THE : FUTURE : LABORATORY

Beauty, Health & Wellness Futures 2022

Introduction

As we move further into the 2020s, beauty, health and wellness brands continue to seek and develop solutions to the pressing issues of our times

Despite the lure of new platforms and technologies for audience engagement, the sectors remain at the mercy of health, economic and climate forces, and the need to develop working practices, products and services in response. Already, **NielsenIQ** reports that 67% of US consumers have changed spending patterns to watch costs since Covid-19, with the number of 'newly constrained' beauty customers rising by 16% in light of inflation in 2021.

Where 2021's macrotrend **Synchronised Care** considered collective health and our interdependence on nature and the world around us, now we must view the industry's future against the backdrop of phygital living, science and technologies that will elevate and improve brands' internal practices and output.

'This year's Beauty, Health & Wellness Futures report examines key sector shifts emerging from the effects of Covid-19 and amid lifestyles that exist ever-more fluidly between digital and physical spaces,' explains Olivia Houghton, senior creative foresight analyst and beauty and wellness lead at The Future Laboratory. 'Emerging now are solution-orientated services and products and brand-driven innovations that respond to challenges such as climate change, product efficacy or translating beauty and wellness online.'

This quest for solutions will be crucial in the next four years, as the global beauty and personal care market speeds towards a forecast value of £453bn ($558bn, €529bn) (source: **Research and Markets**). It will also fuel greater collaboration and investigation across industries to mitigate industry impact and collectively develop responses – and trust. Indeed, major industry players, including **Henkel**, **L'Oréal**, **LVMH**, **Natura &Co** and **Unilever**, recently announced a new global collaboration to co-develop an open, industry-wide environmental impact assessment and scoring system for cosmetics products.

But as we explore later in this report through our new macrotrend, **Accredited Beauty**, solutions require expertise, and with this, greater clarity on research, formulas, impact and value. Such expertise has the potential to fuel bold new directions for beauty and wellness, from analytical in-store experiences to future trust marks and biotech brands.

'We have seen [the trend for expertise] pick up recently as consumers have demanded higher standards from the products they use, and we hope to see more companies start to move the needle on this expectation,' explains Carolina Reis Oliveira, co-founder and CEO of **OneSkin**, a skin longevity company comprised of PhD-level ageing experts.

In this future, then, science cannot equate to staidness; in fact, it will be used to unlock the potential for brands and businesses to develop innovations, ingredients and customer interactions that we are yet to imagine.





Cover: 111umination Beauty by **Aurore Piedigrossi** and **Tobias Siebrecht**, France

Contents



10 Macrotrend: Accredited Beauty

As consumers seek proof points on product quality, efficacy and sustainability, scientific evidence will drive the healthification of beauty industry



4 Trends Rising

From interpersonal advisers to extreme ingredients and applications, we identify six emerging trends that are driving new directions in beauty and wellness



12 Drivers

After the impact of Covid-19, the beauty and wellness sectors are facing fresh challenges that are centred on trust, honesty and resource longevity

28 Strategic Implications

The key steps that beauty and wellness companies can take to garner trust and customer engagement in the era of Accredited Beauty



Trends Rising

From interpersonal advisers to extreme ingredients and applications, we identify six emerging trends that are driving new directions in beauty and wellness

Bio-activewear

Performance apparel and exercise accessories are going plant-based as the need for sustainable, non-toxic alternatives to synthetic materials becomes clearer.

As part of its ongoing environmental efforts, **Lululemon** is partnering with biotechnology company **LanzaTech** to pioneer eco-friendly yarns and fabrics made from recycled carbon emissions. It has also unveiled yoga mats and bags made from Mylo, a leather-like material made from mushrooms.

While many athleisure brands use recycled synthetic fibres, such as recycled PET and conventional elastane, these sadly continue to contribute to micro-plastic pollution. As a result, alternatives made from plants, not plastic, are slowly paving the way forward. Marking the brand's first move into the athleisure category, **Pangaia's** 31-piece activewear line is made from castor beans, seaweed and eucalyptus, manufactured using cutting-edge fashion science and technology.

High-performance and technical fabrics are also being disrupted through more natural materials. **Gentrue** aspires to deliver next-gen activewear that shuns chemical finishes, with a debut line of leggings and tops that replace finishing chemicals with natural silk proteins that deliver impressive functionality, including moisture-wicking and quick-drying properties. This feat is achieved via a nature-based process pioneered by green chemistry company **Evolved By Nature**.

• *Read more on LS:N Global*



Sustainable activewear by Pangaia, US

What are rising trends?

In this section you will discover the nascent trends forecast to grow in influence across the beauty and wellness sectors in the next one to three years. Global in their reach, these trends can focus on consumer experiences or business operations

The global market for sustainable athleisure is expected to reach **£103bn** ($126.9bn, €120bn) by 2026

Source: Research and Markets



Eco-sessories

Lululemon has developed yoga mats and bags made from Mylo, a leather-like material made from the renewable root structure of mushrooms



Hidden Heritages by **Wendy Owusu** explores how African hairstyles have been indicative of a variety of social concepts such as kinship and religion, The Netherlands

Salon Confidantes

Salon spaces and staff training are changing the meaning of 'beauty therapy' as trust, client safety and their wellbeing become integral to salon services. This emerges as some 43% of haircare professionals describe themselves as 'critical to their clients' mental health' (source: **Booksy**).

Indeed, therapists are extending their duty of care – and the typical services provided – far beyond salon walls. In San Diego, **Angelica B Beauty** is positioning its salon as a safe space for its community of women clients to find respite, relax and chat freely about everything from skin conditions to sexual wellness and motherhood.

In the UK, **The Lions Barber Collective** is a mental health charity that offers its BarberTalk training to hair stylists to help them recognise, listen to and guide conversations about mental wellbeing with male clients. Barbers are also equipped with knowledge of charities and organisations they can suggest to clients when needed.

In a similar vein, **Florida Department of Health** has launched training focused on supporting salon clients' mental and physical health. Barbers and stylists will learn about hair and scalp health as an indicator of overall wellbeing – hair dryness or bald spots can indicate changes in hormones or early signs of cancer.

To date, the programme has seen results in terms of engagement among Hispanic and African American communities, owing to trust in their stylists.

• *Read more on LS:N Global*

43% of haircare professionals describe themselves as 'critical to their clients' mental health'

Source: Booksy



Freck Beauty uses Queen of the Night cactus as a key ingredient across its product line, US

Desert Skincare

As shifting climatic conditions transform our skin, brands are developing products that utilise desert plants and their ability to thrive in harsh conditions.

Skincare brand **Akermus** has created a facial serum from 100% pure prickly pear seed oil from cacti, with founder Mahmoud Ismail highlighting that it's now been scientifically proven as a way to repair and heal wounds due to the oil's high amounts of vitamin E, fatty acids and vitamin K.

Described as the 'resurrection plant', Myrothamnus flabellifolia is being used by **Armani Beauty** as the main ingredient in its Crema Nera skincare range. Able to withstand extreme weather conditions, from drought to torrential rain, the plant is being used for its phytochemicals, which serve as powerful antioxidants in cosmetics and pharmaceuticals.

Meanwhile, active ingredients company **Seppic** is trying to normalise the use of 'extremophilic organisms' – a term that describes organisms that can survive in hostile environments – in its marketing and communications.

Its Bioplasma BG extract contains a type of micro-algae native to the Sahel, a desert formerly covered by an ocean that receded 15m years ago. The micro-algae have the ability to resist strong radiation because of a unique mechanism that enables them to become dormant when the environment becomes dangerous for their survival, before reviving again when the conditions are appropriate.

• *Read more on LS:N Global*

‘Resurrection plants [have a] remarkable toolbox of chemicals they use to survive extreme water loss and heat’

Jill Farrant, scientific adviser, Armani Beauty



Resilient beauty

Akermus has created a facial serum from 100% pure prickly pear seed oil, an ingredient which has been scientifically proven to repair and heal wounds due to the oil’s high amounts of vitamin E, fatty acids and vitamin K



Cyber Eau de Parfum by Look Labs, Germany

Digtial Fragrances

Our sense of smell, once impossible to translate via the internet, is now aligning with our digital habits thanks to a new wave of phygital perfumers.

To mitigate the limitations of buying fragrances online, **L'Oréal** recently engaged acoustic experts at **Ircam Amplify** to craft a stimulating soundscape for its **Viktor&Rolf** Spicebomb Infrared scent that would raise the listener's body temperature to evoke the fragrance's olfactive effect. The goal was to expand the sensory footprint of Infrared by creating a unique palette of sounds for the fragrance, inspired by its cinnamon, chilli and red berry notes.

Elsewhere, the internet is inspiring scent development. Media brand **New Models** and **The Society of Scent** asked creatives, academics and **Discord** users, as well as an AI bot, the same question: what does the internet smell like? With descriptions ranging from sex, money, cheap vodka, fur and oil, its resulting perfume – aptly named The Internet – shows how visceral olfactive memories can be crowdsourced to produce a fragrance.

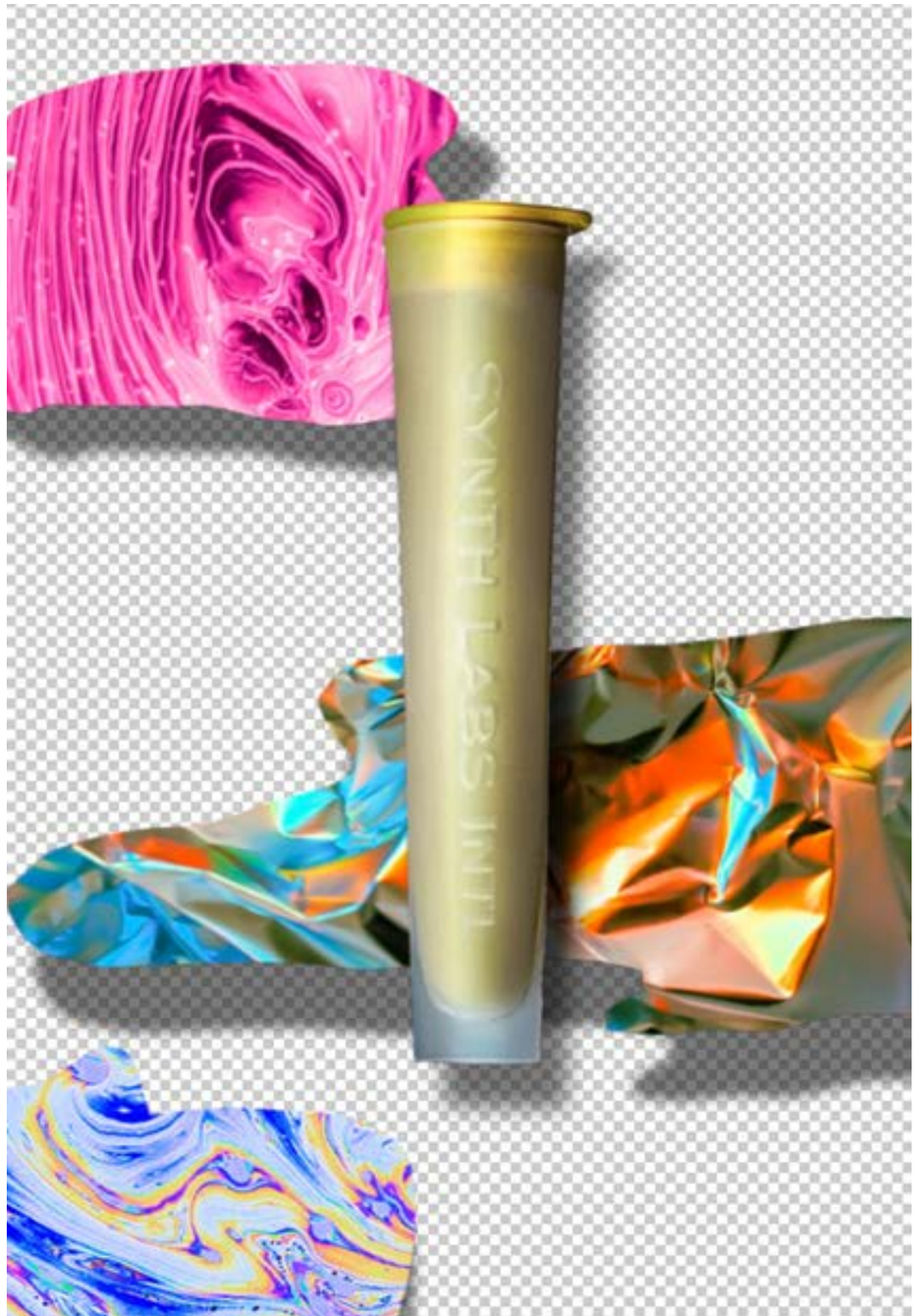
Contemporary beauty studio **Look Labs**, meanwhile, is examining how the molecular make-up of perfumes can be translated into collectible virtual scents. Its Cyber Eau de Parfum is described as 'the scent of the metaverse', with the bottled scent's 'molecular vibrations' analysed using near-infrared spectroscopy to produce limited-edition NFT artworks that can be purchased separately from the perfume.

• *Read more on LS:N Global*

The global cryotherapy market is projected to reach **£318m** ($392m, €372m) by 2030

Source: Allied Market Research

Chill! Formula: Grass by Synth Labs Int'l, Australia



Cryo-beauty

From collaborations to cooling beauty formulas, brands are exploring the regenerative benefits of cryotherapy via tools and topical treatments.

The cooling formula of **Boscia**'s Cryosea Firming Icy-Cold Cleanser is a result of the brand's patented Cryosea blend, made with red algae, sodium hyaluronate, sea kelp extract, sea water and AHAs – ingredients known for their soothing effect and cold-as-ice experience that tightens, firms and plumps skin.

Meanwhile, **Ameon**'s Supreme Energy Ice Cubes are made to be kept in the freezer and applied to the face wrapped in gauze. They are formulated with antiseptic and anti-inflammatory verbena stem water, zinc, copper and magnesium, AHAs and diamond powder.

Australian skincare brand **Synth Labs Int'l** is taking a playful approach to cryo-beauty application with its Chill! Formula: Grass product, which mimics a popsicle. Users of the kit, which is sold for at-home application, fill a silicone mould with a topical treatment that comprises a grass jelly and powder. After freezing for four hours, the frozen formula isn't eaten but applied over the skin, taking on a serum consistency. It is then massaged onto the face for three minutes and left for 20 minutes to soak in.

The Chill! product's key ingredients include algae, snow mushroom, aloe vera, hyaluronic acid and cica grass, reported to calm acne breakouts, reduce redness and inflammation, and give an overall hydrated appearance.

• *Read more on LS:N Global*

60% of Gen Z shoppers in the US think brands should sell their products on platforms associated with the metaverse

Source: Obsess



BeautySPHERE by P&G Beauty is a branded virtual hub providing information on the company's corporate social responsibility efforts, US

Meta Marketing

Shifting focus from e-commerce to experience marketing, beauty and wellness firms are seizing upon the metaverse and Web3 to educate, experiment and boost interaction.

Brand events in the metaverse, for example, not only allow brands to showcase products, but also help them to communicate their values to new audiences. During **Valdé Beauty's** 500-person **Decentraland** launch event, buyers of its new lipstick were given a free matching NFT and access to the newly created **Valdé NFT Collective**.

Merging sustainability efforts with a Web3 presence, luxury beauty brand **Guerlain** is selling 1,828 non-fungible tokens (NFTs) of bees to support a rewilding project in France's Vallée de la Millière nature reserve. Guerlain describes the collection of Cryptobee tokens as a Reaverse – a blend of 'real' and 'metaverse' – venture, uniting digital communities and sustainability through real-life action.

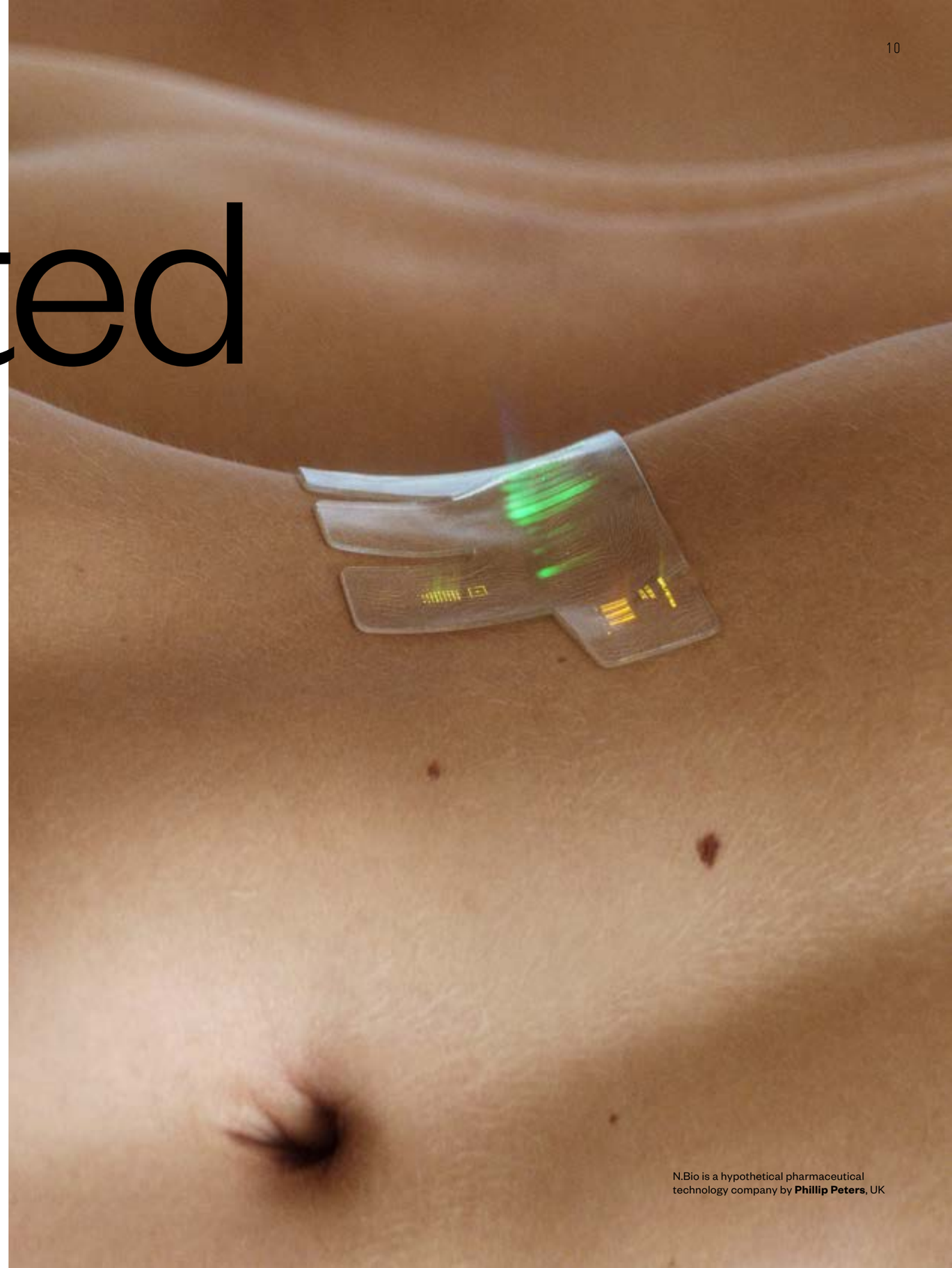
In the wellness sector, **Cardio** has launched Metabike, the world's first metaverse and gaming integrated home fitness bike that offers riders Move-to-Earn (M2E) and Play-to-Earn (P2E) experiences. Users can earn up to £24 ($30, €28) per month in Cardio Points, which can provide healthcare discounts and access to services in Cardio's app – they can even swap Cardio Points for the company's crypto asset Cardiocoin.

• *Read more on LS:N Global*

MACROTREND

Accredited Beauty

As consumers seek proof points on product quality, efficacy and sustainability, scientific evidence will drive the healthification of beauty industry



N.Bio is a hypothetical pharmaceutical technology company by **Phillip Peters**, UK

For almost two decades, a clean beauty narrative has dominated the industry, transforming how the sector operates and its output, from start-ups to supply chains, formulations, packaging, brand marketing and even retail criteria

Underpinning this has been the need for greater transparency across the beauty and wellness sectors, driven by growing consumer awareness and questions about products, ingredients and efficacy, and the wider impact of beauty and personal care on overall wellbeing. A recent study by **Mintel** found that nearly a third of UK facial skincare users research the ingredients used in skincare products to find out how effective they are.

In turn, beauty and wellness brands have embraced radical openness, ownership and the transformation of working practices. They've addressed resource and materials use, and channelled this into innovation and storytelling around products.

Yet, against the backdrop of a global pandemic and its consequences, and the unrelenting climate crisis, the beauty and wellness sectors are tipping in a new direction – that of expertise.

Around the world, consumers have been exposed to watching, reading about and listening to experts advising the public on best practice for our health and lifestyles. In turn, global societies have become more trusting of such figures than ever. According to the **Edelman** Trust Barometer 2022, scientists are now the most trusted (75%) of all societal leaders, ahead of national health authorities (63%) and government leaders (42%).

'We are speeding into the age of the expert,' says Martin Raymond, co-founder of The Future Laboratory. 'For beauty and wellness, this equates to research, testing, proof points and facts that will foster understanding, trust and positive sentiment among audiences.'

As the name of this year's macrotrend suggests, **Accredited Beauty** is on the rise, built on the pillars of expertise, exploration, evidence and certification. This comes at a time when beauty narratives risk spiralling into greenwashing and false claims that could fuel cynicism among customers.

Surging inflation and the resulting price increases for beauty and wellness products and services means that companies must bring their expertise, research and accreditation to the fore, not only to prove the worthiness of their products but also to inspire spending.

'We're entering a period of discernment,' emphasises Jasmina Aganovic, CEO of **Arcaea**, a company building a regenerative future for the beauty industry through biology. 'What is different about this product? Why should I spend my money on this versus something else? That discernment is opening the door to innovation, to science, to new avenues.'

The use of science and technology will also be crucial to safeguard the industry against future shocks, securing supply chains and fuelling fresh directions for formulas, products and experiences. 'It is becoming evident that biotechnology will play a large role in the beauty space,' David Koo Hjalmarsson, CEO and founder of skincare brand **Tiny Associates**, tells The Future Laboratory. 'In the initial rollout, sustainability will drive adoption; later, enhanced ingredients performance will.'

Whether a fledgling brand, established player or marketing team, Accredited Beauty demands an emphasis on science, knowledge and trustworthiness to underscore the future of how your brand operates, innovates and engages with its customers.

Four Stages of Accredited Beauty

Four new stages for beauty and wellness innovation in 2022 and beyond:

Expertise
Brands will bring technical knowledge to the fore to satisfy consumer curiosity

Exploration
Tech-led experimentation will augment products and experiences

Evidence
Research, product trials and results will be shared for transparency

Certification
Patents and auditing will lie at the foundation of all future products

N.Bio is a hypothetical pharmaceutical technology company by **Phillip Peters**, UK

Drivers

After the impact of Covid-19, the beauty and wellness sectors are facing fresh challenges centred on trust, honesty and resource longevity

Aesthetic Health

After the rise of **Recuperative Living**, people around the world are embarking on new lifestyles and routines. This also follows a period of **Conscious Deceleration** brought on by the pandemic, with the chance to re-assess pre-lockdown lifestyles and habits fuelling a new understanding and awareness of lifestyle choices and their impact on body, mind, skin, scalp and hair.

In turn, the continued blurring of wellbeing and beauty is driving a desire for aesthetic health. According to **Euromonitor**, 50% of global consumers now define beauty as 'looking healthy'. In India, meanwhile, 51% of consumers attribute skin problems to stress, 50% say that a lack of sleep is to blame, while 47% believe an unhealthy diet is the issue (source: **Mintel**).

'Consumers are prioritising prevention and protection when it comes to health and beauty returns, focusing on skincare, balanced diets, and active lifestyles to achieve this, as self-care and wellness boomed during the Covid-19 pandemic,' explain Aiste Kriaucinaite and Amrutha Shridhar, co-authors of Euromonitor's Voice of the Consumer Beauty Survey. In response, people are seeking scientifically formulated products that are safe, effective and transparent. When asked why they want these types of products, consumers reported for health and skin benefits (15%) and because the products were recommended to them by professionals (12%).

Global Driver : Urban Mindset

Urban growth and its immediate health impacts are being called into question while the health and wellness of a society is ever-more linked to its success

What are global drivers?

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



The Nue Co's latest perfume, Mind Energy, functions as a mental wellbeing supplement by provoking the senses to combat stress and fatigue, UK



Time named vaccine scientists 'Heroes of the Year' in its 2021 edition, US

Sci-fluence

As the world adjusts to life with Covid-19 as a constant presence, people have become increasingly trusting of science and its related experts and research bodies. Central to this is the expectation that such organisations, and their figureheads, will keep the public informed and up to date with advice about health impacts.

'As the pandemic has brought science into more people's lives, it is perhaps no surprise that people's trust in science and scientists has risen so much,' explains Lara Clements, associate director of public engagement and campaigns at charitable foundation **Wellcome**. Indeed, some 72% of people in Britain reported a high level of trust in scientists during the pandemic, compared to 52% who trust the government (source: Wellcome Monitor).

Elsewhere, a **Pew Research Center** survey of the public in 20 countries found that trust is 'relatively high' in scientists to do the right thing for citizens. Pew, however, highlights that while highly educated people and those on the political left tend to express more trust in scientists than those with lower levels of education and those on the political right, there is consensus that the public doesn't know enough about science to really understand coverage of scientific research.

Global Driver : Dislocated World

The coronavirus crisis has unearthed pervasive social, political and environmental inequalities and divisions on a global scale

72% of people in Britain reported a high level of trust in scientists during the pandemic

Source: Wellcome Monitor



The Brexit Christmas Ration Pack was a project by The Or addressing Brexit-related shortages during Christmas 2021, UK

Inflated Industry

FMCG and beauty producers – and in turn, their customers – are feeling the fallout from post-pandemic inflation, the Ukraine conflict and ensuing supply chain impacts. In April, **Unilever** announced that price growth accelerated by 8.3% in Q1 2022, owing to soaring raw material costs, with more increases expected this year. **P&G** has also emphasised a focus on maximising the availability of products for customers in 2022 in light of rising costs across supply chains. 'As the cost of living crisis hits, we expect to see more cautious shopping behaviour this year with some shoppers foregoing more expensive brands for cheaper private-label alternatives,' explains Sofie Willmott, sector head for health and beauty at **GlobalData**.

In turn, with consumer incomes under pressure, many want to know that when they spend on a product or service, they are not only investing in something of quality, but in a company with a positive impact – be it socially or environmentally.

This also comes in response to the growing number of spurious claims found in brands' marketing: nearly half of UK consumers (41%) agree that greenwashing and wokewashing in the health and beauty sectors are becoming noticeable, highlighting concerns such as brands faking sustainability credentials or being superficial in their support of social movements (source: **The Pull Agency**).

Global Driver : Dislocated World

People are experiencing unprecedented turbulence and financial instability alongside an equal downscaling of consumption

61% of consumers agree that environmental issues are having an adverse impact on their current and future health

Source: NielsenIQ



Studio Hugmun's branding for Murré Skincare spotlights its key ingredients, Poland

Accelerating Ingredients

Amid accusations – and awareness – of both industries negatively affecting the environment, there is a growing requirement for the beauty and wellness sectors to embrace technology to advance ingredient innovation and education.

'Our consumers have evolved more in the past three years than in the 30 years prior,' says Stéphane Lannuzel, Beauty Tech programme director at **L'Oréal**. This is echoed by Cristina Monnoyeur, L'Oréal's director of digital transformation in operations: 'They're much more concerned about the environment, they want more transparency, and they want access to everything, all the time, everywhere.'

Enter the era of biotechnology. Building on the themes explored in **Nature+ Beauty**, companies are recognising that they can build on nature's foundation, combining it with biotechnology to accelerate everything from new product development and product potency to reducing environmental impacts.

The global biotech ingredients market is expected to grow at a CAGR of 9.3% from 2020 to 2027 (source: **Grand View Research**). This will help to fuel growth opportunities for biotechnology-based active ingredients, especially for cosmetics, and in relation to fragrance, flavours and pigments born from biotech innovations.

Global Driver : Accelerating Technologies

From engineered DNA to biodata and technologies, a push towards synthesising natural life is already under way

‘This merging of natural components with lab-made elements creates synthetic alternatives to our planet’s depleting natural resources’

Dr Chris Martin, expert in microbiology and anatomy

Nature+

&Walsh has rebranded Geltor’s ‘ingredients as a service’ offering through a series of vibrant 3D orbs – each detailing the unique components of ingredients used in its product solutions, US

Insight

Beauty and wellness brands are bringing expertise, efficacy and biotech explorations to the fore to prove their capabilities and win consumer trust

Skin-deep Health

Building on the growing appreciation of Aesthetic Health – that is, adapting lifestyles and behaviours to bolster appearance – science-led beauty formulas and tools are emerging that are designed to have direct health benefits.

Already, pilot research has shown that twice-daily moisturising of the skin – the body's largest organ – can help to mitigate age-related issues such as Alzheimer's, heart disease and diabetes (source: **University of California San Francisco**). In this vein, innovators such as **IRÄYE** are creating the first skincare range that activates the lymphatic system through topical application, with its proprietary, science and research-backed Lymphactive Complex helping to clear dead skin cells, boost circulation and nutrient uptake, and reduce inflammation.

The microbiome field is also evolving, with skincare and consumables that support gut health to positively affect skin appearance. **Haeckels** has developed a post-treatment regime to bolster the effects of its facials, including a seaweed collagen broth that promotes absorption of nutrients, and edible nutrition balls containing omega fatty acids, pectin prebiotics, electrolytes and anti-inflammatory powders.

Tech-led tools associated with physical wellbeing are also evolving for beauty audiences. Taking two years to develop, the TheraFace PRO is a facial health device that uses percussive therapy to reduce facial tension, ease migraines, and can even be used to cleanse the skin. 'We hope this device will act as a catalyst to helping people understand the importance of self-care,' says Benjamin Nazarian, CEO of **Therabody**.



TheraFace PRO by Therabody, US

What is insight?

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

The global home-use beauty devices market value is set to rise at a CAGR of **25.1%** between 2020 and 2030

Source: P&S Intelligence



Facial health

TheraFace PRO is a facial health device that uses percussive therapy to reduce facial tension, ease migraines and cleanse the skin, US

72% of consumers report feeling more connected to a brand when employees share information about it online

Source: Sprout Social





Above: MTHK, UK; Below: Ace of Air website and list of expert advisers, US

Experts-in-Residence

As science becomes ever-more prominent in product development and applications, brands will develop their marketing and communications to bring qualified brand experts and ambassadors out of the lab and into consumer-facing roles.

Indeed, for those who want to amplify the benefits of science, storytelling is shifting away from traditional influencers towards expert insiders; some 72% of consumers report feeling more connected to a brand when employees share information about it online (source: **Sprout Social**).

Seen in practice, direct-to-consumer brand **Beauty Pie** recently appointed a dermatologist-in-residence, Dr Andrew Markey. Featuring regularly across its content, he unpacks the science behind new product launches in a way that is relatable, even offering people who follow him on **Instagram** with a discount code for Beauty Pie.

Bridging the gap between science, marketing and customers' bathroom shelves, **MTHK** is an eyecare brand led by professors and scientists that will continually update its products in line with its research breakthroughs. At a time when concerns about eye health are rising due to growing use of screens and fluctuating climates, MTHK brings its expertise to the fore online with explanations about eye conditions, products' proof points and its eco-efforts.

With sustainability and traceability in mind, refillable beauty and supplements brand **Ace of Air** uses its web presence to spotlight the various contributors – and their expertise – that have shaped its range, including a dermatologist, an environmentalist, a naturopath and a branding expert.

Assured Synthetics

Using the expertise that customers are coming to expect, beauty and wellness brands are seizing the opportunity to reframe – and re-educate – people about synthetic ingredients.

Narratives are changing around sulphates and other ingredients that consumers have shunned based on the view that they are toxic or harmful for people and the planet. Long a bastion for ingredient and pricing transparency, **DECIEM** brand **The Ordinary** has created a pro-sulphate haircare range, emphasising that the ingredient is one of the most effective and affordable substances for hair cleansing. 'Amid all the haircare do's and don'ts, we felt we had an opportunity and a responsibility to educate consumers from a scientific view – helping to demystify controversial ingredients, bringing to light the real formulation heroes,' explains Prudvi Kaka, chief scientific officer at DECIEM.

Formula humectant and stabiliser propylene glycol has been advanced through science from its origins as a fossil fuel petroleum-derived ingredient – which landed it on many consumers' banned ingredients lists – into one that can be made from vegetable oils, making it preferable again for use in skin or personal care.

Indeed, product longevity is back in the spotlight as 'natural' or 'clean' beauty reveals itself to be less shelf-stable than products made with synthetics. Vince Spinnato, a chemist working in personal care, cosmetics and fragrance, tells **Allure**: 'Most of the naturally derived, non-synthesised ingredients such as extracts or blends from berries, trees and flowers will go bad earlier than synthetic ingredients.'



Pro-sulphate haircare by The Ordinary, UK

Key Sectors :
Branding

As consumers seek clarity from brands about their science-backed innovations, branding and storytelling will be crucial to break down barriers, concepts and expertise



Kind to Biome, Sweden

Two in five European consumers find third-party verified certifications an influential factor when purchasing goods

Source: GlobalData





Key Sectors :
Health & Wellness

Companies operating in the health and wellness sector can work to translate the rigour of medical practices, ingredients and testing into beauty products and services

Certified Operations

Building on the emergence of **Certified Skincare**, third-party auditing and laboratory-led trust marks will accelerate across the beauty and wellness sector, as the role of science becomes crucial in consumer trust and the assurance of brands' quality, efficacy and sustainability.

At present, two in five European consumers find third-party verified certifications an influential factor when purchasing goods, giving brands ample opportunity to communicate openly about testing and certification of their products (source: **GlobalData**).

Describing itself as an evidence-based beauty brand, **Dieux Skin** is honest about pricing, research and results so beauty shoppers don't have to take a leap of faith when shopping for products. Co-founded by a clinical cosmetics chemist, the brand undertakes extensive Human Repeat Insult Patch Test (HRIPT) testing with a third-party facility.

Elsewhere, hand sanitiser company **Olika** shares in detail its use of **Scivera**, a company focused on safer chemistry exploration, evaluation and selection of consumer products, to assess its products' effectiveness and skin safety. **Estée Lauder** has even launched its Green Score methodology to assess and measure the sustainability of ingredients and formulas based on green chemistry principles.

Looking to drive change across the sector, **Kind to Biome** is a new beauty council on a mission to make all new skincare products skin microbiome-gentle within the next five years. It has developed a test with Dr Vangelis Beletsiotis, head biologist at **QACS** laboratories, to make product assessments more accessible, fast and inexpensive for brands, with its Kind to Biome® mark already awarded to **Votary**'s Super Seed Facial Oil, and **Idun Minerals**' Oil Serum Hydration Booster.

Certified Beauty

Based on the final phase of The Four Stages of Beauty, The Future Laboratory has developed a speculative set of certification marks that future brands must consider to ensure consumer trust and assurance, UK

Amplified Efficacy

Brands are transforming how they communicate with audiences – be it through packaging, social media or web platforms – to share product results data and company know-how.

According to a recent UK survey from haircare brand **weDo**, some 61% of respondents struggle to tell if hair and skincare products are ethical from the packaging. Considering this against the wider sector backdrop, branding, packaging and digital platforms will come into sharp focus as primary areas for educating customers about a company's science and proficiency.

In this vein, accessible health app **Galileo** is rebranding to emphasise the expertise and competence of the doctors and medical advice its users can access. Featuring a combination of typography, pops of bright colour and illustrations, 'Our new brand identity helps us communicate our expertise and competence in a very noisy space,' says Carolyn Manning, vice-president of marketing at Galileo.

Elsewhere online, **Good Science Beauty** shares a glossary of ingredients used in its patented products, themselves created based on findings from its own biotech company **SiSaf.** In turn, its skincare packaging seeks to promote 'a plain-speaking, gender-neutral brand to empower customers, [celebrating] science by making it super-accessible, starting with the name.'

Recognising that future consumers will be more au fait with scientific terms, the team behind San Francisco-based topical skin supplement **One Skin** is unafraid to amplify the science and data behind its products – clinical studies, statistical findings and insights are all shared on its homepage. 'By sharing our scientific research, we help consumers to understand the rationale behind developing the product,' states Carolina Reis Oliveira, co-founder and CEO.



Good Science Beauty branding by Almighty, US



Good Science Beauty branding by Almighty, US

52% of young UK adults would check the packaging of beauty products to ensure they are produced ethically and sustainably before making a purchase

Source: weDo

‘Anything that claims to have medical-grade approval or standards will be deemed more effective and trustworthy by worrisome buyers’

Alexia Inge, co-founder, Cult Beauty

Key Sectors:
Retail

Beyond products, the retail sector can draw from the rise of science and the return of the expert economy to foster educational store experiences, events and interiors



Open Your Eyes by **Dimitri Daniloff Studio**, France



Pyunkang Yul, South Korea

Medi-beauty

Building on the trend for Assured Synthetics, conversation is already amplified around the growth of ‘cleanical’ skincare – products that pair natural ingredients with scrupulous clinical standards to ensure efficacy and shelf life. ‘Terminology borrowed from the clinical world will infiltrate beauty to a greater degree,’ says Alexia Inge, co-founder of **Cult Beauty**.

But, as beauty audiences become more comfortable with science-backed formulas and lab-developed ingredients, they will also embrace a new generation of products that champion medicine.

Ingredients or substances associated with medical treatments and healing are fixing up formulas. American skincare brand **S’eau Prima** has developed a face mist that contains pharmaceutical-grade hypochlorous acid (HOCl) – a molecule found in white blood cells that promotes healing and is typically found in topical treatments for cuts or wounds. When used in the spray, this anti-microbial molecule helps to improve the skin’s moisture barrier, while soothing and protecting it from environmental aggressors.

Colloidal silver, traditionally used for its anti-bacterial properties, is moving from medical settings into skincare. Emerging brands such as **Argentum Apothecary**, **Allies of Skin** and **Active Silver** promote the metal’s healing, anti-bacterial, anti-fungal and anti-viral properties through moisturising creams, acne treatments, lip balms and even eye drops. Meanwhile, South Korean company **Kosame**’s stripped-back skincare brand **Pyunkang Yul** is born from the expertise of Pyunkang Yul Oriental Medicine Clinic, one of Korea’s most distinguished traditional herbal clinics.

Foresight

By the 2030s, data analysis will shape retail and product development, while extreme climatic conditions will command total industry agility

One-stop NPD

In the decade ahead, platforms that streamline new product development in the beauty and wellness sector will become commonplace, offering expedited innovation for everything from sustainable sourcing to ingredients-scanning and formulation analysis.

Australia's **Atelier** is setting an early benchmark. This private cloud manufacturing network helps beauty and wellness creators and brands to formulate and manufacture products from ideation to shelf-ready skus, drawing from more than 1,000 accredited global suppliers and manufacturers. This will foster a future of hyper-local, market-reactive brands, while generating vast amounts of data for Atelier and its network. 'Data is the answer to solving beauty's challenges around sustainability and ethics; it's the answer to product diversity and creating anti-fragile supply chains,' co-founder Nick Benson tells The Future Laboratory.

Pushing this further, by the 2030s, platforms such as **Novi Connect** will be industry leaders in analysing, verifying and certifying sustainability and efficacy claims for burgeoning beauty, supplement and wellness brands. Users will search for ingredients and select an industry standard or certification to see if it qualifies, with the ability to purchase or develop through the platform. Such one-stop new product development will be crucial in an era when customers will be better educated and more discerning than ever about what they buy.

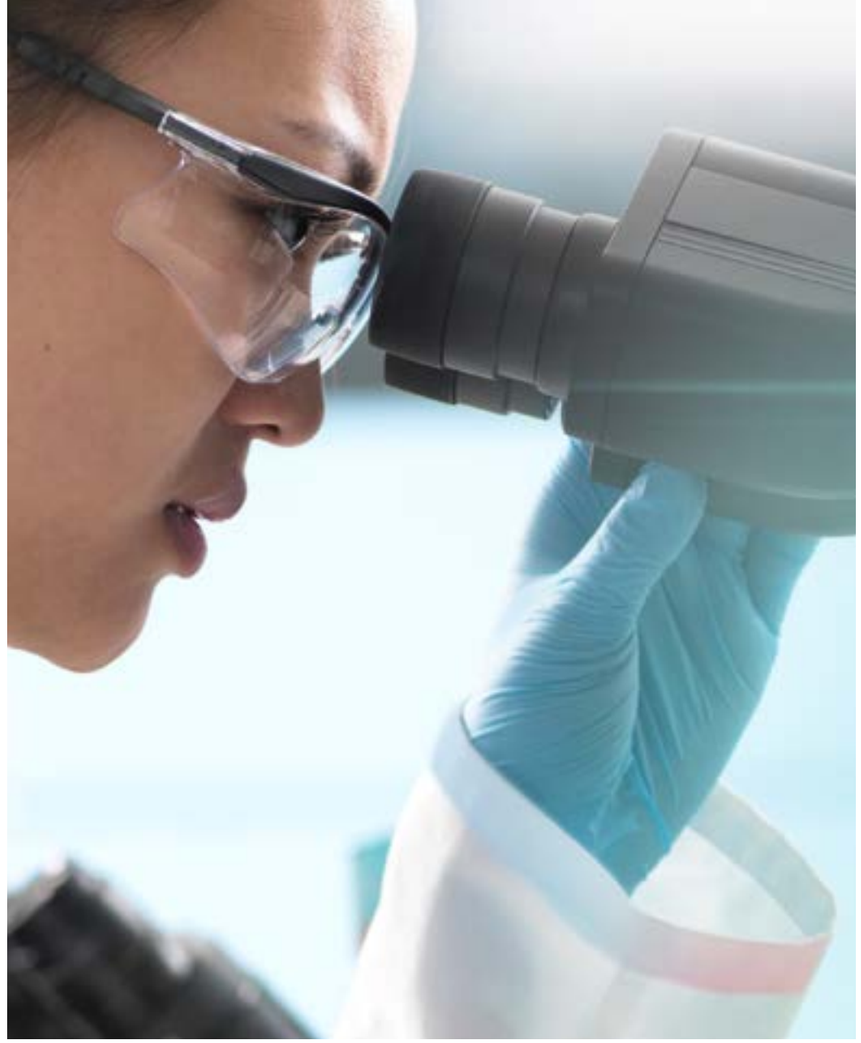


N.Bio is a hypothetical pharmaceutical technology company by **Phillip Peters**, UK

What is foresight?

Foresights examine speculative future scenarios 5–10 years in the future. Building on the Insight section, they show new directions, divergence and developments





Above left: Human Nature by NewTerritory, UK. Right and below: Neuropsychiatry Associates. Branding by **Bravo**, Singapore

49% of global respondents want products and services that are uniquely tailored to them

Source: Euromonitor International's Lifestyles Survey



Analytical Experiences

As we look to the 2030s, the rise of science, in combination with expertise, will underpin the future of beauty and wellness retail and customer experiences.

It will build on the emergence of engaging retail experience underpinned by personal analytics. **L'Oréal** and luxury brand **Yves Saint Laurent** are currently exploring this with in-store **Emotiv** neuro-analysis devices, which help customers to select their ideal perfume based on their neurological response while helping brands to understand the data behind shoppers' emotions and desires.

Indeed, a study by innovation agency **Outform** reveals that half (50%) of UK consumers cite testing beauty products in-store as a key factor before parting with their money – rising to 63% of shoppers aged 25–34 and 58% of those aged 35–44. 'The next step for brands and retailers who dare to innovate will be turning this into a data touchpoint, so that they have a thorough understanding of customer expectations and habits, from how they shop all the way to their unique beauty regimes,' says Simon Hathaway, managing director for EMEA at Outform.

Analytical experiences will also fuel collaboration between beauty and wellness and sectors such as hospitality. Here, scientific expertise and services will inform new guest packages. The **Mandarin Oriental in Geneva**, for example, is teaming up with Switzerland's private medical sleep clinic **CENAS** to provide guests with overnight polysomnographic tests to diagnose sleep disorders. After careful analysis by the clinic's experts, guests receive remedies and routines to attain a deeper slumber beyond the hotel's programme.

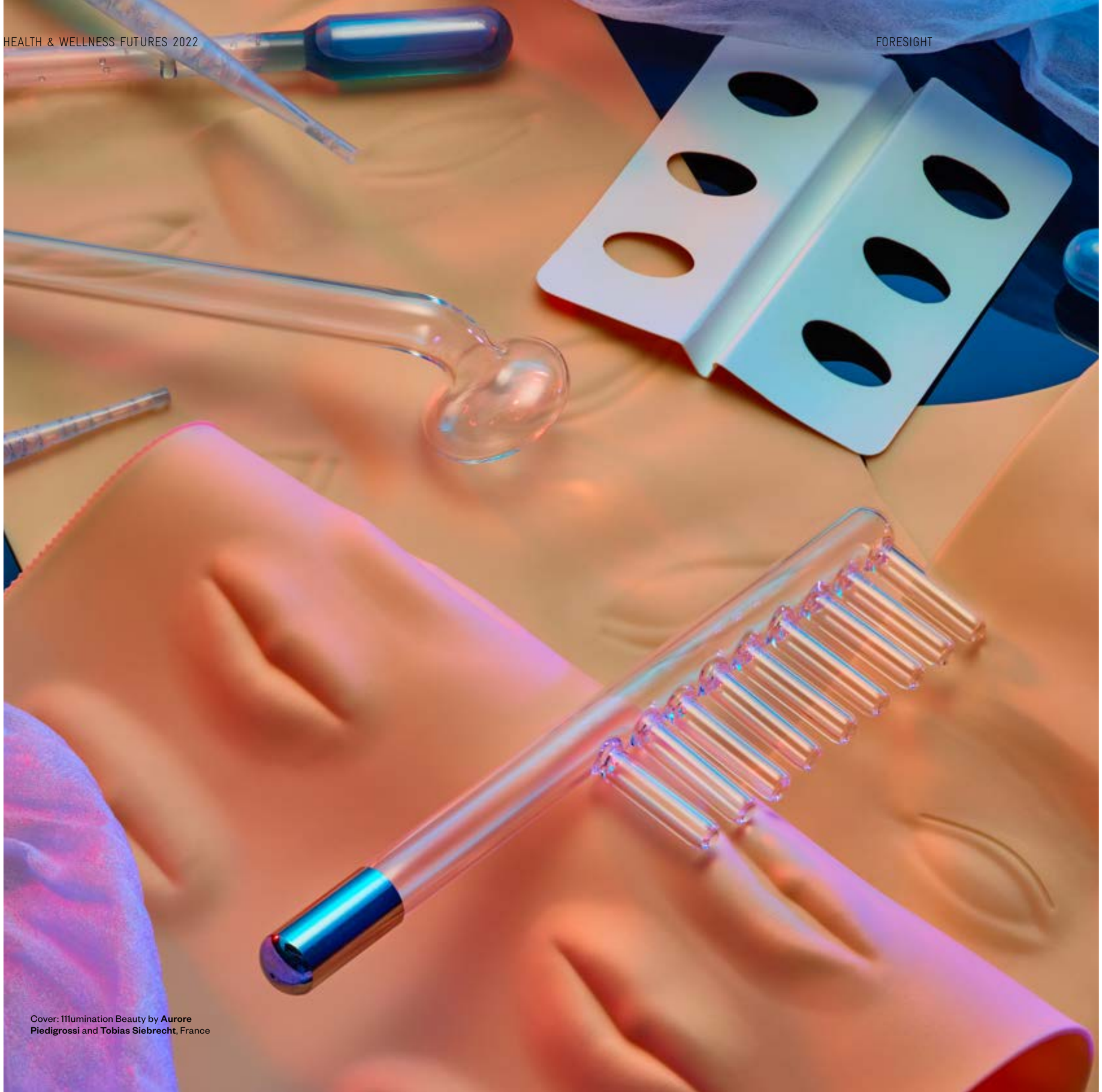
Augmented Applications

The acceleration of science in the beauty and wellness sectors will also fuel unexpected breakthroughs in how consumers experience a product, particularly in terms of application or use.

'While the science, analytics and processes routinely used in the biopharma industry have created some of the most innovative medications available, they have yet to fully infiltrate the skincare industry,' says Lauren Otsuki, executive vice-president and chief innovation officer at **Ourself.** This nascent brand is signalling a future of beauty that bridges the gap between skincare products and clinical procedures, with products for at-home use – such as lip fillers and brightening peels – that feature precision needles and lasers to topically apply and target its formulas.

Even products as humble as eye drops will soon provide a convenient way to enhance people's lives. In the US, pharmaceutical company **AbbVie** is launching **Vuity** – Food and Drug Administration (FDA)-approved eye drops that could replace the need for some people to wear reading glasses by improving vision for up to six hours at a time.

Elsewhere, **Frequency Therapeutics** is a biotechnology company currently trialling injections that will help improve acquired hearing loss, using small-molecule therapeutics to restore tissue structure and function in the cochlea.



Cover: 111umination Beauty by **Aurore Piedigrossi** and **Tobias Siebrecht**, France

99% of the planet's population breathes poor-quality air that is hazardous to their health

Source: World Health Organization





Above: New certification marks by The Future Laboratory, UK; Below: Epara identity by Masha Batsii, UK

Aggravated Innovation

By the 2030s, the impact of the exacerbating climate crisis will be evident in dwindling supplies of natural ingredients, alongside the weather and environments that people will experience day to day. This will demand science-first responses, not only in terms of biotech ingredients but also in the formulations and products consumers seek.

French brand **Pour Moi** is heeding this future with the release of its Smoke Alarm Drops – a serum that strives to protect the skin from the harmful effects of smoke and pollution, which can cause inflammation and premature ageing. 'This is the first product that smoke-proofs your skin… When a wildfire is raging, your skin is hugely at risk,' explains Ulli Haslacher, founder of Pour Moi. At a time when the **World Health Organization (WHO)** reports that 99% of the planet's population breathes poor-quality air that is hazardous to their health, further innovation will be necessary in the skin, hair and holistic wellbeing space. But biotechnology can also lead to exciting, yet-to-be-imagined beauty futures.

Through **Arcaea**, a biotech beauty company that is aligning nature and science to expand the potential of the beauty sector, founder Jasmina Aganovic and her team of mostly women scientists have recently raised £59m ($78m, €70m) in funding from companies including **Chanel** and **Givaudan**, using fermentation, DNA sequencing and biological engineering to create new chemical substances for skincare, haircare and cosmetics. On the potential of biotechnology beauty, Aganovic asks: 'What else can we learn, what types of new product functionality can we access, and what types of product stories and experiences can we create?'

Strategic Implications

The key steps that beauty and wellness companies can take to garner trust and customer engagement in the era of Accredited Beauty



Acla, Switzerland

Strategic Actions

In the age of Accredited Beauty, these are the actions brands will need to take to engage with a consumer base seeking expertise and innovation

Do good, look good

Create brands, products and services that bridge the gap between medical and laboratory settings and salon or at-home experiences. Such initatives can help to lessen the tension between science, efficacy and long-term industry transformation



Ourself, US

Elevate industry standards

In an ever-more crowded marketplace, zone in on your USP as a brand or business, and make this your point of expertise and authority. Amplify the voices and work of researchers, lab teams, scientists or environmental figureheads to boost transparency and educate your audience



Dermalogica Smart Response Serum, UK

Innovate by necessity

Beyond consumer desires, brands must take time to examine the potential environmental, climatic or economic scenarios your customers could experience in the future. Use this to fuel biotech-first innovation and NPD that is both ground-breaking and fit for purpose



Photography by **Ali Blumenthal**, US

Thought-starters

For brands to embrace the future of Accredited Beauty, they will need to make expertise, experimentation and certification central to their operations, from formulations to marketing

Forget binary definitions

Move beyond nature versus science, or organic versus synthetic, to instead view them as a spectrum of solutions. How might you integrate these ‘opposites’ into more inclusive product development?



Geltor branding by **&Walsh**, US

Champion sci-fluencers

It’s time to move beyond beauty influencers and celebrity ambassadors. Instead, consider how you might use your in-house experts to promote your prowess and unpack the proof points behind your products



Time Heroes of the Year 2021 edition, US

Shed light on the lab

In the future, radical transparency and collaboration will underpin solutions-first brands. How might you use communications channels to tease new product developments or lab-based innovation?



IRÄYE, UK

Related Macrotrends

2015

Whole-system Thinking

As the human impact on the environment intensifies, we are moving towards a world in which human innovation and nature will be integrated and hybridised



Cubic Evolution digitally rendered video by **Yaroslav Sheshelovskiy**

2018

Certified Wellness

The once distinctly separate worlds of health and wellness are converging as consumers seek a new framework for healthy living that prioritises convenience, accessibility and fidelity

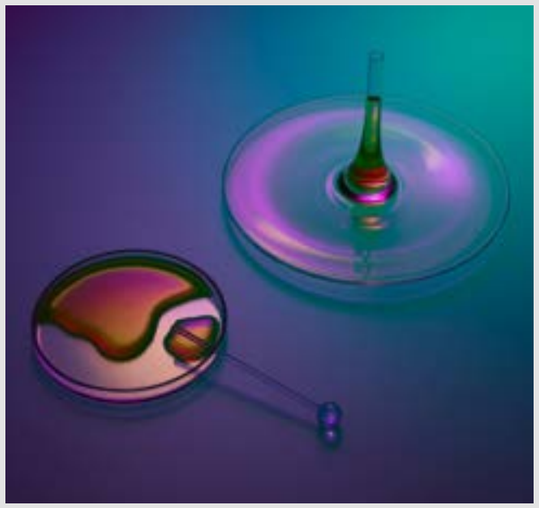


Health and Wellness by The Future Laboratory. Photography by **Louise Hagger**

2019

Bio-positive Beauty

Short, traceable supply chains and condensed routines are in high demand as beauty moves from zero to positive impact



Beauty by The Future Laboratory. Photography by **Louise Hagger**

2021

Synchronised Care

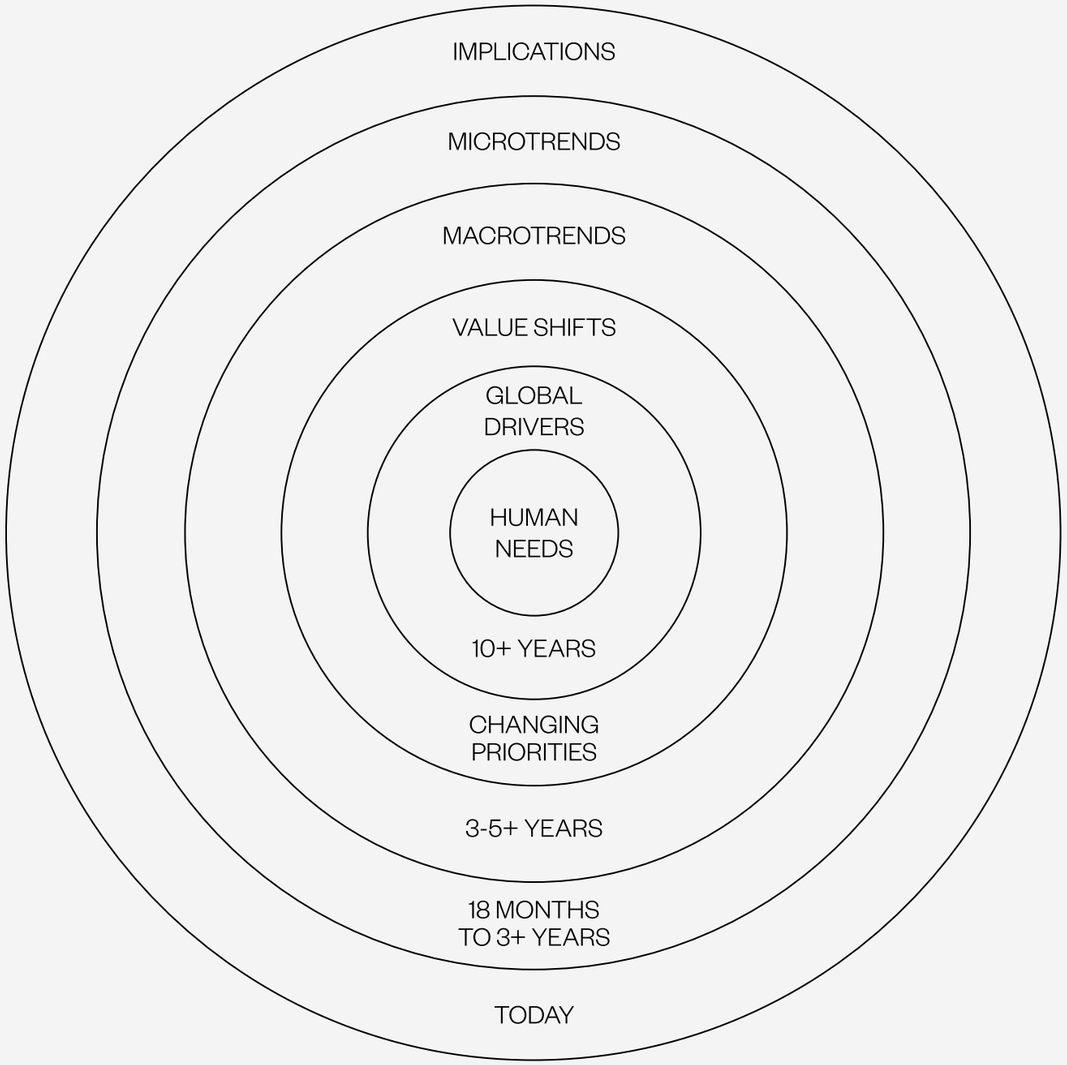
Self-care is now a force for collective health that is interconnected with every aspect of our lives and interdependent on the world around us



Open branding by **Some Days**. Photography by **Emman Montalvan**

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.

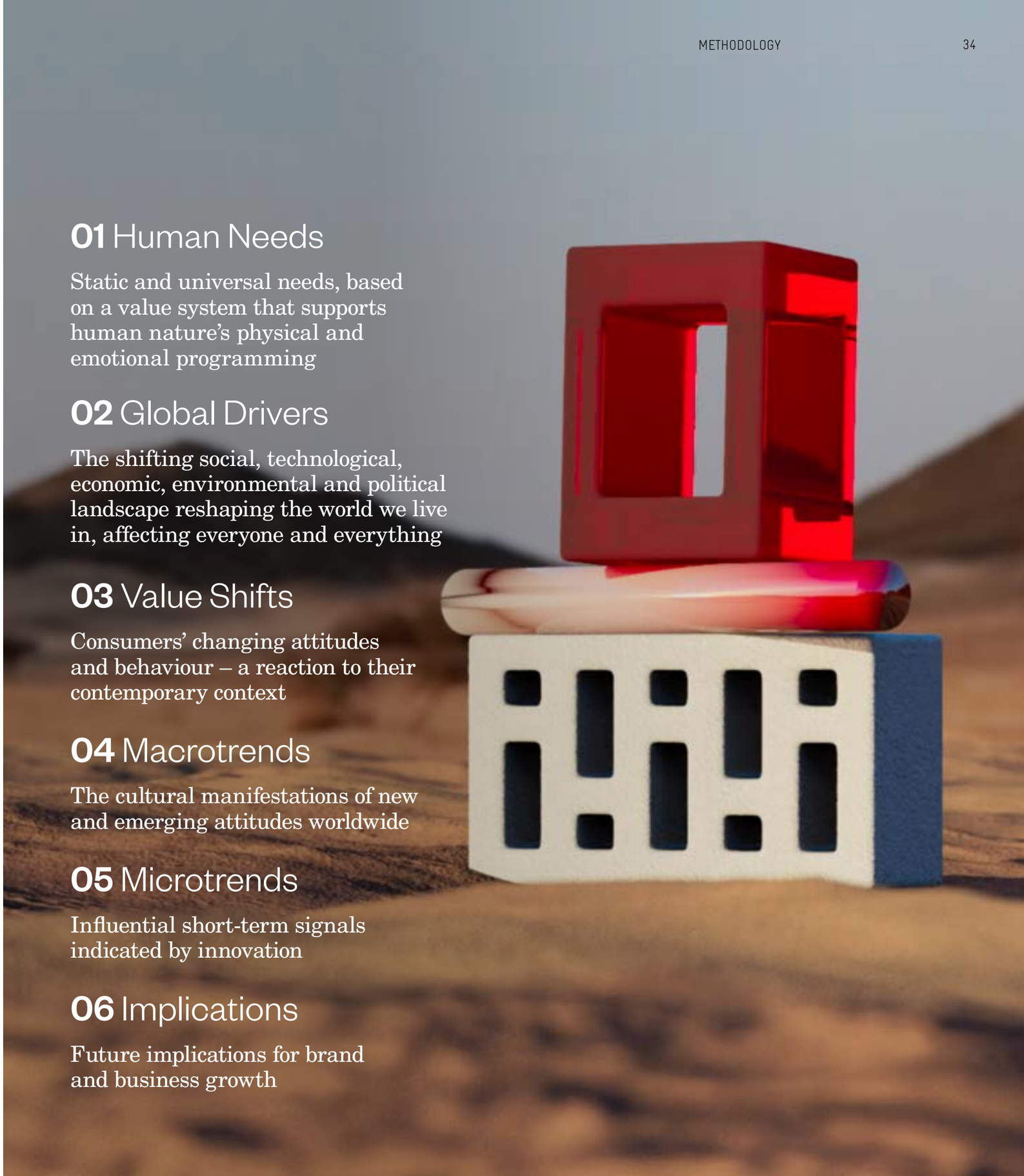
Their impact is assessed against seven core human needs and the ensuing value shifts that change consumers' attitudes and behaviours.

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

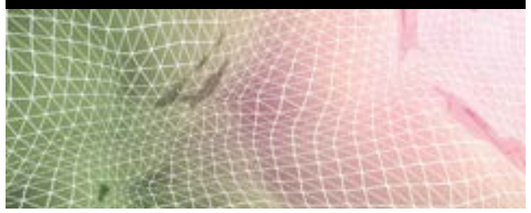


There is a human desire to direct our own lives, to create forms of freedom, and to find deeper meaning and balance in life. It is the psychological need to fully realise our personal potential with the resulting feeling of satisfaction

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.

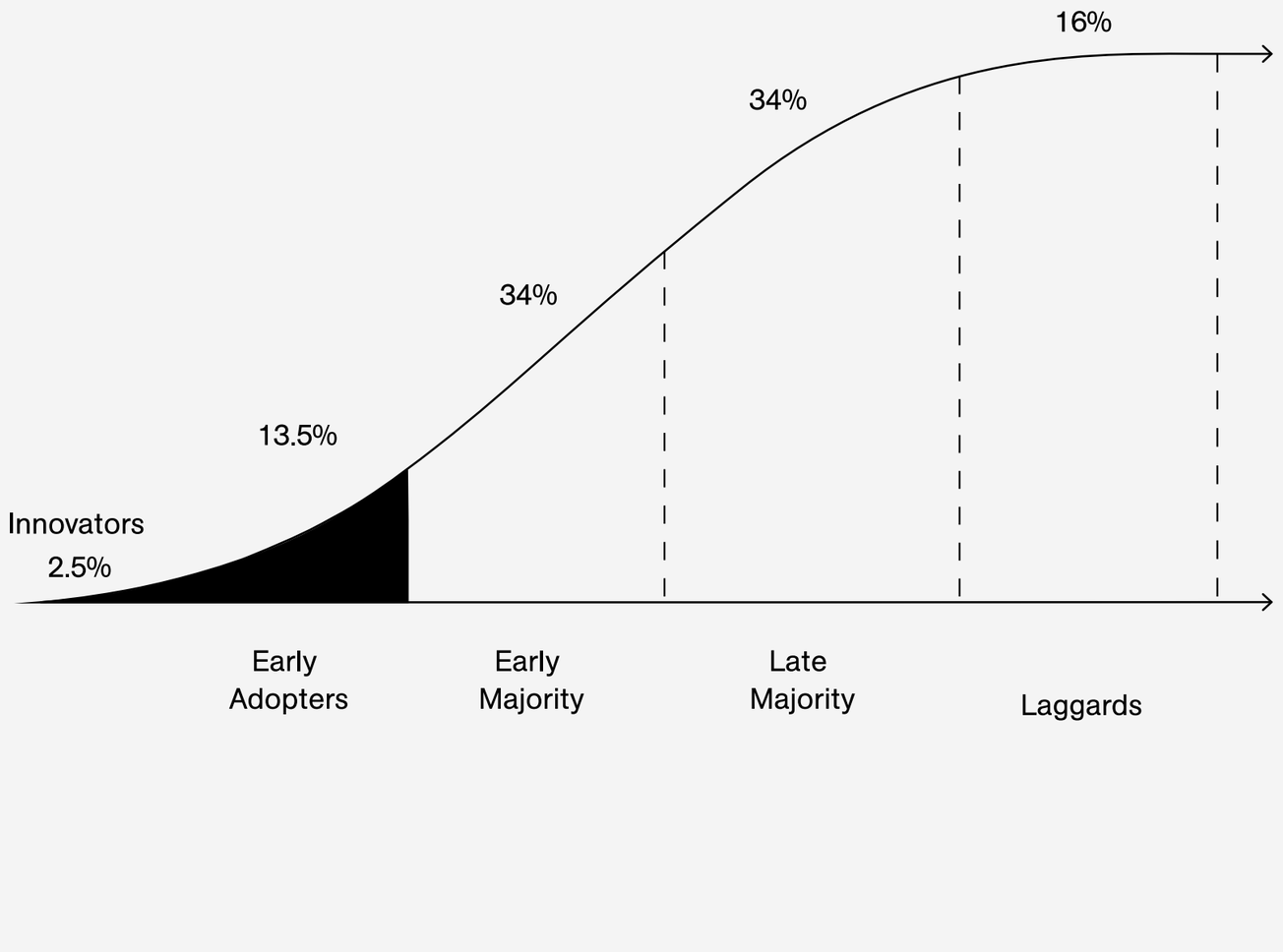
Why they matter: Where to play

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

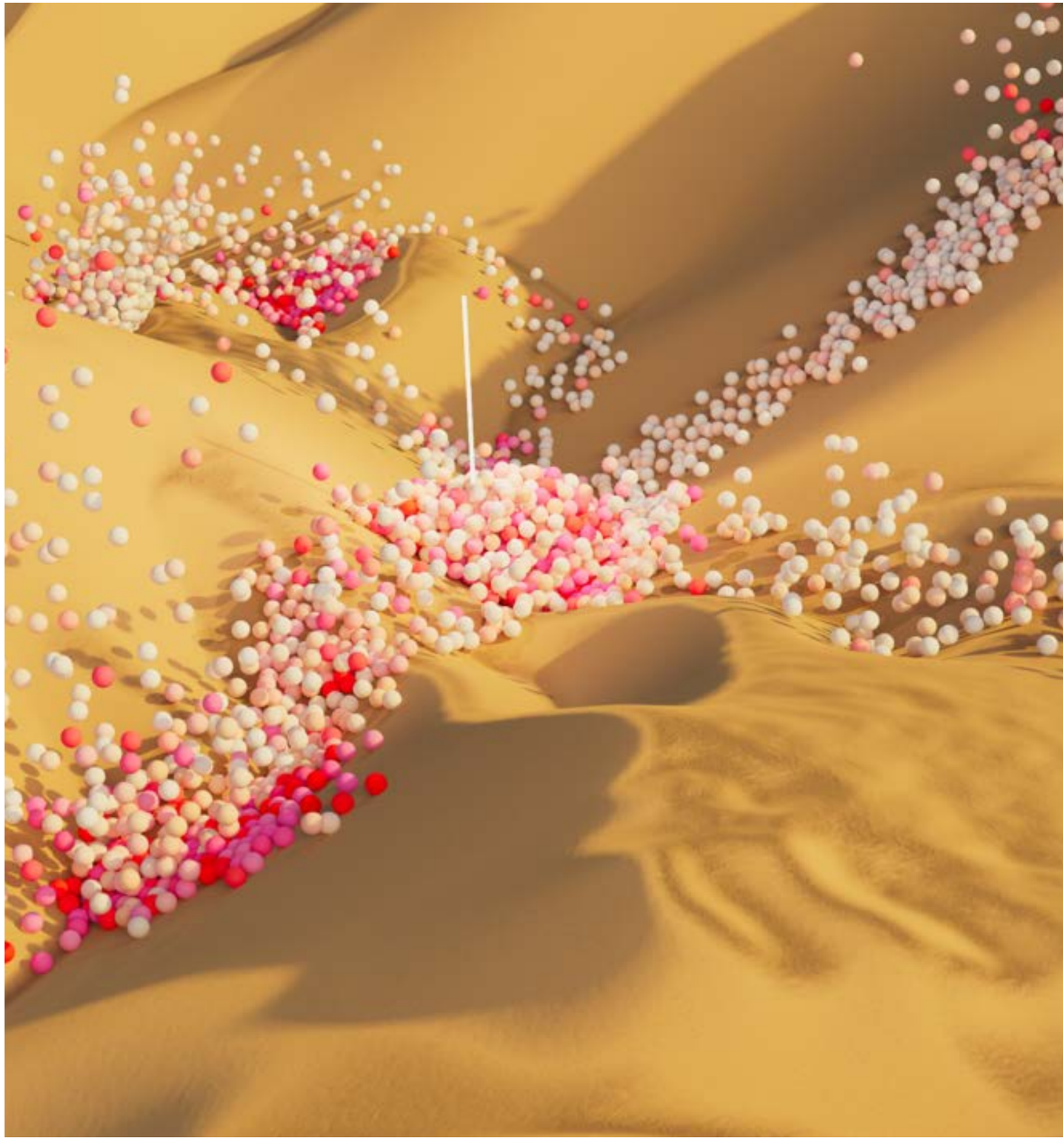
As you can see, we don't predict the future. But through Strategic Foresight we can track global shifts to understand the key drivers of change and mine the evidence of today's world to preview what the future could look like.

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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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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