THE : FUTURE : LABORATORY

The Betterverse Report 2022

Cover: Spotify Island on Roblox, Global

Introduction

The metaverse has become the new multi-trillion dollar digital frontier for all that is immersive, engaged and virtual. But as profits are once more placed before people, some organisations are keen to build a Betterverse by taking a people and ethics first stance

Trends Intelligence
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Despite its recent entry into the cultural zeitgeist, the term metaverse was first coined in 1992 by author Neal Stephenson in his seminal work, Snow Crash. Among other things, the book depicts a future virtual world called the metaverse where people can socialise and live as avatars.

Fast forward 30 years, and this definition still rings true – yet it's still evolving. This new realm promises to be immersive, collaborative and engaging, with the idea of the metaverse built on the notion that citizens will exist 'in' the internet, rather than be connected to it. This vision of tomorrow is shared by technology research and consulting firm **Gartner**, which forecasts that by 2026 a quarter (25%) of people will spend at least one hour a day in the metaverse to work, shop, attend school, socialise or consume entertainment.

But as companies flock to engage in this virtual space race, what's to stop the metaverse becoming just another iteration of the world wild web, where tech giants like **Google**, **Meta**, **Microsoft** and **Amazon** fight to rule the frontier?

As Tim Sweeney, CEO of **Epic Games**, says: 'This metaverse is going to be far more pervasive and powerful than anything else. If one central company gains control of this, they will become more powerful than any government and be a god on Earth.'

Some would argue that a few big companies have already taken control, but this dystopian view isn't absolute. Citizens are already considering how the metaverse can facilitate positive change. A study from **The National Research Group** reveals that 57% of consumers believe the metaverse has a key role to play in addressing the social problems created by the pandemic.

Yet, if the metaverse is set to address social problems, what's to stop it reflecting them too? Retail futurist Doug Stephens is sceptical of the long-term impact of virtual realms. 'While the metaverse may indeed be possible and probable, the question is will it ameliorate or exacerbate the problems that society currently faces?' he asks.

This is driving brands and people to consider what else the metaverse could be – a space for activism, for aid, for support or for democratised access to services. It can also follow in the footsteps of values-driven iterations of the internet we've tracked: the emergence of **Low-impact Interfaces** that reduce digital carbon footprints, consumers seeking **Moral Commerce** or Generation Z using the web for **Teen Ad-tivism**.

For brands that want to operate in the metaverse, then, such values need to be built in from the start. Why? As David Chambers, philosopher and author of Reality+, anticipates: 'Within a century we will have virtual realities that are indistinguishable from the non-virtual world.' In such a case, he argues, we must create fundamental ethical, moral and societal frameworks that govern the metaverse in the same way we have done in the physical world.

'A moral code needs to be built into these hyper-immersive and potentially world-changing digital frontiers from the start,' says The Future Laboratory co-founder Martin Raymond. 'And businesses have a role here. To continue to attract consumers and their ever-changing mindsets through the next decade and beyond, they must help to build the Betterverse, a metaverse that stands for equitability, inclusion, representation, accessibility, transformation, and personal and planetary betterment.'





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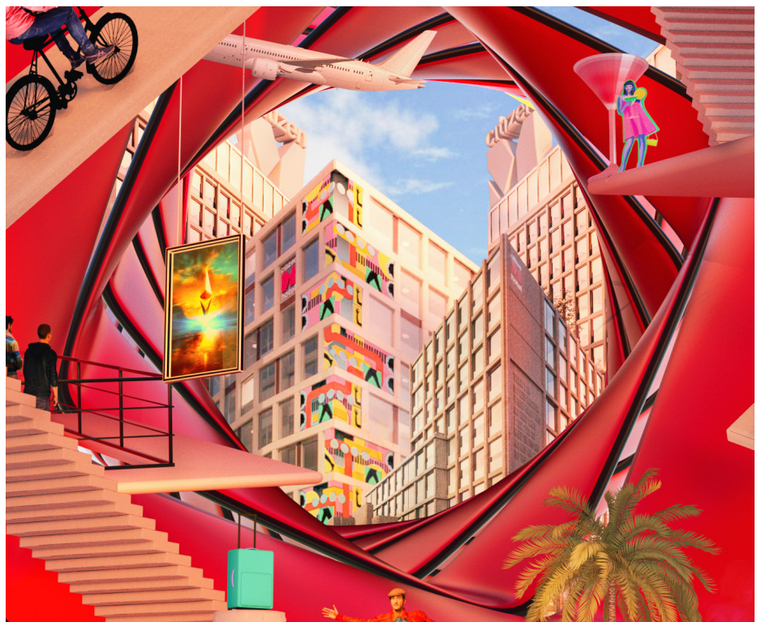
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Drivers

As the metaverse becomes a new frontier of human experience, a series of social, cultural and technological driving forces are underpinning the need for a Betterverse to be created

Constant Connectivity

The digital acceleration spurred on by the pandemic has seen advanced technologies become a ubiquitous part of our day-to-day lives, transforming how society operates, from the way we do business to how we shop, socialise and even date. Amid the shift to working, socialising and shopping online, citizens are also finding themselves in a constant state of digital immersion. Some 31% of US adults, for instance, now report that they are almost constantly online – up from 21% in 2015, according to **Pew Research Center**.

This constant connectivity is forecast to grow across the globe as internet latency continues to improve. The **International Data Corporation (IDC)** reports that by 2025, an average connected person anywhere in the world will interact with connected devices nearly 4,800 times per day – about one interaction every 18 seconds – up from 601 in 2020.

On the cusp of the fourth industrial revolution, the introduction of 5G is not only creating faster connection speeds, but also allowing hardware and devices to work in real time. It's opening a new realm of possibilities in extended reality (XR), which **PwC** forecasts will add £1.2 trillion ($1.5 trillion, €1.4 trillion) to the global economy by the end of the decade.

Global Driver:
Accelerating Technologies

As Web3, 5G and the Internet of Things (IoT) become increasingly omnipotent and interconnected, the metaverse will become the next big platform for us to work, play and socialise in

Pentagram's new identity for **Ankorstore** helps make the online shopping experience feel as natural as it would in the everyday world, France

‘Extended reality possibilities will add **£1.2 trillion** to the global economy by the end of the decade’

Source: PwC

Sam Miles for **The Future Laboratory**, UK

‘Covid-19 left people more reliant on technology than ever before. It helped people remain connected’

Katie Hillier, chief digital anthropologist, LiiV Center



Woo is a media brand for Gen Z, merging categories like pop culture and wellness to make mental health and wellbeing solutions more aspirational and democratic, UK



Intersport’s You Never Sport Alone campaign promotes phygital home workouts and the ways in which people are staying motivated and connected through exercise, Switzerland

Digital Wellbeing

As these technologies evolve, so too will our dependence on them. According to a recent **Wunderman Thompson** report, some 76% of people say that their everyday lives and activities depend on tech, while a majority (52%) say their happiness depends on it.

As early as 2012, The Future Laboratory tracked the rise of digital detoxes and disorders, off-grid adventures and the digital disconnect. But the Covid-19 pandemic has pushed civilisation over the technology tipping point, altering our relationship with it immutably. From telehealth services and biometric wearables to simulation models for health, and even the platforms that allowed people to communicate in isolation, technology has proven to be a pandemic lifeline for many, and with this, a force for good.

‘Covid-19 left people more reliant on technology than ever before,’ says Katie Hillier, chief digital anthropologist at the **LiiV Center**. ‘It helped people remain connected, both to other people and to key services, transforming the acceptance rates of people across an entire demographic spectrum.’

Digital is now seen as a facilitator, rather than the enemy, of our wellbeing. Digital anxiety is rapidly being replaced by digital reliance among consumers, and technology viewed as a necessary utility rather than a novelty.

Global Drivers: Accelerating Technologies, Dislocated World

As the speed of technology accelerates, the gap between the techno haves and have-nots will continue to widen and fragment unless we develop more inclusive strategies to engage with the metaverse



Nearly **two-thirds** of consumers in the US feel big tech companies wield too much power

Source: Escalent

Wired magazine cover depicts the role of messaging app Telegram in the 6 January 2021 insurrection, US

Too Big Tech

Historically regarded as the vanguard of innovation, people are challenging ruling bodies to control the unregulated dominance of big tech in society – and concerns are also shared by the tech workforce itself.

In its first Tech Employee survey, tech publisher **Protocol** found that more than three quarters (78%) of industry employees agree that the tech sector is too powerful. Research from human behaviour and analytics company **Escalent**, meanwhile, reported last year that nearly two-thirds of consumers in the US feel big tech companies wield too much power, and more than half feel the US government should curb their influence.

It's a feeling shared by Kavya Pearlman, founder and CEO of **XR Safety Initiative**, an organisation whose mission is to enable trust, and help build safe, immersive eco-systems. 'In a new world where we extend reality and defy reality, a world where data fuels the progress we make in the metaverse, we have to hold big tech accountable for transparency and ethical use of data being collected,' she says.

In a bid to fragment the monopolised digital economy, regulators are now focusing on ethical policies such as anti-trust bills and children's protection acts which prioritise collective benefit rather than profit.

Global Drivers: Accelerating Technologies, Dislocated World

The soaring scale, wealth and influence of tech is leading to growing scrutiny from society and regulators to put a greater focus on ethics and human wellbeing



Role Models by H&M highlights the power of youth environmental activism, US

Reformation Generation

The old gatekeepers of authority and ownership – governments, mass media and big tech – are rapidly losing their status. The current youth generation, Generations Alpha and Z, are at the forefront of a **Zalpha Reckoning** as they reform, re-assemble and decentralise our outdated societal systems in search of more equitable solutions to the world's problems. And this vision for a new society is seen globally – with a study by **Spotify** finding that 62% of global Generation Z are ready to rebuild society from the ground up.

This digitally native generation are embarking on an approach to social change through activism that's defined by collaboration and decentralisation. These netizens – or metizens, as they will soon be called – are harnessing the tools and technologies of Web3 and the metaverse to spotlight injustices, project regional narratives on a global scale, and create networks that are protected from traditional media.

More and more of these spaces are finding a home in the metaverse. **Roblox** – where 67% of the users are under 16 – has over 202m monthly active users, with 9.5m creators using the platform to create their own games. Meanwhile, **Minecraft** – with over 140m monthly users – has in the ast year evolved from a gaming platform into a space for remote education, teaching financial literacy and safeguarding the works of censored journalists.

Global Driver: Evolving Demographics

Generational groups, and how we define them, may become increasingly redundant as the metaverse offers us the chance to evolve into different avatars or skins in ways that will defy age, demographics, even race and gender

‘We have to hold big tech accountable for transparency and ethical use of data’

Kavya Pearlman, founder and CEO, XR Safety Initiative



Youth in Power is a photography series by **Ryan McGinley** depicting gun control activism, US

Future Trends

Charting the ways that global brands and organisations can build metaverse experiences that are inclusive, accessible, empowering and transformative for customers as well as for society as a whole

Inclusive Identities

As the lines blur between people's real-life personas and their digital avatars, desire for hyperphysical identities to be as diverse as their users is growing. A 2021 report by the **Institute of Digital Fashion** and the **Circular Fashion Summit**, for example, reveals that two thirds (68%) of digital consumers feel there is an under-representation of minority groups in virtual spaces.

This push towards inclusivity is driving brands to offer more diverse representation in virtual realms. **Bitmoji**, for example, recently worked with its user community to launch Bitmoji stickers for wheelchair users. Elsewhere, game-maker **AM Darke** is working to improve the representation of Black hair in video games by creating the **Open Source Afro Hair Library**.

Applied to the workforce, virtual inclusivity has far-reaching ramifications. Increased inclusivity represents an inherent benefit of virtual environments where a person's location, gender or physical attributes are less important than their ideas or their work.

As a result, global organisations are ensuring businesses benefit from diverse talent pools. **Women In Immersive Tech Europe**, for instance, is supporting women and under-represented groups across Europe's mixed reality sectors, while **Seoul National University** is focusing on research into safety, ethics and responsible design in digital realms.



Game-maker **AM Darke**'s Open Source Afro Hair Library is working to improve and democratise representation of Black hair in video games, US

‘The power of the Web is in its universality. Access by everyone regardless of disability is an essential aspect’

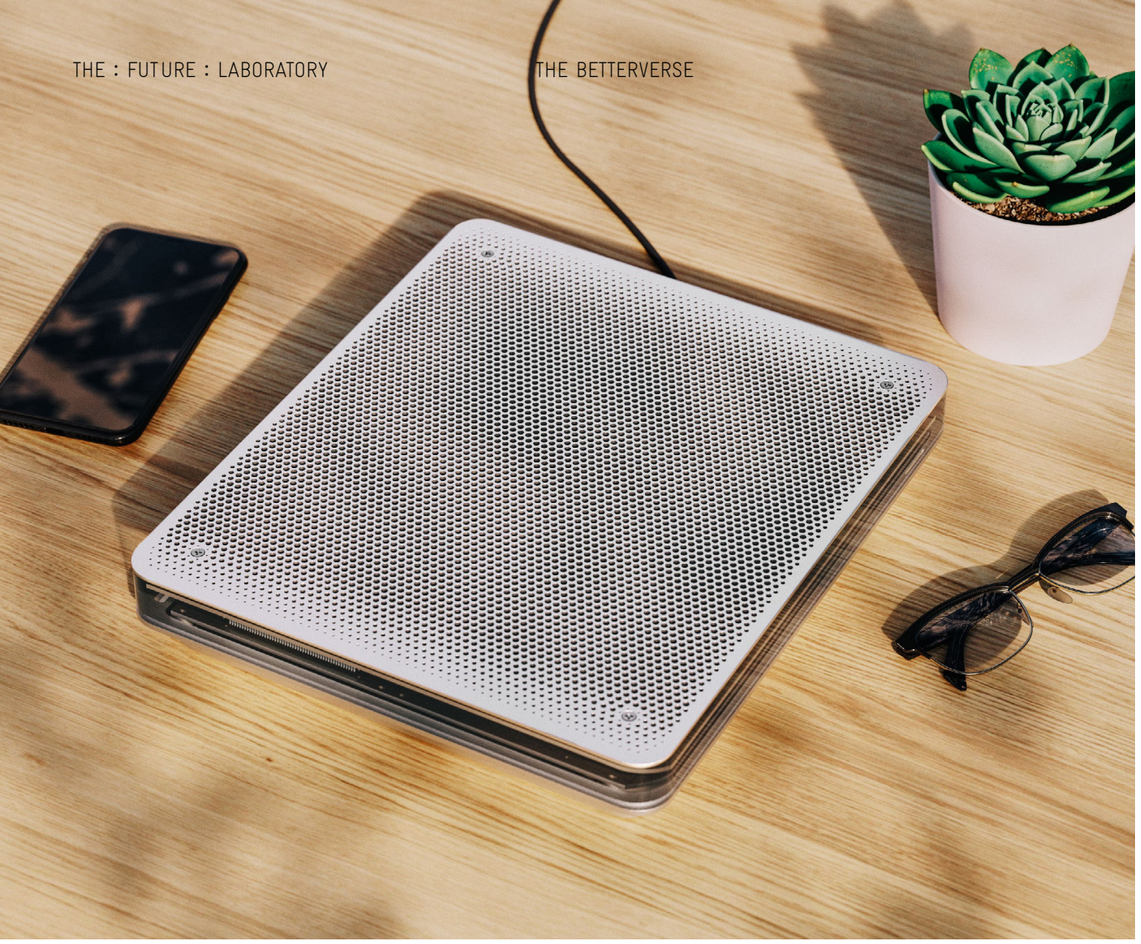
Tim Berners-Lee, inventor of World Wide Web





Cryptopanties by Rave Review

This NFT project is a comment on the crypto-community’s dearth of women. It is also an attempt to bring the upcycling aesthetic into the metaverse, a sustainable technique that the brand is known for, Sweden



Emerge's device emits sculpted ultrasonic waves that create the sensation of touching objects as they appear on screen or a VR headset, US

‘If inclusion and accessibility are at the forefront of its design, the metaverse could prove to be more usable’

Geoff Freed, digital accessibility expert

Radical Accessibility

Beyond ensuring the hardware to power the metaverse is cost-accessible – which in itself represents a challenge – businesses are also working to ensure virtual worlds are accessible to all, from non-native users to visually impaired or neurodivergent citizens.

In 1997, inventor of the world wide web Tim Berners-Lee said: ‘The power of the Web is in its universality. Access by everyone regardless of disability is an essential aspect.’ Yet as we know from recent research conducted by **AccessiBe**, less than 2% of the internet currently meets accessibility guidelines.

Subsequently, accessible platforms are being created to help people with diverse needs move through the metaverse world unhindered. **Akari**, for example, has teamed up with **Microsoft** to offer **Ava**, an accessibility-minded chatbot built on **Microsoft Teams** that uses AI to automate tasks, and skills and language modelling to aid organisations and the lives of users with hidden or situational disabilities.

Inequalities embedded in digital interfaces are also prompting brands to develop assistive tech centred on inclusive design and usability. **TapTapSee** is a camera application created specifically for blind and visually impaired users, with the app analysing two- and three-dimensional objects using a phone camera and audibly describing them.

As digital accessibility expert Geoff Freed states: ‘If inclusion and accessibility are at the forefront of its design, the metaverse could prove to be more usable than current digital experiences.’





The Uncensored Library by Minecraft and Reporters Without Borders is filled with books containing articles censored in their country of origin, Germany

Educational Eco-systems

With research from the **World Economic Forum** revealing that 50% of global citizens will need to upskill by 2025, businesses are harnessing meta-technology to serve a deeper purpose – educating citizens and preparing them for a future of self-directed knowledge and life-long learning.

'The future of education', believes Tina He, co-founder of next-gen educational platform **Station**, 'won't be sitting in a classroom – it'll be embedded in the workflow.' Created with co-founder Mind Apivessa, Station is showing citizens how their skills can be translated to the metaverse and wider world of Web3. Prospective users complete an onboarding quiz to assess their skills and interests before browsing job suggestions supported with practical next steps, best practice and educational content.

The immersive nature of the metaverse is also being used to elevate the skillsets of today's workforce. Recent research from **PwC** forecasts that by 2030 nearly 23.5m jobs will use AR and VR for training, meetings or customer service – with the same study finding that learners in VR are four times more focused than e-learning students and 275% more confident in applying new skills after training.

Harnessing this efficacy, **Interplay**, whose services include online and VR training for a range of skilled trades such as plumbing and electrical maintenance, saw a 445% increase in usage in 2020 – exceeding 300% year-on-year growth.

By 2030, nearly 23.5m jobs will use AR and VR for training, meetings or customer service

Source: PwC



Bump Galaxy by **Bianca Caragu**e, The Netherlands

Democratised Services

By the end of the decade, brands, businesses and governments will harness the immersive power of the metaverse to open up services to previously unreachable consumers. From healthcare to culture, it's a shift that heralds a new era of democratised access to vital public and private services, ensuring a more equitable future for all.

Seoul, for instance, is to become the first city with its own metaverse platform, with the planned 3D virtual space to provide next-gen public service for both administrative and cultural needs. Spaces will include a fintech incubator, a virtual mayor's office and the **Metaverse 120 Centre**, where avatars will help citizens file complaints and solve problems.

As more people find value in caring for their community, we're also set to see the emergence of platforms that offer democratised methods of care. **Bump Galaxy**, for example, is a conceptual virtual world for mental healthcare hosted in **Minecraft** that connects users with trained practitioners in fields such as hypnotherapy and relationship counselling.

Meanwhile, British non-profit organisation **DeHealth** is also revolutionising the healthcare industry with a decentralised metaverse that will take millions of doctors and patients into a new virtual world where they can work and interact with each other, while patients earn virtual assets by selling their anonymised medical data.

‘The future of education won’t be sitting in a classroom – it’ll be embedded in the workflow’

Tina He, co-founder, Station



Sunsilk

Haircare brand Sunsilk is using the Roblox gaming platform to encourage women to pursue careers in the male-dominated fields of science, technology, engineering and mathematics (STEM), Mexico



Adidas offers personalisation for AI avatars, US

Direct-to-Creator

The creator economy is burgeoning, with research from **SignalFire** revealing that more than 50m people around the world consider themselves content-creators – with 93% of this group describing their status as amateur. The current economics of the web, however, make it difficult for creators to earn money directly from their communities.

As people spend more time and money in digital spaces, however, the concept of value creation is changing. A restructuring of the internet's economic model, powered by the metaverse, is allowing creators to move away from intermediary platforms, which usually take most of the revenue, and monetise their creativity.

Roblox, for example, is home to 1.3m developers highly incentivised to create new games on the platform, who receive 24.5% of all revenue generated within their games, earning payouts of £203m ($250m, €236m) in 2020 and £407m ($500m, €472m) in 2021. Swedish artist Zara Larsson's Launch Party hosted on the platform, meanwhile, garnered 1.6m viewers and made more than £814,000 ($1m, €945,000) in revenue through skins and merchandise sales alone.

Elsewhere, **The Sandbox** is a blockchain-based virtual world built on Ethereum where players can build, own and monetise their gaming experiences. The platform utilises a 'play-to-earn' model to incentivise players for time spent in the metaverse and is building an open metaverse to enable greater collaboration with creators and brands alike.



Particle is a fractionalised art platform that uses blockchain technology to divide artworks into thousands of NFTs, US

Collective Ownership

As well as transforming economic models, the metaverse is also transforming businesses' management structures. Instead of traditional, top-down hierarchies, people are now embracing the virtual planes of decentralised autonomous organisations (DAOs), or Decentralised Autonomous Stakeholder Organisations (DASOs), collectively owned by their members.

Instead of being based on executives and board directors, the governance of a DAO or DASO is led by community ownership in the blockchain, with members enacting business decisions through NFT votes and smart contracts, meaning these decisions are transparent and actioned automatically. In practice, this governance model ensures that businesses continue to operate in the best interests of the community populating them.

Writers Kyle Chayka and Daisy Alioto are testing their **DirtDAO** venture, with an entertainment newsletter, Dirt, funded through the sale of non-fungible tokens. DirtDAO is also experimenting with editorial democracy, letting subscribers with NFTs vote on which articles should be commissioned.

This approach and business model, while currently unconventional, doesn't affect a brand's valuation and ability to make profit. As of January 2022, the total market capitalisation of all DAO tokens stood at £17bn ($21bn, €19.8bn) (source: **Social.com**). Highlighting its attraction, NFT arts marketplace **SuperRare** has launched the SuperRare DAO and RARE token to grant buyers voting rights on which new artists should join the platform and what artwork they can sell.

'The metaverse uses the power of creativity to make people think'

Brad Morris, founder, MYAMI



Rares is seeking to democratise access to streetwear investments by allowing people to buy a share of ownership in high-value sneakers, with no minimum investment, US

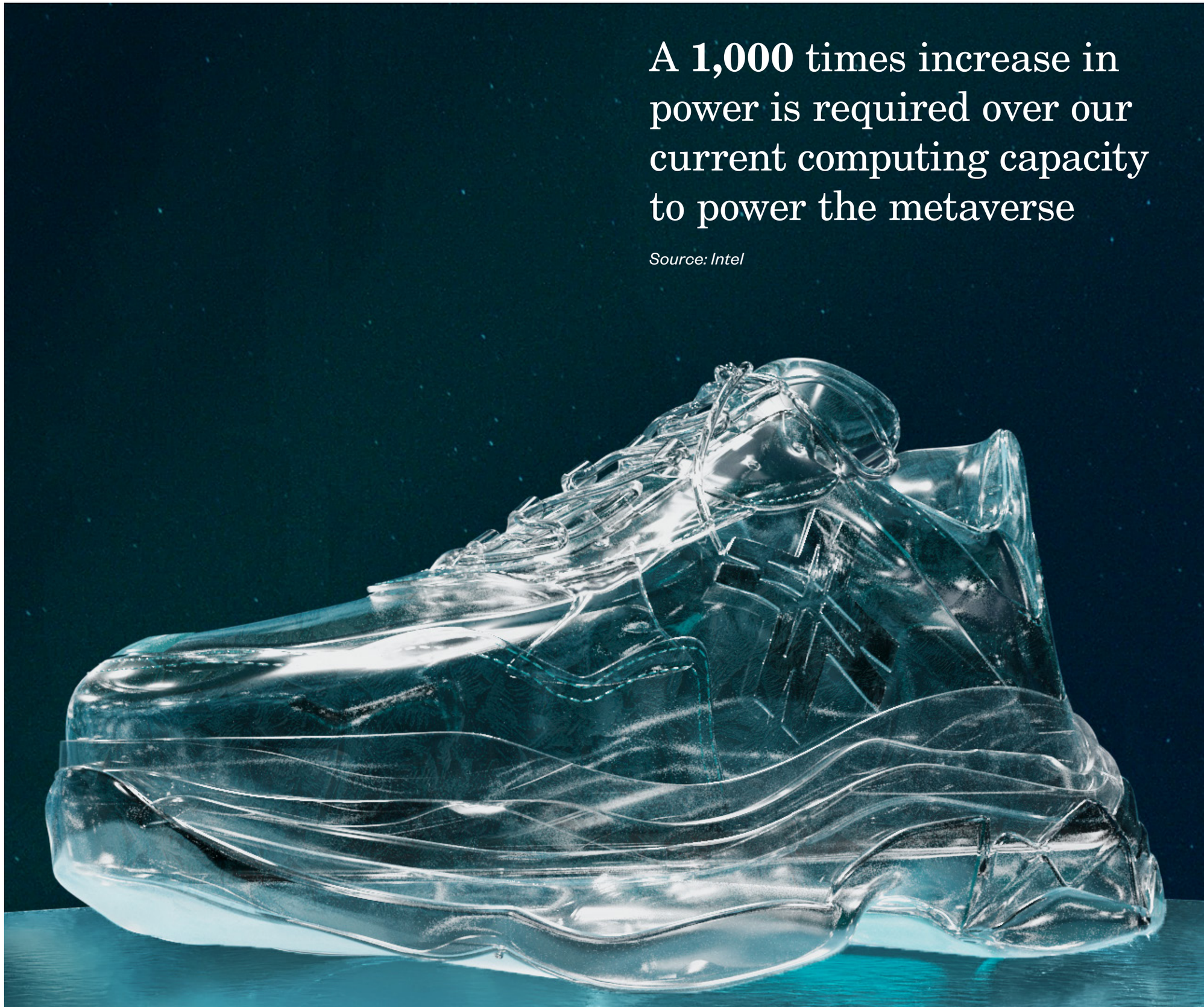
Sustainable Simulations

Citizens have become accustomed to high-res, data-heavy and energy-intensive digital experiences, the price of which comes at a damaging cost to the environment. Research from **Intel** forecasts that a 1,000 times increase in power is required over our current computing capacity to power the metaverse and its immersive nature. But even big tech brands are seeking alternatives.

Leading the charge, **Google** has committed to using carbon-free energy in its data centres by 2030, while **Amazon Web Services** hopes to power its operations with 100% renewable energy by 2025. Tech company **NVIDIA**, meanwhile, is building a real-time digital twin of Earth in **Omniverse** that will be able to simulate, predict and ultimately combat climate change.

Sustainability experts including **CleanTechnica** also note how the metaverse could aid the reduction of job-related emissions, with virtual offices reducing commuter carbon footprints and virtual aviation training cutting flight emissions.

The immersive potential of the metaverse can be used to make a renewed impact on consumers and encourage them to embrace sustainable behaviours too. ‘The metaverse uses the power of creativity to be disruptive and make people think,’ says Brad Morris, founder of digital fashion house **MYAMI**, who discusses how NFTs can become tools for promoting environmental action among consumers. ‘It can offer a new mode of expressing activism.’



MYAMI’s NFT sneaker, Ice Runner, steadily melts to represent the urgency of the climate crisis and growing global temperatures, Australia

‘In the metaverse, brands can make their values tangible, showing consumers what a world built by them would look like’

Adam Steel, The Future Laboratory



Sebastian Koseda’s Silk to Silicon analyses how craft practices have given birth to automation in the past 200 years, UK



Reaverse by Guerlain, France

Virtualised Values

Rather than reading about a brand’s ESG efforts or their values, customers will soon be able to experience them. ‘In the metaverse, brands can make their values tangible, showing consumers what a world built by them would look like,’ says Adam Steel, strategic foresight editor at The Future Laboratory. ‘Instead of telling customers their values, they can immerse people in them.’

The metaverse is offering a new opportunity to cut through the noise and engage consumers with a brand’s values or mission – a vital capability in a landscape where purpose-washing results in marketing that is confused with action. Highlighting this potential, research from **FleishmanHillard** reports that 53% of global consumers say their perception of a company comes from how it acts, while only 47% say it was a result of products and services.

Coca-Cola Korea is leading the way, opening Coca-Cola Wonderful Island on metaverse platform **Gather** to exhibit its latest recycling campaign, where virtual visitors were able to visit branded towns and see how plastic bottles are recycled and re-used.

Building on this, luxury beauty brand **Guerlain** has created **Reaverse**, hoping to unite digital communities and sustainability through real-life action. Merging its sustainability efforts with a Web3 presence, the brand will sell 1,828 NFTs of bees to support a rewilding project in France’s Vallée de la Millière nature reserve.

Strategic Implications

The key steps that organisations can take to establish their role and brand purpose in the era of The Betterverse



Rebuild the World by Lego, Denmark

Strategic Actions

The actions that Betterverse brands will need to take to engage with audiences seeking more immersive and emotive experiences

Ensure that you are co-creating purposeful digital assets

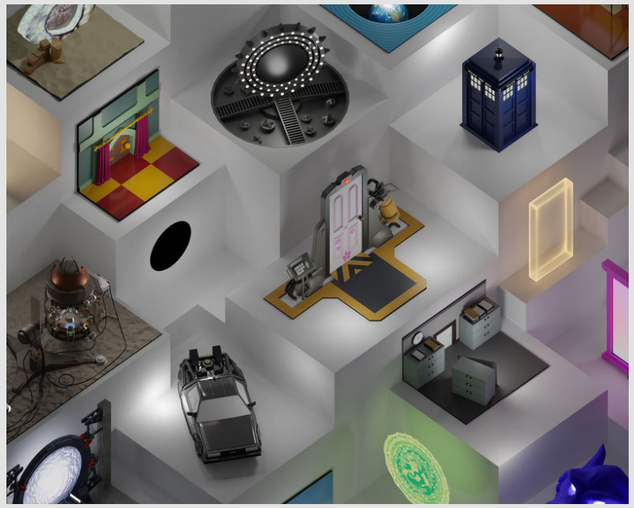
Representation is just as important in the metaverse as it is in real life, especially now that we have the chance to get diversity, inclusion and overall representation right from the start in a new virtual world order. This isn't about doing the right thing, but about using your collective brand powers to do the optimal and most strategic thing – developing immersive inclusivity for all.



Aeriel, US

Embrace the novelty of immersion differently

Wraparound experiences may seem like end goals in themselves when developing your brand offering in the metaverse, but they should also be viewed as the first point of departure in a journey where you can use the immersive, expressive and experiential potential of the metaverse to communicate the values of your brand in more magical and mercurial ways.



Space Popular, UK

Explore the impact of space emotionally

As research indicates, emotions experienced by the brain in virtual and real worlds are exactly the same. This is why a customer's sense of joy, happiness, wonder and awe can be enhanced by allowing them to inhabit skins that transport them into more wondrous experiences – flying, floating, walking on air – tying them to your brand emotionally and viscerally.



Zünc Studio for The Future Laboratory, UK

Related Macrotrends

2014

Awakening Tech

Our digital and offline worlds are converging. We have become bedfellows with robots, we take advice from gadgets, we ask mega-systems for answers to life's questions. But how can we embrace technology without losing our own humanity in the process?

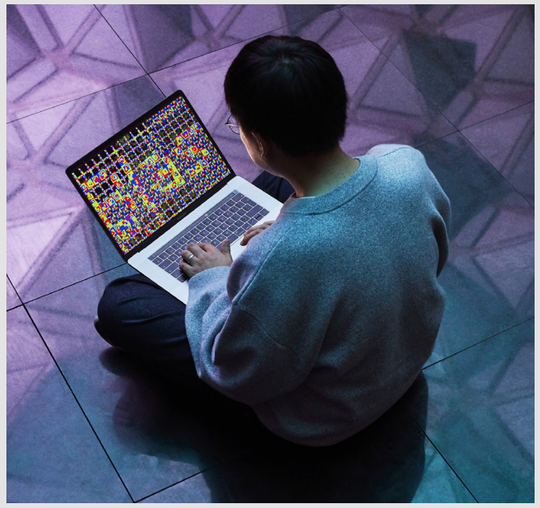


Donghwan Kam, the Netherlands

2018

Morality Recoded

Our traditional moral frameworks of religion and family are declining. Institutions, brands and consumers are now re-evaluating the power of innovation and the need for a moral code fit for a digital era

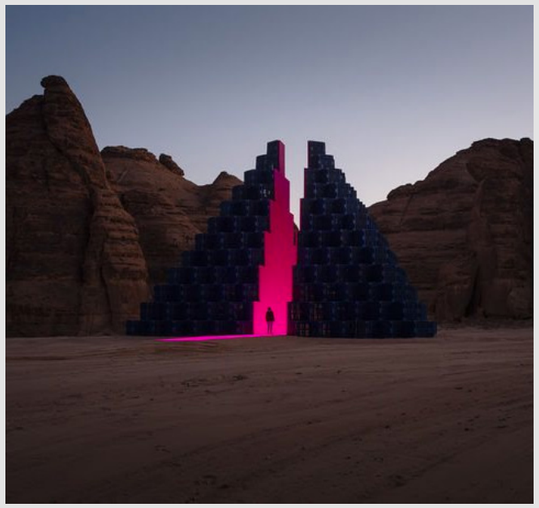


Gang Buron-Yi, UK

2021

Alternet Economies

A technological counter-culture is decentralising capitalism, reforming the internet and powering new value frontiers for creators, consumers and brands



Rashed Al Shashai, Saudi Arabia

2022

Neo-collectivism

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



Dell XPS Youniverse by MPC & YMLY&R, US

Glossary

Artificial intelligence (AI)
A field that uses computers and machines to mimic the problem-solving and decision-making capabilities of the human mind, and computer science and datasets to enable problem-solving.

Augmented reality (AR)
A technology that superimposes a computer-generated image on a user's view of the real world, thus providing a composite view.

Avatar
A graphical illustration of a person that represents them on the internet. This can be a 2D icon such as on social media pages or a 3D figure such as in video games.

Blockchain
A shared, immutable ledger that facilitates the process of recording transactions and tracking assets. An asset can be tangible (a house, car, cash, land) or intangible (intellectual property, patents, copyright, branding). Virtually anything of value can be tracked and traded on a blockchain network.

Creator economy
A software-facilitated eco-system that allows creators to earn revenue from their creations. Examples of creator economy software platforms include Twitch, Substack, OnlyFans, YouTube, Instagram, TikTok and Patreon.

Cryptocurrency
Cryptocurrency, sometimes called crypto, is any form of currency that exists digitally or virtually and uses cryptography to secure transactions. Cryptocurrencies don't have a central issuing or regulating authority; instead they use a decentralised system to record transactions and issue new units. Examples of cryptocurrencies include Bitcoin, Ethereum, Ripple and Dogecoin.

DAO
A Decentralised Autonomous Organisation (DAO) is a crypto-native community that uses the blockchain to manage governance. DAO structures allow various stakeholders to communally invest in and collect assets such as non-fungible tokens (NFTs) or digital fashion, or use their investments to fund their own projects or ideas (see Non-fungible tokens).

Digital fashion
Also known as virtual or immaterial fashion, digital fashion comprises garments, accessories or footwear that exists only on web-based platforms. It can comprise clothing worn by people's avatars, a collectible digital asset such as an NFT (see Non-fungible tokens), or an AR filter that can be layered over a person's photograph or digital image.

Digital tokens
A digital representation of value or rights that is offered and sold online. Digital tokens can be fungible and interchangeable or they can be non-fungible, meaning non-interchangeable and unique. Digital tokens are created to generate value on the web. Digital tokens also reflect the rising trend of individuals such as artists and musicians to mint their own digital tokens for people to purchase, enabling fans to have a stake in content-creators themselves.

Discord
Discord is a voice, video and text communication service where people can hang out and talk to their friends and communities. Users can create 'servers', which are spaces dedicated to topics they are interested in, from hobbies to study or advice groups.

Gather
Gather, also known as Gather Town, is a web-conferencing software platform like Zoom, but with the ability to customise and navigate the virtual space you are occupying. Users are presented as avatars that can move around the space and interact with one another.

Haptic technologies
Technologies that engage users' tactile senses to provide a deeper and more immersive experience. Products that offer haptic feedback, such as some game controllers, often provide different kinds of sensations to correspond with different visual and audio stimuli.



CitizenM, the Netherlands

Glossary

Live-streaming
Live-streaming technology enables users to watch, create and share videos in real time on social media platforms such as Instagram and Facebook.

Metaverse
In its current iteration, the metaverse is a digital space that combines aspects of social media, online gaming, augmented reality (AR), virtual reality (VR) and cryptocurrencies to allow users to interact virtually. More broadly, it reflects a shift in how we interact with technology, and the definition could change as technologies and use cases for the metaverse evolve.

Non-fungible tokens (NFTs)
Non-fungible tokens, or NFTs, are digital tokens that exist on a blockchain with unique identification codes and metadata that distinguish them from each other. This differs from fungible tokens such as cryptocurrencies, which are identical to each other and can be used as a medium for commercial transactions. Non-fungible tokens are more like collectible assets such as art or tokens that can be used to unlock access to a product, service or experience.

POAP
Short for Proof of Attendance Protocol, a POAP is a method of keeping a reliable record of life experiences. Each time they take part in an event, POAP collectors get a unique badge that is supported by a cryptographic record. These badges are non-fungible tokens and can be used as a tool for loyalty, to unlock benefits or to access gated online communities.

Roblox
Roblox is an online platform where people play games made by other users. On Roblox, the fun doesn't just come from playing games, it also comes from making games. Users can buy and spend virtual currency, Robux, on items within Roblox games.

Virtual reality
A three-dimensional, computer-generated environment that a person can explore and interact with. That person becomes part of this virtual world, or is immersed within it and, while there, can manipulate objects or perform a series of actions.

Web3
This is the idea that the next era of the web will be based around blockchain, decentralisation and digital token economics. Web3 has grown in response to power on the internet currently being held by a few big companies such as Apple, Facebook and Google.

XR
XR stands for 'extended reality', and can be considered an umbrella term that covers VR, AR and MR (VR and AR combined). XR enhances the human-to-PC screen interface and modifies it, either by immersing a person in a virtual environment (VR) or by augmenting their surroundings, either through visual layers (AR) or sensory stimuli such as scent and sound.

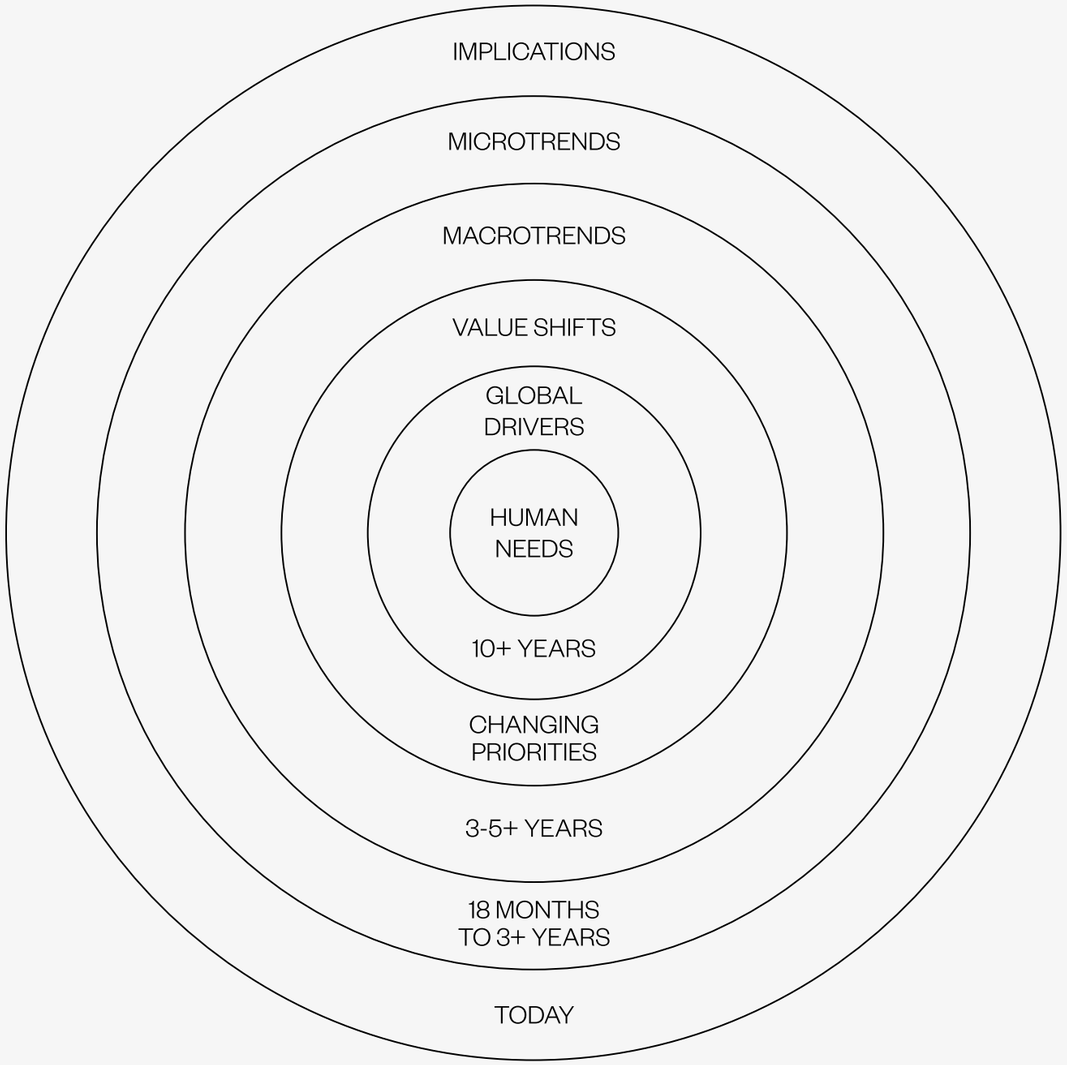
Zepeto
A social media metaverse where users can experience a virtual world as their own avatar (see Roblox) and can customise their 3D avatar to look like them, with the ability to connect with and meet people from all over the world, take part in online games and tasks, build spaces and explore virtual items from brands.



some·place by Lana Hopkins, Australia and US

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

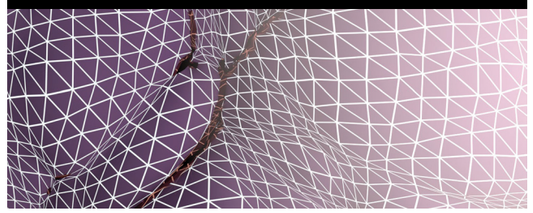
The seven human needs are timeless and universal. Based on a value system that supports human nature's physical and emotional programming, each human need is of importance to us as individuals and together they form the foundation of society as well as that of our methodology:

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

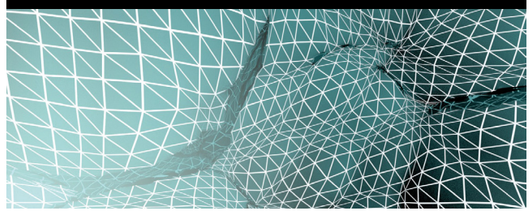


At the core of humanity is a fundamental need for structure, control, certainty and stability. It is a basic human survival instinct to protect ourselves and our loved ones from perceived physical, emotional and economic threats

KEY ELEMENTS

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

Fulfilment

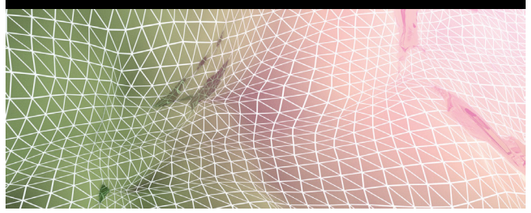


There is a human desire to direct our own lives, to create forms of freedom, and to find deeper meaning and balance in life. It is the psychological need to fully realise our personal potential with the resulting feeling of satisfaction

KEY ELEMENTS

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

Belonging

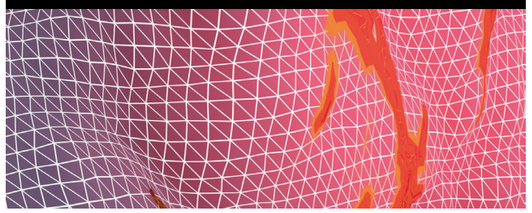


It is a social need to be physically connected to a group of like-minded people. We have an emotional urge, on an individual level, to create support systems and relationships that provide us with acceptance and approval

KEY ELEMENTS

Nationalism, Tribalism, Roots, Conviviality, History, Culture

Curiosity

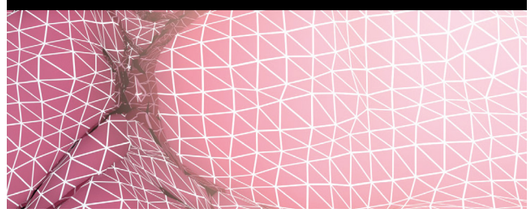


To both create and co-create makes us push the boundaries of what is ultimately humanly possible. Our in-built intuition makes us inquisitive beings with a shared inclination to discover or challenge the norm

KEY ELEMENTS

Exploration, Education, Connoisseurship, Discernment

Identity

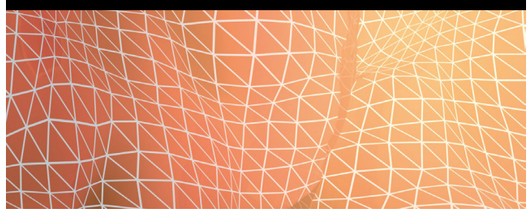


We have a need to distinguish our character or personality from others and to feel unique and respected for who we are. We build our sense of who we are through a personal exploration of gender, sexual orientation, ethnicity and age

KEY ELEMENTS

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

Attainment

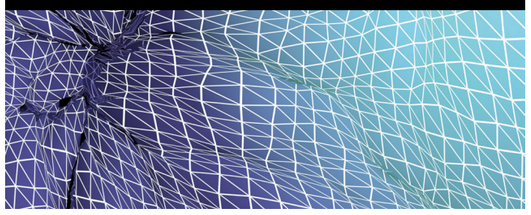


All human beings need to feel respected and recognised among their peers, which drives the desire to constantly express our significance and success, our knowledge and tastes, with our achievements often reinforced through the acquisition of symbolic goods

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

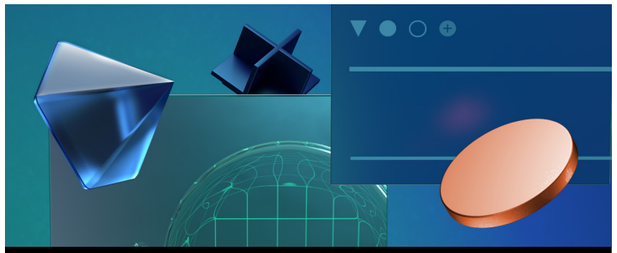
Global drivers represent the cultural, social, economic, political, technological and environmental eventualities reshaping the world we live in. They are factual, objective and long-term structural forces that are pervasive, powerful and transformative.

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



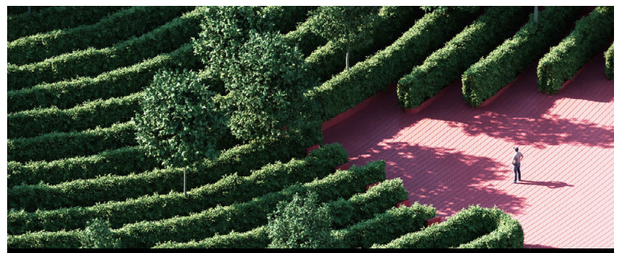
Global Versus Local

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

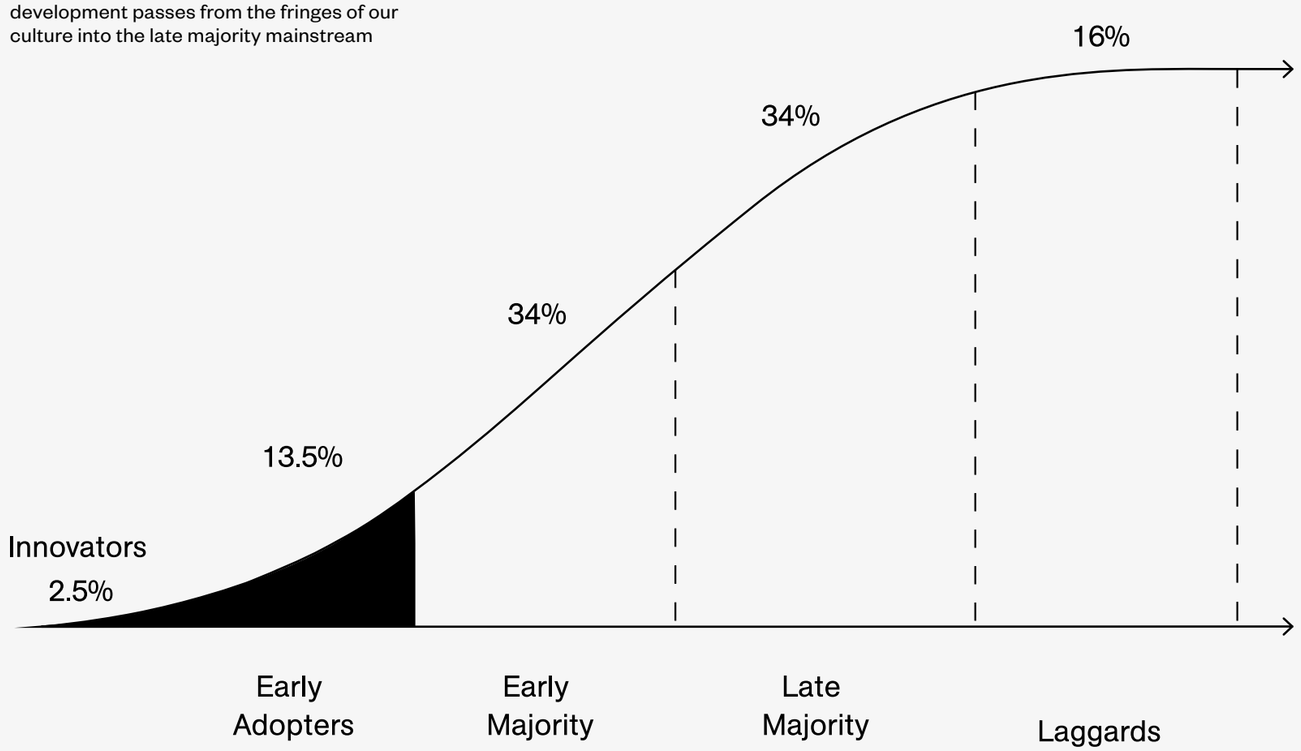
To understand revenue-driving early and late majority consumers, we focus on innovators and early adopters who determine today what the rest of us will be doing tomorrow.

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.

DISCOVER MACROTRENDS

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





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

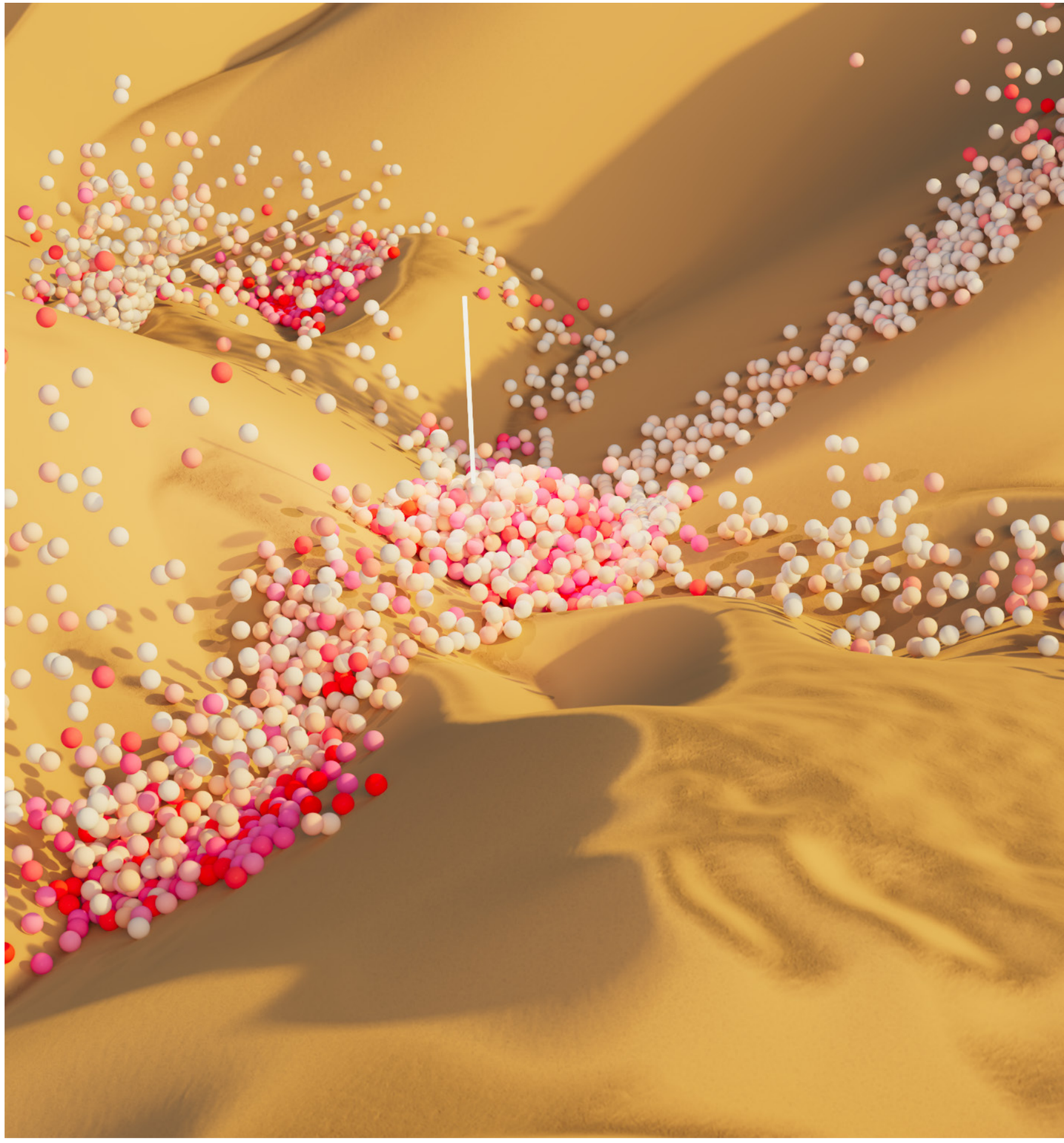
As you can see, we don't predict the future. But through Strategic Foresight we can track global shifts to understand the key drivers of change and mine the evidence of today's world to preview what the future could look like.

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.

Find out more:

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