THE : FUTURE : LABORATORY

# Rebranding Sustainability

## HOW TO REFRAME SUSTAINABILITY THROUGH THE LENS OF BRAND STRATEGY

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# Introduction

Sustainability is Dead. That's quite a provocative statement, we know. Sustainability is one of the key issues that our clients at The Future Laboratory continually ask us about, especially as sustainability narratives are facing growing scepticism and fatigue in a post-greenwashing world

Businesses must still address these issues as political discourse and legislation intensify. So, we're re-invigorating the conversation because its language is tired. Its purpose feels unclear. Its identity is fragmented across regions and audiences. As a result, its experience is often forgettable.

The Future Laboratory has partnered with UK-based Arbor Communications to offer a refreshed perspective that combines forward-thinking intelligence with actionable insights, delivering on our promise to empower clients with confidence and strategies for the future.

So, is sustainability really dead? The concept of sustainability as we know it may be outdated – even proving counter-productive. If sustainability were a brand, it would be overdue for a rebranding.

Like any good rebranding, what's needed is a re-imagining from the inside out (not a superficial refresh).

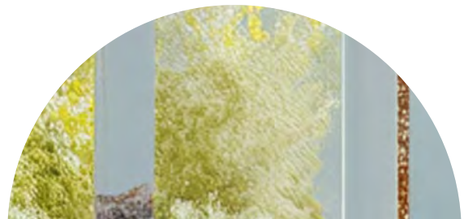
Our Rebranding Sustainability report is broken down into six core reports that reframe sustainability through the lens of brand strategy. If sustainability were a product, how would you rebrand it? What would you keep? What would you kill?

This series will give you and your business a framework to confidently re-imagine your positioning, marketing and value in this space and show how to communicate it in ways that are timely, desirable and commercially smart.

*Fiona Harkin,*
*director of foresight,*
*The Future Laboratory*

*Stephanie Turner,*
*founder,*
*Arbor Communications*

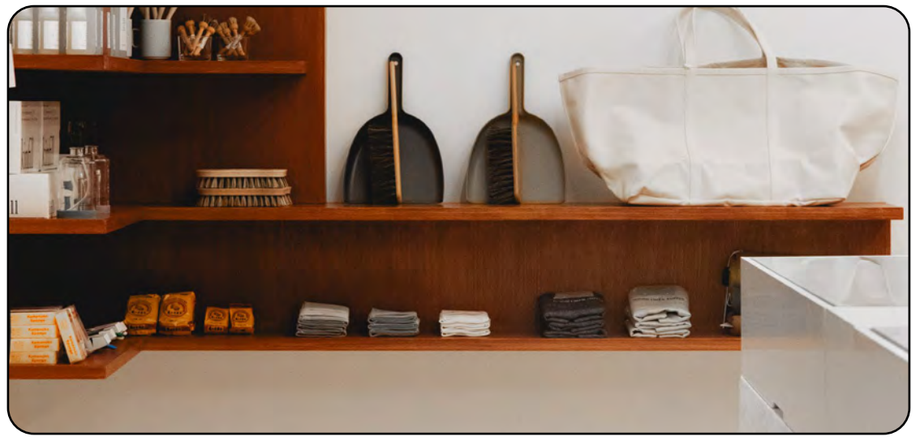




Cover: AI imagery by The Future Laboratory, UK

# Key Statistics



## Gen Z

the youngest spending cohort, question whether convenience and sustainability can coexist (source: D1A)

Convenience outweighs conscience as a purchase driver across all demographics, with the effect strongest among consumers

## aged 25–34

(source: Arbor Communications, Subtle Sustainability)



## Up to 80%

of consumers say sustainability matters, yet only 1–7% consistently act on it, revealing a persistent gap between stated values and real-world behaviour (source: Boston Consulting Group, 2022)

## Up to 70%

of climate sceptics already behave ‘sustainably’, driven by practicality rather than environmental belief (source: C Space, 2025)

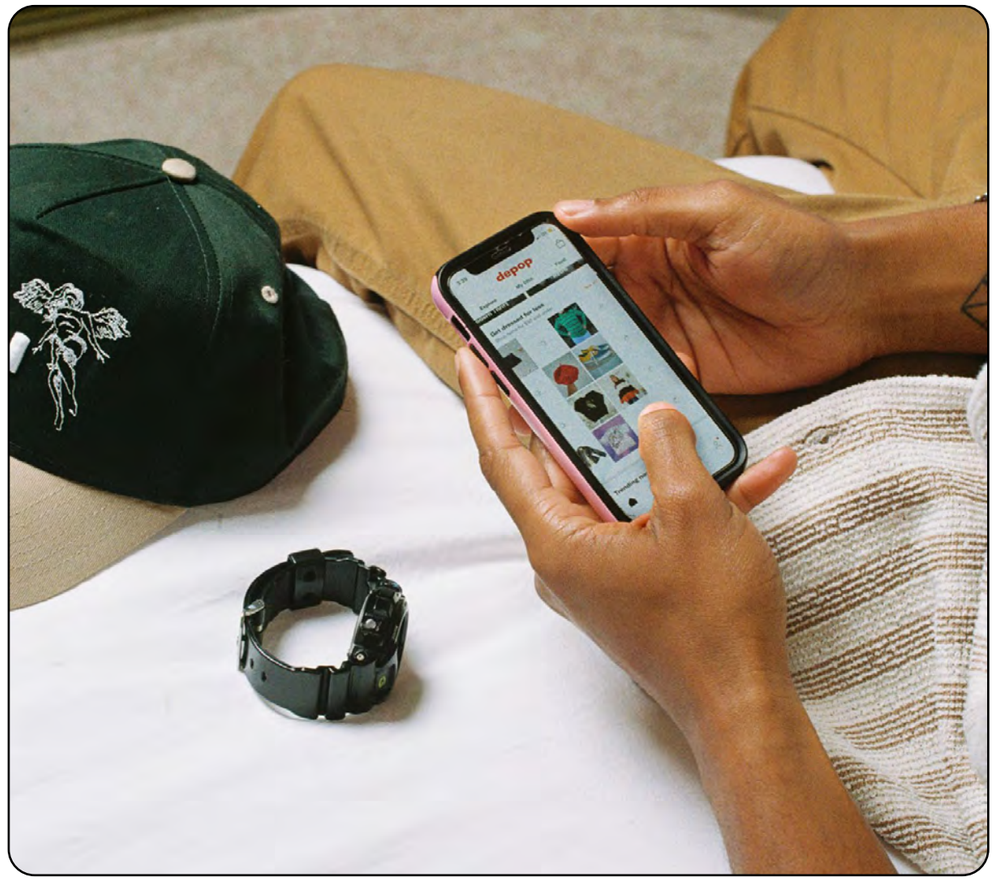
In 2022, Selfridges sold almost 20,000 pre-loved items, as it works towards making

## 45% of all transactions

circular by 2030

Left to right: Vestiaire Collective, France; Veja General Store, France; ReBurberry at Selfridges UK

# Key Statistics




**78%**

of global consumers say they are likely to boycott a brand based on where it is based (source: Edelman Trust Barometer Special Report: Brands and Politics, 2024)




**72%**

of retail sales in the US are still expected to happen in physical stores by 2028 (source: Forrester)

Marketing budgets have dropped to

**7.7%**

of overall company revenue, one of the lowest levels seen in the past decade (source: Gartner, 2025 CMO Spend Survey)

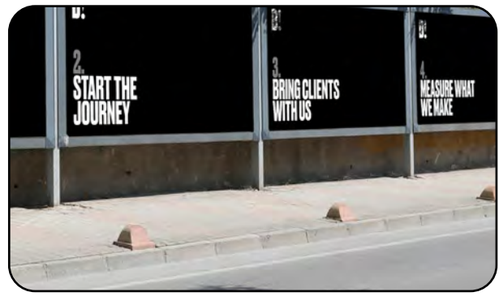
The global circular economy is projected to reach

**£3.5 trillion**

by 2030 (source: Accenture)

**Almost 50%**

of younger consumers trust brands more when store design reflects their values, signalling expectations that environmental commitments show up in lived experience (source: MG2)




Left to right: Depop, UK; Aesop Hainan. Design by Other Matter, China; Design Declares

# Topline Takeaways




AI imagery by The Future Laboratory, UK

As an idea and a language of its own, sustainability as we know it is dead. A new approach is needed that changes the language for a positioning and narrative reset, reflecting today's blended physical and digital realities. This report explores three sustainability values ripe for rebranding: Invisibility, Proactive Luxury and Future Legacy.

**Rebranding lesson:**
Change the language for a positioning and narrative reset




AI imagery by The Future Laboratory, UK

Others are meant to disappear. As industries phase out wasteful systems, extinction becomes an innovation opportunity. Reshaping materials, ownership and circularity now define the next era. Learn how to design for extinction, from planned obsolescence and branding for ever to circularity as an investment magnet.

**Rebranding lesson:**
Develop the product and adapt to market forces




AI imagery by The Future Laboratory, UK

The third report in our Rebranding Sustainability series looks at how localisation can become a powerful marketing tool and a meaningful sustainability strategy in one. Both for business resilience and as a powerful message, knowing exactly where, why and for whom something was made is a sustainability strategy.

**Rebranding lesson:**
Translate, don't transplant – through localisation and cultural relevance

# Topline Takeaways




AI imagery by The Future Laboratory, UK

What a brand feels like matters as much as, if not more than, what it says. It isn't messaging but experiences and spaces that drive trust. In a post-verbal, post-greenwashing world, sustainability must be felt to be believed. Sustainability must be something tactile that you see, feel and move through.

**Rebranding lesson:**
Create new experiences – not just messages – via multi-platform brand storytelling




AI imagery by The Future Laboratory, UK

Nature doesn't start over, it adapts. When marketing budgets are squeezed while consumer expectations rise, we argue for evolution over re-invention, and how mimicking nature's intelligence can guide smarter, more resilient marketing. After all, a brand's sustainability stories shouldn't need to start from scratch. They can evolve in public, layer by layer.

**Rebranding lesson:**
Develop your values and deploy biomimicry as an evolution metaphor for strategic growth




AI imagery by The Future Laboratory, UK

The future customer is already  being shaped by the systems we design and the stories we repeat until they pass into common sense. Future customers were nurtured by brands that didn't wait for perfection and by businesses that made better choices feel ordinary. What once read as virtue now registers as basic literacy.

**Rebranding lesson:**
Check your customers against behaviour-based, near-future personas

PART ONE

# Sustainability is Dead

## Changing the language

Sustainability as we know it is dead. Long live sustainability. A new approach is needed that changes the language for a positioning and narrative reset, reflecting today's blended physical and digital realities.



Vestiaire Collective, France



# Drivers

## *What's Happening*

As an idea and a language of its own, sustainability as we know it is dead. More and more, the data shows that sustainability feels overwhelming – or worse – insincere, to today's consumers. Yet a new lexicon offers sustainability a compelling new relevance.

Using the world's resources in smarter ways is not a new story. Throughout history, humans have found smarter ways of designing, living and working, creating imaginative solutions, products and systems that can be easily maintained.

The rise of the modern sustainability lexicon is still, at its core, about a smarter use of resources. But the focus has rightly shifted from cost-saving to planet-saving. So, the way that we talk about it has changed dramatically; the language that once sounded the much-needed alarm on environmental collapse may have now lost its ability to change behaviour at scale.

Eco-fatigue and greenwashing scepticism dominate and 'sustainability' has come to mean so much that it means little at all. This is reflected in consumer behaviour. The 'say-do' gap persists – while many consumers claim to prioritise sustainability (up to 80%), only a fraction act on it (between 1% and 7%, as reported by Boston Consulting Group in 2022).

With this waning impact in mind, we've pinpointed three sustainability values ripe for rebranding.

# Signals & Shifts

*What's New*

## Sustainability is Dead
## Value #1 **Invisibility**

Subtle sustainability is the idea that responsible practices can be seamlessly embedded into industries where core values – like craftsmanship, provenance and exclusivity – already align with sustainability principles.

In luxury and fashion, these values naturally limit resource use.
In architecture and urban design, efficient design and longevity are inherent. The technology sector creates systems that enable smarter, more sustainable environments.

But subtle sustainability can go even further: it can become invisible. Rather than loudly broadcasting environmental credentials, brands could weave sustainability into the customer experience so seamlessly that it becomes a silent yet fundamental layer of luxury.

An invisibility story doesn't avoid conversations about sustainability but changes the way they are told. By making sustainability feel effortless, brands could create a compelling story that enhances desirability and brand love, rather than demanding any moral buy-in.

### In practice, how does this translate?

Imagine seamless verification: blockchain-enabled digital passports that track an item's provenance and lifecycle or AR technology revealing a product's ethical story. These records could be accessed via apps or smart labels – invisible unless customers seek them out. This is context-aware sustainability: technology-driven, authentic and free from the fatigue of overexposure.






EON provides digital passports that enable consumers to trace their item's lifecycle, understand its carbon footprint and resell seamlessly, US



*Ahluwalia collaborated with Microsoft and EON to develop digital IDs that trace garment journeys and provide care guidance, UK*

## Sustainability is Dead Value #2 **Proactive Luxury**

Sustainability rebranded does not disrupt the luxury experience. Instead, it enhances it. In what The Future Laboratory calls The Synthocene Era – where technology and human intelligence converge – luxury brands have the opportunity to create experiences that are frictionless, blending luxury and responsibility seamlessly.

Data from Arbor Communications' Subtle Sustainability report shows that convenience trumps conscience as a purchase driver across all demographics, particularly among consumers aged 25–34.

If sustainability is embedded into services that provide a more convenient solution – through diagnostics, on-demand repairs or resale alerts – brands can continue to change consumer habits without asking for any significant shift in mindset, at the same time as building brand love and an ongoing relationship with a future customer base.

### In practice, how does this translate?

Circular systems lend themselves to this innovation. AI-driven services could predict wear-and-tear cycles, offering personalised restoration or resale. Marketed as an exclusive privilege, sustainability would become synonymous with luxury, personalisation and long-term value. These innovations would be simply positioned as premium, personalised experiences, making responsible consumption feel like an organic part of high-end ownership.

‘It is increasingly unlikely that sustainability, in its current incarnation, will ever be a compelling enough story to change consumer behaviour’

*Stephanie Turner, founder and director, Arbor Communications*





Land Rover is offering a bespoke restoration service for its Classic Defender V8, combining a desire for heritage with the added benefit of sustainability, UK

## Sustainability is Dead Value #3 **Future Legacy**

If sustainability as a language is failing, the vocabulary around legacy – and not leaving a mess for future generations – unites both environmentalists and sceptics alike. Unlike sustainability, which often carries guilt or obligation, legacy is forward-looking, aspirational and deeply personal. Yet it also speaks to the collective, bridging the gap between exclusivity and responsibility.

This new legacy vocabulary also allows for innovation. Synthetic naturalism – a possible new label for lab-grown materials, biomimicry and AI-driven design – positions sustainable materials as progress rather than restraint. Lab-grown diamonds, carbon-negative textiles and bio-engineered leathers are no longer eco-alternatives but a pinnacle of luxury craftsmanship.

### In practice, how does this translate?

Legacy and its language align naturally with high-end craftsmanship. A watchmaker promising a generational guarantee isn't selling sustainability, he or she is selling a commitment to timeless value. Or if a brand's circularity model was framed as heritage rarity, limited-edition restorations could turn reclaimed materials into sought-after collectibles. Ultimately, this approach does more than replace outdated sustainability language: it restores meaning and desire to responsible consumption.

# Analysis

## *What this Means*

A recent study shows an even more compelling development: up to 70% of climate sceptics already behave 'sustainably', seeking out energy-efficient appliances, shopping second-hand and eating less meat simply because they perceive these choices as smarter (source: C Space, 2025).

Saving resources is smart. Durable materials, products that can be repaired and lifetime guarantees appeal as rational investments rather than ethical imperatives. Meanwhile, those who care most about sustainability may feel paralysed by its complexities, struggling to act at all.

Meanwhile, the data shows that younger consumers, despite strong environmental values, still place convenience above sustainability in purchasing decisions. Qualitative research from D1A suggests that the youngest spending cohort of all – Gen Z – wonder whether convenience and sustainability can even coexist.

All the while, the more responsible options remain the more expensive or time-consuming ones (think organic food, slow fashion and using public transport).

Study after study reaches the same conclusion: it is increasingly unlikely that sustainability, in its current incarnation, will ever be a compelling enough story to change consumer behaviour.

So, what comes next? What could be the next rebranding of this ancient idea?

Sustainability's language today is fractured – technical jargon competes with vague claims or condescending messaging, failing to resonate with consumers. If the goal is to help us to live smarter, it's time for a new lexicon – one that reframes responsible consumption in ways that feel intuitive, practical, valuable and even aspirational.



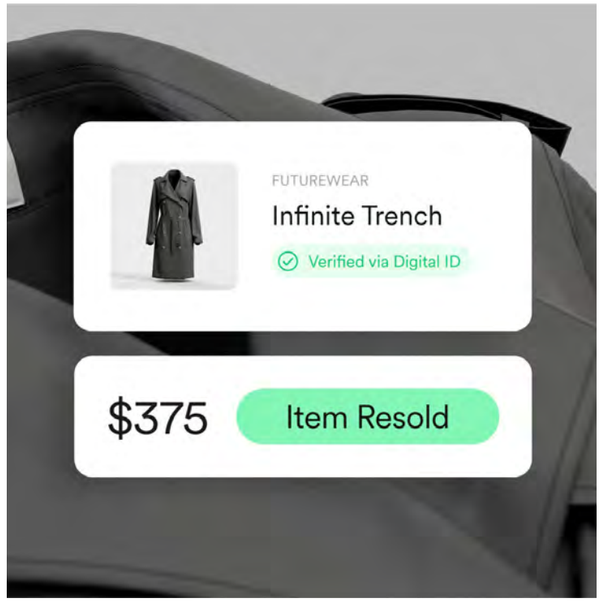


AI imagery by The Future Laboratory, UK

# Strategic Opportunities

## Consumer Behaviour

**Invisibility** – Make sustainability a seamless, silent layer of the brand experience. From AI-driven circular services to digital verification, responsible consumption should feel like an effortless, premium standard rather than a disruptive choice




EON, US

## Consumer Product

**Proactive luxury** – Use technology to extend the life and value of luxury goods. AI-powered restoration, predictive repairs and personalised aftercare services can transform sustainability into an exclusive benefit that enhances desirability




Ahluwalia Symphony Unlocked. Connected by EON. Powered by Microsoft, UK

## Consumer Engagement

**Future legacy** – Reframe sustainability through the language of craftsmanship, rarity, preservation and forward-looking innovation. Brands that embed responsibility within these future-facing values will shape the next era of smart consumption



Landrover Classic Defender V8 by Works Bespoke, UK

PART TWO

# Designing for Extinction

## Develop the product and adapt to market forces

Some things are meant to last. Others are meant to disappear. As industries phase out wasteful systems, extinction becomes an innovation opportunity. Reshaping materials, ownership and circularity now define the next era.

# Drivers

## *What's Happening*

Not all industries, behaviours and products are being built to last – and that's a good thing. The take-make-waste economy is being designed out of existence, creating new brand opportunities and competitive advantages for those who embrace extinction as a strategic pivot.

The end of an era is always an opportunity to define the next one. The smartest brands see this as a brand-building moment, using the idea of extinction as a lever for differentiation and market leadership.

The shift is being propelled by many forces: rising material costs, evolving consumer expectations and a tidal wave of regulation. The flipside is the rise of the global circular economy, projected to reach £3.5 trillion ($4.5 trillion, €4.2 trillion) by 2030 (source: Accenture). Investment is flowing into models that reduce or design our waste.

Consumers, too, are actively shaping this landscape. The Future Laboratory's New Codes of Value research suggests that neo-abundance and richness in regeneration are becoming aspirational, as 'super-savvy consumers see resourcefulness as a badge of honour'.

In response, new tools are emerging to bridge smarter production with smarter consumption, such as Digital Product Passports (DPPs). These will put detailed product information in the palms of our hands, changing the game for transparency and circularity across industries.

So, which are the industries, behaviours and products most likely to disappear next, and what will be the powerful brand narratives and competitive advantages that emerge as a result?




Camper's Roku trainer is made of six interchangeable components that can be easily disassembled, replaced and recycled, Spain



Fairbuds by Fairphone, The Netherlands



# Signals & Shifts

*What's New*

## Designing for Extinction
## Value #1 **The branding of 'forever'**

Repairable, modular and 'forever' products are moving from niche offerings into brand value drivers. This doesn't mean a loss of revenue – it means a model of customer engagement where lifetime value means better loyalty.

Luxury brands have been normalising this for some time, offering repair, reconditioning or even renovation services as a way of leaning on the values inherent in luxury like bespoke services and individual relationships: see Nudie Jeans' lifetime promise, Barbour's rewaxing services or start-up repair services SOJO and The Seam.

The Right to Repair movement, now legislated across the EU and several US states, will continue to reinforce consumer expectations for brands to offer longer-lasting goods, preservable at a minimum but upgradeable at best.

**Brand spotlight**: Fairphone

Fairphone has been leading modular smartphone design for over a decade with a simple premise, allowing users to easily replace parts. By positioning repairability as a feature, the Dutch manufacturer has quietly shifted the conversation from sustainability to long-term ownership and smarter investment in technology. This strategy builds customer loyalty while extending product lifecycles.



The SURI 2.0 electric toothbrush has recyclable heads made of cornstarch and the bristles are made with castor oil, UK

## Designing for Extinction Value #2 **The era of high-performance, regenerative design**

As EPR (Extended Producer Responsibility) and other legislation mounts up, having disposable materials as part of your design is fast becoming a liability. Which is why designs like SURI's plant-based toothbrush heads and general materials science approach have rapidly become popular.

Expectations are shifting towards materials that self-heal, regenerate or at least contribute positively to eco-systems. The rise of bio-engineered materials is transforming self-repairing and regenerative materials into high-value industry standards across all industries, from traditional craft to cutting-edge tech.

The challenge for brands is positioning these materials as something other than a compliance feature and to find a way of talking about them that is aspirational and a smart investment decision.

**Brand spotlight:** Basilisk

Basilisk has pioneered self-healing concrete, a material that – incredibly – uses embedded bacteria to repair cracks automatically. This innovation is marketed from the outset not just as a sustainability solution, but also as an infrastructure investment, reducing maintenance costs and improving long-term performance.

‘From coffee pods to fashion rentals, needs-based consumption has proved easy for marketers to introduce into our daily lives, delivering exactly what consumers need – nothing more, nothing less’

*Stephanie Turner, founder and director, Arbor Communications*






Oddbox, UK

## Designing for Extinction Value #3 **The UX of precision consumption**

Precision consumption already exists, but we've known it as 'convenience': Nespresso coffee pods mean no excess water is boiled or coffee brewed, Amazon's 'just-walk-out' store technology is meant to reduce impulse purchases.

Unfortunately, while the intention is there, the execution isn't always perfect; single-use pods and excess soft plastics bring their own waste challenges. More successfully, perhaps, myriad rental and sharing platforms like Rent the Runway, By Rotation and Loanhood have transformed fashion into an on-demand, needs-based service.

This type of needs-based consumption has already proved itself to be easy for marketers to introduce seamlessly into our daily lives, delivering exactly what consumers need – nothing more, nothing less.

**Brand spotlight:** Oddbox

Oddbox is a food waste subscription service delivering surplus produce directly to consumers based on availability. By branding this a 'smart way to shop' for fresher produce first and as a way to combat food waste second, Oddbox taps into consumers' desire for efficiency, affordability and convenience while tackling food waste at scale.




Left to right: Drawing inspiration from the London Stock Exchange, Selfridges' The Stock Market is an immersive hub for buying, selling, repairing and upcycling, UK; Digital Product Passport by YAKU, Institute of Digital Fashion and EPAM, London Fashion Week, UK

## Designing for Extinction Value #4
## **The rise of savvy ownership**

For decades, second-hand was synonymous with lesser. Now, resale and longevity are status symbols and signs of being smart with both your responsibility as a global citizen and with your wallet. Brands that integrate take-back programmes and resale platforms are not just reducing waste – they're also creating new customer touchpoints and completely new revenue streams.

The likes of Depop and Vinted allow consumers to turn their belongings into an asset class, while international retail giants like Ikea and Philips have rolled out what began as pilot projects for pre-loved furniture and 'better than new' electronics, respectively, taking back, refurbishing and reselling their own goods.

**Brand Spotlight**: Selfridges

The British department store's ReSelfridges initiative is folding resale services into its core offerings, positioning second-hand items as aspirational and curated. Accompanied by a cheeky tone to match its young, affluent audience, Selfridges challenges traditional perceptions of pre-owned goods among its own, luxury customers. In 2022, the retailer sold almost 20,000 pre-loved items, aiming for 45% of transactions to be circular by 2030.



## Designing for Extinction Value #5
## **Circularity as an investment magnet**

The circular economy is no longer a fringe concept, it's an investment magnet. As extinction scales – and outdated, wasteful business models disappear – the companies developing scalable solutions for circularity are becoming some of the most fundable and commercially exciting ventures.

Blockchain and traceability's latest incarnation in the luxury sector is Truss, which applies luxury inventory traceability to authenticate and extend the lifecycle of high-end goods, mirroring what the Everledger blockchain system has done for art, diamonds, gemstones and even wine.

The developer Fabrix is pioneering 'urban mining' steel recovery for architecture, while digital twin technology is emerging as a key enabler of circularity – helping to design in circularity from the start and convert those products to a traceable reality.

**Brand Spotlight:** UrsaLeo

UrsaLeo's's digital twin technology allows businesses to simulate the impact of both material and spatial design before production, reducing waste and improving efficiency. Imagine being able to identify when your product is likely to need a repair having tested it in a digital environment before it's even made. What was once a sustainability-driven concept is now a business intelligence tool.



# Analysis

*What this Means*

In designing for extinction, how can you reposition for a new era?

## : Planned obsolescence → Branding ‘forever’

Longevity is already a well-understood luxury – turn repairability and lifetime value into a premium brand advantage.

## : Disposable materials → High-performance design

Shift materials stories from a compliance feature to innovation stories that your brand can own.

## : Non-accountable consumption → Precision consumption

Frictionless, needs-based consumption is already here.
Marketers should frame it as intuitive and smart.

## : Waste → Value-based ownership

Resale and take-back models are proving themselves to be about unlocking new revenue and deepening brand engagement (not necessarily about appealing to sustainable behaviour).

## : A new design norm: circularity is an investment magnet

Circularity is the next-gen business standard. Brands that position it as an intelligence-led advantage can dominate their sectors.





AI imagery by The Future Laboratory, UK

# Strategic Opportunities

## Consumer Behaviour

**Make it aspirational** – Sustainability as a compliance exercise is over. The real opportunity lies in making ‘designed extinction’ a seamless, aspirational and commercially compelling narrative




SURI 2.0, UK

## Consumer Product

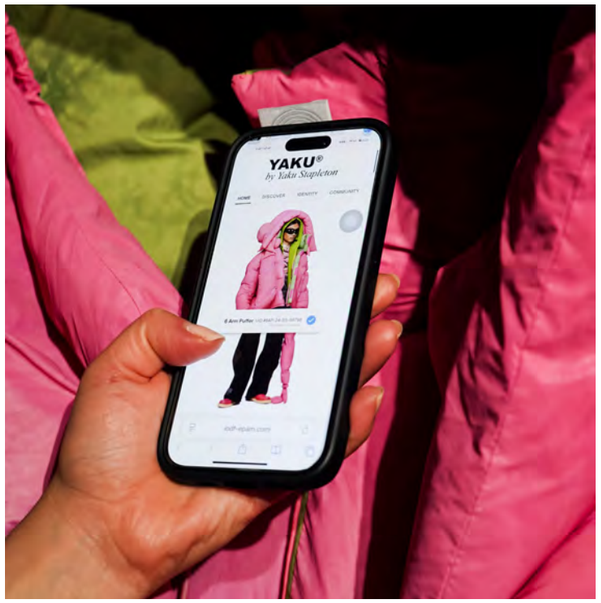
**Bake in your advantage** – The shift towards circularity isn’t niche, it is a defining marketing force. The brands leading this are actively shaping a competitive advantage in commerce, design and consumption



The Stock Market Corner Shop at Selfridges, London, UK

## Consumer Engagement

**Adopt a new angle** – Investment is flowing into scalable circular solutions, from digital twins to traceability tech. Brands are positioning these innovations as part of their core storytelling




Digital Product Passport by YAKU, Institute of Digital Fashion and EPAM, London Fashion Week, UK

PART THREE

# Localise to Survive

## Translate, don’t transplant – through localisation and cultural relevance

Localisation can become a powerful marketing tool and a meaningful sustainability strategy in one.

# Drivers

## *What's Happening*

Add geo-economic disruption to the shifting expectations of globally connected, locally grounded consumers, and brand planning gets harder. Localisation used to be marketers simply transplanting a story into different markets with an eye to cultural relevance. At best, the impression was that a brand was doing a good job at the table stakes: it understood its audience.

But we are in an age when we meet and get to know brands across borders as well as across platforms. It is an age when supply chain challenges like sourcing and tariffs are great unknowns – not to mention climate-linked disruption. Getting much, much better at localisation is non-negotiable.

On top of this, 78% of global consumers say they are likely to boycott a brand based on where it is based (source: Edelman Trust Barometer Special Report: Brands and Politics, 2024). Or put another way: almost four in five consumers might consider local resonance a measure of status, trust and sustainability.

Clearly, localisation is at once about both sustaining business better and selling better. Done right, it reinforces community trust, reflects customers' real values, streamlines supply chains and reduces environmental impact. There are much more interesting, layered stories to be told in a way that recognises the consumer as at once a global citizen and a locally influenced and culturally passionate individual.

We explore how localisation – through the lens of rebranding – can become a powerful marketing tool and a meaningful sustainability strategy in one.





Arket's autumn/winter 2024 campaign was a love letter to slow living, Sweden



Toast New Makers, UK



# Signals & Shifts

*What's New*

## Localise to Survive Value #1

## **Why local relevance matters**

In brand storytelling, location matters. What feels aspirational in Paris might fall flat in Singapore. More often than not, mass global messages land as tone deaf or out of touch.

UK beauty start-up Glossier successfully broke into the US market but was met with criticism when expanding into Europe for failing to reflect diverse beauty cultures.

Fenty Beauty, by contrast, localised launches in Europe and South Africa with regionally relevant influencers and skin tone-tailored product education. One brand mis-stepped by assuming its voice was universal. The other translated its Beauty for All inclusivity values into local reality.

The same applies to environmental messaging. Today, 'made nearby' is a signal of care, credibility and climate sense as much as a manufacturing decision. In a world of mass sameness, rootedness becomes desirable.

### Brand spotlight

: UK fashion brand Toast's New Makers programme reframes UK-based craft as ethical, emotionally rich and born of international influences

: Aman Resorts delivers ultra-local luxury, tailoring architecture, partnerships and sustainability stories to each setting – 'connecting guests to the spirit of a place' without ever losing the global brand's poise



Aesop's Hainan store uses algae-based material from design studio Other Matter to refract light and evoke the calm of being under water, China

## Localise to Survive Value #2 **Speaking the language of local value**

First and foremost, storytelling must adapt linguistically. Too-literal translations quickly invite brand mockery, especially in markets like China, where a single character can shift tone, and on platforms like X, where screenshots travel faster than corrections.

But translation isn't purely linguistic, it's emotional.

In the search for more emotional realism and cultural context, sustainability stories could be the solution, offering brands fertile marketing ground whether or not that brand originates in that market.

Far from exhausted 'net zero' or 'carbon footprint' messages, sustainability offers a chance to truly get under the skin of consumers' understanding of materiality, heritage, pride and responsibility in a way that feels human, with the brand's own roots in plain sight.

### Brand Spotlight

: The Australian-origin, L'Oréal-owned brand Aesop embraces local packaging aesthetics and in-store rituals in Japan to merge cultural resonance with brand identity

: Imane Ayissi is the first sub-Saharan designer to be featured on the Paris haute couture catwalk. The brand's storytelling bridges heritage and modernity, offering a form of localisation that honours both origins and audience

'If it doesn't land emotionally, in a way that's right for that culture and context, then it doesn't land at all'

*Lin Kuek, Singapore managing director and head of sustainability communications at Vero*





In Shanghai, Zegna's invitation-only unveiling of the re-imagined Middle Huaihai Road as an oasis of linen, spotlighting the brand's fully traceable Oasi Lino and its commitment to circular craftsmanship, China

## Localise to Survive Value #3 **Production as brand story**

Where a brand appears, and how, is just as important as the story it tells. Proximity production, distributed logistics and circular infrastructure like take-back and repair services are more than operational decisions – they are narrative assets, if a brand chooses to tell that story.

In the luxury sector, this opens up a whole lexicon to connect luxury customers to sustainability in a way that makes sense to them, about exclusivity, customisation and investment.

When producing things nearby isn't possible, transparency can reinforce the value of local sourcing and craft. Organisations like the Responsible Jewellery Council set new industry standards for traceable supply chains, helping luxury brands turn sourcing into powerful proof points.

### Brand Spotlight

: Hermès locates its ateliers near traditional French craft hubs (Normandy, Alsace, Auvergne) and shares behind-the-scenes access in campaigns like Hors Les Murs – marketing local production as both heritage preservation and modern responsibility

: LVMH uses high-end editorial content to spotlight its regional craft hubs, LVMH Métiers d'Art, positioning near-market production as traceability

# Localise to Survive Value #4 **Localised value stops customers opting out**

Changing production costs, tariffs and supply chain logistics can quickly shrink margins and – as a result – raise prices for the end customer. In the face of this and without a culturally embedded value story, customers will find it easy to delay their purchase, switch to a cheaper brand or drop out entirely.

Localised messaging helps head this off. Whether it's local benefits like experiences, job creation, shorter transport emissions or local product relevance, using regional insight to show value is a way of building customer loyalty in the face of price sensitivity.

Yigit Susmus, founder of growth consultancy Porté, and former global marketing programme director of HSBC Wealth and Personal Banking, says: 'Luxury is becoming a regionalised trust economy.  The smartest brands don't just 'localise a message', they uncover what their clients care about locally and decentralise meaning itself.'

## Brand Spotlight

In Brazil, the French footwear brand Veja highlights fair-trade partnerships in sourcing its organic cotton and wild rubber via The Veja Project. In France, however, the focus is on minimalist design, assembled and distributed by social re-integration workers in-market. Using one product with two stories, both highly localised, Veja has turned ethical logistics into a central part of its brand trust.

The Veja General Store in Paris offers shoe repair services to customers, opening up new opportunities for retail staff to retrain and gain new skills, France

# Analysis

*What this Means*

Much more than a manufacturing shift or a tactical PR tweak, localisation is a brand imperative and a sustainability story in its own right.

From messaging to materials to manufacturing, when brands appear in contextually fluent, locally resonant ways they are both more credible and more future-ready businesses.

As marketers we know this, but in the case of sustainability it's even more vital; boredom and scepticism run high and are easily triggered by tone deaf messaging.

But rather than simply 'adjusting the playbook' per market, there are opportunities for richly layered and compelling stories that – far from being patronising – reflect the reality of global citizenship and multiculturalism.

Charly Petitteville, EMEA marketing lead for Material Bank, the world's largest material marketplace for the architecture and design industry, says: 'Materials are cultural artefacts. Yes, sourcing is about sustainable choices, but it's also about enabling better stories to be told with localised textures.'

Freed from universal jargon and reframed as a locally meaningful value proposition, sustainability in its broadest sense – environmental, social and cultural – is a way to supercharge brand connection and future-proof a business by anchoring it in its customers' local and global realities.



**78%** of global consumers say they are likely to boycott a brand based on where it is based

Source: *Edelman Trust Barometer Special Report: Brands and Politics, 2024*

AI imagery by The Future Laboratory, UK

# Strategic Opportunities

## Consumer Behaviour

**Be emotionally resonant** – Sustainability as a compliance exercise is over. The real opportunity lies in making ‘designed extinction’ a seamless, aspirational and commercially compelling narrative



Aesop Hainan. Design by Other Matter, China

## Consumer Product

**Consider the ‘where’ of your product** – Where it is sourced and made are compelling narrative assets, not just operational decisions



Toast New Makers, UK

## Consumer Engagement

**What’s your culturally embedded value story?** – Regional marketing prevents consumer dropout by demonstrating local benefits before price sensitivity kicks in




Veja General Store, Paris, France

PART FOUR

# Sensorial Sustainability

## Create new experiences – not just messages – via multi-platform brand storytelling

What a brand feels like matters as much as, if not more than, what it says. It isn't messaging but experiences and spaces that drive trust. In a post-verbal, post-greenwashing world, sustainability must be felt to be believed.

# Drivers

## *What's Happening*

The trouble with branded spaces is that there is no marketer's dashboard for measuring atmosphere. We don't have the data to prove that we trust a brand's physical environment as an expression of its values more than, say, its advertising or online presence. We also have confusing signals about the role of physical retail, still caught between the growth of e-commerce and the disruption of the pandemic.

**But we do know this:**

: Human beings respond more to emotional resonance than ethical instructions (aka being guilt-tripped)

: We also know that younger consumers expect brands to embed environmental values in lived experience: almost 50% trust a brand more when their store design reflects their values (source: MG2)

: And that physical space – its design, layout and sensory cues – has long been a powerful system for shaping perception and brand values

None of these things are changing. Despite the noise and even in a digital-first world, 72% of retail sales in the US are still expected to happen in physical stores by 2028 (source: Forrester).

Taken together, these signals suggest the most effective sustainability strategy today is designing systems that can be lived – not messages for a social scroll.

Sustainability shouldn't feel like a campaign or a message, it should feel normal. Space can create that context in a way that words can't.




OpenAREA is a new platform using cultural programming and brand collaborations to reframe sustainability as something that is experiential, aspirational and accessible, London, UK




Worn Wear by Patagonia, Chicago, US



# Signals & Shifts

*What's New*

## Sensorial Sustainability Value #1

## **You cannot claim your way to being trustworthy. You have to show it.**

Trust, once something marketers built through messaging, now lives more often in the experience.

Brands can prove their values through their behaviour – and nowhere is that more visible than in the spaces they build.

This is where experiential design becomes strategic – through environments that embody what a brand stands for. At its best, experiential design makes values tangible: you don't have to say you care about sustainability, the space does it for you.

When aligned with sustainable principles, this kind of design can be creative, compelling and make a brand memorable without explanation by giving people something to feel. Materials, light, layout – all can make the right choice easy.

The Future Laboratory's Culture-coded Retail macrotrend shows how physical retail has evolved into a hugely creative tool for emotional storytelling and cultural alignment. Brands applying this to sustainability shift from telling people what they believe to creating better systems that people want to be part of.

### Brand spotlight

: Sustainability is an obviously lived part of brand values for 1 Hotels, where reclaimed materials, biophilic design and closed-loop operations like composting are part of the environment, not a campaign message

: Patagonia's Worn Wear store in Chicago offers in-store repairs, bold and retro visual branding, and a normalised retail experience makes second-hand circularity feel aspirational



Arcadia stage, Glastonbury 2025, UK

## Sensorial Sustainability Value #2 **Make it easy to feel good**

Sustainability messaging often veers into guilt, sacrifice or confusion. But real behaviour change rarely comes from pressure. People don't want to be forced into good decisions or compromise out of guilt. It comes from something that feels good, where the better choice also feels like the obvious one. In other words, smart systems beat moral arguments.

We've seen how space can communicate values through materials and layout. But beyond the physical structure lies something else: the emotional tone of an experience. The best sustainability examples often make zero noise. Instead, they nudge us gently, shift the mood or offer better choices without fanfare.

This is behaviourally intelligent design. Rather than instruct or demand, it makes sustainable action feel ambient and enjoyable – part of the atmosphere, not the agenda.

**Brand Spotlight**

At Glastonbury Festival, Grid Faeries powered the epic Arcadia stage with quiet, clean and almost-invisible battery technology – the biggest showcase to date of its renewably powered generators

‘Real behaviour change comes from something that feels good, where the better choice feels like the obvious one’

*Stephanie Turner, founder and director, Arbor Communications*




Salewa flagship store by gpstudio, Bolzano, Italy

## Sensorial Sustainability Value #3 **Retail and hospitality spaces are where values get real**

Today, retail and hospitality spaces shouldn't tell you a brand is sustainable – they let you feel it through every surface, service and system.

When London-based design agency gpstudio began working with Salewa, an alpine equipment brand based in the Dolomites, the project started not with a creative brief but with a snow-covered hike that ‘shaped everything that followed’, says Gregor Jackson, founding partner at gpstudio.

The result is Salewa's flagship store, a space that breathes its environmental DNA. The store itself incorporates recycled and locally sourced materials, plus a dedicated space for second-life products as part of its Circular Experience Programme. The wider HQ also features a climbing wall and a mountain bistro serving local produce. Nothing here shouts about sustainability, it quietly makes it real.

This is part of a wider shift, explains Alex Wateridge, director of gpstudio, where stores become more than just points of sale: ‘A flagship has never been just where you buy things – it's where the brand's beliefs become tangible. It's retail, hospitality, content platform and community hub in one. It's a system. And for brands like Salewa who truly value sustainability, it becomes something that you can participate in – definitely not something you read on a product label.’

# Analysis

## *What this Means*

Sustainability has a storytelling problem – not a solution problem. For too long it has relied on messages and claims. In the absence of mature market demand and faced with an unwieldy concept, marketers had to start somewhere.

Now what we need is a way to feel it. Sustainability does not need a metaphorical stage. It needs literal staging.

In a world of greenhushing and the 'death' of sustainability, space becomes quiet but powerful proof. The experience is now the message. Physical space, smart service and emotionally intelligent design all move sustainability from concept to context – from a message you read to an experience you remember.

This moment offers marketers a reset: to treat sustainability not as a campaign to win, but a context to build within.

In this future, brands won't tell you what they believe – they'll invite you to live it. Rather than telling customers they're making the right choice, smart brands design environments where it simply feels that way.

In doing so, they move the record on from proving values to the more powerful marketing challenge: building emotional loyalty, material memory and spatial trust.

'Signals suggest that the most effective sustainability strategy today may be to design systems that can be lived – not messages for a social scroll'

*Stephanie Turner, founder and director, Arbor Communications*



AI imagery by The Future Laboratory, UK

# Strategic Opportunities

## Consumer Behaviour

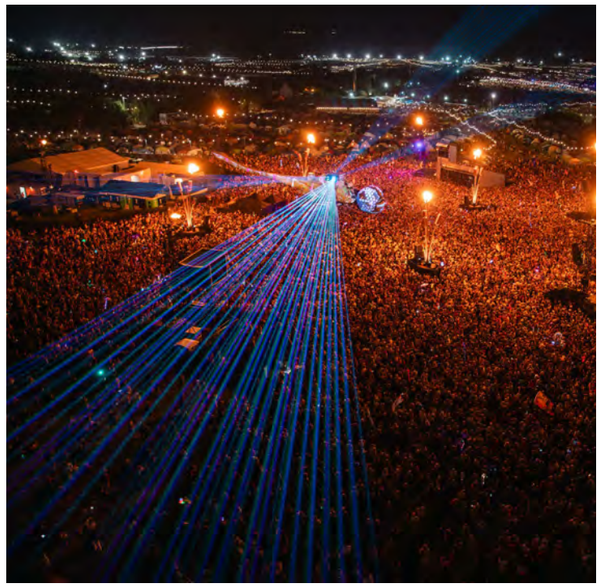
**A behaviour change tool** – Use design to make the better choice feel like the easier one. Frictionless systems, intuitive layouts or simply a more pleasurable experience can nudge sustainable decisions without needing to preach




Worn Wear by Patagonia, Chicago, US

## Consumer Product

**A trust-builder** – People believe what they experience. Use material choices, sensory design and consistent service to make your values felt, ‘living’ the sustainability story rather than simply saying it



Arcadia stage, Glastonbury 2025, UK

## Consumer Engagement

**A content engine** – Think of space as a physical canvas for a wider digital platform. The ‘wow!’ of design, exclusive launches and events can spark sharing as the space becomes more a branded environment for online storytelling than a point of sale




OpenAREA launch event, UK

PART FIVE

# New Naturalismn

## Develop your values and deploy biomimicry as an evolution metaphor for strategic growth

Nature adapts, layer by layer. While marketing budgets are squeezed and consumer expectations are rising, we argue for evolution over re-invention, and show how mimicking nature's intelligence can guide smarter, more resilient marketing.

# Drivers

## *What's Happening*

Marketing budgets are under pressure. According to Gartner's 2025 CMO Spend Survey, budgets have dropped to 7.7% of overall company revenue – one of the lowest levels in a decade.

Add to this creative fatigue, cautious stakeholders, active regulators and savvy customers, and sustainability storytelling faces a dilemma: limited resources and heightened scrutiny. Amid this, marketers face a question: how do you keep telling your sustainability story without over-promising?

This report suggests looking to nature itself, not literally but as a blueprint for growth. Rather than chase big statements or perfection, we suggest a quiet but powerful path forward: develop what you have.

'Continuity, made visible, is a much more powerful brand strategy than disruption,' says Arbor Communications' Turner.

With more headwinds than ever, it's time to get strategic by looking to nature's logic, where learning how to adapt builds resilience. Like tree rings recording seasons of growth and drought, the strongest sustainability stories show how brands have responded to the pressures of their time.




Design Declares urges designers to acknowledge the climate emergency and provides practical toolkits to start implementing changes, UK

# Signals & Shifts

*What's New*

New Naturalismn Value #1

## Evolution in plain sight

Sustainability communications are often caught in a cycle of over-correction: either over-promising and under-delivering or greenhushing entirely. But nature doesn't do either. It adapts – slowly, strategically and visibly evolving in complexity.

Marketing, too, can build brand stories that feel layered and adaptive in products, services, spaces and stories that embed the values of continuity rather than the ruling trend of disruption. This is brand refreshing rather than relaunching, which in today's market can be expensive, risky and often unnecessary.

Brands already look to nature literally, drawing inspiration from biological systems to develop their materials. Marketing can embrace the same logic: developing what's already there, cutting marketing 'waste' and adapting visibly so your brand's journey unfolds in public.

**Marketers can apply this approach by:**

: Building a narrative of incremental change (materials, services, packaging), experimentation and response

: Avoiding the 'all-new' trap – switch from 'brand new' language to 'smarter evolution'

: Building progress into products and services; for example, minimal-change product lines and repurposing

**Brand spotlight:** Ganni

Refusing to call itself a 'sustainable' brand, the Scandi giant of cool uses Ganni Lab as a container for all its initiatives, from Postmodern (resale) stores to circularity. Under the banner of 'progress over perfection', this is sustainability as status – well organised, well told and easy for customers to get on board.

Nike's ISPA Link Axis is built on the principle of improvised, experimental and purposeful design, making design constraints and transparency a branded feature, US



Shielding Suit by Vollebak, UK

‘Continuity, made visible, is a much more powerful brand strategy than disruption’

*Stephanie Turner, founder and director, Arbor Communications*

## New Naturalismn Value #2
## **The Clever Click: marketing the ‘aha’ moment**

Nature is full of cleverness: orchids that mimic insects, birds that use tools. These aren’t just ecological facts, they’re memorable, repeatable micro-revelations – moments of smart delight that you want to tell someone about.

Brands can harness the same spark in sustainability stories where cleverness is often under-used. They can create the same effect by focusing on cleverness not worthiness.

Shareability, not complexity. Surprise, not sanctimony. Curiosity over conscience.

Think ‘did you know?’ moments, rooted in product or process details. Think intelligent anecdotes and factual surprises as hooks that genuinely delight. This is well-trodden creative ground: stat-led OOH, short-form video series, packaging with discovery moments.

The micro-revelation can build enthusiasm for responsible consumption and reward ongoing curiosity. Vitally, it makes customers want to tell others – just like finding out that corals can clone themselves.

**Brand Spotlight:** Vollebak

This is a brand that turns material science into trivia, with jackets made from copper and T-shirts grown from wood pulp. Take the Mineral Sweatshirt sodalite edition, which is ‘dyed in a giant bath of crystallised magma’: part micro-science lesson, part pub fact.






Let’s End Fast Tech campaign by BackMarket

## New Naturalismn Value #3
## **Less waste, more wonder**

Nature doesn’t waste. Fallen leaves feed new growth. Similarly, your marketing shouldn’t be disposable. Marketers today can’t afford content that goes nowhere. In a moment of cautious budgets and attention scarcity, every activation needs to work hard.

This isn’t new. Content marketing has long understood how to dice up an idea so that it can live coherently across channels, and how to earn loyalty beyond gaining attention. ‘Your marketing shouldn’t be disposable either,’ says Arbor Communications’ Turner.

Enter no-waste marketing. This is content that earns its keep: modular, re-usable, consistent across channels in a strategy that is at once about waste reduction and part of system design.

Think using fewer channels more intentionally. Think slower, episodic content that can be unfolded gradually. Think re-usable messaging – adaptable and layered.

Brands are investing in creative content strategy over spectacle in truly inspiring new ways because when you can’t afford to be wasteful, you’re forced to be more intentional.

**Brand Spotlight:** BackMarket

This refurbished tech retailer revives iconic ad structures for circular messaging. Its Let’s End Fast Tech campaign riffs off Apple’s Shot On iPhone and Patagonia’s legendary Don’t Buy This Jacket campaigns to highlight how second-hand phones still take great photos. Low effort, high resonance – it’s putting a guilt-free, responsible choice back in consumers’ hands.

# Analysis

## *What this Means*

Marketers are under pressure to deliver more with less and prove it. This demands evolution, not perfection or erasure – a move away from one-off campaigns that drive volume and into systems that reward durability, delight and intelligence.

For marketing sustainability today, the smart move is to act like nature: build with what you've got, design with constraints, evolve in public. Use natural intelligence as both blueprint and metaphor.

This opens up a creative brief worth answering: experiment with refinement rather than radical resets.

'The smartest sustainability message might be the most shareable, not the most ethical,' adds Turner. It's a direction that offers cultural fluency and commercial strength. Think like a forest floor or a coral reef – waste nothing, surprise often and grow over time. Let the story grow like tree rings, not burn out like a firework.



AI imagery by The Future Laboratory, UK

# Strategic Opportunities

## Consumer Behaviour

**Evolve in public** – Sustainability storytelling doesn't have to mean change. It can mean showing your past evolving in plain sight. Use visual language, campaign structures and touchpoints to show growth, not perfection



Nike ISPA Link Axis, US

## Consumer Product

**Seek cleverness, not conscience** – Sustainability is full of micro-revelations to be told. These are small, sticky moments that invite wonder, earning brand curiosity and emotional loyalty



SURI 2.0, UK

## Consumer Engagement

**Design your content systems to match** – From content minimalism to using fewer channels more intentionally, your marketing shouldn't be disposable either. Modular, creative, editorial eco-systems and slow content build long-term loyalty



Fairphone Gen 6, The Netherlands

PART SIX

# Tomorrow's Customer

Imagine a world where better choices feel normal. Drawn from over 20 voices across sustainability – from architecture and retail to fashion and brand strategy – we describe the future customer that our brand systems are already shaping.

# Introduction

Marketers constantly map tomorrow's customers, turning behaviours into patterns and patterns into people. It's how we reduce chaos into a picture of a real, lived universe so we can build with confidence.

But sustainability unsettles that system.

The signals now contradict one another: eco-fatigue and distrust rise in parallel with intent and willingness. The story loops between two marketing dead ends: stay quiet or say everything louder. One means your brand disappears; the other overwhelms. Between them, meaning drains away.

This series argues for a different route: sustainability not as a message layered onto a brand, but as a quiet underlying system of language, design, localisation, brand experience and values evolving with the discipline of any serious rebranding.

If sustainability is being redesigned at the level of systems, then the customer must be re-imagined too, not by asking the same questions of a different future human, but by changing the frame entirely.

So, instead of chasing another generation of contradictory metrics, this piece paints a coherent picture of the next customer – one who may never experience sustainability as effort, identity or virtue, but simply as the way the world works.

This is their universe. Brands, businesses and marketers have been building it. Here's who we've been building it for.

**Our Future Selves: A field guide to the future customer that brand systems are already shaping**

'Our future clients will be pretty much the same, but will have grown up with a sensibility that sustainability is important to them,' says Chris Turner, CEO at UK manufacturer CTO Lighting. Our future selves will be shaped less by ideology than by long exposure to better systems and design decisions that softly redirect to things that simply work better.

'In the eco-centric world we can only hope to inhabit, near-future customers will be instinctively eco-literate. They'll expect circularity, renewable materials, brand transparency, spatial efficiency and adaptive environments that make slow, sustainable consumption as compelling as today's culture of instant gratification. This will be the industry baseline'

Gregor Jackson, founding partner, UK design studio, *gpstudio*



Where Taste Recognises Taste by Uncommon for Depop, UK




SURI's Restore Toothpaste is packaged in a recyclable aluminium tube and the plant-based lid can be returned for recycling, UK



# Values

## *What future customers will expect without asking*

The future self won't ask whether a brand is sustainable. The question alone has become a signal of lag rather than leadership: as soon as digital proof became truly searchable, greenwashing did not survive the algorithm. Responsibility, decisively and permanently, came down to brands themselves.

Values are no longer in slogans or statements. They are sensed through access, ease, tactility and alignment. They are felt long before they are articulated. If sustainability is there, it's legible in the way something moves, responds and holds up over time.

These customers don't demand perfection. They are, however, quietly intolerant of contradiction.



*'The myth of sustainable compromise is long gone. Tomorrow's customers won't weigh up trade-offs, and they'll wonder why we ever did'*

*Hannah Craik, customer and strategy director, UK interiors brand House of Hackney*



*'We buy less but spend more – we want quality items that last'*

*Suzy Goulding, head of sustainability APAC, Publicis Groupe*



*'As hotel and restaurant guests, we're purpose-driven. We demand data on emissions and efficiency – as both personal and business patrons – and expect our hosts to meaningfully contribute across the locations where they operate'*

*Will Silverwood, head of sustainability, UK hospitality brand Whitbread*



*'Our customers evaluate brands, not by promises but by measurable ecological return. They want spaces – and partners – that leave the world better than they found it'*

*AJ Paron, executive vice-president and design futurist, Sandow Design Group*



*'They are sharp, discerning and not afraid to take a stand. They understand the power of their patronage and will use that to amplify brands and products they think are aligned with their values'*

*Lin Kuek, managing director, Singapore-based communications consultancy Vero*



*'We see a 'retrofit-first' approach as the norm, helped by strong government policies that create a level playing field, where existing buildings are celebrated and constraints are seen as opportunities'*

*Franck Robert, partner, Buro Happold engineers*



*'When every brand has a beta AI assistant, only the depth and originality of your thinking will earn consumer trust and make you a source of personalised and curated insight'*

*Sean Kearns, strategy and innovation director, marketing agency FT Longitude*

# Behaviours

*What future customers will do without thinking*

A typical day is full of second-nature behaviours – new rituals, patterns and norms that appear small or invisible because they are truly embedded. Many are shaped by interfaces, infrastructure and spaces.

These micro-habits are largely brand-taught through repetition. As businesses recognised the scale of their influence, optimisation and responsibility began to collapse into the same products and services. The sustainable choice became the easiest one because everything else began to feel like hard work.

‘They always shop second-hand first for fashion and homeware,’ says Jules Haines, founder and director at surplus fabrics company Haines Collection. ‘They only purchase a brand new product when they have to and all other options have been exhausted.’

They assume that sustainable choices will be available to them at every turn: ‘The depth of research that they undertake is growing: digital product passports are an important tool for transparent storytelling and for informed, values-aligned decisions,’ according to Helen Brocklebank, CEO at UK luxury sector body Walpole.

And this system of new behaviours feeds itself: ‘Economic models inherently value regenerative actions,’ explains Rebecca Rice, director at global communications agency Burson. ‘Your smartwatch turns steps into micro-carbon credits, which help fund local forests for the community’s benefit. Corporations, driven by stringent net-zero mandates and consumer expectation, directly fund these micro-carbon credits. Individual contribution is effortless and ultimately impactful.’



Nudie Jeans Repair Shop, Bristol, UK



*'There is pride in giving something a second, third or fourth life. Fast fashion no longer exists'*

*Suzy Goulding, head of sustainability APAC, Publicis Groupe*



*'They choose denim that lasts, repairing instead of replacing, and valuing transparency and circularity as second nature. Responsible decision-making isn't a choice for them, it's simply how they live: creating tomorrow's vintage'*

*Gareth Cullen, regional general manager, Nudie Jeans*



*'They've stepped away from the capitalist hamster wheel and are more considered with how they spend their money. They buy with intention, support local businesses and shop from a sense of genuine need rather than a false scarcity mindset encouraged by consumer culture'*

*Megan Doyle, sustainable fashion journalist*



*'Legislation will nudge them back to a world of re-use and return, which in time will become muscle memory'*

*Angus Dick, creative director, tech design studio Map Project Office*



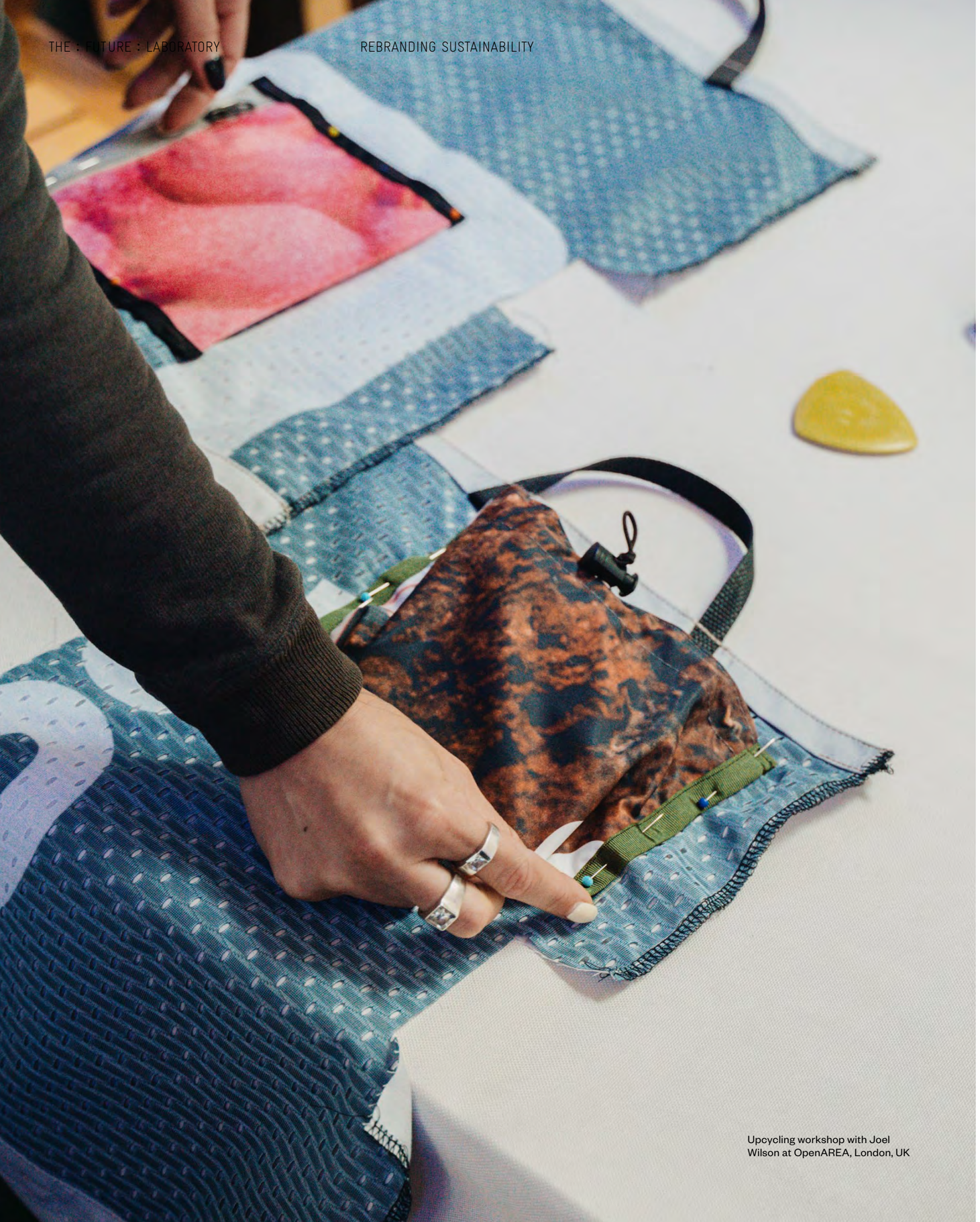
*'Property developers prioritise health and wellbeing, data-driven and transparent with the performance of their assets'*

*Franck Robert, partner, Buro Happold engineers*



*'Future customers will look for net-positive interiors, materials that actively clean the air, and furnishings that sequester carbon without fanfare. Circularity is their default lens'*

*AJ Paron, executive vice-president and design futurist, Sandow Design Group*



Upcycling workshop with Joel Wilson at OpenAREA, London, UK



# Aesthetic

## *What will feel desirable to future customers*

Beauty itself has evolved. The digital world sounded the first warning, under the strain of infinite feeds, infinite images and finite mental health. Burned by simulation, beauty gravitated back towards the real.

It became much more than visual – both intelligent and textural. Things feel desirable because they endure, they can be taken apart and understood. 'The most sustainable product is also the most beautiful, the most efficacious and the best value – proof that responsibility is the ultimate marker of quality,' says Hannah Craik, customer and strategy director at UK interiors brand House of Hackney.




Fairphone, The Netherlands





*'Experiences matter more than excess'*

*Will Silverwood, head of sustainability, Whitbread*



*'We're more creative and individual in our style – making tweaks, adjustments and additions to things we already own'*

*Suzy Goulding, head of sustainability APAC, Publicis Groupe*



*'The near future customer will look for design signatures that denote efficiency. They'll want to see the language of disassembly shine through in the construction of a product'*

*Angus Dick, creative director, Map Project Office*



*'It's not quixotic; the next generation already reject design that feels overtly 'green', favouring companies whose sustainability is embedded in their brand DNA. Design becomes the ethical interface between consumer desire and brand responsibility'*

*Alex Wateridge, director, gpstudio*

# Influence

*How future customers will affect others in their universe*

The word 'consumer' is strangely outdated, from a more linear era when the customer was the end of a funnel. They're no longer simply an audience; they are shapers of culture, they move through brands and curate values in public.

Sustainability spreads when it's shareable and socially reinforced. 'They're more perceptive than ever – noticing what you say and what you don't,' says Peter Bragg, EMEA sustainability and government affairs director at Canon. 'If sustainability and social impact are genuinely part of your brand's DNA you can't just do good and expect your consumers to know about it – you need to consistently show them the impact you're making and do this via the channels that they consume.'

'Gone are the days of blind loyalty,' adds Lin Kuek, managing director at communications agency Vero Singapore. 'The future customer will continue to demand better from the brands, and if they witness behaviour that does not live up to their standards, they won't hesitate to walk away.'

The result is a kind of co-designed world between brand and customer: 'My vision for the future is that everyone is a co-creator in restoring the planet,' says Rebecca Rice, director at global communications agency Burson. 'Every daily activity is seamlessly replenishing and enabling biodiversity and sustainability.'



Where Taste Recognises Taste by Uncommon for Depop, UK



*'Hungry for stories, they want to know how things are made, by whom, and from what, as they've already committed to an informed set of choices'*

*William Knight, co-founder,*
*UK materials intelligence platform, Material Matters*



*'They're aware of the impact of their buying decisions, seeking brands that create a positive contribution to people and planet – through materials, support for local communities or philanthropic initiatives'*

*Helen Brocklebank, CEO, Walpole*



*'They share their choices online, influencing peers and amplifying a brand's credibility. Affordable, authentic and accountable – they value brands that make sustainability effortless'*

*Will Silverwood, head of sustainability, Whitbread*



*'Advertising focuses on long-term brand-building where provenance and legacy are seen as key to consumer decision-making'*

*Suzy Goulding, head of sustainability APAC,*
*Publicis Groupe*



*'They are brimming with the joy and generosity that arises from access to abundant clean energy – this is the stellar revolution'*

*Leo Rayman, founder and CEO, Eden Lab*



*'Businesses like ours want to provide people with an opportunity to gain from purchasing, interacting or engaging with us directly. Whether that's environmental, economic, financial or for their own personal wellbeing – only happy, healthy and positive people will change the world'*

*John Stubbs, founder and CEO,*
*premium paint brand YesColours*



*'Brands and businesses will understand that actively investing in high-integrity projects that align with their own values builds long-term brand equity, customer loyalty and competitive advantage. True sustainability is created slowly through conscious and consistent action. Fortune will favour the early movers'*

*James Dingle, development director, Carbon Bank*



AI imagery by The Future Laboratory, UK



# Analysis

## *What this Means*

These customers are not a distant horizon. They're already being shaped by the systems we design and the stories we repeat until they pass into common sense.

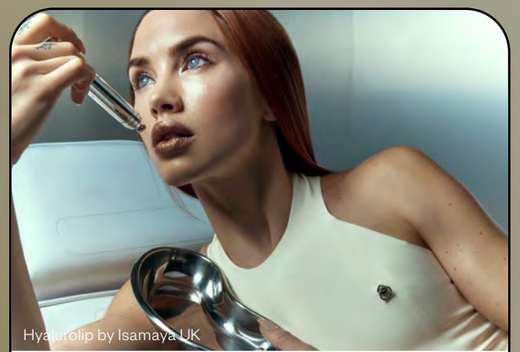
And these behaviours were not innate: they were nurtured by brands that didn't wait for perfection and by businesses that made better choices feel ordinary.

They do not think of themselves as ethical. They move through the world with a sense of what works and what lasts. What once read as virtue now registers as basic literacy.

They are, in the end, the product of very good marketing, of homes built to flex, of wardrobes built to last, of businesses that stopped urging change and began to design it into the fabric of our everyday life.

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Feels like UGG. Photography by Samuel Bradley, US

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**Director of strategic foresight** : Alex Hawkins
**Deputy strategic foresight editor** : Darian Nugent
**Presentations editor** : Rhiannon Hudson

**Design director** : Samuel Davies
**Creative director** : Savannah Scott
**Creative artworker** : Harry Parker
**Senior sub-editor** : Ian Gill
**Production and resource lead** : Maddie Watts

**Director of marketing** : Rodrigo Tobal
**Marketing manager** : Sophia Wood-Jenkins
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