THE : FUTURE : LABORATORY

Work States Futures 2023

Cover: Lyonesse Pictures Office. Design by Kii Inc, Japan

Introduction

The big question organisations are asking themselves at the moment is: will we or won't we? As in, will we all go back to the office full-time, or will TWAT days – Tuesdays, Wednesdays and Thursdays – become the new in-office days for the majority of their teams?

It is a good question. And analysts and authors like London Business School's professor Lynda Gratton are already addressing it. As she puts it in her recent book, Redesigning Work, we need to re-imagine work in terms of place and time: place in terms of whether we are co-located in relation to where we need to work, or time, in terms of whether the work we do requires us to be synchronous, as in collaborative, or asynchronous, as in quiet, or lone working.

Each, as we identify in our **Work States Futures** report, requires different kinds of places, and different ways to work in them. Place-wise, we explore everything from **Fivetran**'s Vibe Venue headquarters designed using employee data (page 5) to **LinkedIn**'s Agile Architecture offices that prioritise the ergonomic needs of workers (page 32). Time and task-wise, we examine why many future workers consider themselves polyworkers (page 4) or promadic professionals who work during 'cuffing-season' only, or take career-cushion jobs, where plan B options are already being considered or under way via that side hustle.

But there are other, more fundamental questions we need to ask, especially now that workers themselves are already asking and answering them. Why are people resigning from their work without alternatives in place? How can we keep our teams motivated, drive passion and kick-start desire? And more relevantly, how do we go about embedding our five states of future work, the core focus of this report, into our organisational DNA? All questions are answered in our **Work States Futures** macrotrend on page 13.

We also look at how and why tomorrow's workplaces will require us to think differently, be more innovative, more collaborative and more creative as our work patterns change. And we examine how TALENT, and how we nurture and maintain it, will become paramount. Enter the neuroaesthetic workplace (page 6), where architects, designers and behaviourists are working with neuroscientists and awe doctors to create physical and virtual realms that unlock curiosity, wonder and awe. This is a key component, as author of Awe and founding director of the Greater Good Science Center, Dacher Keltner, tells us: 'When we want to reduce organisational risk, improve openness, spark curiosity and kick-start innovation.'

So, a timely report then, with just the kind of insights, lessons and action-based to-do lists needed to future-proof our organisations, at a time when why we work, as well as where we work, need to be massively re-assessed.



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Key insights into tomorrow's workplace



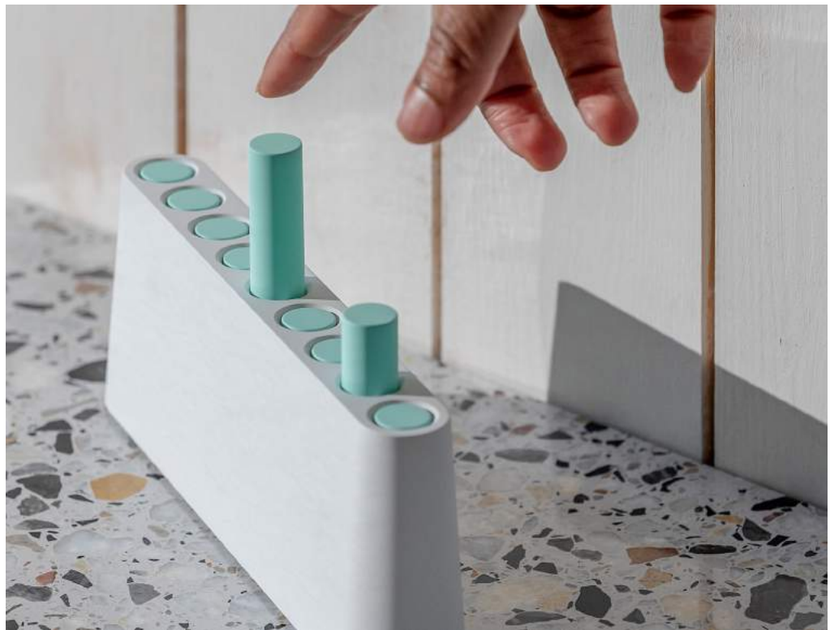
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Executive Summary

Research at The Future Laboratory indicates that we will begin to settle on a different kind of work flexibility, with work-learn-play-live programmes allowing us to thrive differently and more holistically as work becomes an anywhere-and-everywhere pursuit

Designing workplaces around neuroaesthetics – stimuli with the ability to alter the brain's chemistry – will also become increasingly vital in the next decade.

Workers are therefore re-evaluating their relationship with employment and experimenting across roles as they seek out personalised employee experiences (EX) and flexibility in where, when and how they work, as our six report drivers reveal:

: **Growing Tensions** – A recent survey by **Slack** found that only 12% of people would choose to be in the office full time, while 50% of employers are keen for us to do so

: **The Wokeforce** – Pay was the number one reason for Gen Z and Millennials to leave a role in the past two years, but learning and development opportunities were key reasons for choosing an employer (source: **Deloitte**)

: **Polywork** – This is a term that has amassed 4.2m views on **TikTok** and denotes the natural evolution of side hustling as workers expand their horizons beyond the confines of a single job

: **Gen Covid** – A US survey found that 57% of Gen Z who worked remotely felt they might be overlooked for opportunities or job promotions (source: **CGK**)

: **EX Personalisation** – Some 79% of the global workforce feel disengaged, making re-engagement a key priority for companies in 2023 (source: **Gallup**)

: **Promadic Economy** – According to **Spotify**, 42% of Gen Z and Millennials identify more as global citizens than citizens of their own country



Space10's new library space is designed to empower the local community and create a culture of ideas-sharing. Photography by **Seth Nicolas**, Denmark



At Vestre's latest facility, The Plus, guests can learn about the manufacturing process in a public-facing environment. Design by Bjarke Ingels Group, Sweden

Our five states of work explored
As workers become more peripatetic, self-determined and aware, future-facing organisations are embracing our five states approach to help them more effectively navigate these uncertain yet hugely opportunistic times ahead:

State 1: Inspiration and Intent – which is used for job-hunting or starting a new role or project. It's in play when we assess the purpose of our work to uncover meaning.

State 2: Collaboration and Culture – which looks at new ways we need to convene and collaborate as our work becomes permanently hybrid.

State 3: Learning and Leadership – which explores how and why we should invest in others' development to ensure that our workforce is continually evolving and adaptable.

State 4: Focus and Flow – is an ecstatic state of being at one with both the problem and the solution.

State 5: Rejuvenation and Resilience – Rest and rejuvenation are vital to the success of every other state, so here we look to downtime to reboot our internal systems with the kind of focus and resilience that enable us to do our best work.

Tomorrow's workplaces
Each state, as we shall see, requires us to build separate places, moments or online activities to ensure that each is contributing to the other. Each state, however, can be manifest in many different ways:

Outside-in Office: **Amazon**'s state one second headquarters, The Helix, is now being constructed in Virginia, US, with its own hiking trail wrapped around the building's exterior, complete with greenery sourced from the local Blue Ridge Mountains.

Vibe Venues: Data integration start-up **Fivetran**'s state two US headquarters were designed based on employee data. Knowing that most of their employees would no longer be commuting daily, the company created spaces for 'non-daily work' and 'onsite offsites'.

Social Edworks: **Google**'s Career Certificates provide state three courses in high-demand job areas such as digital marketing, IT support and data analytics by partnering Google experts with university faculties.

Hospitality HQs: Google's new London headquarters resemble a five-star hotel more than an office, with a 25-metre pool, rooftop running track and massage services. Locals are set to benefit as Google opens up areas to the public.

Workplace Retreats: Software company **Salesforce** is opening The Trailblazer Ranch, which will host employee engagement programmes, onboarding and skills coaching, while employees can also forge connections through nature walks, yoga, meditation and art.

Finally, as we move towards the 2030s, working life will continue to flex in favour of harnessing different mind states. Here, we look ahead to explore the trends that will define the future of work.

: **Web3 Workforce** – Alongside the metaverse, Web3 will reshape our working lives over the next decade. Decentralised autonomous organisations (DAOs) that run on blockchain will revolutionise how workforces connect, communicate and organise

: **Betterverse Boardrooms** – As the Web3 workforce comes into its own, AI is predicted to boost global GDP by £12.2 trillion ($15 trillion, €13.7 trillion) by 2030, according to **PwC**. The same report also says that 30% of jobs are at risk of elimination by the mid-2030s

: **Neuroaesthetic Placemaking** – Through neuroaesthetics, designers will begin to solve many of the mental and physical issues faced by tomorrow's workforce, and address how we develop social, physical and spiritual infrastructure to accommodate our many work states

: **Sentient Spaces** – Towards the end of the decade, neuroarchitects and designers will push the limits of productivity, performance and inspiration through a focus on psychology, neurobiology and technology

: **Haptic Twinstitutes** – Finally, as we flow into our far future states, digital twins will come into their own as organisations use the same technology to create Digital Twinstitutes, or virtual twins of their physical spaces, so that we can use them to train our future teams more effectively

The Neuroaesthetic Workplace

As we seek meaning and purpose in how and where we work, the science behind art can help us create spaces, moods and mental states that turbocharge awe, wonder and creativity at a time when we need it most

Key takeaways

: Our reaction to art isn't just emotional, it is physiological; when stimulated in a certain way, the brain releases chemicals such as serotonin, dopamine, endorphins and oxytocin that flood our system with feelings of wellbeing, elation, happiness and contentment

: This is according to Your Brain On Art co-authors Ivy Ross, **Google** vice-president of design for hardware products, and neuroscientist Susan Magsamen, founder of the **International Arts + Mind Lab** (IAM Lab)

: Now that we can map these shifts using fMRI scanners, Ross and Magsamen show how we can stimulate the senses – and our ability to create and engage in deep work activities. This can be done via neuroart, design and architecture that can induce states of bliss, contentment and wellbeing, which has huge implications for everything from hospitality to hospitals

: The biggest insight is how and why art, because of its transformative effects, can become a powerful therapeutic tool for dealing with everything from depression to anxiety, to how we maintain a healthy life-work-play balance



Kii Inc created a highly transparent space for video production company Lyonesse Pictures Office where the entire floor can be felt as one, Japan

Neurochemical Hits

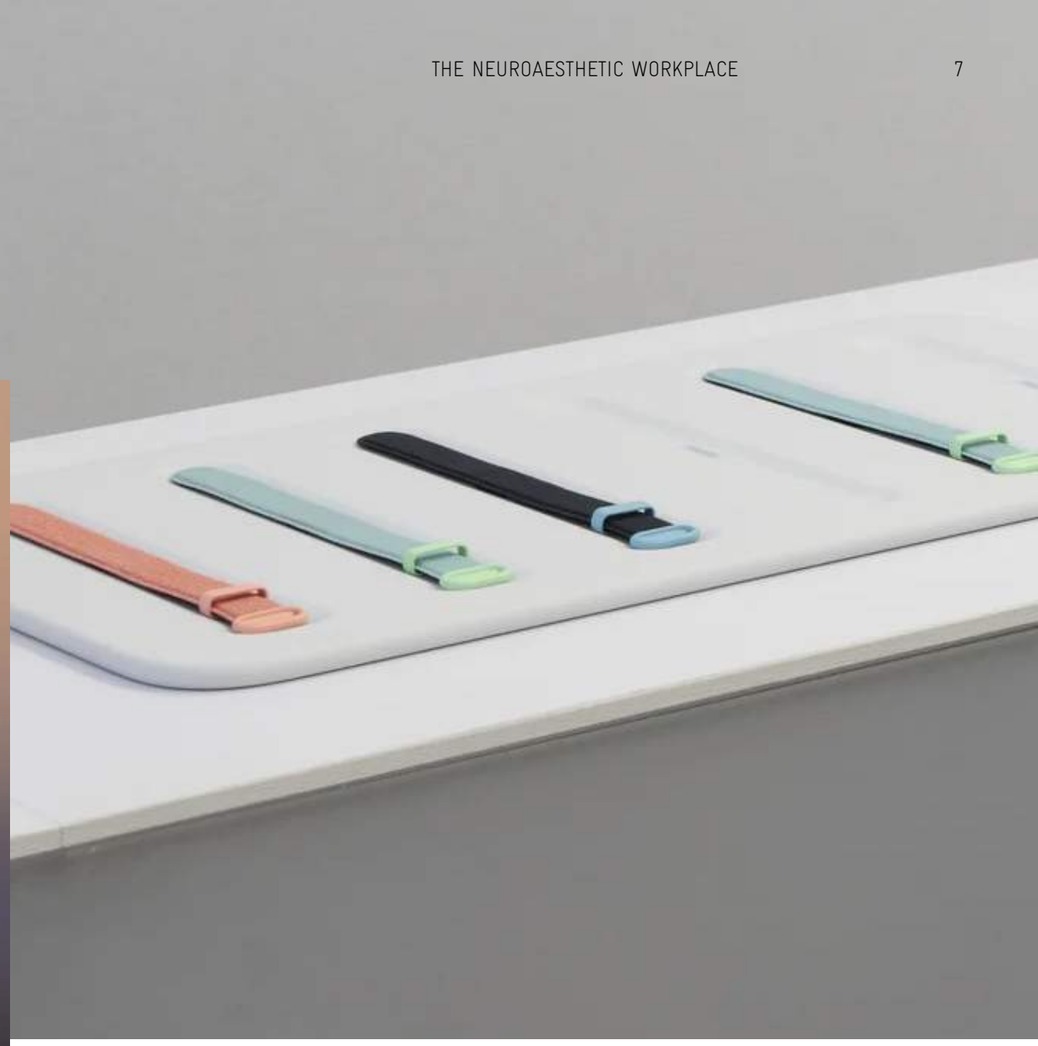
Many of us will have heard the old adage – originally a quote from William Congreve's play, The Mourning Bride – that 'Musick has Charms to soothe the savage Breast'.

But, according to Susan Magsamen and Ivy Ross in their new book, Your Brain On Art: How the Arts Transform Us, the arts – when considered within the burgeoning field of neuroaesthetics – have provable restorative powers that calm and soothe our troubled souls.

As Magsamen explains: 'The arts trigger the release of neurochemicals, hormones and endorphins that offer you an emotional release. When you experience virtual reality, read poetry or fiction, see a film, listen to a piece of music or dance, you are biologically changed. There is a neurochemical exchange that can lead to what Aristotle called catharsis, or a release of emotion that leaves you more connected to yourself and others afterwards.'

This happens because the chemicals ebbing and flowing through our brain and nervous system – serotonin (wellbeing), dopamine (elation), endorphins (reduced pain), oxytocin (happiness), cortisol (stress) and nitric oxide (enhanced vascular flow) – are triggered or reduced as different parts of our brain respond to particular shapes, room styles, colours, rhythms, smells or textures; the workplace as transcendental enabler, in other words.





A Space for Being by Susan Magsamen and Ivy Ross, in collaboration with Google, Italy

'The arts trigger the release of neurochemicals, hormones and endorphins that offer you an emotional release'

Susan Magsamen, co-author, Your Brain on Art

The Neuroaesthetic Space

To prove this point, Ross and Magsamen used Salone del Mobile in Milan to create A Space for Being, an installation where visitors wore Google-designed wristbands that monitored heart rate, respiration and body temperature as they passed through three contrasting zones, or rooms, called Essential, Vital and Transformative, with each designed to reflect these states.

At the end of their visit, all visitors received biophysical feedback. As Ross puts it: 'These were spaces to be curious and spaces to be,' but for Ross and Magsamen, one of the most curious discoveries wasn't that people reacted to the different stimuli that the rooms contained (which they did), but that they did so on a subconscious level that some weren't even aware of.

In other words, their thoughts were out of synch with the biological signs they were experiencing – an indicator that even if we think we're not relaxed, stimulated or transformed in an environment initially, our brains may already be tuning into such shifts without us knowing it.

Such disconnection, coupled with the fact that neuroaesthetics is still a developing field, means that CEOs, workers and workspace architects themselves can still regard the discipline as a bit abstract, or as one CEO put it to me recently, 'hippy-dippy'.

The Curative Science of Art

But before concluding that Magsamen and Ross and their ideas fall into this ‘hippy-dippy’ category, it is worth looking at their CVs.

Magsamen, for instance, is the founder of the **International Arts + Mind Lab** (IAM Lab) at the Center for Applied Neuroaesthetics, a pioneering initiative at the Pedersen Brain Science Institute at Johns Hopkins University School of Medicine, while Ross, a recent judge on our Futures 100 Innovators Award, is the vice-president of design for hardware products at **Google**, as well as being ranked in Fast Company’s top 10 list of the 100 Most Creative People In Business.

Both, then, come from hard-nosed science, research and innovation backgrounds, and have tackled their subject by taking a wholly evidence-based position on how art can tackle how we heal ourselves and how we design our spaces to heal, energise and transform.

What if our doctor prescribed music to relieve work-related stress or anxiety or very high levels of chronic pain?

Ross points out that this is already happening. A form of sound therapy known as vibroacoustic therapy, or VAT, treats both physical and mental pain by imparting a low-frequency sine wave into the body using a device embedded with speakers. VAT is sufficiently effective that the US Food and Drug Administration (FDA) has approved the therapy for increasing pain relief, circulation and mobility.





Left: Teenage Engineering’s synthesiser translates music into real-time AI-generated imagery, by **Modem Works** and **Bureau Cool**, US; Right: The Ambient Machine by Yuri Suzuki allows people to customise the background noise of their home, Japan

Salience and the Aesthetic Triad

The same rhythmic beat can induce an alpha wave state, while enriched design environments, universal symmetries (horizon lines, sunsets), a Bach fugue or a grime set by Stormzy all have roles to play in shaping our brains, from the notion of neuroplasticity, where our brains can be rewired over time as our sense of what is salient or relevant changes our psyche, to what Magsamen refers to as The Aesthetic Triad. This is a theoretical model developed by neurology, psychology and architecture professor Anjan Chatterjee, ‘which explains how three components – our sensorimotor systems, our reward system, and our cognitive knowledge and meaning-making – combine to form an aesthetic moment.’

‘At the centre of these three nodes,’ continues Ross, ‘lies an experience that registers as aesthetic for you. That experience consists of a combination of factors unique to you and your biology and circumstances, as well as containing some universal qualities that all humans find aesthetically compelling.’ This moment, coming together as a building, light-filled room or a social space, can and does induce a sense of calm, bliss, awe or something even more profound.

The Power of Awe, Neuroarchitecture and Biophilic Spaces

Perhaps the best-known example of neuroarchitecture built with a view to stimulating ideas, deep work and flow is **The Salk Institute** in La Jolla, California.

Designed by the architectural minimalist Louis Kahn, the campus works on the principle that scientists and artists are exploring the same fields but in different ways. It was created to champion awe, surprise and curiosity. But it was also designed to stimulate these attributes of work and investigative activities through rhythmic symmetries of light and shade, materials and form.

It does this with monolithic concrete, horizon lines that bisect sky and sea, and a water Channel of Life that cuts through the campus, along which the sun aligns twice a year during the equinox.

Dacher Keltner, a professor at the University of California, Berkeley, who has written the definitive book, Awe: The Transformative Power of Everyday Wonder, notes that buildings like this can trigger a sense of awe within us. Consider the brain's love of symmetry, of surging columns (they remind us of forest glades), of blues and blacks (day and night), pinks and reds (sunrise and sunset), curved, adobe-style interiors (the desert, dunes and pueblos). Certain volumes, shapes and colours and how we react to them are embedded into our DNA. 'We are literally hard-wired for it,' he says, especially when we engage with nature, or bring biophilic elements into our built environment.



The Salk Institue. Photography by **Adam Bignell**, US

Work-state Wonder

In these new work states (see page 21) such biophilic triggering mechanisms will become essential. Collaboration, creativity and our ability to imagine differently will become the hallmarks of a successful workforce where many of the mid-order tasks we do will perhaps soon be facilitated by ChatGPT equivalents.

Water sounds, for example, activate the vagus nerve, natural smells stimulate our stress-related physiology, while plants themselves give off phytoncides, chemical components that reduce blood pressure and boost the immune system.

Even images of nature – on-screen, on our walls, incorporated into abstract patterns or colourways in our work spaces – activate our dopamine networks which fire, rather like Kahn's rhythmic symmetries, our desire to explore and to wonder about the world we work and live in.

Awe, Keltner reminds us, alters our mind state from one of self-centredness to one that is community-centric, making us more prosocial and open to ideas, at the same time boosting our curiosity and creativity. It also makes us more generous, tender, empathic and hopeful – key attributes needed when we are managing the kind of loose-tie networks that hybrid working increasingly requires of us.





Left: Artwork by Anton Alvarez. Commissioned by Brookfield Properties, UK; Right: The Energy Show at Het Nieuwe Instituut, The Netherlands

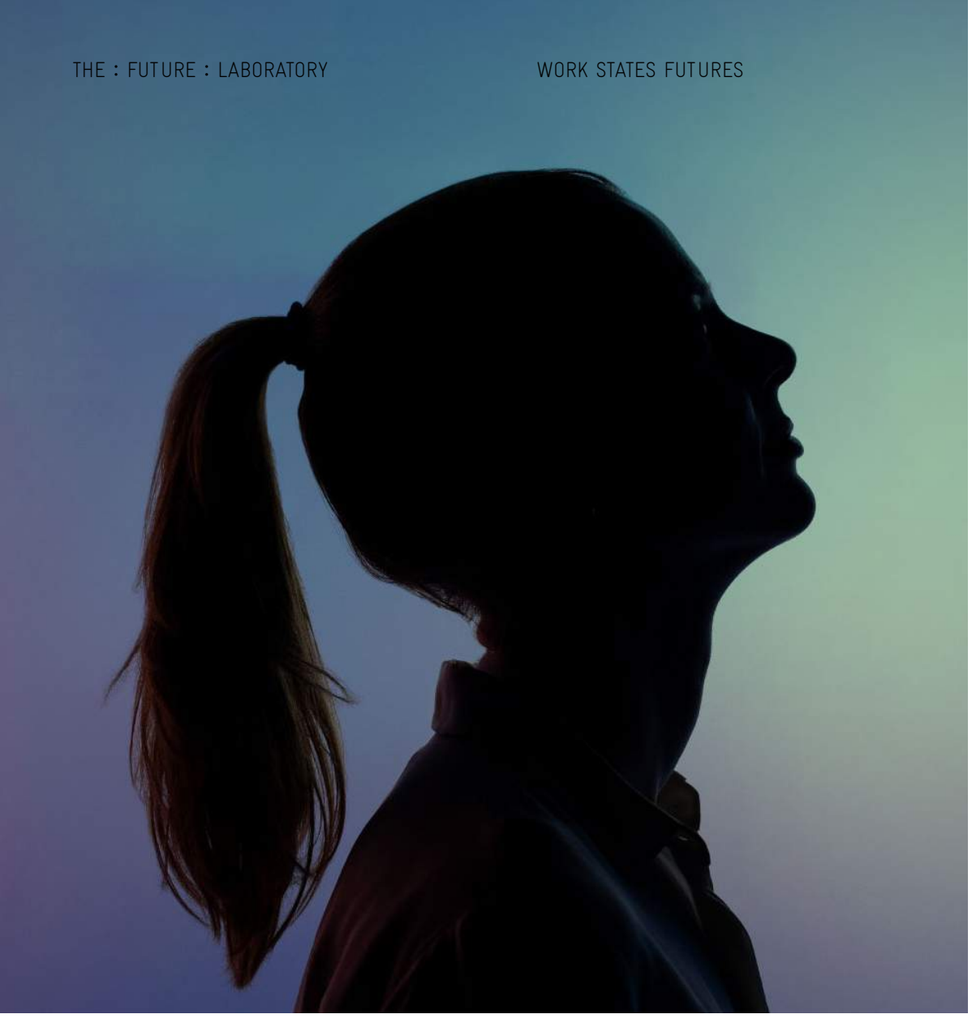
The Surprise and Awe Corporation

But the role of awe in the workplace doesn't stop there. If we are to develop organisations or teams that are more diverse, embrace equity, are open to risk, uncertainty and innovation as an opportunity rather than a threat, then we have to see awe as a core business tool and activator. It is not a soft, fuzzy, cosy-hour activity.

As neuroscientist Beau Lotto reveals in his TedTalk on the same subject, people who are actively experiencing awe 'have less need for self-regulation and a higher tolerance for uncertainty'. Their tolerance for risk also increases. 'When experiencing awe, differences between people become irrelevant because awe enables us to embrace, appreciate and celebrate diversity.'

How we use colour in these moments, says Ross, also affects our mood and sense of awe, and similarly stimulates our ability to be creative, which is really about the frequency at which the colour vibrates and how that vibration strikes our brain. Blue and green frequency-based colours are calming for the workplace, and foster creativity (mid-tone greens that emulate nature and the sky), while red, which has the longest frequency, triggers energy, with yellow being used to promote attention and focus.

Find inspiration and directions from hybrid spaces in other fields – culture, media, hospitality – where neuroart, design and architectural practices are already being exploited.



Left: The Museum of Earth, US; Right: Shenzhen Rural Commercial Bank. Designed by SOM, China

Theory in Practice

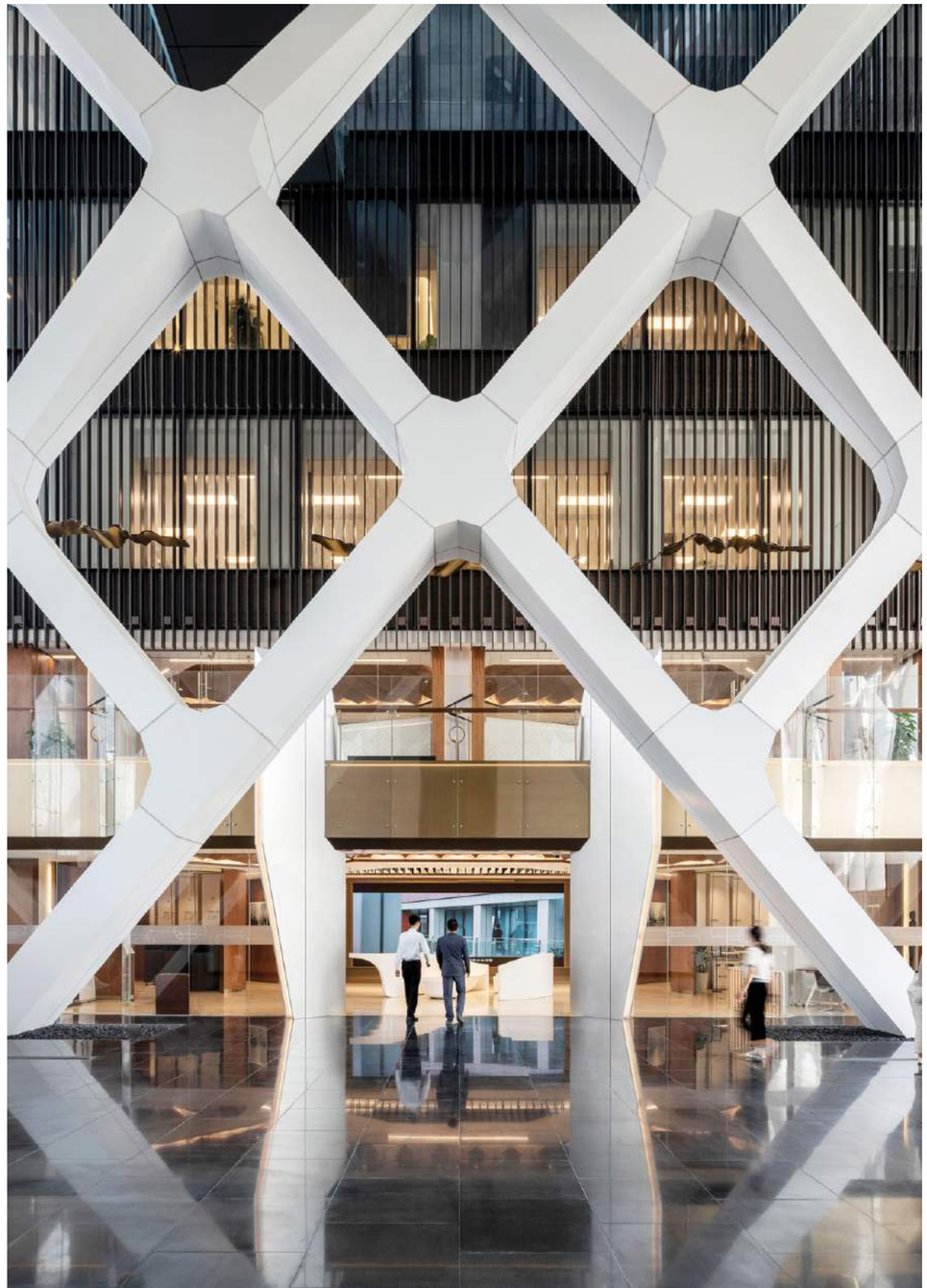
There are multiple examples of this concept increasingly being put into practice. Opening in Los Angeles in 2024, **The Museum of Earth** is a tactile, immersive space designed to fuse the awe of the experience economy with action on the climate crisis. The museum will enable visitors to explore what Earth means to them and to travel virtually to parts of the planet few have ever seen, where they can do everything from orchestrating a personalised chorus of birdsong to listening to the sound of trees talking or synchronising their heartbeat with a shark.

Created by Venezuelan film-maker, futurist and speaker Jason Silva, **Cyberdelic Dreaming** is a visual concept that uses generative AI to create breathtaking, beautiful and trippy visuals akin to a psychedelic experience. The AI tool responds to real-world objects and reacts to voice prompts in real time, and Silva plans to create an accessible VR version of the concept in future.

While Fiji's luxury hospitality destination, **Nanuku Resort**, is awe-inspiring in its own right, a recently launched astrotourism programme is invoking even more wonder among guests. Designed to help people connect with the energy of the moon, the programme includes stargazing experiences led by Celestial Concierges and the use of a sophisticated NASA-gifted Dobsonian telescope for observing planets and deep sky objects like nebulae and galaxies.

'This shift towards sensory literacy will result in our collective awareness of the mind-brain-body connection'

Ivy Ross and Susan Magsamen



Super-vitamin Architecture

The design and philosophy of the biophilic workspace, as espoused by a growing body of architects from **The Academy of Neuroscience for Architecture**, calls on us to consider seven architectural elements when designing buildings; each element mimics nature, and stimulates our creative, wellness and spiritual wellbeing levels in the process.

Tye Farrow is a Toronto-based architect who is a key exponent of the movement and refers to these principles as 'super-vitamins'. He uses evidence-based design practices that show how the use of natural materials, high ceilings, glass walls, atriums, open ventilation, plants, transition gardens and so on have a direct impact on blood pressure, heart rate, muscle tension, creativity ability and emotional resilience.

Designed by American architecture firm **Skidmore, Owings & Merrill** (SOM), the headquarters for the **Shenzhen Rural Commercial Bank** heralds one of the more urban examples of this philosophy. Described as a 'breathing building', the 33-storey skyscraper employs a variety of design tactics to respond to the local climate.

Situated at the edge of a public park in the tropical region of Shenzhen, the tower's façade is encased in an external diagrid that reduces solar gain by about 34% and allows for a completely column-free floor plan that enables maximum workspace versatility. In the lobby, a visually dynamic 15-metre tall 'rain curtain' also has a cooling effect on a hot summer's day.

Enlightened Sensory Realms

To develop more optimised and enhanced ways of learning and recalibrating our bodies for different work or mood states is essential if we are to navigate the long-term changes we are about to encounter in organisations over the coming decade.

Ross and Magsamen believe that these neuroaesthetic shifts will enable us to better understand the senses. They say research suggests that we could have as many as 53 senses rather than our supposed five.

‘Beyond these basic biomarkers already captured through wearable tech,’ says Ross, ‘engineers are perfecting wearable skin sensors capable of analysing our hormones, proteins and chemical states in real time, offering us early warning of conditions like prolonged stress.’

There is a growing desire, they say, ‘to become more than productive workers, and to instead live in the full thrall of our sensory world. This shift towards sensory literacy will result in our collective awareness of the mind-brain-body connection, resulting in advances for our health and wellness.’

Such knowledge will allow us to develop sensory literacy programmes for schools and the office where we can equip people with a deeper, more attuned understanding of how we can use the senses to proactively manage our long-term health and wellbeing. At the same time, integrating the arts with virtual and augmented realities can teach us to be more empathic, sympathetic, curious and alive to possibility, and to flourish – using all of our senses and the hidden powers and chemicals they trigger – and become more purposeful, meaningful, more sociable and, of course, happy.

Contentful's Berlin office was designed in consultation with employees to create a human-centric space. Design by **Toi Toi Toi Creative Studio**. Photography by **Koy+Winkel**, Germany

Work States Futures

As CEOs remain conflicted about luring their teams back to the office with team socials, wellness hubs and hybrid fit-outs that resemble thrift shop private members' clubs, innovator and early adopter brands, businesses and organisations are now focusing on work state solutions, rather than work place ones



Contentful's Berlin office was designed in consultation with employees to create a human-centric space. Design by **Toi Toi Toi Creative Studio**. Photography by **Koy+Winkel**, Germany

Global lockdowns floored the accelerator on flexible working:

: 40% of workers consider a flexible work schedule a top motivator for staying in a position (source: **McKinsey & Co**)

: By 2030, the US could see an economic boost of as much as £3.6 trillion ($4.5 trillion, €4.1 trillion) annually from flexible working, while China and India could gain £1.1 trillion ($1.4 trillion, €1.3 trillion) and £305.3bn ($375.8bn, €344.1bn) extra a year, respectively (source: **Regus**)

: The introduction of a remote worker incentive programme in Tulsa, Oklahoma, generated £16.2m ($20m, €18.3m) in GDP (source: **Airbnb**)

‘If you want to break down silos, spaces have to enable collaboration, new interactions and experiences’

Rupinder Mann, managing director, UnNamed Ventures

Random Studio's office is a dynamic environment that captures moods and fosters wellbeing. Design by **X&L**, Amsterdam

There is no longer a one-size-fits-all approach to how we work and the kind of spaces we work in. No longer just turning on, tuning in and clocking out (to paraphrase the famous counter-culture slogan), today’s workers are experiencing different ‘work states’; they need optimal mindsets for different types of work.

Employers must now rethink flexible working as ‘flourish-enabling’.

In this report, we investigate a human-centric, state-focused future of work. We explore the products and spaces – physical and virtual, home, office, and everywhere in between – being built in response. We’ll uncover how future workplaces will induce different mental states in the quest for enhanced creativity, productivity and performance in ways that extend way beyond any four walls or single office role.

TWAT Days Rising

There is no doubt that employees now expect greater flexibility with Tuesday, Wednesday and Thursday, or TWAT days, rapidly becoming the remote core of a new flexi-working week. But there are still tensions among employers and employees about what flexibility looks like. Many companies and their CEOs – particularly in the US – have made news with mandatory return-to-office (RTO) policies. Meanwhile, 64% of workers around the world say they would think about a new job if they had to go back full-time (source: **ADP Research Institute**).

Return-to-Office Tensions

It’s a tension that will continue to grow as employers justify their RTO demands in line with current, or looming, recessions in the US, the UK and key European economies. But maybe there is an alternative solution. What if we reframed our idea and ideals of work around, not only where we work and the time we should spend there, but, more crucially, how we should work and why we do so?

‘Human beings are not binary,’ says Rupinder Mann, managing director at consultancy **UnNamed Ventures**. ‘We’re complex and each has different workflows, requiring a whole range of experiences to be productive. If you want to break down silos, spaces have to enable collaboration, new interactions and experiences. But you also want to balance that by offering personal and personalised settings for optimal concentration and productivity’

Our own research at The Future Laboratory indicates that we will begin to settle on a different kind of work flexibility, with work-learn-play-live programmes allowing us to thrive differently and more holistically as work becomes an anywhere-and-everywhere pursuit. As Satya Nadella, chairman and CEO of **Microsoft**, puts it: ‘Thriving employees are what will give organisations a competitive advantage in today’s dynamic economic environment.’

But for employees to thrive, we may have to accept that flexible working is here to stay, especially among Gen Z employees. According to a recent study by the **Oliver Wyman Forum**, work-life balance is their priority. Some 85% of respondents said they prefer hybrid or remote working environments. Unlike their Millennial counterparts, Gen Z don’t want perks or opportunities to socialise at the office, but to clock in and out of jobs that offer flexibility and autonomy.

Enabling Mind States

So how can employers help their talent to thrive, both solo and in teams? We believe it will take a recalibration of operating systems to create cultures and employee experiences that embrace anywhere-and-everywhere flourishing by tapping into different mind states through technological, architectural and scientific facilitation.

Embracing Neuroaesthetics

Designing workplaces around neuroaesthetics – stimuli with the ability to alter the brain’s chemistry – will become increasingly vital in the next decade. We believe the influence of neuroaesthetics will spread in home, hospitality and office design, as well as in the digital realm. After all, a recent study by **The Adecco Group** found that nearly half (46%) of Gen Z workers believe the metaverse will become part of their job in the future, and they want it to.

‘Flourishing is what people are ultimately after,’ says Tyler J VanderWeele, director of **Harvard’s Human Flourishing Program** (source: The New York Times). ‘We usually think about flourishing as living in a state in which all aspects of a person’s life are good – it’s an all-encompassing notion.’

Drivers

Workers are re-evaluating their relationship with employment and experimenting across roles. They are demanding personalised employee experiences (EX) and flexibility in where, when and how they work.

We define this through six key drivers:

: Growing Tensions
: The Wokeforce
: Polywork Power
: Gen Covid
: EX Personalisation
: Promadic Economy



Wet Beast Office was designed with three spatial elements that build connection and spark curiosity. Design by **Studioninedots**. Photography by **Maarten Willemstein**, The Netherlands

Growing Tensions

Brands including **Disney**, **Starbucks** and **Morgan Stanley** are all pushing for a 4–5-day 'working from the office' ethos. Survey results published in December by recruitment website **Adzuna** indicated that since summer 2022, office-based job vacancies in the US have risen to a 19-month high (up 4.2%), while ads for remote working have slipped to a 10-month low of 13.8%.

Twitter CEO Elon Musk backtracked on his claims that remote workers are only 'pretending to work'. Closures of the social network's Singapore and Seattle offices prompted him to actively – if not reluctantly – request that employees work remotely. Musk is not alone in his sense of Productivity Paranoia. A **Microsoft** report published in September 2022 revealed that although 87% of employees said they are productive at work, 85% of the business leaders polled said they are not confident that is the case.

Another tension is brewing: The Great Mismatch. A recent survey by US collaborative work platform **Slack** found that only 12% of people would choose to be in the office full time, while a significant 50% of employers are keen for their teams to do so. But the expectation gap between employers and employees appears to be shrinking overall, with workers saying they want to work from home 2.8 days a week on average, versus 2.3 days for employers (source: **WFH Research**).



Airbnb's Live and Work Anywhere initiative helps support global hosts to become remote worker-friendly, US



Ethel's Club is a wellness-centred co-working and community space in Brooklyn for people of colour, US

The Wokeforce

Workers have woken up. No longer sleepwalking through life-long careers they don't believe in, they are now searching for greater purpose in their everyday lives.

The great resignation, it turns out, is more of a great re-evaluation; more than half of workers are questioning the purpose of their jobs and the role work should play in their lives (source: **Gartner**).

They either want unobtrusive, low-stress work that pays well so that they can pursue meaning elsewhere or they demand self-actualisation as a job feature. And employees are prepared to quit (quietly or not). More than half of US workers (61%) are considering leaving their jobs in 2023, according to a report from **LinkedIn**. For Gen Z and Millennials, a good work-life balance and learning and development opportunities were the top priorities when choosing an employer (source: **Deloitte**).

'It isn't so much that people have less ambition, but that their ambition is changing – from being about career success first to work-life balance,' says Julia Hobsbawm, consultant, and author of The Nowhere Office [source: The Guardian, UK]. 'What people want less of now is pointless presenteeism, stress, toxic workplaces and the commute.'

Polywork Power

As people embrace flexible working and re-evaluate occupational purpose, they are also experimenting. Polywork is a term that has amassed 4.2m views on **TikTok** and denotes the natural evolution of side hustling as workers expand their horizons beyond the confines of a single job to explore other projects and professions.

According to the **Oliver Wyman Forum** study, almost half of Gen Z are already engaged in work outside of their employment; 45% of respondents say they have a side line. The findings also suggest that for Gen Z, jobs are more a means to an end for them, and they look to find meaning in their everyday passions not their work. They are also demanding more time to explore these passions.

‘[There] are two elements of flexibility,’ says Lynda Gratton, professor of management practice, **London Business School**. ‘One is place and one is time. I think we’ve really explored the place bit. But now we’re also exploring whether we could be more flexible about time.’

This flexible time and place approach will lead to a new world of power-flexing, with people gaining credibility and influence across professional spheres. Ultimately, they’ll ensure that work works for them.

Selling on Depop

Gen Covid

Gen Z are predicted to occupy nearly 27% of the global workforce by 2025, according to **Zurich Insurance** – and they are the ones feeling Covid 19's impact the most in terms of missed work opportunities. According to Gartner, 46% of Gen Z employees say that the pandemic made pursuing their educational or career goals more difficult.

In the US, 57% of Gen Z survey respondents who worked remotely felt like they might be overlooked for opportunities or job promotions and 56% said they need more frequent communication with their team to stay engaged (source: **CGK**). To ensure that younger generations aren't missing out on the social benefits and professional osmosis traditionally attained through in-person interactions and proximity, employers will need to redesign culture, tools and spaces to encourage connectivity.

Cristina G Banks, director of the **Interdisciplinary Center for Healthy Workplaces, Berkeley Haas School of Business**, says: 'Given information in hand, the work experience should be curated to deliver a work experience that meets [workers'] needs – but not without limits. Having the generations come together part of the time on-site or in different settings… is a necessary part of building social cohesion and inclusion across the generations.'





Left: The Cohort by Anyone connects marginalised people seeking career advice with industry experts, UK; Right: Edge Technologies headquarters Edge Olympic has been widely celebrated for its human-centric design, The Netherlands

79% of the global workforce feel disengaged

Source: Gallup's State of the Workforce 2022 report

EX Personalisation

According to **Gallup**'s State of the Workforce 2022 report, 79% of the global workforce feel disengaged, making re-engagement a key priority for companies as they rethink their HR strategies, especially post-pandemic. A total 92% of employers have plans to improve EX (employee experience) by 2024, compared to just 52% before March 2020, and with good reason. According to the same research, companies with a better employee experience are more profitable (source: **WTW**).

Samantha Gadd, co-CEO and founder of employee experience learning platform **Excellent**, joined 33 other HR leaders in 2022 to publish the **EX Manifesto**, which sets out a vision for putting EX on the same agenda as the customer or user experience. Gadd believes that designing with employees, not for employees, will be central to keeping talent engaged in the coming decade:

'Many of our experiences at work have been designed to be one-size-fits-all and can feel impersonal and old-school. Leaders prescribe solutions because they think they should, or because they are scared to ask employees what they want, thinking employees will ask for something unreasonable. I hope more organisations see the power and efficacy of involving employees in design and decisions that are for employees – it makes so much sense and really is the only way to find solutions for a diverse and changing workforce.'

Promadic Economy

As work continues to evolve into an anywhere-and-everywhere model, workers will increasingly seek Bleisure travel experiences that provide optimal inspiration. According to **Spotify**, 42% of Generation Z and Millennials identify more as global citizens than citizens of their own country. Meanwhile, over half of Gen Z and Millennials in Europe aspire to live in multiple cities throughout the year (source: **Edyn**).

These professional nomad travellers (Promads) will invest in environments that offer a profusion of facilities and functional features. Remote working and co-working spaces top the list, but Promads will also demand wellness and fitness facilities, membership schemes and extended stay options.

'Leaders, when they think hybrid, they think people working from home or the office, they don't understand it's combining the best of every world,' says Kevin Empey, managing director of **WorkMatters**, and author of Thrive in the Future of Work. 'Working remotely means working from other offices, co-working spaces. Working all together doesn't mean the office, it could be in a restaurant or hotel.'

Promads will force a re-evaluation of hospitality, retail and real estate. Employers should consider hub-and-spoke places, with central HQs and satellite spaces around the globe for workers in numerous locales.

KEY STATS

: Since summer 2022, office-based job vacancies in the US have risen to a 19-month high, up 4.2% (source: **Adzuna**)

: 87% of employees say they are productive at work, while 85% of the business leaders say they're not confident that is the case (source: **Microsoft**)

: Only 12% of people would choose to be in the office full time, while a significant 50% of employers are keen for their teams to do so (source: **Slack**)

: Overall, workers say that they want to work from home 2.8 days a week, versus 2.3 days for employers (source: **WFH Research**)

Minoan is a shoppable hotel catering for the post-pandemic boom of Bleisure travellers, US



Nomad by Seymourpowell, UK

Viewpoint:

Transit Working

Oliver Williams, design strategist, Seymourpowell

The resurgence of nomadic living could one day enable us to revisit our exploratory ancestral lifestyle, hypothesises Oliver Williams.

Contemporary nomadic living, coupled with future autonomous vehicles and community service hubs, could potentially enable fully autonomous nomadic concepts: a selection of electric vehicles designed for the future digital nomad community. They not only provide a versatile home and a place of work, but also a range of service vehicles that help support this flexible way of life.

Workationers on the move: We've already seen a steady uptake in people travelling as they work, giving rise to the half-tourist or workationer. This principle untethers people from urban environments and enables them to explore. A study by **Upwork** estimates that 22% of the US workforce will be working remotely by 2025, while Italy and Thailand have both introduced Digital Nomad visas.

This all sounds good, but what's preventing widespread adoption?

Promadic visas: Challenges around cost, time, energy and infrastructure continue to exist. Some countries are offering solutions to barriers, such as the Digital Nomad visa: a document that gives someone the legal right to work remotely while residing away from their country of permanent residence. At present, only a handful of countries are offering such visas: The Bahamas, Germany, Portugal and Mexico, to name a few. Companies such as **Deel** are also helping businesses and individuals overcome the legal and compliance obstacles involved in remote working and international hiring.

These services are becoming more commonplace, paving the way for a frictionless, nomadic lifestyle.

Autonomous Nomad vehicles: At Seymourpowell, our concept vehicle **Nomad** is a level 5, fully autonomous home that moves between urban centres, providing an unrestricted form of off-grid and remote living. The concept is an exploration of how autonomy and services might eventually enable people to form new lifestyles rooted in flexible attitudes to work.

Radical new autonomous vehicles could change the way our cities evolve, and our communities form. The freedom to move is already evident in the rise of the Van Life and Boondocking movements across Europe and the USA.

'Strategically positioned service hubs would enable users to charge their vehicle, comfortably settle for a period, and take advantage of any amenities they require'

Connective services: On top of these autonomous solutions, strategically positioned service hubs would enable users to charge their vehicle, comfortably settle for a period, and take advantage of any amenities they require. Such hubs would also provide the opportunity to meet like-minded members of the community. An entire industry and service economy could be built on this framework, facilitating fleeting experiences which, when coupled with a networked infrastructure, allow for permanent ways of living.

Work States

Overview

The future of work will be characterised by facilitation and optimisation of working mind states – or work states. Employers will need to provide tools and implement strategies that aid flexibility of thought, as well as time and space.

Our proprietary framework of work states aims to help organisations design and plan environments, technologies and policies that optimise each state. The result: flourishing individuals and thriving teams, with each state representing an eco-system of collaboration, co-creation and cross-company opportunity rather than a staged system whereby company teams move from one to another in a stepped hierarchy. This is a company, or work state, that is distributive and collegiate rather than a C-suite one that is hierarchical and rigid.



State One
Inspiration and Intent

The first work state is that used for job-hunting or starting a new role or project. It's in play when we assess the purpose of our work to uncover meaning.



State Two
Collaboration and Culture

Working together is key to innovation and success. As we move physically apart, we'll need new ways to convene and collaborate.



State Three
Learning and Leadership

To lead in turbulent times, we must be willing to invest in others' development, as well as our own. To ensure the workforce is evolving, we need to be adaptable and eager to learn.



State Four
Focus and Flow

This is the ecstatic state of being at one with both problem and solution, empowering the creation of quality work at speed.



State Five
Rejuvenation and Resilience

Rest and rejuvenation are vital to the success of every other state. Using downtime to reboot our internal systems builds the focus and resilience that enable us to do our best work.

State One

Inspiration and Intent

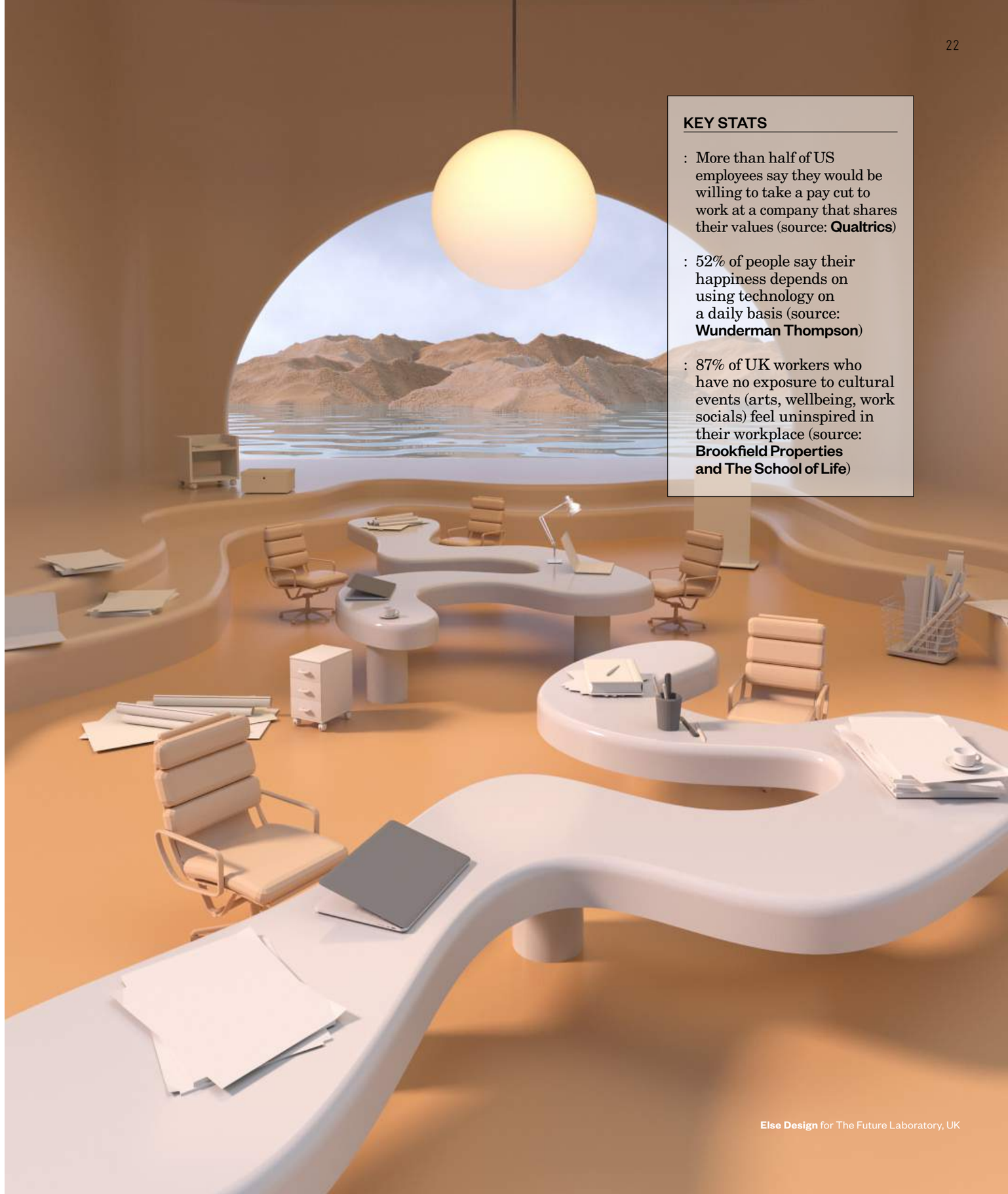
The first work state combines inspiration and intent. It's the mindset used for job-hunting, or starting a new role or project; it unites people around a common goal and makes a positive impact on businesses and society.

Using awe to assess purpose can be particularly beneficial for daily work motivation.

'One of the things that studies find is when you really focus your mind and you think about… what really matters in the next few years for my ideal future… you establish plans, which is good news for wellbeing,' says Dacher Keltner, author of Awe: The Transformative Power of Everyday Wonder.

Nurturing inspiration and intent involves a mix of synchronous and asynchronous work; this relates to looking both within ourselves and to others to spur new ideas and motivations. Toolkits, visual stimuli and shared vision bring this state to life culturally, while art, nature and awe-inspiring design facilitate it in physical workspaces.

'When we think about places that inspire creativity, we shouldn't be thinking about stationary design, but rather dynamic,' says Itai Palti, a former director of **The Centre for Conscious Design**. 'It's about the temporal experience of moving from different kinds of spaces, being drawn to external stimuli, but also having the time to let our minds wander.'



KEY STATS

: More than half of US employees say they would be willing to take a pay cut to work at a company that shares their values (source: **Qualtrics**)

: 52% of people say their happiness depends on using technology on a daily basis (source: **Wunderman Thompson**)

: 87% of UK workers who have no exposure to cultural events (arts, wellbeing, work socials) feel uninspired in their workplace (source: **Brookfield Properties and The School of Life**)

Else Design for The Future Laboratory, UK

Outside-in office

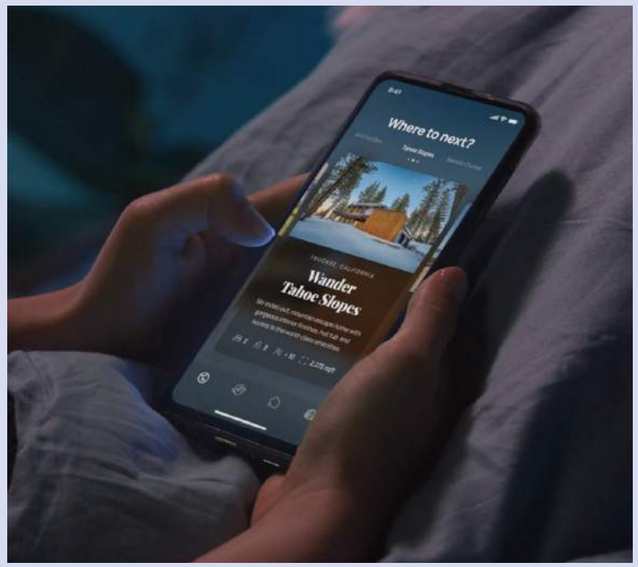
Architects are bringing the inspirational qualities of nature into workplace design through biophilia. Amazon's second headquarters, The Helix, is under construction in Virginia, US. It has a hiking trail wrapped around the building's exterior, with greenery sourced from the local Blue Ridge Mountains. Inside is more biophilic design in the forest plaza and giant waterfall feature



The Helix by Amazon, US

Promadic inspiration

Premium travel rental network Wander aims to bring together inspiration and seamless convenience. Its curated selection of smart homes has been designed for a new era of Promad workers. Each promises an inspiring location, a Tesla and a full desk set-up as standard. Individuals can buy memberships or companies can buy credits for staff retreats or benefit packages



Wander, US

Underground haven

South Korean property app ZigBang went online during the pandemic, creating Soma, its own metaverse HQ. It recently completed a Soma Lounge offline space in Seoul, located underground in a high-density urban area, which has no windows or natural light, but is designed with lighting and fake windows with nature-inspired views to inspire employees



Soma Lounge Office by Design Studio BYO, South Korea

State Two

Collaboration and Culture

As flexibility and remote working proliferate, workers will need new spaces – physical, digital and phygital – in which to convene and collaborate. With feelings of isolation soaring, especially among younger generations, employers must establish company culture that supports everywhere-and-anywhere conviviality and teamwork. Reconfigured, human-centric, community-building spaces will be vital.

So too will technological advances, which are stepping in to fill the gaps and remove physical barriers to working together, apart. Many of these new ways to connect eliminate figurative as well as structural barriers to increase accessibility and equity, making for a more diverse, inclusive workplace.

'People from different groups feel that flexibility – not only in location but also skill – has been beneficial,' says Gustavo Razzetti, workplace consultant, and author of Remote, Not Distant.

'Collaboration is changing. With interactive tools we're doing more silent brainstorming, which works a lot better for introverts, so now we're getting more ideas from people who might not have spoken up before,' says Razzetti.

'Leaders that will thrive in this future will be ones who can facilitate courageous conversations, even dissent, and integrate different insights and divergent perspectives but also deal in questions rather than answers,' adds Razzetti.

KEY STATS

: The global team collaboration software market is projected to hit £33.10bn ($40.79bn, €37.10bn) in 2028, increasing at a CAGR of 13.2% during the forecast period [2022–2028] (source: **Fortune Business Insights**)

: Only 30% of employees say their company provides support to help them work effectively with people who share different views (source: **PwC**)

: Employees who strongly agree that they feel connected to their culture are 3.7 times as likely to be engaged at work, and 37% more likely to be thriving (source: **Gallup**)



Else Design for The Future Laboratory, UK

Vibe venues

Data integration start-up Fivetran's US headquarters were designed based on employee data. With hybrid workers in mind, the company created spaces for 'non-daily work' and 'onsite offsites', such as team meetings and community events. The design includes brainstorming areas and lounges that create a motivating buzz of activity even when the office isn't heavily populated



Fivetran headquarters by Gensler, US

Neurodiverse design

Software company Contentful's Berlin office was designed in consultation with employees to create an agile, human-centric space that supports neurodiversity. Workers can personalise spaces with multi-directional lighting, automated sunshades, privacy booths and ergonomic workstations. There are quiet and loud zones, open and closed workspaces, a child-friendly zone, and a private feeding room for parents



Toi Toi Toi Creative Studio for Contentful. Photography by **Koy+Winkel**, Germany

Community co-labs

Ikea's innovation lab Space10 has opened a new community-focused public space in Copenhagen featuring a library of 100 books focused on 'creating a better everyday life for people and the planet', as well as a coffee bar and a design store, alongside an existing gallery and event spaces. The aim is to welcome the local community to share perspectives and create a culture of ideas-sharing



Space10 Library. Photography by **Seth Nicolas**, Denmark

Viewpoint:

The Connected Corporation

Rupinder Mann, founder, UnNamed Ventures

Businesses are swapping productivity and peak performance for a culture of connection, belonging and resilience as key metrics of their success.

Amid a pandemic, economic and political instability, racial discord, data wars and incoming technology, employees are more concerned than ever about who and what they're buying into, supporting and working for.

The workplace was once a space reserved for productivity and peak performance. Now, with growing awareness of organisations as living systems, driven by their people and constantly in flux, connection, belonging and resilience are coming to the fore as key metrics of business success.

At the heart of every corporate strategy should be the question of relevance: what makes us relevant today and what will keep us relevant in future?

Workplace culture is certainly being put under a spotlight – and organisations are having to find their place in societies and communities before they find their place in customers' hearts, minds and wallets.

In one best-in-class example, Nike has made £5bn ($6bn, €5.6bn) since its campaign featuring civil rights activist Colin Kaepernick, and outperformed its peers in stock price. In 2020, the brand continued its efforts by releasing an all-black jersey to commemorate four years since Kaepernick took a knee to peacefully protest against systemic racism and social injustice. It sold out in less than a minute. It's a brand that so beautifully understands and executes its values, mission and purpose together to create momentum that transcends its internal culture, external communications and global customer base.

> 'Nike executes its values, mission and purpose together to create momentum that transcends its internal culture, external communications and global customer base'

Organisations paving the way in culture are busy creating a new land of opportunity where transparency, purpose and meaning reverberate outwards from every pore of their being. They connect and plant their feet within what matters most, accept their flaws and those of their people, while also creating opportunities to reflect on a new world order – one that's both accessible and aspirational.

Aligning a business begins with enabling its people. As we move further into the Transformative Twenties, businesses are uniquely positioned to connect people across cultural, geographical and economic boundaries, creating incredible eco-systems that are diverse, inclusive and representative.

But to enable this, the dogma that resides in business hierarchies, processes and management practices must be exercised out – with intention. As Satya Nadella, CEO of **Microsoft**, once said: 'Our ability to change our culture is the leading indicator of our future success.'



Bot Initiated Longevity Lab by Nike NXT Innovation in collaboration with PCH Innovations, US

State Three

Learning and Leadership

In a future of polywork and professional power-flexing, life-long learning is a non-negotiable part of working life. Technology and flexibility offer opportunities to become more adaptable, enabling workers to learn on the job, or even remotely, and to upskill with speed and agility.

In this new work landscape, traditional hierarchies and ideas about what makes a good leader will be challenged. Reverse mentoring will continue to grow in popularity as younger generations bring fresh knowledge and values. Legacy will be paramount to decision-making as employees act as citizens and future ancestors.

‘Our research shows that agility is the skill people need to thrive in a constantly changing work environment, says Kevin Empey, managing director at **WorkMatters** and author of Thrive in the Future of Work.

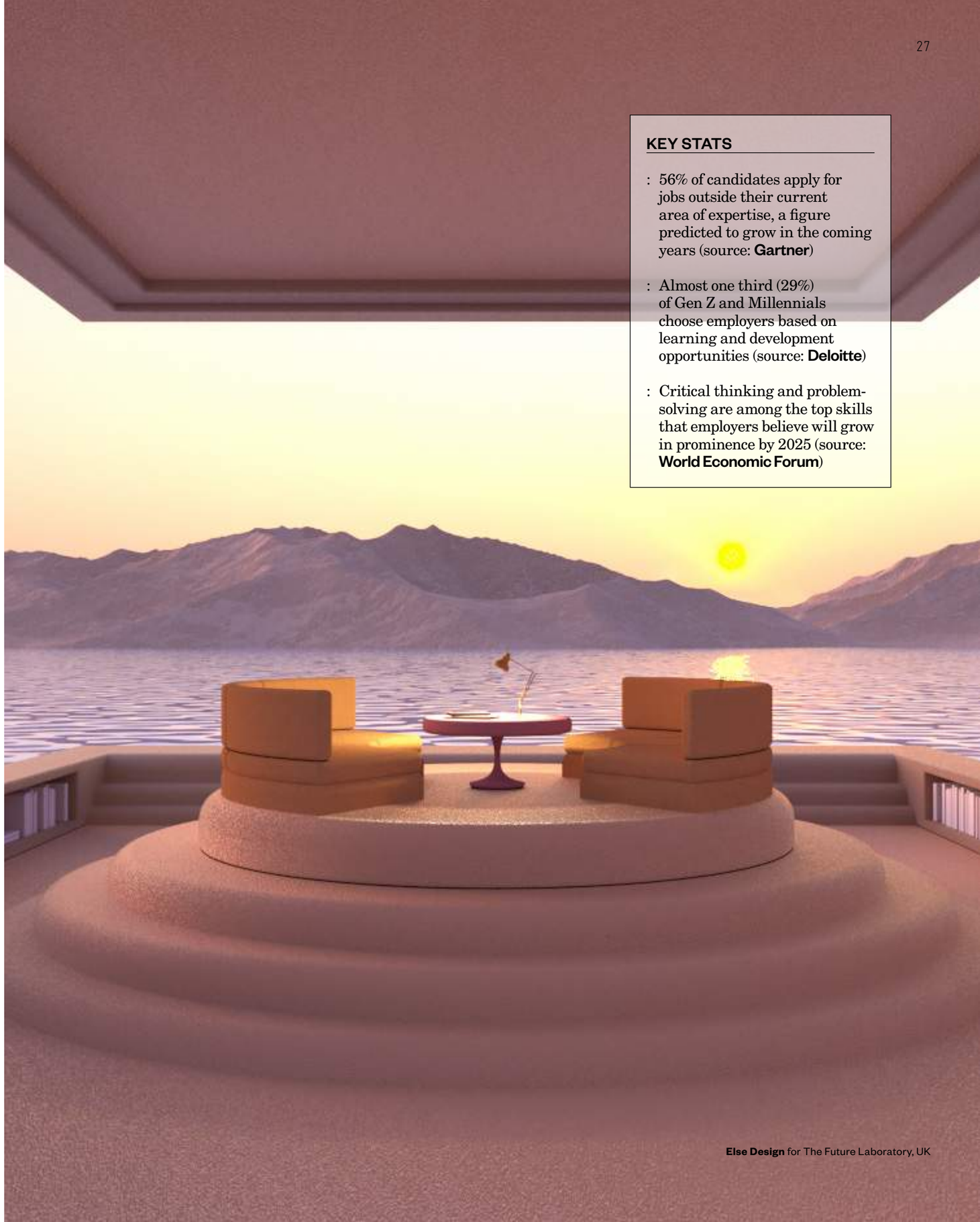
‘Leaders need to embrace a culture of experimentation, iteration, learning from mistakes and so on,’ he says.

KEY STATS

: 56% of candidates apply for jobs outside their current area of expertise, a figure predicted to grow in the coming years (source: **Gartner**)

: Almost one third (29%) of Gen Z and Millennials choose employers based on learning and development opportunities (source: **Deloitte**)

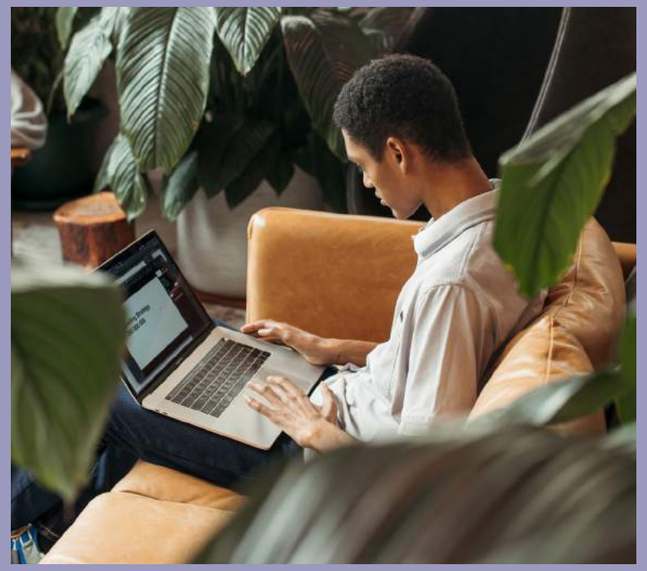
: Critical thinking and problem-solving are among the top skills that employers believe will grow in prominence by 2025 (source: **World Economic Forum**)



Else Design for The Future Laboratory, UK

Social edworks

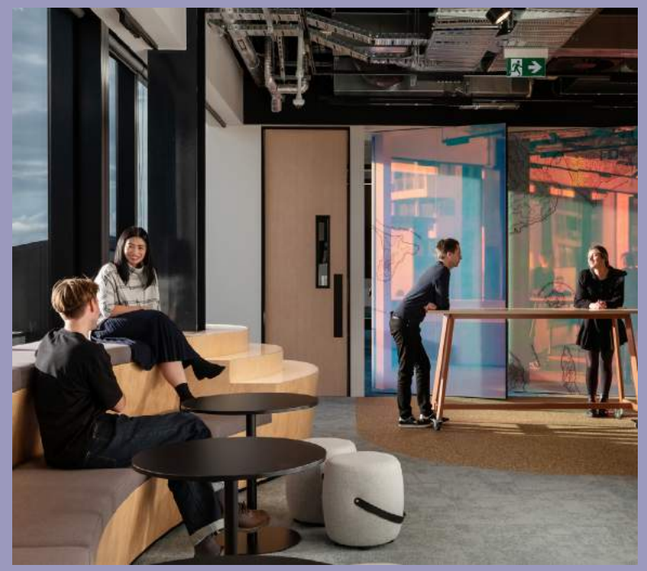
Tech giants are stepping into higher education to offer low-cost, high-value training courses. Google Career Certificates provides courses in high-demand job areas such as digital marketing, IT support, data analytics, project management and UX design. Courses are developed by Google experts in partnership with university faculties and are designed to be completed in six months or less around other work



Photography by **Anastasia Shuraeva**

Transmutable skills

In future, workers' skills will not only be transferable but transmutable. 'Designers are writing copy, planning and account-pitching ideas,' says Jason Kreher, chief creative officer North America at Accenture Song. 'This way of working lets people show up in places they hadn't before.' As a result, job descriptions will need to be rewritten



Google Aotearoa Office. Designed by **Warren and Mahoney**, New Zealand

Progressive problem-solving

Inter-generational teams inspire businesses to solve problems differently. The Body Shop's Youth Collective of under-30s advises the company's executive leadership team. Conversely, ad agency Thinkerbell's Thrive@55 programme offers an eight-week paid internship for Baby Boomers that addresses the industry's age gap, with younger employees benefitting from diverse viewpoints



Photography by **RF._.studio**, South Africa

Viewpoint:

C-suite Futures

Adam Steel, applied foresight editor, The Future Laboratory

New leadership and employee roles will emerge by 2030 as businesses respond to evolving customer, employee and commercial needs. These new roles are being driven by the growing role of data, AI and the rise of knowledge chatbots such as ChatGPT, which will inevitably remove many of those mundane day-to-day tasks we deal with.

But with more of these tasks managed by teams of Chief Automation Officers, workers will spend more time on value-adding tasks, I believe, and prosper from their ability to make better, quicker decisions informed by real-time data and AI-powered analytics.

Data empowerment: Employees will not only collaborate with each other but also with customers and with machines themselves. The most forward-thinking enterprises are already embracing Active Intelligence. Take UK communications group **BT**, which partnered with **Qlik** to put data directly into the hands of more than 1,200 consumer team members. Through customised analytics dashboards and real-time data feeds, employees can now answer any business question in six clicks or fewer – a task that would previously have taken a data analyst weeks to find, prepare and analyse.

The AI decade: As we move towards the end of the decade, this acceleration of tasks will be commonplace, with many jobs and roles being automated. This will have its downside: 83% of C-level executives expect their organisation to reduce staff head count because of the automation of some manual and operational tasks.

This reflects **McKinsey & Co**'s estimate that 375m will need to adapt their roles to automation by 2030, while most C-level executives predict employees' working practices will change and become more collaborative, with intelligent tools helping them to make better decisions (84%) and become more productive (83%).

The rise of the chatbots: Employees, too, have both negative and positive feelings about it. Over two-fifths of global employees (42%) fear the growing use of intelligent automation of manual tasks in the workplace will lead to them being made redundant due to the automation of manual tasks. But 53% believe it will give them more time to spend on value-adding work and decision-making rather than operational tasks.

Finally, a third of employees say that having a virtual assistant to guide them through the analytical process would help them when making decisions with data. This reflects the prediction by industry consultancy **International Data Corporation** that by 2024, 50% of knowledge workers will regularly interact with their own AI-enhanced robot assistant.

This has already happened with **Microsoft**'s integration of Open AI's ChatGPT into its Teams messaging service as an advanced AI personal assistant.



Cartier Tokyo headquarters. Photography by Tomooki Kengaku, Japan



AI artwork by Samuel Davies for The Future Laboratory, UK

Viewpoint:

Job Roles of the Future

Adam Steel, applied foresight editor, The Future Laboratory

Chief Metaverse Officer: To prepare for a metaverse-enabled future, organisations need to consider how they can adapt and transform operations, culture and workforces. Leading this charge in future will be Chief Metaverse Officers, with the Data Literacy: The Upskilling Evolution report from The Future Laboratory, in collaboration with business intelligence company **Qlik**, revealing that 85% of C-suite executives (CXOs) believe this position will be important in the next five years.

Metaverse Experience Designer: Helping this metaverse leader, these will be responsible for employee and customer experiences that straddle virtual and physical realms.

Workplace Environmental Architect: These will ensure physical and virtual workspaces are designed to maximise employee productivity and wellbeing, with 86% of CXOs viewing this role and that of Metaverse Experience Designer as important.

Chief Trust Officer: The findings of the **Edelman Trust Barometer 2022** indicate companies will need to step up to maintain and improve a sense of trust from the public.

By 2027, Chief Trust Officers will take responsibility for these aims, with 86% of CXOs believing their companies will hire for this position, and a majority (51%) of employees aspiring to work in such a role. Work will involve embracing adaptive and elastic strategies that allow businesses to step in where governments are lacking and contribute to society at a macro level.

Head of Collaboration: In 2027, the Head of Collaboration will be in charge of eliminating departmental silos, according to 88% of CXOs. They will be responsible for ensuring that insights are shared across the business, and even outside it, to boost competitive advantage and innovation.

Heads of Collaboration will drive new, open-source approaches to once-in-a-generation issues like the climate crisis.

Chief Automation Officer: Estimates from **McKinsey & Co** reveal that up to 375m workers will need to adapt their roles to automation by 2030. For 88% of CXOs, the Chief Automation Officer will oversee the implementation and management of automated working practices and machines across their businesses.

Striking the right balance between humans and machines will be integral.

> ‘My advice is to invest as much in humanity as we invest in technology. So good people, great training, human skills, empathy, not investing 90% in technology and then basically cutting people out. Keep the human in the loop’
>
> *Gerd Leonhard, author and futurist*

Head of Betterment: Businesses are having to work harder than ever to attract new and keep existing talent.

In five years’ time, 88% of CXOs believe the Head of Betterment will be on hand to help, identifying areas for employee development and learning, opportunities for ongoing improvement of processes and operations, and helping their organisation do better. The role will also include environmental, social and governance (ESG) initiatives, with the KPI to put purpose at the core of the business.

State Four

Focus and Flow

This is a state of sustained focus, which results in a flow of creative work. It is where clarity reigns, and problems and solutions merge into quality output. The question is: how do we attain this deep work ability in a world of constant distractions?

Flow is perhaps the most glamorous of work states, but employers must take a more holistic approach to designing experiences that ensure workers can tap into various states as and when necessary for the job in hand. As Lynda Gratton, professor of management practice at **London Business School**, says, we need to consider the time and geography of how we work. She highlights the need for both synchronous working, where we collaborate together, and asynchronous working, where we work apart, quietly and in silence shelters, for example.

'Both need facilitation through different kinds of work diaries, as well as an understanding of what makes us flourish (a recognised psychological state) and more realistically, the tools we need to learn to do these things,' says Gratton.

Add to this the hybrid working environments – such as multi-functional domestic settings – of the 2020s, in which we are continually juggling personal and professional needs and tasks, and finding focus can be seemingly impossible. But designers are working hard to help us regain flow through agile spaces and audio, while brands are banning meetings and adding services to minimise distractions.



KEY STATS

: 65% of creative people need quiet to do their best work (source: **WeTransfer**)

: In a survey of 1,000 UK office workers, 65% said noise was an issue. Over half say they are interrupted by noise more than five times a day, while 17% are disturbed more than 10 times a day, leading to losses in time and concentration (source: **Remark**)

: It takes an average of just over 23 minutes to return to a task after an interruption (source: **University of California**)

Else Design for The Future Laboratory, UK

Agile architecture

LinkedIn's new office space was designed using a 'postures matrix' to shape layouts and furniture based on usage and the ergonomic needs of workers. Individual desks were replaced with a series of spaces designed to help employees focus on the task at hand. Game developer Ninja Theory's headquarters was designed using colour theory to stimulate different moods in different spaces



Ninja Theory headquarters. Design by **Tala Fustok**, UK

Focus tech

Google's Little Signals concept explores the potential of haptic design to help its users achieve balance and tranquillity while spending time online in the home. The anti-distraction technology consists of conceptual items that use movement, shadows and sound to gently alert netizens when something requires their attention. The Ambient Machine is a similar example of tailoring audio for focus at home. It uses white noise to filter out other distractions



Little Signals by Google and Map Project Office, UK

Corporate concierges

Beauty brand L'Oréal is enticing employees to work at its second US headquarters, opened in Los Angeles in August 2022, by providing a concierge service. Employees can reduce their load – and interruptions – by paying for various errands, such as collecting laundry, posting mail, filling their car, or picking up their dogs from day care. To take advantage of the service, all workers have to do is pay £4 ($5, €4.57) per hour and return to the office at least three days a week



L'Oréal, US

Viewpoint:

Liquid Work States

Danni Mohammed, founder, GentleForces

In a world of shifting work states, Elastic Brands and hybrid offices, organisations themselves can become more fluid and liquid-like in their practices and processes.

Taking inspiration from a recent Frieze thematic essay on How Liquid Modernity Shaped Art and the World, in which writer and curator Carson Chan asks: 'What if art institutions acted like water?' Chan references philosopher Zygmunt Bauman's book, Liquid Modernity: 'Fluids... neither fix space nor bind time. Fluids do not keep to any shape for long and are constantly ready [and prone] to change it.' It's a state and behaviour Bauman deems as 'modern' – ever-changing and 'modernising'.

Fluid thinking: This calls to mind The Future Laboratory's macrotrend **Elastic Brands**, which says that businesses and brands can no longer afford to be stagnant and urges brands to pilot a new transformative future for business. So why do organisations and businesses feel so fixed?

While some organisations feel they have got there with agile processes and digital transformation accelerated by the pandemic and blockchain technology, these approaches can often feel limited to those working in the digital and Web3 field.

But what would happen if organisations behaved like water? Why wouldn't we create a business that is fluid, flexible and malleable?

Degrowth solutions: Two profound examples come to mind, both concerning the climate. The first is John Elkington's **Triple Bottom Line**, a concept revolving around the three Ps: people, planet and profit, which, as he stated on its 25th anniversary, needs re-assessment and some strategic fine-tuning.

The other is from the marketing expert and author Philip Kotler, who has called for a degrowth movement, and rightly so. For someone who defined marketing and advertising as creating demand, he reversed his stringent thought-leadership and instead embraced the much-needed constraining of consumption and growing our population at a slower rate.

Transformative waves: If ideas were more fluid, we'd flow with the current state of affairs, while rigid definitions and academia would become more adaptive, transforming over time. But what does this tell us about leadership? Rightly or wrongly, Elkington and Kotler were willing to ensure the state of business or economics, and moreover the world, weren't harmed by their formerly fixed opinions: a fine example of a liquid mindset.

In its simplest embodiment, to act like water is about being fluid and free-thinking. But it's also about letting go and riding the wave of uncertainty – and this requires organisations and leaders to put their ego to one side. In this way, we can enable new perspectives to come to the surface, and eradicate unnecessary titles and hierarchies to create a culture that flows.



Danni Mohammed, founder, GentleForces, UK

State Five

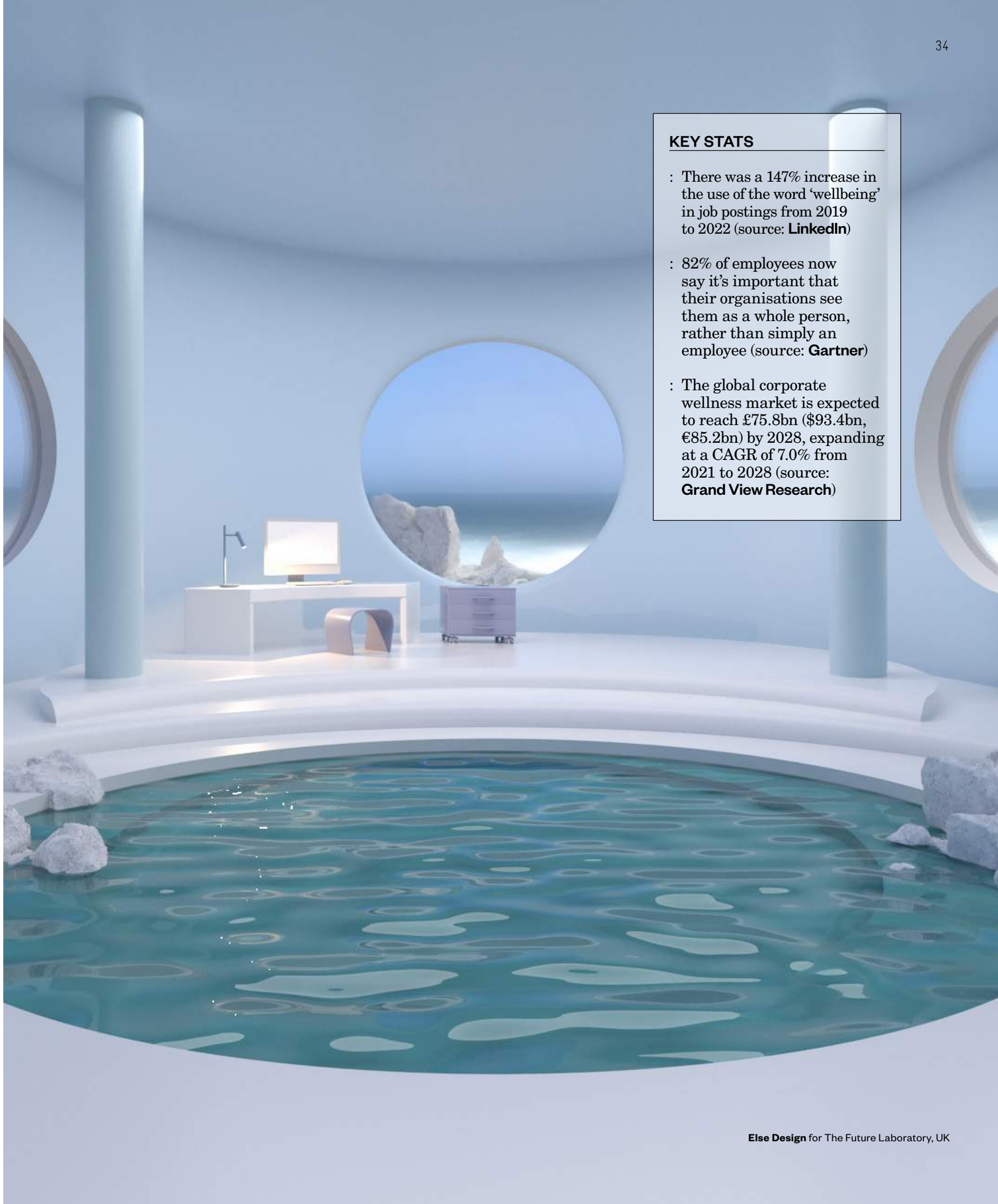
Rejuvenation and Resilience

Quality downtime is vital to overall productivity and wellbeing. Workers need opportunities – both in and out of the workplace – to reboot their internal systems and reclaim their creativity. According to **Slack**, 43% of US office workers feel burned out at work, and this is leading to a talent crisis for employers who don't step up to help their workforce tap into states of rejuvenation and resilience-building.

Benefit schemes will be holistically re-imagined as workers demand more than gym memberships, in-office pool tables and drinks nights. Both mental and physical wellbeing will be central to future employment packages. Brands such as **McDonald's**, **Nestlé** and **GE** have all announced the introduction of mass coaching, through apps such as **Ezra** and **BetterUp**, to help their employees improve relationships, manage conflict and boost productivity. A 360-degree approach to employee wellbeing is vital.

'Every business function that touches employee-related issues [must] work together as a cross-function management team [similar to cross-functional teams in product and lifecycle development] that works together to ensure all strategies, plans and actions taken within each function support employees,' says Cristina G Banks, director of the **Interdisciplinary Center for Healthy Workplaces at the Berkeley Haas School of Business**, US.

'In essence, the business becomes a 'healthcare business' because it operates in ways that avoid harm and promote health,' says Banks.



KEY STATS

: There was a 147% increase in the use of the word 'wellbeing' in job postings from 2019 to 2022 (source: **LinkedIn**)

: 82% of employees now say it's important that their organisations see them as a whole person, rather than simply an employee (source: **Gartner**)

: The global corporate wellness market is expected to reach £75.8bn ($93.4bn, €85.2bn) by 2028, expanding at a CAGR of 7.0% from 2021 to 2028 (source: **Grand View Research**)

Else Design for The Future Laboratory, UK

Hospitality HQs

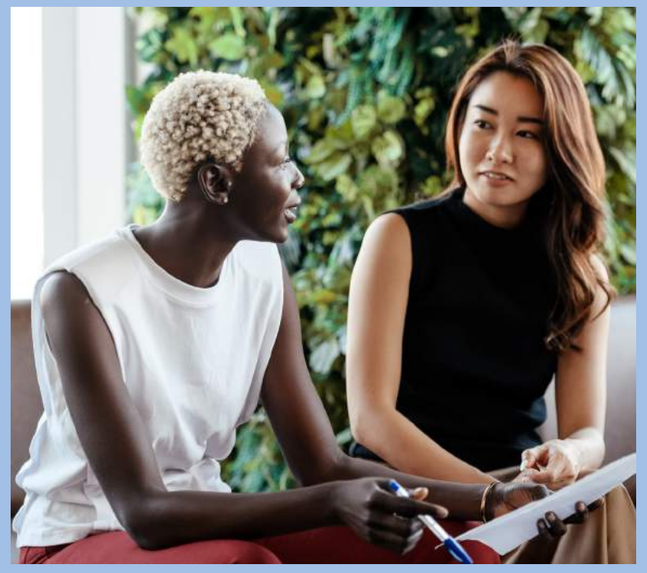
Google's new London headquarters relate more to a five-star hotel than an office. Plans include a 25-metre swimming pool, a rooftop running track and massage services. As well as employees, locals are also set to benefit from the complex as Google opens up areas to the public



Google's headquarters in London, UK

Employee health services

British broadcaster Channel 4 has partnered with health specialist Hertility to offer its UK employees access to reproductive health testing. In the US, retail giant Walmart is offering doula support for workers, aiming to address inequalities in natal healthcare. And in Argentina, e-tailer Mercado Libre is helping trans workers to finance gender re-assignment surgery



Photography by **Alexander Suhorucov**, UAE

Workplace retreats

Software company Salesforce is opening its own employee wellbeing retreat to act as a space for company togetherness. The Trailblazer Ranch will host employee engagement programmes, onboarding and skills coaching, while employees can also forge connections through nature walks, yoga, meditation, art, journalling and cooking classes

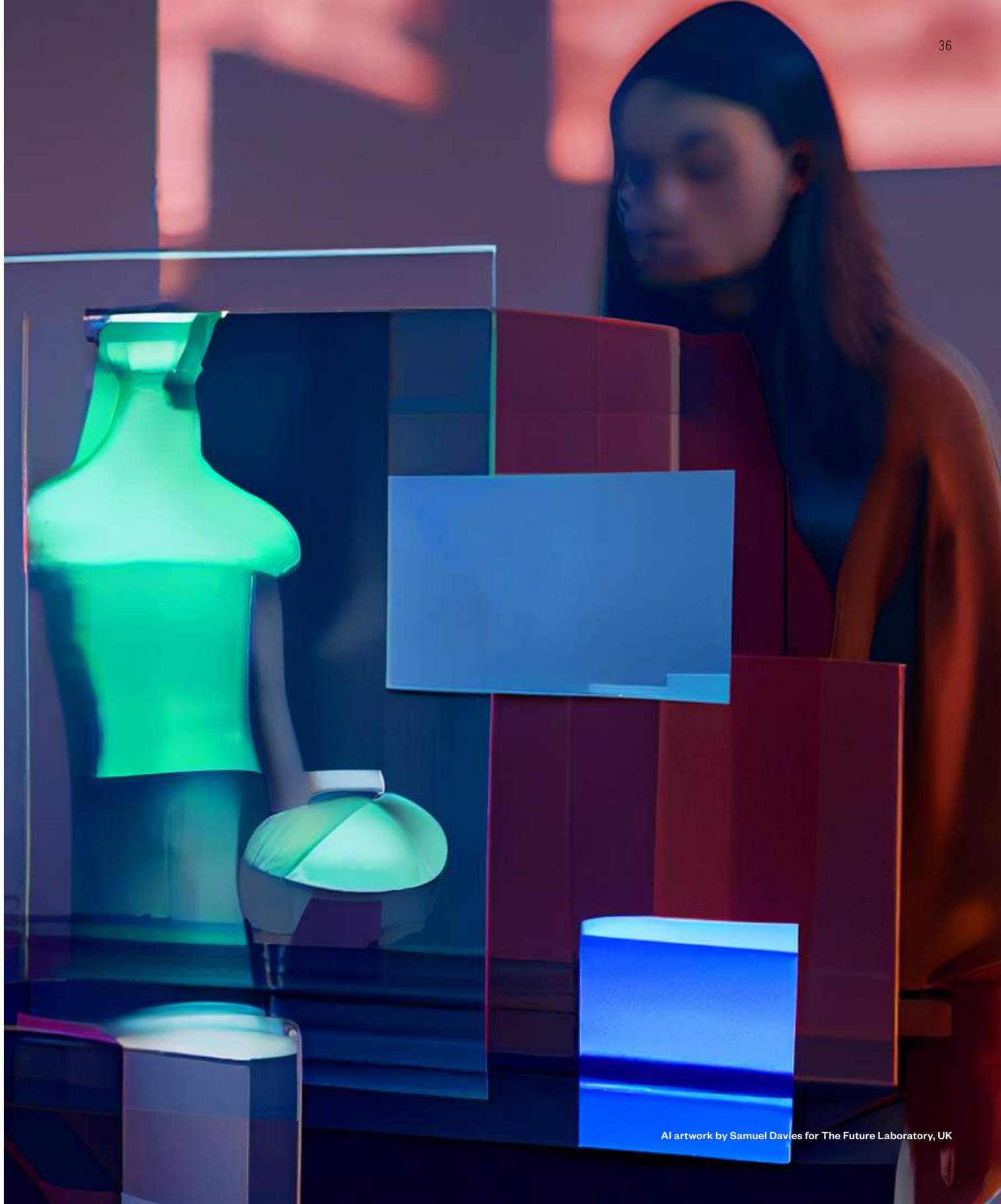


The Trailblazer Ranch by Salesforce, US

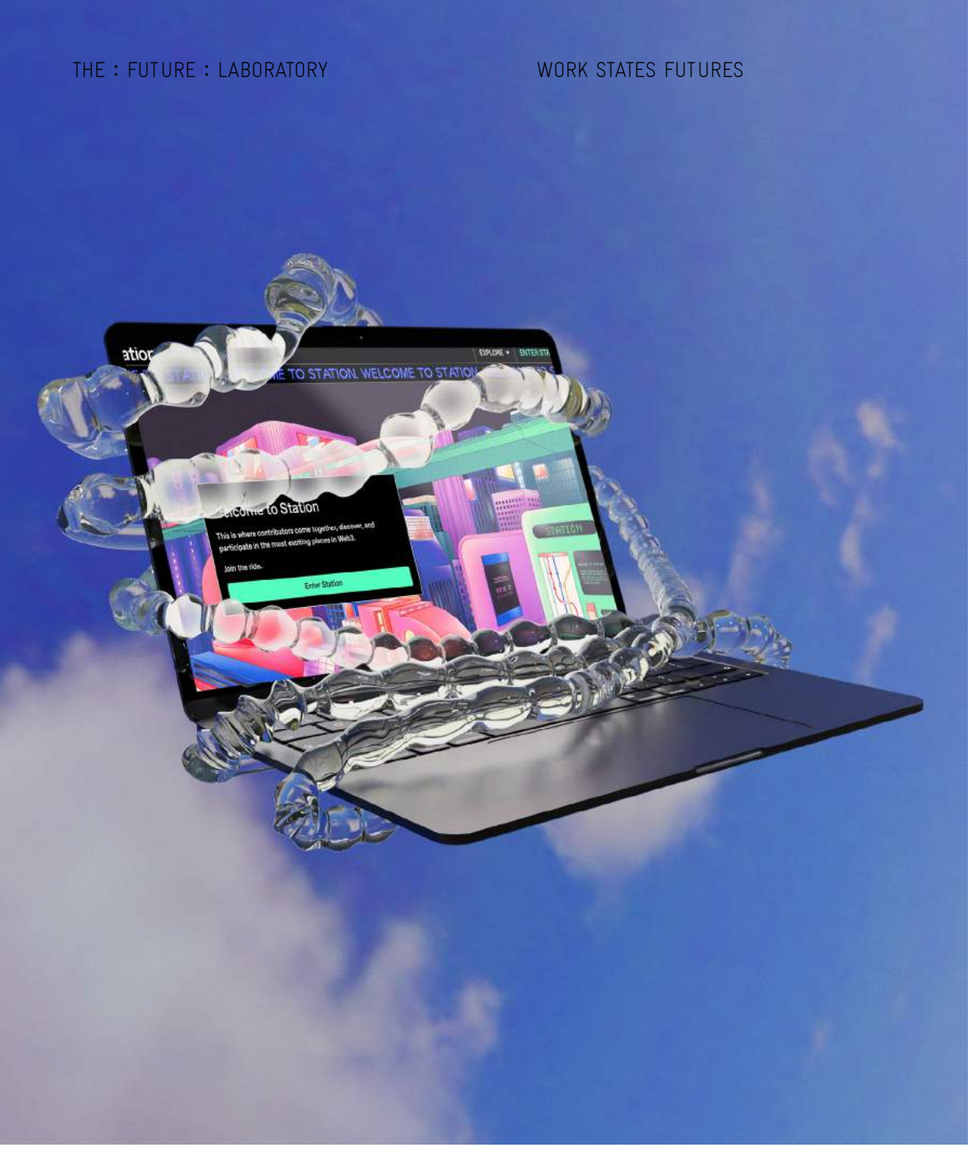
Foresight

As we move towards the 2030s, working life will continue to flex in favour of harnessing different mind states. Here, we look ahead to explore the trends that will define the future of work:

: Web3 Workforce
: Betterverse Boardrooms
: Sentient Spaces
: Haptic Twinstitutes



AI artwork by Samuel Davies for The Future Laboratory, UK



Station is building the rails that guide top-quality talent into the world of decentralised technology

Web3 Workforce

Alongside the metaverse, Web3 – or the decentralised web – will reshape working lives over the next decade. Decentralised autonomous organisations (DAOs) that run on blockchain will revolutionise how workforces connect, communicate and organise.

The number of DAOs has skyrocketed. In 2021 alone, the number of participants grew from 13,000 to 1.7m people globally. In addition, 67% of Gen Z workers say they have already worked in a DAO or are considering doing so (source: **World Economic Forum**).

Instead of being based on executives and board directors, the governance of DAOs is community-owned, with members enacting business decisions through non-fungible token (NFT) votes and smart contracts. The resulting transparency means businesses operate in the best interests of the community populating them.

DAOs have the potential to completely overhaul occupational systems and hierarchies. They could eliminate the need for recruitment, as contributors prove their worth in practice, enable people to work for multiple organisations all at once, and create new payment systems based on value creation.



Field Desk by Teenage Engineering, Sweden

Betterverse Boardrooms

AI is expected to replace many jobs, demanding a re-evaluation of roles and organisational structures. AI is predicted to boost global GDP by £12.2 trillion ($15 trillion, €13.7 trillion) by 2030, according to **PwC**. The same report also says that 30% of jobs are at risk of elimination by the mid-2030s.

Board level re-invention will be necessary as purpose, ethics and technology collide with the world of work in unprecedented ways and we usher in the age of the Betterverse. Incumbent chiefs predict that several new leadership roles will emerge over the 2020s. One survey found that 85% believe it will be important to have a chief metaverse officer and 88% believe their companies will hire for the position of head of betterment by 2030. At a lower level, 87% predict the hiring of immersion counsellors who use virtual and augmented reality to boost mental resilience and wellbeing (source: **Qlik** and The Future Laboratory). All of these new leadership roles will help reshape working lives with the goal of 360-degree betterment.

'The creation of these roles reflects the revolutionary shift in data and digital,' says Louise Brownhill, chief HR officer and chief learning officer at PwC UK. 'It reflects COP26 and everything that's happening around sustainability and climate change, and around ethics and governance. ESG [environmental and social governance] is a top emerging skill.'

But leaders should also be aware that AI might come for their jobs. Rum brand **Dictador** now has a 'human-like robot, incorporating AI' called Mika as its CEO, responsible for running the brand's DAO and communicating with its members.

> 'You should worry more about the clerical, white-collar jobs than the physical [jobs]. A large number of them will get replaced. So the question is: 'What jobs do you create to replace those?"

Arvind Krishna, chairman and CEO, IBM (Davos 2023)

Sentient Spaces

Towards the end of the decade, as neuroaesthetics comes into its own, neuroarchitects and designers will push the limits of productivity, performance and inspiration through a focus on psychology, neurobiology and technology. Our homes and other workplaces will sense our needs and adapt in real time.

Mediated Atmosphere, a project by the **Responsive Environments group** at the **MIT Media Lab**, hints at how 'sentient spaces' might function. It uses in-built bio-signal sensors to track heart rates and facial expressions to autonomously regulate lighting, projection and sound on the basis of the user's activities and physiology.

'The home will understand how individuals can work with the greatest efficiency and productivity,' says Annie Auerbach, author of Flex and co-founder of **Starling** bank. 'Morning larks might peak during breakfast, while night owls might need quiet towards the end of the day. Homes will take a nuanced approach, offering different options across design and technology that fit with each resident's rhythms and work state flows.'





Left: Connectivity Concept by Layer and Deutsche Telekom, Italy; Right: The Impact Will Be Real by Meta, US

Haptic Twinstitutes

Finally, as we flow into our far future states, digital twins – virtual models of objects or systems that harness data to monitor performance and enable experimentation – have been around for some time. Now, companies are applying the same technology to create Digital Twinstitutes, or virtual twins of their physical spaces.

NASA's Welcome to Our Metaverse is one example. It includes 3D recreations of about 30 of its labs and auditoriums so that the 2,000 of its 7,000 employees who work remotely can still collaborate in a technical setting. **PepsiCo**, meanwhile, has put a gamified spin on its Digital Twinstitute to train its staff. Working with design studio **BlockWorks**, the company has built a virtual warehouse in the **Minecraft** universe where employees must solve productivity puzzles.

The realism of these experiences will be further enhanced towards the end of the decade through haptic technology – which stimulates the sensation of touch through vibrations, motions and forces. The global haptic technology market was valued at £7.5bn ($9.2bn, €8.4bn) in 2021 and is projected to reach £19.3bn ($23.8bn, €21.7bn) by 2030, expanding at a CAGR of 11.14% from 2022 to 2030 (source: **Precedence**).

Emerge Home is a set of devices that allow users to feel virtual interactions without the use of gloves, controllers or other wearables. Instead, the devices emit sculpted ultrasonic waves that allow users to freely gesture and experience sensations.

Viewpoint:

Decentralised Autonomous Workplaces

Martin Raymond, co-founder, The Future Laboratory

As our workplaces become more decentralised and autonomous, we can imagine how more collaborative, Web3-style workplaces, where decisions are made by the many rather than the privileged few, can become reality.

Employee-owned companies: About 730 cooperative-style, employee-owned companies operate in the UK, with the top 50 companies' combined sales standing at over £22.9bn ($27.5bn, €25.6bn in 2021 (source: **Employee Ownership Association (EOA)**). In the US, employee-owned businesses hold assets worth a total £1.3 trillion ($1.6 trillion, €1.5 trillion), according to the **National Center of Employee Ownership**.

And yet, as business entities, such employee-owned (EO) companies are still relatively unknown – despite a 30% increase in EO companies in the UK during Covid-19 (source: EOA and **White Rose Centre for Employee Ownership**). But this anonymity around EOs is about to change, for three reasons:

: Generation Z and their lust for socialism, collectivism and cooperativism

: The rise of Web3 and its decentralised, distributive Alternet Economies

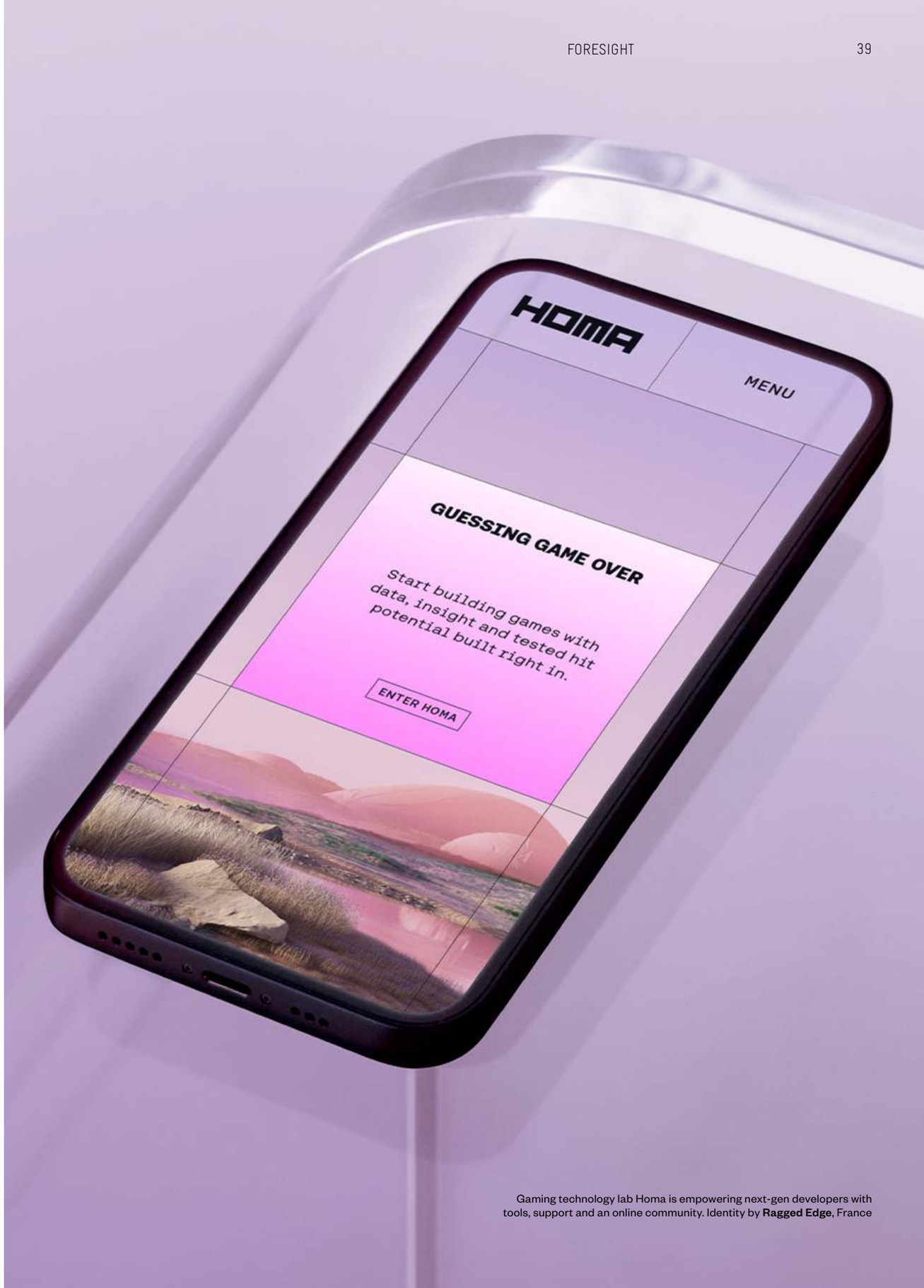
: The dawn of Decentralised Autonomous Organisations (DAOs) with structures built on transparency and accountability

Bossless organisations: Combined, these attitudinal and technological advances are paving the way for B-Corps of a different kind – the B stands for boss-less. These are not directionless, as many old-school CEOs would have you believe, but future-facing Decentralised Autonomous Stakeholder Organisations, or DASOs, as I call them.

Here, employees are stakeholders – and all stakeholders, regardless of seniority, rank or specialism, have one vote (or token) that is used to sanction, challenge or mitigate decisions. As the tech futurist Cathy Hackl puts it: 'DAOs envision a collective organisation owned and managed by its members with all of them having a voice.' My vision for DASOs takes this concept further by allowing the collective members to be the organisation's Collective Executive Officers – a new breed of CEO.

Self-organised saviours: As David Ehrlichman, author of Impact Networks, explains it, when Hurricane Sandy struck in the US in 2012, Occupy Sandy volunteers self-organised, collectively agreed their priorities, roles, key aims and objectives, and got on with the task of feeding people and saving lives. So successful was their emergent decision-making that the American Red Cross delivered supplies directly to them for wider distribution.

These, then, are the principles of DASOs: employee-owned trusts or organisations that are self-governed, bound to the blockchain, transparent, emergent, and demand that everyone in the system is answerable to the many. To paraphrase Ehrlichman, for them to succeed, we need to foster strong relationships and decentralised connections, and never be dependent on a singular, dominant voice – that know-it-all CEO. In other words, someone who sees power in reigning voices in, rather than allowing them to become collaborators that work things out.



Gaming technology lab Homa is empowering next-gen developers with tools, support and an online community. Identity by **Ragged Edge**, France

Strategic Implications

Adopting flexible, human-centric and decentralised approaches that nurture work states can help build more resilient businesses



Little Signals by Google and Map Project Office, UK

Strategic Actions

Embrace work places that facilitate work states

Remote working has shifted the previously fixed approach to synchronous (where we collaborate with others) and asynchronous working (where we work quietly and alone), giving rise to newly empowered employees who are embracing unique work states. As employers re-evaluate the role and design of physical spaces, they must consider how they can become flexible hubs that facilitate new employee work states



Lyonesse Pictures Office. Design by Kii Inc, Japan

Create human-centric places that champion cross-age diversity

As work places and work states are enhanced by neurodiverse thinking, intergenerational teams and divergent perspectives, employers need to facilitate and encourage these traits by removing silos – when people meet online or in real life. Do this by discouraging polarities, allowing dissent and defending your people's rights and responsibility to think divergently, with a view to innovating and solving challenges inclusively



Toi Toi Toi Creative Studio for Contentful. Photography by **Koy+Winkel**, Germany

Be a decentralised mentor and an open-source legacy-builder

As future work places begin to adopt flat structures and shun hierarchical organisation, talent development, knowledge acquisition and life learning will be core to how they thrive and succeed. But to flourish, leaders and C-suite members will need to embrace a reverse mentoring mindset in which all employees are regarded as knowledge-holders, insight-givers and company mentors. Each one can contribute to collective goals and organisational objectives



Office S&M, UK

Thought-starters

Do you understand the difference between a work state and a work place?

In the fight for survival, smart brands know that working together beats operating in isolation. Put traditional rivalries and hierarchies aside and look for progressive growth opportunities through mutually beneficial partnerships with those who strive towards common goals



Little Signals by Google and Map Project Office, UK

Have you considered the hidden patterns of your own work states?

Our states do not represent a hierarchy of activity but unpack the narrative requirements of how we work. Have you considered your own organisational work states? Do they resemble ours? And if not, do you think your version is effective, encourages flow and delivers long-term success and legacy?



Shopify Berlin. Design by **MVRDV**, Germany

Do you really believe in hybrid working and the everywhere corporation?

If you believe that TWAT days are here to stay, have you considered the long-term challenges this may have for deep working, team collaboration, or the culture of your brand, business or organisation. In the way we need to train people for any job, do you now train them to be effective on that ‘everywhere’ job or in that hybrid team meeting?



Wander, US

Related Macrotrends

2020

Enlightened States

The experience economy is pivoting towards personal transformation, as people begin to look inwards and prioritise self-discovery, while brands are rethinking their roles in the emotional lives of consumers



Consider Falling by Sarah Howe at The Science Gallery, London

2022

The Paralysis Paradox

At a time of global dissonance, shared solutions and radically disruptive innovation will emerge from science, technology and business organisations willing to challenge and transform the ongoing paralysis



Zünc Studio for The Future Laboratory, UK

2022

Neo-collectivism

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

2022

The Betterverse

The metaverse has become the new multi-trillion-dollar digital frontier for all that is immersive, engaged and virtual, including how we will work, collaborate, and design better brands and organisations together



Build the Change by Lego, UK

Strategic Worksheets

These strategic worksheets are to help you apply this macrotrend to your business

Photography by **Antoni Shkraba**, Poland

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?

Urban Mindset | Dislocated World | Accelerating Technologies | Evolving Demographics | Climate Change & Resource Scarcity | Global vs Local



Influence

Consider the following:

How will this trend affect how you fulfil that need?

What impact could these drivers have on the business?

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

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

How could you apply these insights to your business?

Which foresight scenario is your company least prepared for?

What is most surprising about this foresight scenario?



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





01 Culture

What cultural conversations are emerging and who are the taste-makers?

How do we add value to culture?

What will our consumers pay more for in the future?

02 Category

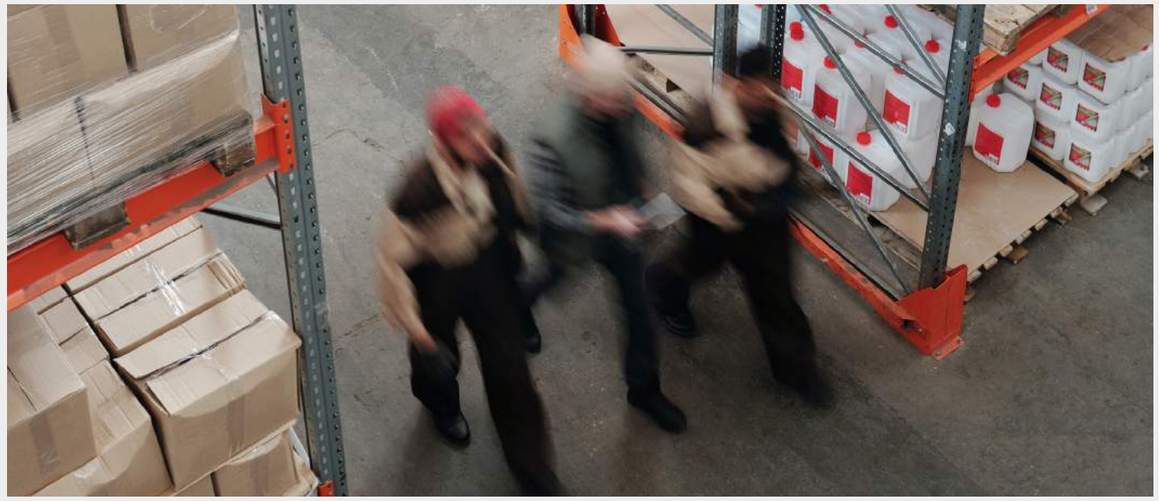
What's our greatest opportunity?

How is the competition evolving?

How can we differentiate?

From left to right: **Toi Toi Toi Creative Studio** for Contentful. Photography by **Koy+Winkel**, Germany; Space10 Library. Photography by **Seth Nicolas**, Denmark

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

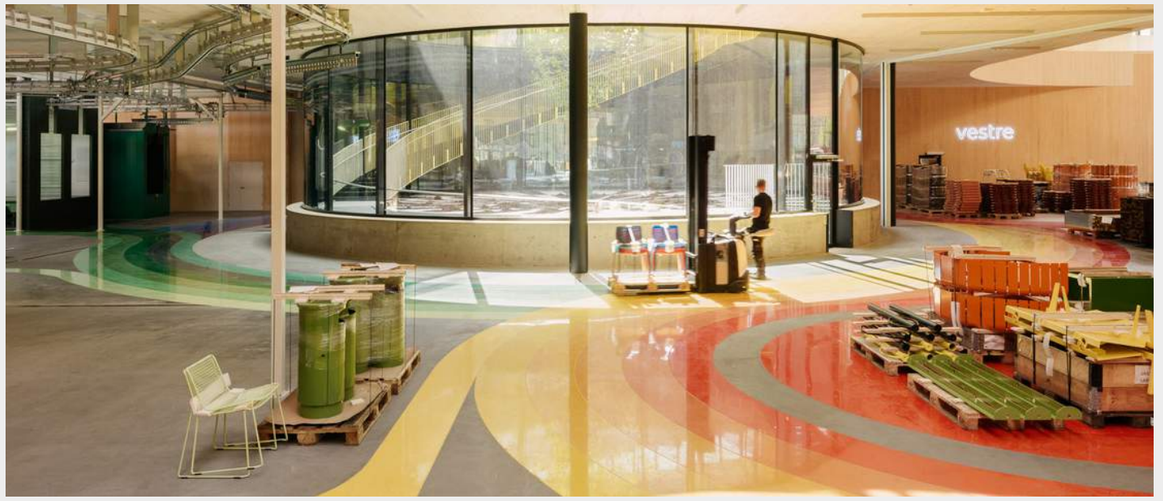


03 Consumer

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?

From left to right: Photography by **Tiger Lily**; The Plus designed by Bjarke Ingels Group for Vestre, Sweden

Planning

YEAR 1

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

YEAR 3

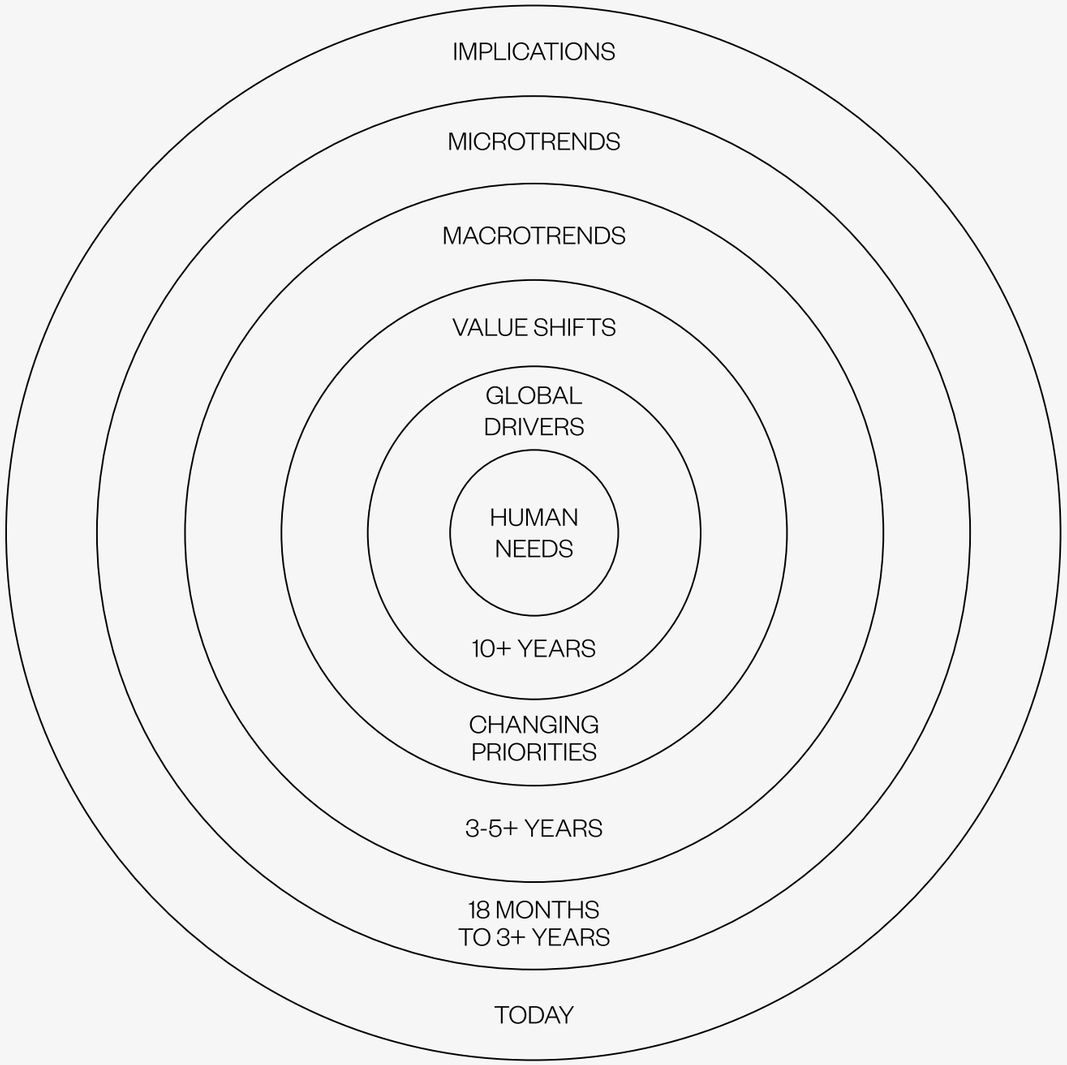
In three years, how will this macrotrend change the brand?

YEAR 5

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

Methodology

The Future Laboratory's unique proprietary methodology allows us to track, monitor and determine the key drivers of change affecting future consumers, culture and business. Here is how we identify our trends



The Future Laboratory's proprietary foresight methodology

Introduction

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.

Futures Taxonomy

At the heart of The Future Laboratory is a taxonomy that our teams have used since the millennium to shape the strategic thinking and foresight capabilities of FTSE 100, Fortune 500 businesses, and progressive brands and disruptors.

We use this methodology to map, monitor and interrogate the future. It serves as the foundation for everything we do as a business, and is based on six layers of hindsight, insight and foresight:



01 Human Needs

Static and universal needs, based on a value system that supports human nature's physical and emotional programming

02 Global Drivers

The shifting social, technological, economic, environmental and political landscape reshaping the world we live in, affecting everyone and everything

03 Value Shifts

Consumers' changing attitudes and behaviour – a reaction to their contemporary context

04 Macrotrends

The cultural manifestations of new and emerging attitudes worldwide

05 Microtrends

Influential short-term signals indicated by innovation

06 Implications

Future implications for brand and business growth



The Seven Human Needs

The seven human needs are timeless and universal. Based on a value system that supports human nature's physical and emotional programming, each human need is of importance to us as individuals and together they form the foundation of society as well as that of our methodology:

Why they matter:

Every day consumers make decisions based on what they feel and believe is most important. By aligning our research with these static needs, businesses gain a deeper understanding of how the needs of early adopter consumers will translate into product and service needs as their values shift with the global drivers.

The Seven Human Needs

Security

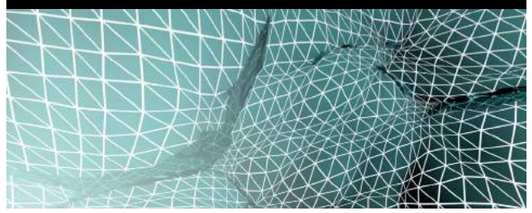


At the core of humanity is a fundamental need for structure, control, certainty and stability. It is a basic human survival instinct to protect ourselves and our loved ones from perceived physical, emotional and economic threats

KEY ELEMENTS

Finance, Health, Food, Shelter, Employment, Safety, Environment, Wifi

Fulfilment

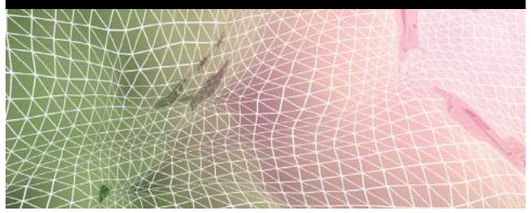


There is a human desire to direct our own lives, to create forms of freedom, and to find deeper meaning and balance in life. It is the psychological need to fully realise our personal potential with the resulting feeling of satisfaction

KEY ELEMENTS

Wellness, Spirituality, Love, Emotions, Self-esteem, Beauty

Belonging

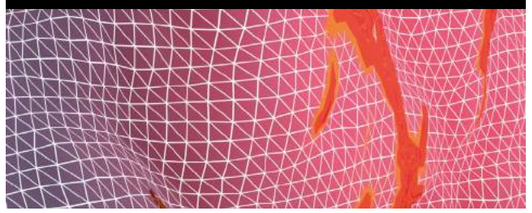


It is a social need to be physically connected to a group of like-minded people. We have an emotional urge, on an individual level, to create support systems and relationships that provide us with acceptance and approval

KEY ELEMENTS

Nationalism, Tribalism, Roots, Conviviality, History, Culture

Curiosity



To both create and co-create makes us push the boundaries of what is ultimately humanly possible. Our in-built intuition makes us inquisitive beings with a shared inclination to discover or challenge the norm

KEY ELEMENTS

Exploration, Education, Connoisseurship, Discernment

Identity

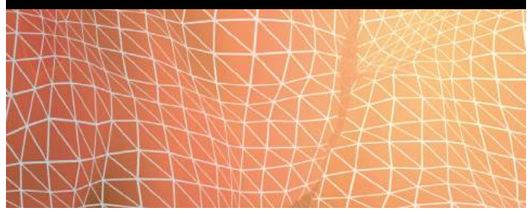


We have a need to distinguish our character or personality from others and to feel unique and respected for who we are. We build our sense of who we are through a personal exploration of gender, sexual orientation, ethnicity and age

KEY ELEMENTS

Gender, Age, Ethnicity, Religion, Nationality, Self-image, Language, Collectivism, Morals

Attainment



All human beings need to feel respected and recognised among their peers, which drives the desire to constantly express our significance and success, our knowledge and tastes, with our achievements often reinforced through the acquisition of symbolic goods

KEY ELEMENTS

Knowledge, Taste, Work, Respect, Prestige, Connoisseurship, Ownership

Purpose



It is in the interests of the human species for all of us to contribute, participate and add collective value to progress. Each day we plan for a better tomorrow, aligning our passions with our purpose to grow and achieve collective betterment

KEY ELEMENTS

Meaning, Ethics, Mastery, Learning, Collectivity, Sustainability, History, Culture

The Six Global Drivers

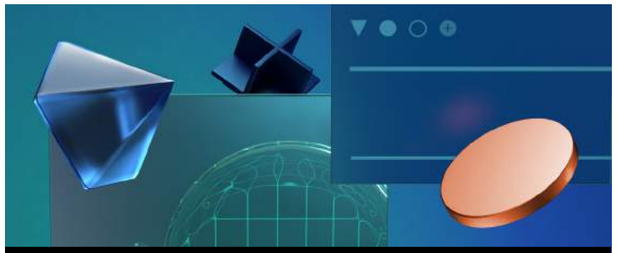
Global drivers represent the cultural, social, economic, political, technological and environmental eventualities reshaping the world we live in. They are factual, objective and long-term structural forces that are pervasive, powerful and transformative.

Why they matter: What's next

These are the fundamental shifts or external forces that have the potential to reshape the future trajectory of a brand or business. They help to contextualise decision-making by considering why and how the world is being reshaped. They enable clients to rethink what kind of world consumers will live in and therefore what will drive the businesses of tomorrow.



The Six Global Drivers



Accelerating Technologies

The digital and offline worlds are converging. For millions of people around the world, living a day without technology is almost unthinkable. On the cusp of a Fourth Industrial Revolution, new technologies are fusing the physical, digital and biological worlds, creating new data streams and altering the way society operates



Climate Change and Resource Scarcity

Climate change is the biggest global risk, according to the World Economic Forum. The stresses and conflicts created by this force have far-reaching impacts for our planet, resulting in eco-system degradation, more frequent and harsher weather patterns, competition for resources and new migratory flows



Dislocated World

The Covid-19 pandemic unearthed pervasive inequalities and divisions on a global scale. People are experiencing unprecedented turbulence as political instability and extremism, polarisation between rich and poor, new health epidemics, global trade wars and rapid technological advances contribute to economic and social upheaval



Global Versus Local

Today's interconnected world, in which goods, services, information and culture are rapidly spread, instantly creates an impact in one global region that has a knock-on effect on others. Simultaneously, supply chain shocks, sustainability concerns and economic protectionism are leading to localism being prioritised across many regions



Evolving Demographics

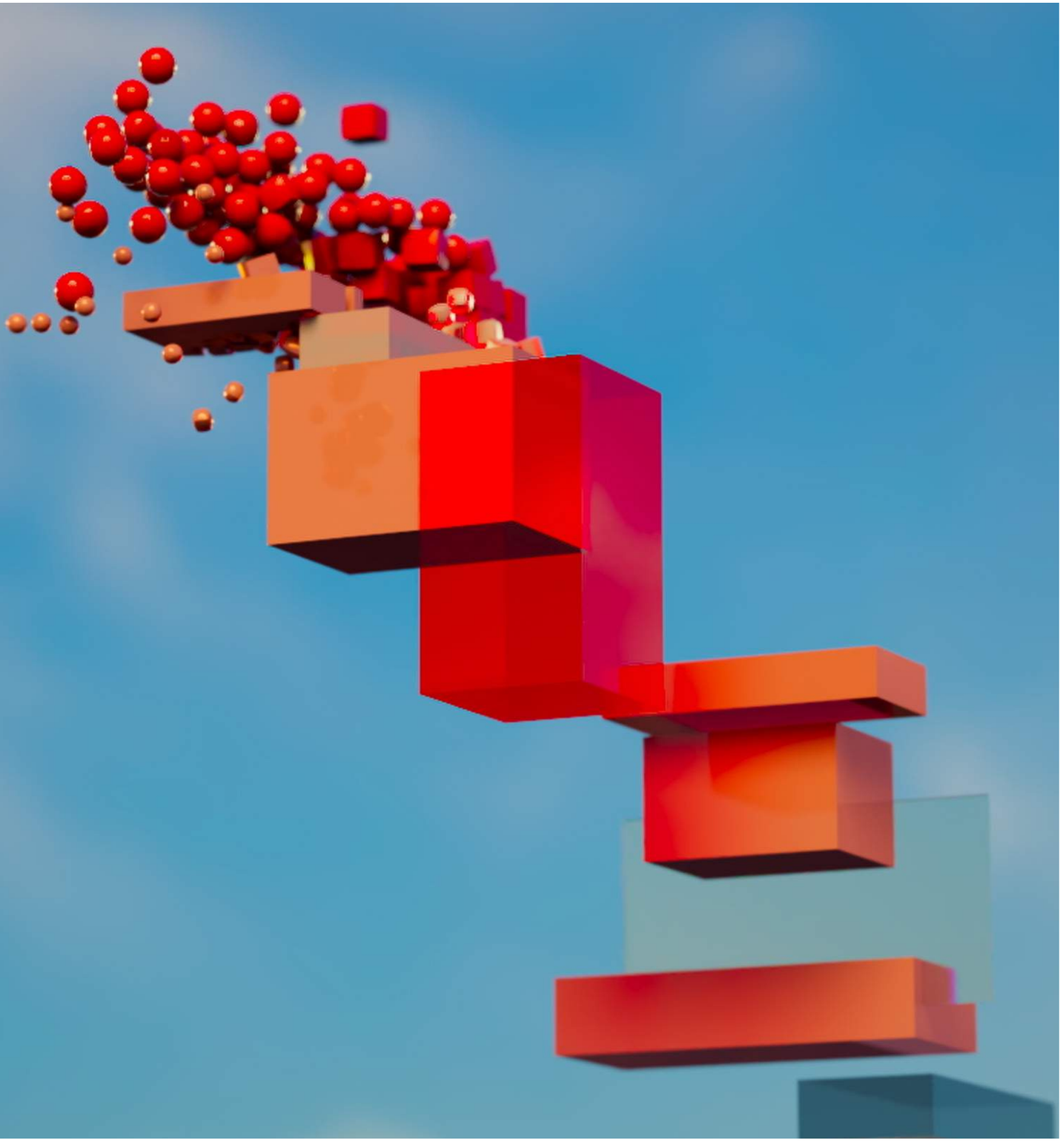
In the next decade, a number of forces will begin to change the global population, contributing to major social and cultural shifts that will affect how we measure and use traditional demographics – including ethnicity, gender, sexuality and age. From new household models to more fluid forms of identity, these shifts will transform our cultural values and day-to-day lives



Urban Mindset

In the past four decades, the number of people living in cities has more than doubled to over 4bn today, more than half the world's population (source: Wharton School, University of Pennsylvania). The Covid-19 pandemic revived anti-urban sentiments, but the broader global trend of rapid urbanisation continues

From left to right: **Carolina Carballo** for The Future Laboratory; EBIOS by Interstellar Lab, US; Mutant Matter by **Dutch Invertuals.** Photography by **Barbara Medo**; Self-sufficient City by Guallart Architects, China; Protect Your Spirit by NorBlack NorWhite and Fila India. Photography by **Prarthna Singh**; Parc de la Distance by **Studio Precht**, Austria



The Value Shifts

We know that our needs are prioritised, expressed and pursued differently as time, culture and social requirements change.

The evolving forces sitting above these needs are changing our value expectations, transforming our aspirations and priorities, and beginning to reveal the role, the purpose and the direction that brands and businesses can take as they move towards 2030.

Identifying how societies and culture are changing provides the sociocultural context for our macrotrends.

Why they matter: What to plan for

As consumer values shift from year to year, we track their evolution through the lens of our global drivers and human needs to help businesses stay ahead of the cultural curve and understand the trajectory of the trends they have invested in or should be investing in.

Macrotrends

We can identify future macrotrends by studying the behaviours of innovators and early adopters who signal the cultural manifestations of new and emerging attitudes globally.

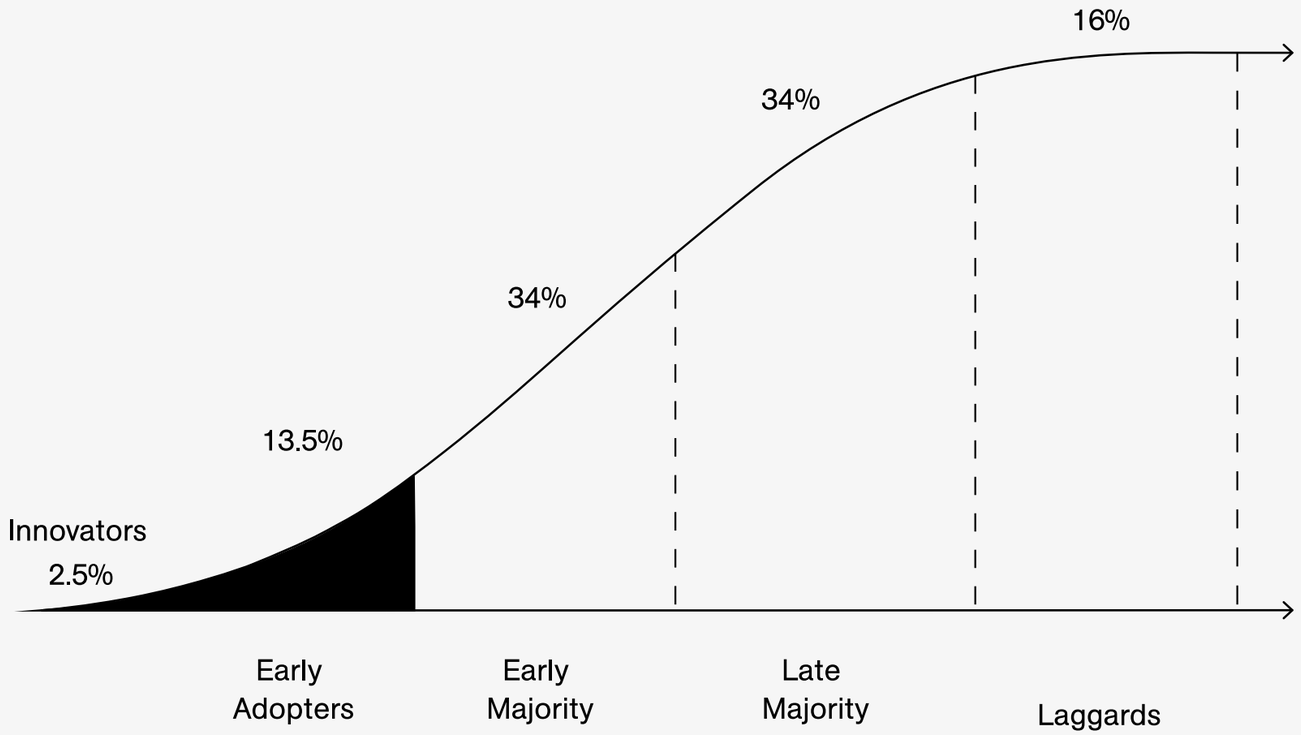
Why they matter: Where to play

To understand revenue-driving early and late majority consumers, we focus on innovators and early adopters who determine today what the rest of us will be doing tomorrow.

By understanding these consumers, we can help our clients deliver a business strategy that appeals to early adopters and the late majority – ultimately future-proofing your business.

The Diffusion of Innovation curve

Seen here is a simplified version of the mapping process used by Bryce Ryan and Neal Gross to describe how an idea, innovation or product development passes from the fringes of our culture into the late majority mainstream



DISCOVER MACROTRENDS



Microtrends

Where macrotrends chart the next 3–5 years, microtrends are tangible examples that are emerging now.

Supported by new consumer-facing innovations, microtrends are evident in new start-ups, products, services and experiences. Manifesting in the short term, microtrends emerge in local and regional variations.

Why they matter: How to win

Microtrends highlight specific shifts in consumer behaviour that change the business environment in the short term.

They enable businesses to see what's happening now across industries, regions and markets, allowing them to re-align new workstreams and help articulate a proposition from local insights.

Strategic Implications

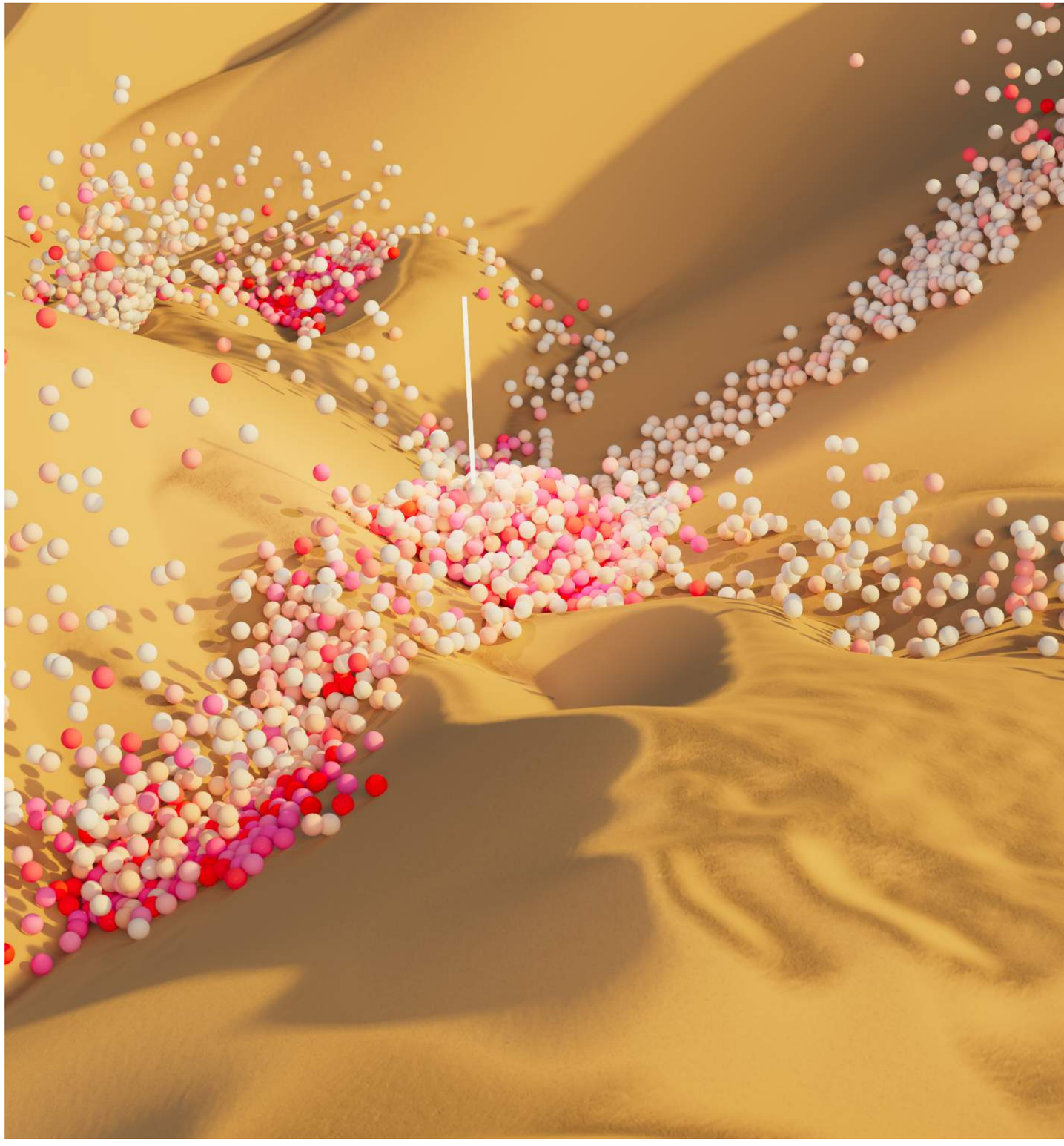
As you can see, we don't predict the future. But through Strategic Foresight we can track global shifts to understand the key drivers of change and mine the evidence of today's world to preview what the future could look like.

Our Strategic Implications enable clients to contextualise, navigate and find opportunities by highlighting how a macrotrend might affect them and refocus their outlook.

They act as recommendations to help clients discover future growth and set a series of positive actions about what they can do today to apply the trends.

Our team of strategists are always on hand to dig deeper and build a personalised Foresight Framework for you. Get in touch to understand how our human needs, global drivers and macrotrends will affect your organisation.

BOOK A STRATEGIC CONSULTATION



Make a better future happen

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

Did you know that members get free access to all of our trend reports?

We can also deliver our research to your business in a number of ways, from **virtual presentations** to **strategic workshops** and **bespoke reports**.

If you want to find out more, say **hello@thefuturelaboratory.com**

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Creative artworker : Amber Richards
Senior sub-editor : Ian Gill
Senior production planner : Madeleine Watts

Marketing manager : Emily Kelly
Junior marketing manager : Jaylene Mbararia

The Future Laboratory
6 Orsman Road, London N1 5RA, UK
Phone: +44 20 7791 2020
Email: office@thefuturelaboratory.com

The Future Laboratory is one of the world's foremost strategic foresight consultancies. Members of our trends intelligence service LS:N Global get exclusive access to the mindsets defining tomorrow and the early adopters driving global change across eight industry sectors.

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Contact: For further information on all our services please contact hello@lsnglobal.com or call +44 20 7791 2020