to 2025. Insights help brands and businesses to understand and identify the opportunities presented by this trend



Resistance Rising

Consumers are resisting hyper-consumption, embracing resale and seeking authenticity over instant gratification. Resale is outpacing fast fashion, deinfluencers discourage overconsumption and private communities thrive



System D: The Alternative Economy

A rising counter-marketplace sees consumers resisting full-price goods, embracing shoplifting, illegal streaming and multi-careers. System D thrives on resourcefulness, negotiation and flexibility



Real Life Masters

Rising inflation and economic shifts drive financial literacy, with influencers and apps aiding savvy spending. Real Life Masters embrace frugality, FIRE goals and mindful purchases. Brands like Waitrose and Your Juno support smart decision-making, making financial clarity more accessible and rewarding



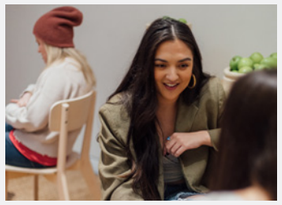
Dupe Cred

Dupes signal smart shopping, not status-seeking. Consumers embrace alternatives for savings and quality. Shifting value perceptions favour confident brands that embrace the trend strategically



Modern Anchors

Consumers reject hyper-consumerism, embracing rituals and mindfulness, leading brands to tap into anticipation and sensory engagement – and reshaping how they create and deliver value



Regenerative Practices

In a world where numbing cosiness, comfort and convenience are available 24/7 on our devices, it takes discipline and courage to go for the regenerative route – yet people want re-energising and potentially transformative activities

Resistance Rising

People are resisting hyper-consumption and instant gratification – but it's a values revolution that will not be televised or easily followed on the web. This is The Resistance after all, a response to 'enshittification' in which consumers at scale seek alternatives to overpriced products and underwhelming services.

The rise of resale alone is evidence of the power behind the values shift away from blind consumerism and towards savvy spending that leaves the individual feeling better post-purchase than before. According to a report by ThredUp and GlobalData, the resale market is set to surpass fast fashion by 2028; in the past three years, resale has grown 21 times faster than the retail apparel market. In the US, the second-hand market grew seven times faster in 2023 than overall fashion retail where sales were flat compared to a year earlier.

Deinfluencers on social media critique products to dissuade consumption, while #deinfluencing has 233m views on TikTok. And #underconsumptioncore is normalising anti-consumerism and encouraging the re-use of everyday or cherished items, driving demand for longer-lasting products.

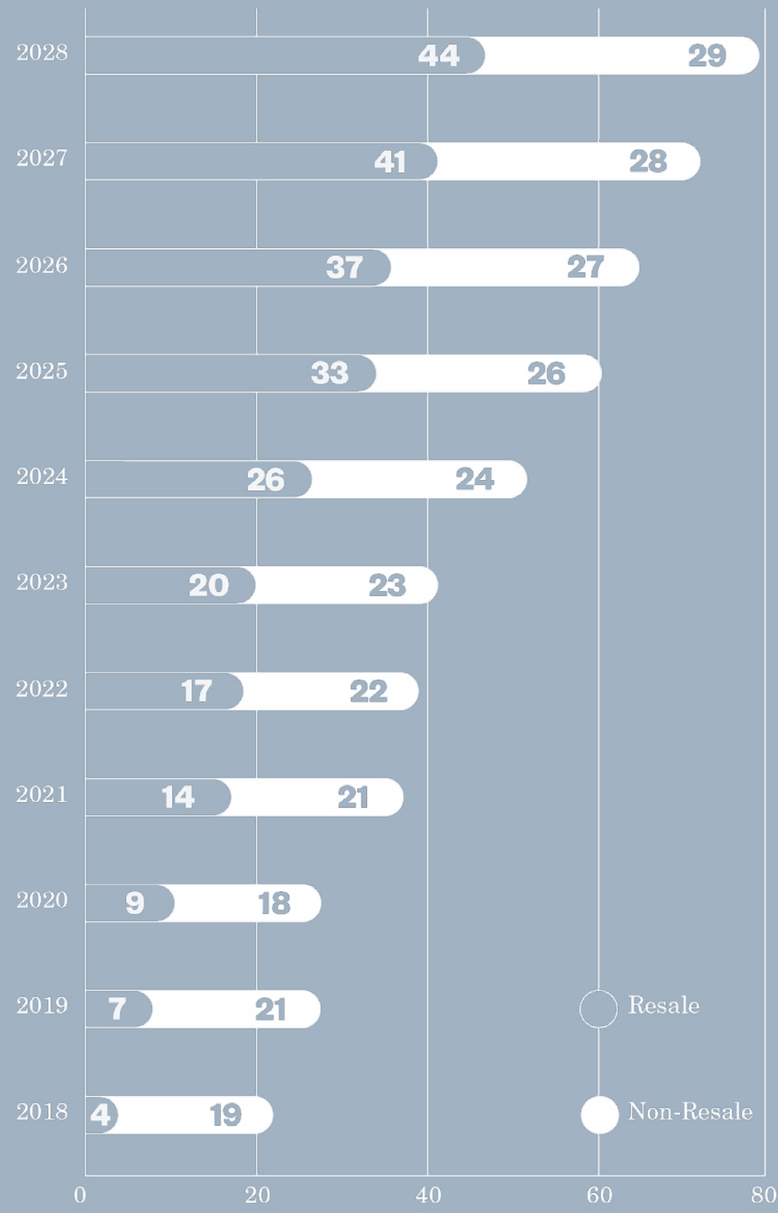
The Resistance has retreated to private Discord or Mastodon groups, gated to avoid the bots and branded content cheapening today's web. Almost 50% of internet traffic today comes from non-human sources, according to imperva 2024, lending weight to the Dead Internet Theory in which the fight for attention – through authentic or inauthentic means – can get you whatever you want. This is also partly why Reddit is growing so fast; people want authentic, human interaction.

For Black Friday 2024, home electronics brand Philips targeted The Resistance, showing brands can lie low too. Its Better than New campaign suspended sales of new items to clear all its refurbished devices first.



ThredUp, US

US second-hand apparel market to reach $73bn by 2028



Tha Data source: 2023 Edelman Trust Barometer, Edelman, US

‘People are stealing on a large scale to resell to people struggling to make ends meet’

Paul Gerrard, *director of public affairs, Co-op*





Both: Fix Your Phone Shop by Waag Futurelab at Dutch Design Week addressed issues of data privacy in centralised operating systems, The Netherlands

System D: The Alternative Economy

D stands for ‘débrouillard’, a French word for a resourceful and ingenious individual. The black market is becoming a vibrant counter-marketplace frequented by even the most respectable in society – partly doing it because money is tight and partly on principle; they simply don’t think the goods are worth their full price.

After all, 43% of British Gen Z think it is important to express their moral convictions through civil disobedience if necessary (source: **National Centre for Social Research** 2024). This is behind the rise of the Swiper, a term used to describe a Seemingly Well-Intentioned Patron Engaging in Regular shoplifting.

A **January 2025 article** in youth culture title Dazed sought to justify the casual shoplifting of cuddly toys. ‘But it’s hard to fault people for stealing Jellycats, whether out of financial desperation or simply because they want one. People deserve to have nice things. And in a world where corporations exploit us daily, and capitalism steals our time and wellbeing, what’s so wrong with people getting their lick back?’

It’s also why illegal streaming is surging around the world and 40% of people use a work VPN to access personal streaming services (source: **Forbes Advisor 2024**). Some do so out of necessity, but others don’t think it is ethical to charge so much for content.

Those who thrive in System D have multiple income streams – not so much side hustles any more, more like multi-careers, such as an Only Fans channel, or pet breeding, furniture dealing, dropshipping or dog walking.

Assessing value and negotiating price are essential for survival in System D. Brands that appeal to The Débrouillard will be those that can show flexibility and offer discounts, good deals or bulk buys. UK online fashion retailer ASOS, for example, launched Nibble in summer 2024, a haggling chatbot reported to secure **discounts of up to 40%** on ASOS purchases.

Real Life Masters

Just as the Covid-19 pandemic forced a new level of data literacy among the common public, so too rising inflation, supply chain shocks and energy price hikes are encouraging people to upskill on everyday economics with online influencers and banking apps.

The UK's biggest exam board AQA has launched the **Real Life Maths** platform for kids as young as 14 to learn how to understand interest rates, pensions and calculate inflation.

A new wave of content-creators are emerging in the shape of influencers full of professional acumen, life wisdom and meaningful messages to share on how to get through the slog. The **Financial Feminist Podcast** with Tori Dunlap, a money expert and author who describes her podcast as the top money show for women, has already been downloaded more than 15m times (source: **Linkedin**).

Across social media platforms, Real Life Masters are upskilling on financial advice by watching the millions of social media videos to be found under #passiveincome and #financialfreedom, planning carefully and living frugally in the present to achieve their FIRE goal (financial independence, retire early).

Real Life Masters derive pleasure and peace of mind when the books balance and want brands to assist with smart, frugal decision-making. Personal budgeting app **Your Juno** uses **Instagram** to de-influence and normalise frugality. Crucially, this isn't about being mean, Real Life Masters can shop at upscale UK supermarket Waitrose if they want – but they can also be smart about it. The **Waitrose** Food & Drink Report targeted exactly this mindset, suggesting people are gifting quality olive oil, honey or premium salt rather than a bottle of wine that is polished off in no time.

Consumers want brands to assist in this way to break down the mental maths gymnastics they have to do to rationalise and justify spending.



Financial Feminist by Tori Dunlap, UK

Dupe Cred

It's no longer seen as nouveau riche to sport a dupe; it shows you're smarter than the system. In a **recent survey cited in The Guardian,** half of US adults say they buy dupes for the savings, while 17% say that even if they could afford the genuine article, dupes are a great alternative.

Dupe.com offers riffs on desirable furniture designs while The Fragrance Company does the same for perfume. **Elf Beauty** has found success by duping high-end cosmetics products at more accessible price points. According to **Kantar**, alongside their competitive pricing, supermarket chains Aldi and Lidl are building a reputation for quality, often matching or even surpassing more expensive products from rivals in blind taste tests.

Lululemon has used this secondary market by offering DupeSwaps of its Align leggings to anyone who had purchased a dupe. According to Lululemon, 50% of the more than 1,000 people who came to the swap were new customers – and half were under 30 (source: **Fast Company**).

In December 2024, US retailer Walmart collaborated on two bag styles that drew social media attention for their similarity to luxury brand Hermès's celebrated Birkin bag, subsequently dubbed the Wirkin (source: **Forbes**). Walmart has since launched a partnership on its online marketplace with resale platform Rebag, which sells Hermès Birkin bags priced at up to £32,120 ($40,000, €38,155) on its site. More than anything, this is evidence of the scrambling of consumers' notions of value – especially considering that Walmart now attracts a larger share of more affluent customers than ever before (source: **Fox News**).

Brands with poor materials, below par taste, shoddy provenance or craftsmanship will struggle while confident brands will continue to play with this trend to amplify their brand halo.

Above: Photography by Felipe Monteiro, Brazil; Right: Dupeshop sources, tests and sells affordable alternatives to luxury beauty products, UK

Affluent families now constitute **54%** of budget supermarket chains Aldi's and Lidl's customers

Source: ***Kantar***



Modern Anchors

Consumers are pushing back at the fast-paced, superficial values of hyper-consumerism in favour of slowing down and being more present and aware in the moment as the prioritisation of experiences over products continues. Some 70% of consumers are very, or somewhat, open to adopting new rituals (source: **WARC**).

In the past, religion allowed those moments of pause; today the blur of modern life can at times feel overwhelming. 'No one wants to go back to too much religious control but at the same time, freedom can be a terrifying prospect,' Dr Alex Curmi, psychiatrist and host of **The Thinking Mind podcast,** tells The Future Laboratory.

This is an obvious space for a sensory product like Yankee Candle whose 'make it more magical' Christmas 2024 campaign focused on the power of the candle to jolt the senses and thereby shift perspective and lift mood. But all brands can lean into this trend and appeal to the consumer need to slow down consumption by selecting a bit of friction or find new ways to bookmark time.

Vorfreude, the German word to describe pleasure in anticipation, is having a moment as people look for ways to create new rituals and savour more (source: **The Guardian**). This could involve a spring equinox, midsummer, midwinter, full moon or apple season celebration.

Adding more friction into the customer journey can be a way to differentiate. Perfumes from niche brand Avestan, for example, are purposely not available online, nor visible in online ads. Instead, customers are required to travel to its small London and New York stores to purchase from a product range of just two fragrances. The product is hard to come by, it takes effort and planning to access – all of which builds anticipation and intensifies the moment of consumption.

70% of consumers are very, or somewhat, open to adopting new rituals

Source: ***WARC***

Atlas of Tarot by Solveig Weimar and Antonia Schreiber re-invents the cards as a tool of unification for people and planet. Photography by Nicole Marnati, The Netherlands

Regenerative Practices

People want activities that feel regenerative, re-energising and potentially transformative as opposed to ones that deplete the individual and numb their senses. In a world where cosiness, comfort and convenience are available 24/7 on our devices, it takes discipline and courage to go for the regenerative route.

In health and wellness circles people want to confront and process trauma in order to come back stronger. The Sanctum exercise class combines self-reflection and trauma release by encouraging participants to cry, groan and let it all out through dance.

Meanwhile, Peoplehood offers 60-minute guided group conversations and brings complete strangers together online and in person to overcome social awkwardness and get to more open conversation.

According to psychiatrist Dr Alex Curmi, 'Comfort can be really dangerous. The thing that can make you comfortable in the short term is psychologically disabling in the long term,' he tells The Future Laboratory.

Curmi works with patients who have grown so used to life on demand, with everything seemingly one click away, that they have lost the ability to confront even mildly difficult situations such as a challenging conversation or a walk outside. 'From an evolutionary perspective, some measure of discomfort is just as crucial to our survival as rest and relaxation,' he says.

Hospitality brands can differentiate by encouraging people out of 'goblin mode' and 'bed rotting' and into a more awakened, alert path to personal growth. Luxury resort St Regis Punta Mita in Mexico is leaning into sexual wellness to do this, with coach-led seminars for guests wanting reconnection and deep relational healing. None of this is easy, but it gets travellers to a more transformational place than flopping by the pool.





Peoplehood by Soulcycle is a guided group conversation practice designed to improve relationships, US

The sexual wellness industry is projected to reach **£94bn** by 2030, growing by **4.7%** per year from 2023 to 2030

Source: ***Research and Markets***

Foresight

In tough times, community bonds and networks become even more vital and crucial to business success as brands embrace care, waste innovation and become engines of empathy

What is Foresight?

Foresights examine speculative future scenarios five to 10 years in the future. Building on the Insight section, they showcase new directions, divergence or developments



Empathy Engines

Consumers are tired of purpose-washing. They want products and services that offer value when it comes to technology, and this means platforms and services that bring people closer to each other – not further apart



Care Communities

In tough times, community bonds and networks become even more vital. Showing care for all agents in the system is becoming an essential value. People want brands that enrich the community by designing altruism into the product or service



Neo-Abundance

The future will be marked by resource shortages relating to environmental pressures and geopolitics. The Neo-Abundant era is about types of practices like product mining and resource pooling happening at scale



Retro Finance

Consumers are looking for alternatives to the profit-driven, self-interest of traditional banks and demanding more personalised and community-focused financial services that take inspiration from the past – with an AI twist



Board of Dinner XAI for Empathy Project by Deep Food and Joseph Wan is a recipe generator exploring how explainable AI (XAI) can foster empathy through food, The Netherlands

Empathy Engines

Consumers are tired of purpose-washing (as we detail in our Post-purpose Brands report). They want products and services that offer value when it comes to technology, and this means platforms and services that bring people closer to each other – not further apart.

As Wise Animals author Tom Chatfield explains, it is time for change. 'The metrics that stand for value on social media – engagement, sharing, volume of content – are very shallow. They tend to reflect short-term engagement. They're not a good reflection of what people truly value.'

Brands and organisations with in-built Empathy Engines do the opposite of stoke division. Take US-based StoryCorps, a virtual program (website and video call scheduling tool) to connect people across political divides. The service pairs people up and asks them to have a civil conversation – not to debate politics – but simply to get to know each other as people.

The LA Times will add an AI-powered 'bias meter' to news articles in 2025 so that readers will get both sides of the story at the flick of a button, which owner Patrick Soon-Shiong says will serve to differentiate news and opinion.

This idea of fostering a new mutuality and overcoming division can be aided by technology; take Microsoft Teams' new interpreter feature, which uses real-time AI-powered speech-to-speech translation to simulate your speaking voice during meetings, in the language of your choosing.

As Flex author Annie Auerbach explains: 'We are looking to understand people outside of our own cultural spheres, rather than just retreating into our own space where everything is cosy, but we are isolated and potentially divided.'

Tech brands will need to align their UX and community strategy with emerging values around care, connection and transformation if they are to retain audiences over the next decade. In Cory Doctorow's view, enshittification is how platforms die. Empathy Engines are an indication of the types of digital products and services that will replace them.

> 'The metrics that stand for value on social media are not a good reflection of what people truly value'
>
> *Tom Chatfield, author, Wise Animals*

Care Communities

In tough times, community bonds and networks become even more vital. Showing care for all agents in the system is becoming an essential value. People want brands that enrich the community by designing care and altruism into the product or service.

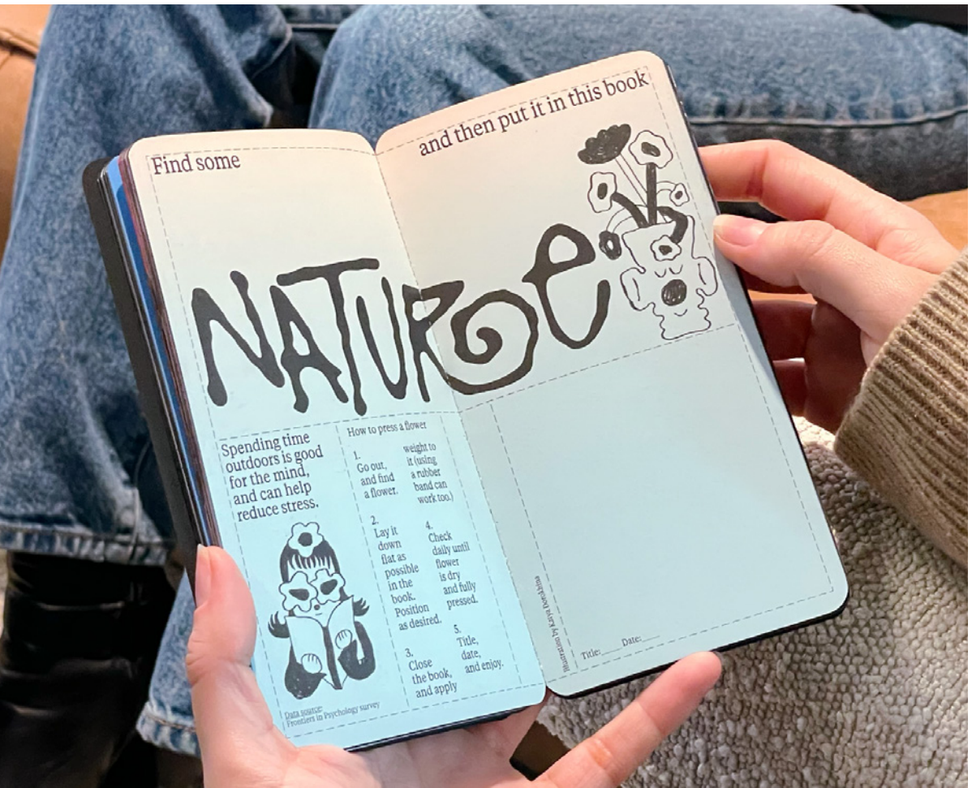
Hinge's **anti-screen book** is putting the care back into online dating. The book contains 100 pages of engaging and thoughtful activities designed to get people offline (and off the Hinge platform) and back to in-person interactions.

This is why publisher Verso has put together a reading list of 14 titles, **What to Read When Self-care isn't Enough,** saying: 'We need to move towards a world in which we acknowledge the extent to which we are all dependent upon each other… These books highlight the solidarity needed in struggling for better lives for all.'

New York ASMR spa Whisper Wave offers hair play appointments described by founder Rebecca Benvie as 'care for the nervous system', pointing towards a future of more relational, less transactional shopping districts.

Cult luxury brand Telfar shows community care in its new pricing model **Telfar Live** – dynamic pricing flipped to benefit customers. Higher demand keeps the price low; Telfar's most popular products are sold at wholesale prices because they can manufacture higher volumes at lower cost.

Over the coming years, the notion of agentification will gain traction as businesses incorporate AI agents. The Internet of Things eco-system will evolve to become a web of agents, but it won't be limited to technology; it will trigger a more 'agentified' view of the world where people will consider each 'agent' in a system when making a consumption decision. Brands will also start to function as an eco-system, recognising and giving visibility to all of its 'agents'; perhaps, for example, having a seat for Nature on the board.





Left: Phonebook by Hinge, US. Above: Arc is the UK's largest sauna, providing group classes, ice baths and a social space that transforms wellness into a shared experience, UK

'[Community network] BlueSky is generating real value, designed on an open protocol. It's people helping each other out'

Tom Chatfield, author, Wise Animals



Roku by Camper, Spain

Neo-Abundance

The future will be marked by resource shortages relating to environmental pressures and geopolitics. China is already restricting exports of critical minerals needed for consumer electronics. And yet the world throws away 13m mobile phones a day (source: The Shopping Conspiracy, Netflix). In these scarce times companies will be collecting those phones and harvesting the nickel and cobalt within them.

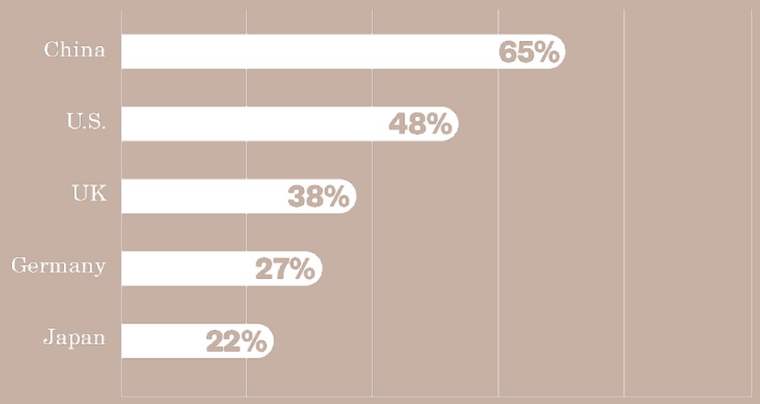
The Neo-Abundant era is about types of practices like product mining happening at scale. One disused phone doesn't get you many rare earth minerals, but pool those phones and the micro-mining becomes interesting. Resource pooling will soon be the business buzzword, replacing talk of productivity efficiency.

The EU agrees. It has already published recommendations to return used and waste mobile phones, tablets and laptops. California has a 'right to repair' law. Neo-Abundant products are modular and easy to repair, like Spanish footwear brand Camper's modular trainer Roku, parts of which can be easily swapped and replaced. Or look to mobile phone Skyline partnering with Ifixit to order spare parts and repair guides.

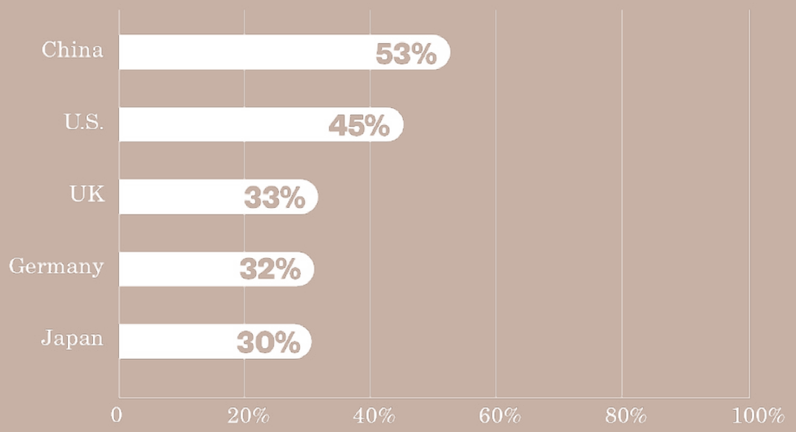
Mainstream brands are already moving towards a Neo-Abundant positioning: Sweden's Ikea has launched a peer-to-peer second-hand furniture marketplace, and UK fashion retailer Primark and Verte have a swap-shop collaboration. For Neo-Abundant Brands, peer-to-peer rental platforms are the core business, such as Loanhood or Upstream.

Financial services companies are perceived to be lacking in vision and equality of care

Financial service companies **serve the interest of everyone equally and fairly**



Financial service companies have a **vision for the future that i believe in**



Data source: ThredUp Resale Report 2024, ThredUp and GlobalData, US



Collaborative earning app Fluz asked Koto to craft a visual identity that appealed to Gen Z, US

Retro Finance

Consumers are looking for alternatives to the profit-driven self-interest of traditional banks and demanding more personalised and community-focused financial services that take inspiration from the past – with an AI twist.

Only 38% (UK) and 48% (US) of respondents think financial service companies serve the interests of everyone equally and fairly (source: **Edelman report**). This will inevitably begin to change.

Financial precarity demands more nuanced service, something that Faisel Rahman, founder of Fair Finance, describes as relationship-driven financial services, based around a conversation. 'If you talk to people, you can find out why or how they defaulted on their last loan or not,' says Rahman.

Expect to see the rise of community banks and mutuals with characteristics closer to informal credit networks and lending. 'They know your family, understand your context, understand that things change and find a realistic solution for your problems,' says Rahman.

In the UK, Nationwide has just acquired Virgin Money to become the UK's second-biggest mortgage and savings provider. 'Unlike a bank, we run for the benefit of our members and the community. Our members have a say in how we're run too,' it says. Brands across sectors can take inspiration from the mutual model, which ensures customer-centricity is at the heart of the business. This is the powerful message that consumers will be looking for over the coming years.

Elsewhere, nimble fintechs will harness the powerful AI algorithms, data analytics and APIs providing investment guidance to high-net-worth individuals (HNWIs) – effectively making this accessible to all.

As inequality grows over the coming decade, consumers will look for brands that utilise the democratising power of technology to inject fairness back into the system. This is as relevant to banking as it is to brands across categories.

Value States and Codes

These five states summarise the consumer mindsets and brand positions to aim for in order to meet future consumer needs now.

Emerging from each state is a related code. These new codes can be used as actions for brands, businesses and organisations to take in order to align with changing perceptions of value, whether they be financial, emotional, social/ societal, professional, functional or environmental.

These states, and their emerging codes, are not linear or progressive. Brands can occupy or draw from more than one of these states at once, as future-focused brands must become ever-more elastic.



Ragged Edge's rebranding for foreign exchange fintech Wise, UK



FemTech Activewear Collection by Sweaty Betty and Hertility, UK

State One
Care

Short-term ⟶ Long-term

The Code: Brands have a choice to build for long-term value and consider the customer's social, mental, physical and financial wellbeing, or to remain in an extractive, short-termist model – and face the backlash.

As consumers shift to consider value in the long term rather than the short term, it's an invitation for brands to do the same.

This aligns with the rise in the functional clothing market. UK fitness wear brand Sweaty Betty recently launched its new **Femtech collection with Hertility**, including Leak Protect Power Leggings, and Maternity Leggings, Shorts and Vests, successfully aligning itself with women for the long haul as their bodies age and change.

Care is shown through micro-brand engagements too. Just as with human relationships, care isn't just about grand gestures, it's about continuity and being there in those in-between moments when things don't always go to plan.

Care is key for Cadbury, whose re-orientation around one word, 'generosity', has given it permission to be there in those 'everyday acts of kindness that bring people closer together'. It is a repositioning that has won out, allowing it to reconnect with consumers and regrow what was a declining business 8–10 years ago.

State Two
Connection

Transactional ⟶ Relational

The Code: People are seeking meaningful connections and belonging. They are increasingly viewing themselves within an eco-system of agents and they want brands to foster a sense of belonging to their inner circle too.

People want experiences that bring them closer to each other and their communities. Deep, meaningful relationships are today's scarcity in a world where so much time is spent online in a state of pseudo-intimacy.

People are looking for brands that facilitate connections between each other not just with a brand. How can brands truly serve this need, allowing an audience to coalesce around them, but also giving fans freedom to find each other?

Individuals are moving into private, gated communities in favour of genuine exchange away from the bots and AI slop. Brands can follow suit by inviting loyal customers behind the scenes, turning them from spectators to stakeholders.

Skincare brand **Refy** recently did this by inviting community members rather than influencers on an exclusive trip to build deeper connections and empower them to shape the brand's narrative from within.

Fenty Beauty's F Club is designed like a group chat with friends, allowing for connection between consumers within the fan base.



REFY, UK

State Three
Resourcefulness

Scarcity → Abundance

The Code: People know there is a different way; that pools of untapped resources are within reach. But they want brands to do the hard work on product innovation, factor in the true, external costs and turn waste into wealth.

Extreme economic conditions are pushing people to be continually thinking through workarounds. But it can be exhausting. This is where brands come in. If a brand can be a by-word for excellent value for money and good use of resources, consumers will be looking for those short cuts.

Consumers will determine resourcefulness based on how a brand is using circularity, peer-to-peer communities or turning waste into new abundance. Brands like Kiki World or **MetaFactory**, which flip production on its head, only make the exact amount that their communities desire, show new ways to eliminate waste and appeal to a new respect for finding riches in what was once overlooked.

Brands would do well to take inspiration from these Gen Z-led, independent brands, like **Of Planet Earth** that follow a made-to-order business model, ensuring no excess stock is produced. Being able to clearly convey shrewd accounting and operational prowess will deepen consumer trust and inspire behaviour change.

The Bikini Sweater by Femke Hoppenbrouwer at Duty Free Zone. Photography by Nick Bookelaar, The Netherlands

State Four
Enoughness

Maximiser → Satisficer

The Code: People want to live well with the mess (in all its forms) and this requires less self-judgement. Brands need to channel this practice too and avoid empty promises that keep consumers wanting more, more, more.

As overconsumption-core shifts further into the mainstream, people will look inside themselves and to their communities to find value and feel satisfied. Self-acceptance and self-love will provide space for individuality to grow in place of perfection-seeking and comparison, which has fuelled consumerist tendencies around continual betterment.

Messy is gaining cultural traction, as seen in the rise of the Messy Girl or **#messyroom** aesthetic and the Brat lifestyle, which is less exacting. Knowing you are enough is accompanied by feeling you have enough, as we detail in our **Curated Clutter** analysis.

It taps into US psychologist Barry Schwartz's distinction between 'maximisers' and 'satisficers'. While the maximiser is always trying to improve, always chasing an ideal and not happy, the satisficers have less, but enjoy themselves more.

Brands can lean into this by adding friction into the purchasing journey. This injects mindfulness, helps consumers to slow down, gradually building anticipation and heightening pleasure.

Department Of founder Gia Seo in her maximalist apartment in Brooklyn, New York. Photography by Max B Photo, US



BreathLab for Nike House of Innovation by Random Studio, France

State Five Transformation

Double-digit growth → Personal growth

The Code: People want to spend time on enriching pursuits not devaluing ones, but everyday environments are stacked against this. They want brands to take lessons from health and wellness and apply insights from coaching to help them feel recharged.

People are prioritising activities that feel regenerative and re-energising, but it takes discipline to divert time and energy to activities that nourish rather than deplete us. It might take courage to choose to step out of a comfort zone (and infinite scrolling) and into the unfamiliar; to challenge oneself and experience transformation and growth.

Brands would do well to take inspiration from New York's wellness speakeasy spa **Elahni**, which is based on the premise that people are more likely to stick to new, restorative behaviours when there is a social element involved. Panasonic's business incubator **Panasonic Well** is orientating itself to deliver transformation for a sector of the population that it has identified as in acute need of help – families. Products and services include conversational AI, tailored wellness plans, and a shared dashboard to build family connections, and track activities and progress.

Strategic Implications

As consumers' values shift, driven by growing awareness of often destructive digital habits, they are considering more carefully what they spend both their money and their time on – ever more alert to overpriced products and underwhelming services



Ragged Edge's rebranding for foreign exchange fintech Wise, UK

Strategic Actions

From Transactional to Relational Strategies

Conveying better value beyond just pricing will become ever more essential for brands and businesses. Ask what your share of life is, as opposed to share of wallet.



Lynk & Co Barcelona Club, Spain

Build BWBs – Brands with Benefits

Consumers will expect more from their relationships with brands. How can you bake in better quality, for example, or ensure sustainability is a given?



Veja General Store, Paris, France

Deploy Pull-down Luxury

As the luxury sector leads on issues such as quality, craftsmanship and experiences, how can you pull down strands from this – such as rarity – into your offer without increasing pricing?



Sunnei and Mid/night 00.00 pop-up store, Milan, Italy

Thought-starters

How can you relieve the burden?

Understanding what your consumers consider as ‘fair’ – whether fair finance for all or fair pricing – will be crucial in future brand positioning. Appeal to the new, super-savvy consumers by offering the tools and services that make the calculations for them and relieve the burden of the modern value dilemma.



Shopify Retail Kit, US

How can time become the new currency for your brand?

Consider the growing importance that time also plays in this fairness equation, whether it’s a product that conveys a sense of time or the idea of time well spent. How can the product or service enrich time – through packaging, for example – and deliver quality for the consumer rather than devalue time or cheapen an experience?



Ikea Resten, Singapore

How can you build care into the core of your offer?

Building trust is intrinsically linked to the notion of value. Brands will be judged through the level of care evident in their design, their values, right down to the micro-interactions and experiences people have of a brand. Attention to detail will be critical to convey those values.



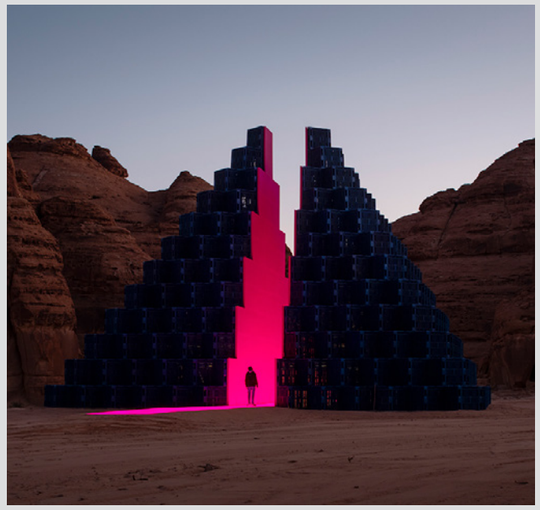
Icons by Tesco. Campaign by BBH London, UK

Related Macrotrends

2020

Post-purpose Brands

Pushing back against purpose-washing and jumping on the bandwagon, brands will embrace imperfection and focus on betterment. With more intuitive technologies, new products and services will constantly evolve to meet our needs



A Concise Passage by Rashed Al Shashai at Desert X Alula 2020. Photography by Lance Gerber, Saudi Arabia

2022

Neo-collectivism

Society is facing a mass re-organisation. United by values of empathy and community, consumers are shunning individualism in favour of alliances that are decentralising industries and redistributing power at scale



Utopia is Possible by Kenzo. Photography by Vicki King, France

2023

Luxury Recrafted

The consumers – or rather the collectors – of tomorrow will expect luxury to signal status not through excess, but by acting as a guardian of craftsmanship and provenance, an ESG champion and a cultural compass



Loewe ReCraft, Japan

2023

The Great Wealth Transfer

Wealth ownership, distribution and the politics that influence cross-generational spending are all in flux, according to the latest findings of The Future Laboratory's Great Wealth Transfer report



AI imagery by The Future Laboratory, UK

Strategic Worksheet

This strategic worksheet is to help you apply a macrotrend to your business



Collaborative earning app Fluz asked Koto to craft a visual identity that appealed to Gen Z, US

Prioritisation

Consider the following:

Which human need is most relevant to your brand/business?

Attainment | Belonging | Curiosity | Identity | Purpose | Security | Fulfilment

Which driver will have the most impact on your brand/business?

Micro-globalisation | Fragmenting Societies | Accelerating Technologies | Evolving Demographics | Climate Change & Resource Scarcity | Urbanising World



Select two insights that feel most relevant to your brand/business:

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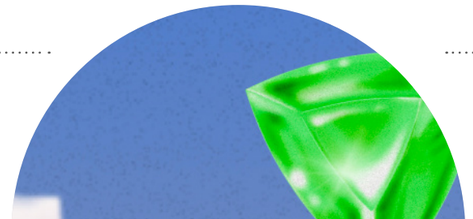
Which foresight scenario is your company least prepared for?

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Influence

Consider the following:

How will this trend affect how you fulfil that need?

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What impact could these drivers have on the business?

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How do these insights align with your brand's trajectory?

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How could you apply these insights to your business?

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What is most surprising about this foresight scenario?

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Consider how this macrotrend could affect the following pillars of your brand:





01 Culture

What cultural conversations are emerging and who are the tastemakers?

How do we add value to culture?

What will our consumers pay more for in the future?

02 Category

What's our greatest opportunity?

How is the competition evolving?

How can we differentiate?

Left to right: Pinterest, US; Ragged Edge's rebranding for foreign exchange fintech Wise, UK

Consider how this macrotrend could affect the following pillars of your brand:





03 Consumer

What's our greatest opportunity?

How is the competition evolving?

How can we differentiate?

04 Business

What are our biggest challenges?

What part of the value chain will add the most and least value?

What are the strengths of the brand in this future?

Left to right: By Rotation Mayfair pop-up, UK; Fluz. Identity by Koto, US

Planning

12 MONTHS

Over the next 12 months, how will this macrotrend affect your team?

3 YEARS

In three years, how will this macrotrend change the brand?

5 YEARS

In five years, how will this macrotrend change the business?

This report is based on the sector research from The Future Laboratory's trends intelligence platform, **LS:N Global**

Read our latest macrotrend reports:



Future Forecast 2025

Future Forecast 2025 goes beyond the fleeting to uncover the behavioural patterns shaping tomorrow. Across 10 sectors, we spotlight 50 trends set to define 2025

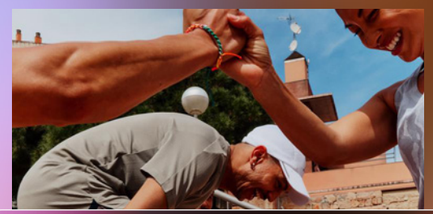
Rapha and Shrimps, UK



The Synthocene Era

As AI redefines our understanding of intelligence, we begin to enter The Synthocene Era, an age in which the lines between what is natural and what is artificial are increasingly blurred

Nikeland on Roblox, US



Game-changers: The Future of Sports Fandom

By embracing new technologies, geographies and audiences, sport is becoming bigger than ever and offering valuable lessons on nurturing a new era of fandom

Adidas Ultraboost 5, Germany

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