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The Value Vanguard





Contents

3 Key Takeaways

4 Introduction

5 Future:Poll

6 The Community

7 Key Behaviours

8 The Re-evaluator: Stefan Mannes

10 The Social Shopper: Jasmine Brindley

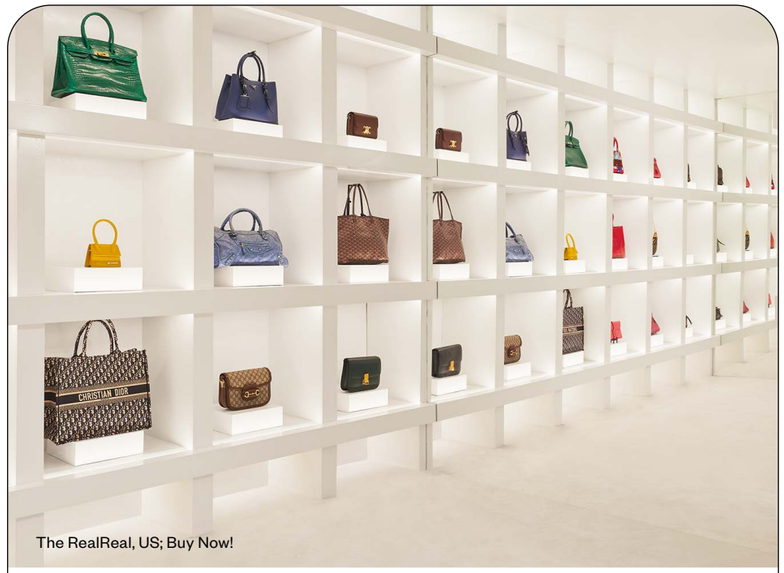
12 The Ethical Spender: Kika von Klück

15 The Community-seeker: Clarissa Lilananda

18 The Localist: Sara Tesfai

20 Analysis

Key Takeaways



The RealReal, US; Buy Now!

Physical Retail is Resilient

Despite e-commerce's dominance, shoppers still crave in-person experiences for social and financial reasons. The high street isn't obsolete – it's a creative opportunity



The Shopping Conspiracy on Netflix, US

Loyalty is Dead

Enshittification (gradual degradation of services over time) and inflation have left customers disillusioned with brands. Instead, they're opting for products and services that offer low prices in the moment or experimenting with what's new



M&S Only Ingredients, UK

Simplification Sells

Consumers want transparency about the ethics and sustainability of the products they're buying, but don't want to do the legwork. More than ever, brands must make their values clear and simple

Introduction

Meet the consumers redefining value through imperfect sustainability, emotional spending and radical pragmatism, offering brands a glimpse into the future of meaningful connection and commerce

A perfect storm of sociocultural, economic and technological forces has permanently changed the world as we know it, leaving a profound imprint on how consumers spend their money. The old rules have gone out of the window along with any hope of things ever going back to how they were.

Why? Our **New Codes of Value** macrotrend offers a new framework based on emerging values around connection, care and human flourishing. But to truly grasp what these new values mean for your business, we need to first identify the consumers driving change.

As these new values continue to evolve, they offer brands the opportunity to stay ahead of the curve, creating meaningful connections with customers and building long-lasting brand relevance.

Our **Communities reports** provide members with a deeper understanding of the people on the other side of the screen (or till). In an age of AI, the importance of hearing from *real* people cannot be overlooked, and offers your business a competitive edge in a sea of ChatGPT strategies and generic insights available to all.

How? Backed by proprietary Future:Poll data, this Communities report pulls back the curtain on five consumers united by a vein of shifting consumer values. The new values that emerge, identified through each consumer's purchase patterns and brand attitudes, cross geographical, demographic and financial gulfs. We're calling this group The Value Vanguard.

Even as economic conditions fluctuate, our research suggests this shift in values is irreversible. The rise of high-income consumers opting for dupes and the decline of traditional brand loyalty are only the beginning. Understanding how to deliver value beyond price and embracing the new codes of value are essential to business resilience and success.





Future:Poll

This Communities report personifies the New Codes of Value macrotrend, bringing our strategic foresight analysis to life. Before diving into the lived experiences of five consumers, we commissioned an original Future:Poll survey of 2,000 adults across the UK, the US and Australia to expand on our findings about what value means to consumers today. Our Future:Poll survey revealed that:

Almost two fifths say they now place more emphasis on values than they did five years ago (39%)

More than one fifth of consumers (22%) will spend on products from brands that share their values

More than seven in 10 (72%) of consumers agree that companies are too focused on profits to focus on values

The most important considerations when buying a product are **durability** and **quality** (ranked first), **cost**, **usability** and **brand values**

Consumers are more likely to spend more on products if they are higher quality (60%) and if they have longevity (57%)

A decline in product quality (56%), increased prices (53%) and poor customer service (48%) are the factors most likely to stop consumers using a brand

Almost three in 10 think dupes are just as good as the real thing (29%)

25% say they would stop using a brand that supported a cause they disagreed with, while **22%** would stop if they showed poor environmental credentials, **20%** if the brand backed a political party they didn't support, and **15%** if the brand had a poor record for D&I

Three in 10 (31%) are now less confident in their household's financial stability and 28% less confident in their ability to afford essentials

Confidence in the economy has seen the biggest drop – more than two fifths (44%) are now less confident in the economy of their country and 48% less confident in the global economy

The Community

For the purposes of this report, we will classify community members by Social Grade, a socio-economic classification produced by the UK's Office for National Statistics (ONS) (source: UK Geographies)



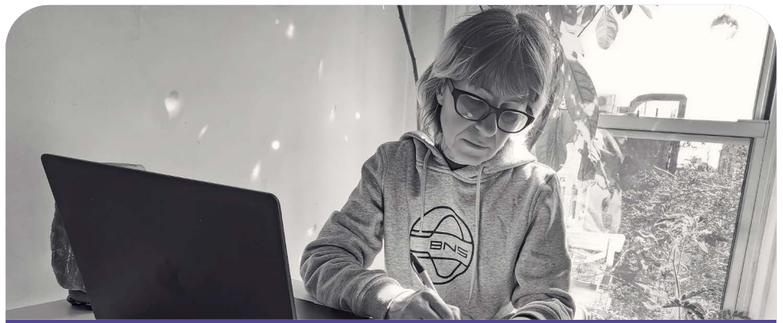
The Re-evaluator

Stefan Mannes — Social Grade : AB



The Social Shopper

Jasmine Brindley — Social Grade : DE



The Ethical Spender

Kika von Klück — Social Grade : AB



The Community-seeker

Clarissa Lilananda — Social Grade : DE



The Localist

Sara Tesfai — Social Grade : C1

Key:
Social Grades

AB	Higher and intermediate managerial, administrative, professional occupations
C1	Supervisory, clerical and junior managerial, administrative, professional occupations
C2	Skilled manual occupations
DE	Semi-skilled and unskilled manual occupations, unemployed and lowest grade occupations

Key Behaviours

Imperfect Sustainability

There's a newly pragmatic approach to sustainability as consumers do what they can within the limits of their budgets, accepting that doing something is better than doing nothing and that the pursuit of perfection is often counter-productive.

Leaving Loyalty Behind

Meanwhile, faced with the enshittification (a gradual degradation) of products and services and rising prices, brand loyalty is almost unheard of. 'If you're going to spend at least £20 [$25.75, €23.45], you might as well try something new,' says 21-year-old Clarissa Lilananda.

Back to Reality

All but one of the community say they prefer to shop in person rather than online, suggesting there is hope for the high street and physical retail yet. Reasons for doing so range from the personal interaction of visiting a store to the sensorial aspect of buying clothes and the ability to make more sensible financial decisions when spending in person.

Experiences Over Objects

When The Value Vanguard are willing to spend more, it tends to be for experiences instead of items. While financial pressures and environmental consciousness play a role in the decision-making behind day-to-day products, these consumers let emotional spending take over if the product or service will reward them with memories or social connection.

Ethics and Convenience

Consumers are increasingly aware of the ethical behaviour of companies. Shopping locally and with independent businesses is preferable, but the convenience of big brands is unavoidable. Knowledge is power for conscious consumers, but tracking the immorality of capitalism is exhausting and demoralising – they'd rather brands were honest and clear in the first place.



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

Consumer Snapshot

THE RE-EVALUATOR

Stefan Mannes (he/him), 48, lives in Berlin, Germany, with his 11-year-old son. He is the co-founder and CEO of kakoii, a boutique communication firm that works with NGOs and cultural organisations. He is his household's chief income earner.

Stefan is a conscious consumer who opts for organic produce, powers his home and office with green energy and keeps an eye on his environmental impact using a CO2 rating checker on the German Environmental Ministry website. He reads the labels on products and intentionally shops at smaller supermarkets to avoid being overwhelmed by advertisements and products.

Stefan Mannes



Social Grade
AB

Key values
Simplicity, convenience, quality, emotional connection, sustainability

Most visited supermarkets
Lidl, Edeka

Favourite clothing brands
Muji, Uniqlo, H&M Kids

Hobbies
Writing film scripts, gym, travelling

Most used tools and services to stay true to values
Stiftung Warentest, German Environmental Ministry CO2 Rating Checker

How to win him as a customer
Innovation, functionality, quality, provide a sense of calm in a chaotic world

How to lose him as a customer
Prices up, quality down, over-processed or over-complicated products, complacency

What does value mean to you?

Value, to me, is a balance between ethics and pragmatism. While I appreciate sustainable and responsible choices, I have also become more conscious of financial stability and long-term security. Value is no longer just about what aligns with my ideals – it's also about what makes sense in a practical, day-to-day context.

How have your values shifted or changed in the past 18 months to two years?

My perspective on values has shifted significantly due to increasing global uncertainties, including economic instability, inflation and political tensions. While I still value sustainability and ethical consumption,



The Ordinary Eggs, US

I have become more aware of the limits of individual consumer choices in driving systemic change. As a result, my values have evolved to prioritise resilience, adaptability and financial prudence alongside ethical considerations.

How have your purchasing habits changed as a result?

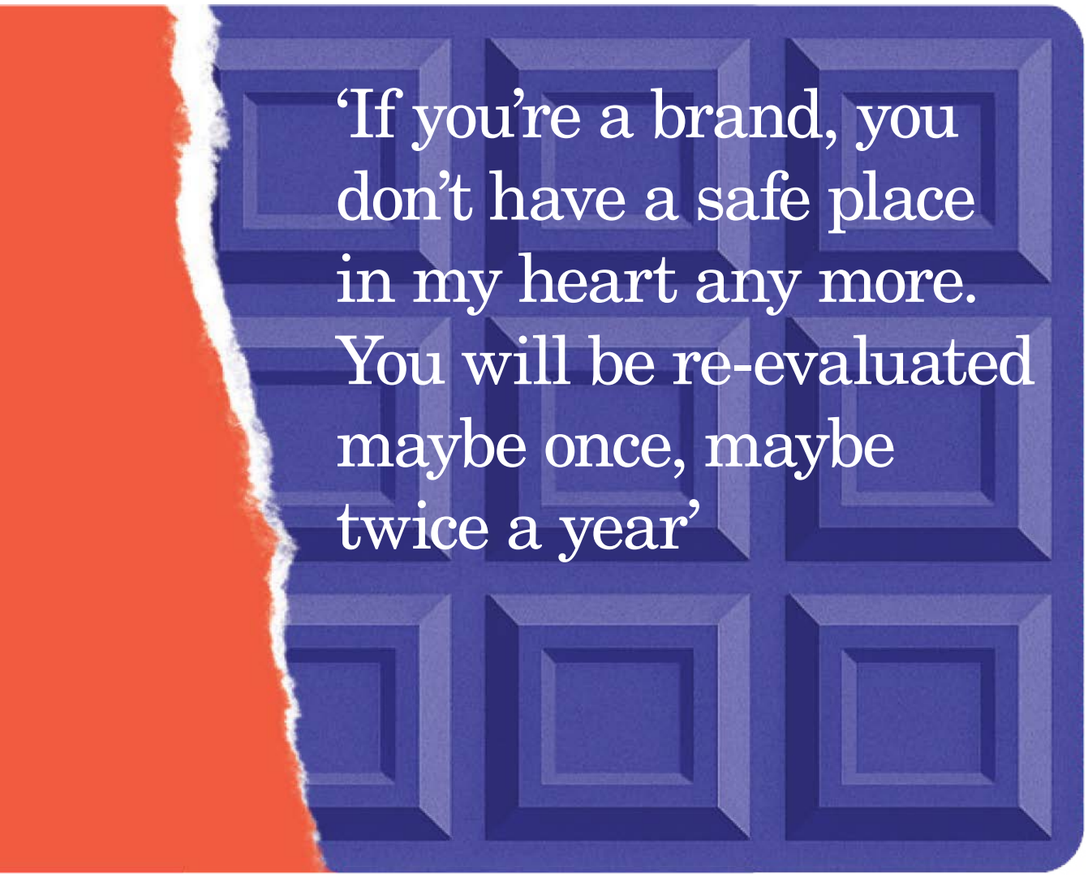
There are a lot of products which I think were a perfectly fair price three years ago, good value for, say, 10 eggs or a certain type of sausage in a supermarket, and now it's maybe 100% more and I have this feeling that it's not worth it. I know from a rational point of view it's due to production, labour costs and the whole system, but it still does not feel right any more. I want to buy it, but I will have to fight the feeling that I am being somehow betrayed by the system.

When products get more expensive, I stick to other brands or I look for new ones. I re-evaluate if it's still worth it, if it's still the best choice. If you're a brand, you don't have a safe place in my heart any more. You will be re-evaluated maybe once, maybe twice a year.

I shifted to spending more on experiences with friends or my son. Fewer products, more things you don't keep in your closet but in your memory.

Do you shop in-store or online?

I do both: 85% online because it's convenient to get the best price. When I do go shopping it's for the experience; I go to stores to see what's in there and because I like the atmosphere, not because I urgently need something.



STATISTICS

Over four fifths have seen brands make changes in the past two years such as:

Reducing the size of products despite cost remaining the same or higher	64%
Reducing the quality of the product despite price remaining the same or increasing	44%
Caring less about their customers	27%

Source: Future:Poll

Consumer Snapshot

THE SOCIAL SHOPPER

Jasmine Brindley (she/her), 21, lives in Swansea, Wales, in the UK. She is a third-year student studying Surface Pattern and Textiles at the University of Wales, Trinity Saint David. She lives alone.

As a fashion student with no regular income, Jasmine is both cautious with her spending and conscious of materials and quality. She does most of her clothes shopping in charity shops.

Jasmine Brindley



Social Grade
DE (student)

Key values
Affordability, quality, experience

Most visited supermarkets
M&S, Lidl

Favourite clothing brands
Nike, ASOS, charity shops

Hobbies
Walking, spending time with family and friends, galleries and museums

How to win her as a customer
Use micro-influencers that authentically appeal to niche audiences, have a physical space for a tangible product experience

How to lose her as a customer
Prioritise price over quality (buy cheap, buy twice), poor customer service in-store

‘I like the whole in-person aspect of being able to feel the quality of the clothes’

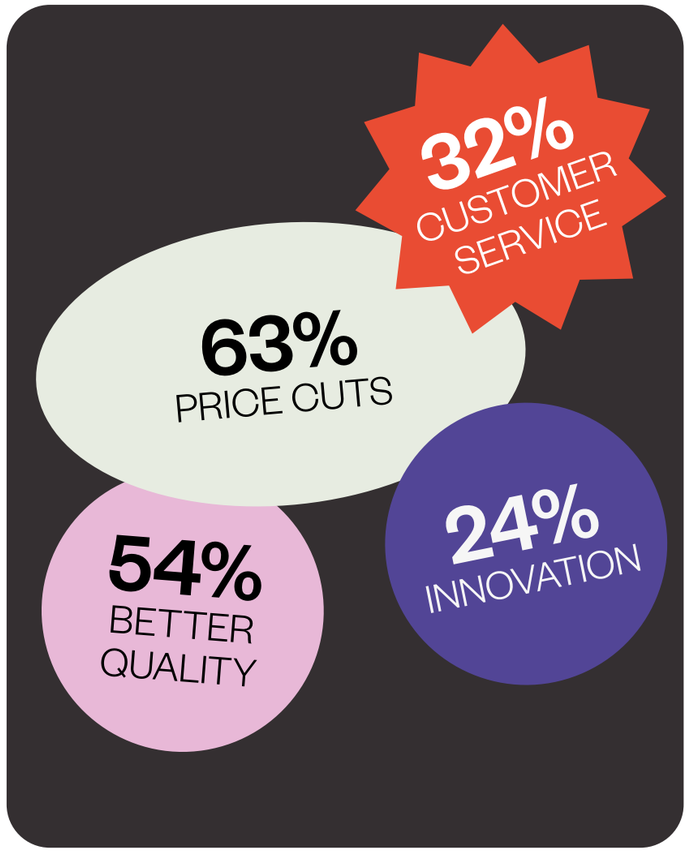


Photography by MART Production

STATISTICS

Price cuts or sales (63%) are most likely to attract customers to brands over the next year, along with offering better quality or longer-lasting products or services (54%), improving their customer services (32%), and developing innovative products and services (24%)

Source: Future:Poll



What does value mean to you?

I’m a university student; I don’t have that much money. So, if it’s food, it’s accessibility and value for money. But I’m also not the type of person who just eats lots of fast food, so I do value things being fresh, organic, clean and quality. When it comes to fashion, I’m not one to care about trends. It’s just whatever I find. I like shoving through a pile and seeing if something sparks my fancy. So, I’d say: sustainability (a bit), money, accessibility and quality.

How have your values shifted or changed in the past 18 months to two years?

At university, I can’t be bothered to go downstairs and pick up a parcel, so I just pop into town. And because I live on my own, I enjoy that little interaction out in public, even if it’s just me going: ‘I’ll just have this, please.’ I like the whole in-person aspect of being able to feel the quality of the clothes. If I want something high-quality, let’s say a pair of Nike trainers, then I’ll look online because it’s a trusted brand.

Are there any brands that you used to think were good value that you feel you’ve been priced out of?

Lidl. Don’t get me wrong, it’s accessible, it’s cheap, but the quality isn’t there. Even though it says the vegetables will last five days, the lettuce is already brown after one evening in the fridge. It’s cheap, but I think maybe this is how it then gets you coming back. Whereas if you just spend double at [UK grocery chain] M&S, you’d still have it [fresh produce]. I like that M&S’s whole thing is freshness. I know it’s more expensive, but I feel like it shows it’s good quality, and I like the innovation behind its ideas like the different Colin the Caterpillar products.

Do you shop in-store or online?

I like the in-person option of being able to feel the quality of the clothes.

What’s something that weakens a brand’s value in your eyes?

I think what pops into my mind is the advertisement through influencers. You can tell when a brand has sent a massive PR package to 15 people; you suddenly see [the product] on everyone’s stories. It’s not authentic. Whereas if you’re just seeing maybe one person or just a small handful post about it, it seems a bit more personal, a bit more worthwhile.

Consumer Snapshot

THE ETHICAL SPENDER

Kika von Klück (she/her), 54, lives in Williamsburg, New York, with her husband. She is the co-founder of data solutions provider BNS UEP. Originally from Brazil, she has lived in the US for more than 30 years and spends a few months per year in Europe.

Kika closely follows the social, environmental and ethical behaviour of companies. She shops locally and independently where possible, but acknowledges that sometimes it is hard to avoid 'humungous evil brands', especially when it comes to financial services and healthcare.

Kika von Klück



Social Grade
AB

Key values
Pro-people, pro-planet

Most visited supermarkets:
Farmers' market, local/artisanal stores, Trader Joe's

Favourite clothing brands
Vintage/thrift stores or, once in a while, H&M, Uniqlo, Levi's, Pinkyotto, Marc Jacobs, Stella McCartney, Betsey Johnson

Hobbies
Performance art

Favourite restaurants and cafes
Black Brick Coffee, La Bicyclette Bakery

Most used tools and services to stay true to values:
Good On You, Goods Unite Us, Buycott

How to win her as a customer
Unexpected cultural collaborations, regenerative business models, giving back to local communities, strong sustainability credentials, transparency

How to lose her as a customer
Greenwashing, poor DEI policies or workers' rights

‘Aligning with my values is what will make me spend my money’



Patagonia, US

What does value mean to you?

I follow closely what companies are doing in terms of workers’ rights or greenwashing. Value, to me, is the first choice when buying into something because I truly believe the only power we have is the power of the dollar or pound. You may vote on the ballot paper, but it doesn’t really do much for us here [in the US] or maybe in the world. I am very pro-planet and pro-people, and I believe that a better world is possible. My values align with better wealth distribution in the world and the protection of the environment. Aligning with my values is what will make me spend my money.

How have your values shifted or changed in the past 18 months to two years?

I have come to the conclusion that you can’t become over-anxious about how you purchase things, and there are certain things you cannot avoid: health insurance in America, for instance, or banking. We are part of a community bank, but at the end of the day, I have to have an account at a bigger bank. Financial services and health services have taught me a lesson – to be humble and make exceptions. I always like to try to balance my consuming habits to see what’s the least evil at this moment. I try not to buy from ‘humungous evil brands’, but sometimes you can’t avoid them.

In the past 18 months, I’ve been avoiding all these companies that decided to go with authoritarian governments, especially here in America. We buy our food at the farmers’ market most of the time, but things have changed, and we are trying to pay even more attention to the small things. I’ve been trying to convince my mum not to order everything on Amazon.

Did you take part in any of the economic blackouts in February 2025?

Absolutely. And even my Amazon-addicted mum is doing it as well, which is really sweet. In my case, on the day of **the economic blackout**, I needed bread, so I went to the local bakery. I know that you were supposed to use cash, but I didn’t, unfortunately. We all have our little levels

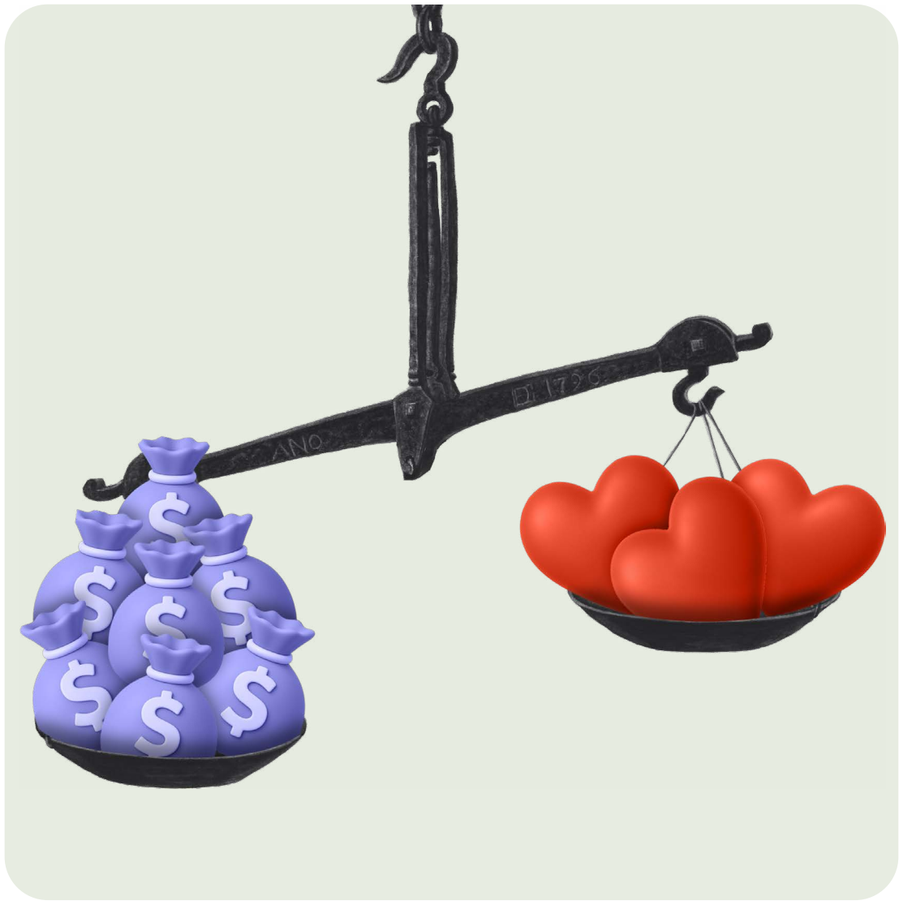


Revolut for Primavera Sound in Barcelona, Spain

STATISTIC

More than seven in 10 (72%) consumers agree that companies are too focused on profits to focus on values

Source: Future:Poll



of hypocrisy here and there, but I did my best to avoid all major brands that were the target of the economic blackout.

Can you think of an example of a brand doing something that you felt enhanced its value?

I have always been a bit against the bank JPMorgan Chase, and I don't have an account with it because many years ago it used to **fund mountaintop removal mining** and stuff like that. So that was a huge no, no in my playbook. Yet it was one of the companies that decided to go ahead with its DEI programmes after everybody faltered and I thought, good for them. Credit where credit is due.

Have you used any new financial tools, services or products in the past 18 months and if so, why?

Revolut because it gave discounted tickets to the Spanish festival Primavera Sound for people who had a Revolut account. I think Revolut is one of the financial services that is contrasting itself with normal financial banking. There is a young, fresh air to them, I feel. And so I was, believe it or not, very happy to open that account. Things can shift pretty instantly when you do a little bit of research and there is an incentive.

Do you shop in-store or online?

I'm a Gen Xer, so I like to go to see what experiences the physical stores are giving me.

What could a brand do to win you as a customer?

Stop greenwashing, first of all Sustainability is not even a word any more, but if you can show me that you are inclining more towards regenerative business models, that will win my heart in half a second. If you show me that you are giving back not only to shareholders, but also to communities, or eliminating slave labour and have pretty good regulations on top of that... oh, I'll buy you in a heartbeat. We have that luxury.

Consumer Snapshot

THE COMMUNITY-SEEKER

Clarissa Lilananda, 21, is an Indonesian student living in London, England, with one flatmate. She is in her final year at King's College London studying International Relations.

Over the past few years, she has educated herself on the impact of over-consumption and the role technology plays in encouraging us to buy unnecessarily, empowering her to make more conscious choices while also enjoying her time living and studying in London.

Clarissa Lilananda



Social Grade
DE (student)

Key values
Quality, longevity, affordability, community

Most visited supermarkets
Tesco ('and if it's not Tesco I think I probably should have shopped at Tesco for the Clubcard points')

Favourite clothing brands
Uniqlo, American Vintage

Hobbies
Visiting museums and galleries, watching films, reading, running

Favourite restaurants and cafes
Itsu, St George, R&H Cafe Gallery

Most used tools and services to stay true to values
Student discount, Tesco Clubcard

How to win her as a customer
Good customer service, supply chain transparency, community, student discount

How to lose her as a customer
Poor materials, bad quality, unethical or unsustainable supply chain

‘If you’re going to spend at least £20, you might as well try something new’



Marimekko and Laila Gohar, Milan Design Week 2025, Italy



STATISTICS

Consumers are more likely to spend more on products if they are higher quality (60%) and if they have longevity (57%)

Source: Future:Poll

What does value mean to you?

The ability of something to last a long time. I’m an avid museum-goer and love all things curated. I try to emulate this in the way I consume so that everything I buy continues to have meaning and doesn’t feel like consumption for the sake of consumption.

How have your values shifted or changed in the past 18 months to two years?

Last year I was doing a lot of research on global supply chains and it opened my eyes to what consumption actually means. I was reading this piece in The Financial Times and thinking about how the cost of us here in the West having access to something as simple as supermarket salmon contributes to food insecurity in Mauritania or West Africa. I always buy salmon, I love it, but now knowing this, it’s haunting me a little.

Having this huge understanding that everything is connected in the supply chains and that our consumer choices have huge impacts has been interesting to me and has shifted my sense of value. I used to think if something is cheaper then it means I can just get more bang for my buck, but now I’m considering whether the quality of that might not extend beyond short-term use. I would love products to be a lot more valuable in the sense of being higher quality and lasting longer.

How has your consumer behaviour changed as a result?

Before I buy something, I do a lot more research on quality. What are the types of fabric? How do I take care of them? As a result, I feel less susceptible to sales trends or promotions.



Lush, Global

Can you think of an example of a brand doing something that you felt enhanced its value?

Lush. You walk in, it smells amazing, and I think it's one of the brands that bakes in sustainability to its business model instead of just sprinkling some greenwashing here and there and calling it a day.

I also just generally appreciate how hospitable it is. When you come in, you're barraged by this extremely nice group of sales people, and it feels genuine. I know they're trained to do that, but I think it's very smart on their end because they make people feel seen. As someone living in London or a big city it's really easy to drown in the everyday. It's nice to feel seen, I suppose. Even if its prices are a bit higher than for regular beauty products, I don't feel bad spending that money because I know that it's a bit of a treat and there's a circular element too. Supporting a business that makes you feel good is nice.

Do you prefer shopping online or in-store?

Call me old-fashioned, but I genuinely love a retail experience. I love the experience of hanging out with my friends and window shopping. Also, purchasing on my phone or laptop feels like I'm not spending money; it doesn't feel as tangible or as real, so it's a lot better for me, budgeting-wise anyway, if I go into the store. Seeing how things look in real life is a fun experience and irreplaceable to me.

What could a brand do to win you as a customer?

Build a sense of community around the brand or product. As university draws to a close, it makes me feel a bit sad because I know I'll miss this sense of community that's baked into the everyday experience. If a brand could replicate this feeling, I think I'd be more inclined to purchase whatever it is selling. There's this cafe called St George on King's Road that sells high-quality pastries and coffee. There's a sense of community that you get there, which is rare in London. My friends and I like to study there. Every time I'm there I always see recurring characters, so I know some of those people practically live there.

Consumer Snapshot

THE LOCALIST

Sara Tesfai, 36, is an Italian freelance market research analyst living between Italy and Portugal. She currently lives by herself in Florence, Italy.

Sara likes to spend lots of time in her neighbourhood and invest in local businesses. She is price-sensitive when it comes to travel, but less so when shopping for clothes.

Sara Tesfai



Social Grade
C1

Key values
Community, social impact, experience

Most visited supermarkets
Continente (Lisbon), Coop (Florence), El Corte Inglés

Favourite clothing brands
Cos, Oysho, Mango

Hobbies
Reading, watching films, visiting bookshops, Pilates, yoga

How to win her as a customer
Give back to local communities, curate hyper-local stores, support and promote minority-owned businesses

How to lose her as a customer
Poor DEI policies, hidden prices, no bricks-and-mortar spaces

What does value mean to you?

For me, value goes beyond just price or quality. Over the past 4–5 years, I've become more mindful of the ethical, social and environmental impact of my purchases. I try to choose brands that focus on sustainability, social causes and diversity, like supporting eco-friendly practices or buying from under-represented groups. I also avoid brands that don't align with my political or social values.

How have your values shifted or changed in the past 18 months to two years?

My habits are influenced by where I live and I'm a very local person. When I started studying and working from home, I spent so much time in my neighbourhood and it was like my kingdom. Something really important to me is investing in my neighbourhood, investing in my local businesses.

I think I'm just more aware of what's happening in the world too. I started to consider things I hadn't considered before like how politics affects us.

How has your consumer behaviour changed as a result?

I try to give my money to the people in the neighbourhood. I love reading, for example, but I don't buy books from Amazon. After the pandemic, some of my friends opened a bookshop in my neighbourhood, but it's not just a bookshop, it's something that has meaning for the people living in the neighbourhood. They host talks and drinks there; it has a social impact on our lives. So, books are something I prefer to buy from them rather than Amazon.



STATISTICS

A quarter (25%) of consumers say they would stop using a brand that supported a cause they disagreed with, while 22% would stop if they showed poor environmental credentials, a fifth (20%) if the brand backed a political party they didn't support, and 15% if the brand had a poor record for D&I

Source: Future:Poll



Do you prefer shopping in-store or online?

I can't buy online. When it comes to shopping, I need to touch, smell and experience everything. There is a brand that I really like – Cos. I love the style, the shape and feel of the fabric. Half of my wardrobe is from Cos probably and I love the whole store experience. Cos is on one of the most beautiful streets in Lisbon; even walking there is super-nice. The experience in the store is beautiful. I know all the shopping assistants and you can't have this experience online. I love buying in-store.

What brand do you find yourself always going back to?

Something I would never change is my foundation. I am less price-sensitive and more loyal when it comes to skincare. I use Fenty Beauty; it has the perfect shade for my skin colour, which many other brands don't offer in Italy, so I'm very loyal.

Are there any brands that you used to think were good value that you feel you've been priced out of?

I used to fly with Ryanair a lot but it's not actually cheaper, at least for me. It has all of these tricky little policies and in the end it's never cheaper.

Analysis

What started as a crisis response has evolved into a permanent value shift. Brands need to listen to and learn from The Value Vanguard if they want to remain relevant and in tune with their customers

Glossier and Random Studio, France

Rethinking retail

Take, for instance, The Value Vanguard's stance on bricks-and-mortar shopping. E-commerce might be convenient, but consumers are left wanting more. Stores can fulfil a social desire for customers through exemplary customer service and community-building activations such as craftsmanship workshops or VIP shopping events. This is especially true for brands targeting Gen Z and Alpha customers, who are hungry for real-life experiences.

Rethinking physical spaces can also be an opportunity to experiment with 'hyper-community' thinking. While physical stores might struggle to compete with e-commerce when it comes to price comparison, investing in the local community, collaborating with local small businesses and offering discounts and offers for those living within a close radius can provide physical stores with an intimacy worth paying more for.

As consumers become increasingly conscious of value in terms of quality, stores or branded areas could also act as hybrid exhibition spaces for customers to experience the touch and feel of different materials and education centres that take audiences on a journey through a brand's supply chain.

Culture Clash

While workers' rights, DEI policies and environmental impact have come up time and time again, value extends to culture too. Unexpected collaborations such as financial services app Revolut and Spanish festival Primavera Sound can give traditionally 'stuffy' industries access to new audiences. The brands and businesses that think about value beyond the parameters of price will be the ones to maintain customer loyalty in an era of wandering eyes.

Pragmatic Ethics

The Value Vanguard are also rejecting outdated ideals of perfection in sustainability, loyalty and ethical consumption, instead adopting a more pragmatic and flexible approach to spending. Faced with financial pressures, this cohort acknowledge that small steps towards sustainability are better than none, and prioritise practical choices over unattainable eco-purity.

These consumers want to shop in a way that matches their personal values, but have limited time in their busy lives to navigate this. Businesses that can provide accessible transparency and show their ethical, social and environmental standards will appeal to consumers burnt out by the effort required to research every purchase. Simplicity, authenticity and honesty are the new benchmarks of trust.

Now is also a good time for brands to take stock of the language used when discussing sustainability. Consumers are better educated on greenwashing than ever, and sustainability is a term that has been used so many times it's lost all meaning. Our **Sustainability is Dead report** introduces a new lexicon designed to revive consumers from the depths of eco-fatigue and effectively communicate with The Value Vanguard.

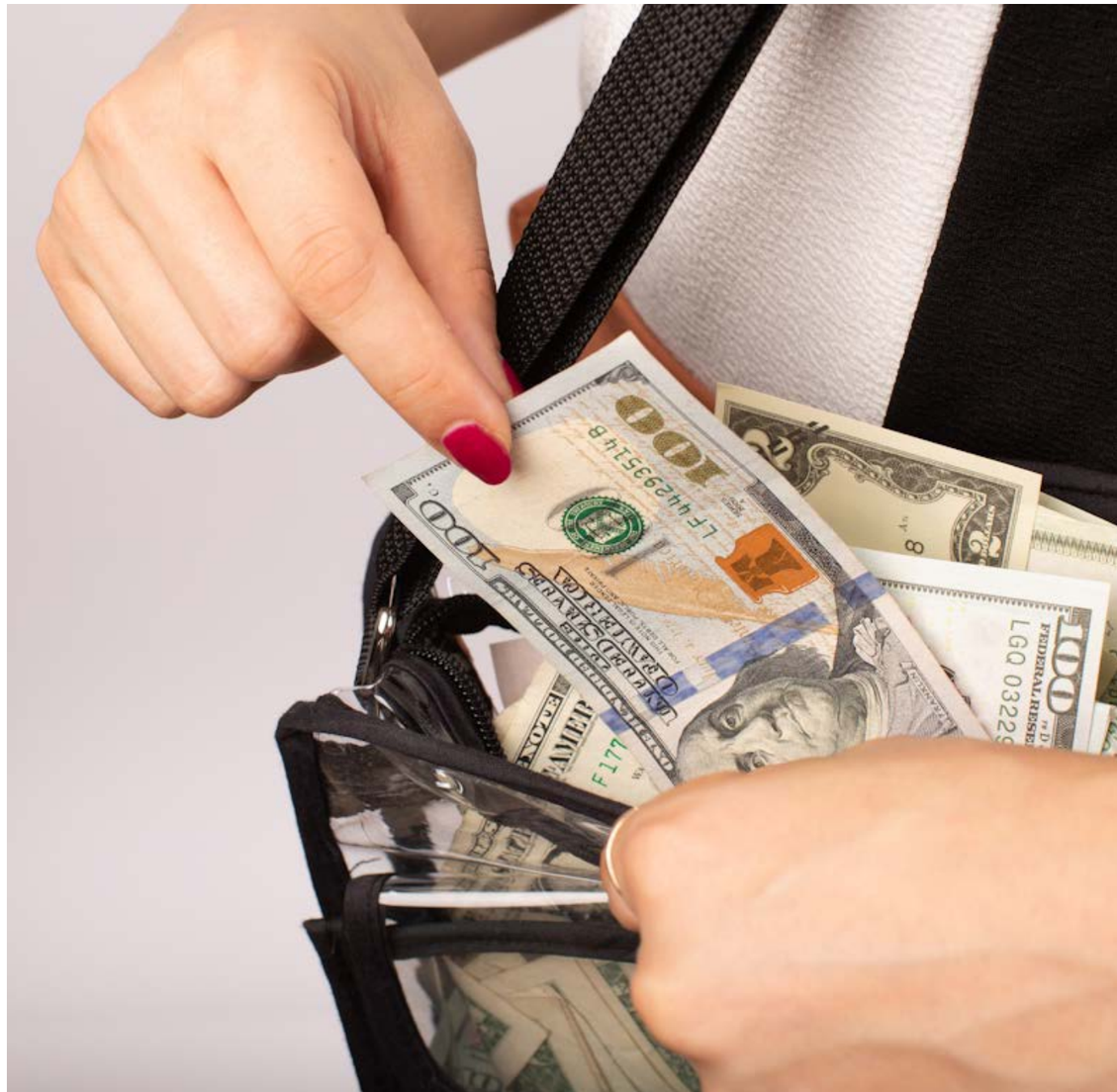
Unlocking Emotional Spending

Finally, spending habits are shifting towards experiences over possessions. Whether for travel or entertainment, consumers see value in memories rather than material goods. To unlock 'emotional spending' and loosen even the tightest of purse strings, businesses must offer products and services that are designed to enhance social connection and personal fulfilment.





Clockwise from top: Pleasing by Harry Styles at The Corner Shop, Selfridges, London, UK; MoneymBag$ by Mackenzie Freemire, US; Contiki Chateau Dinner Party, France



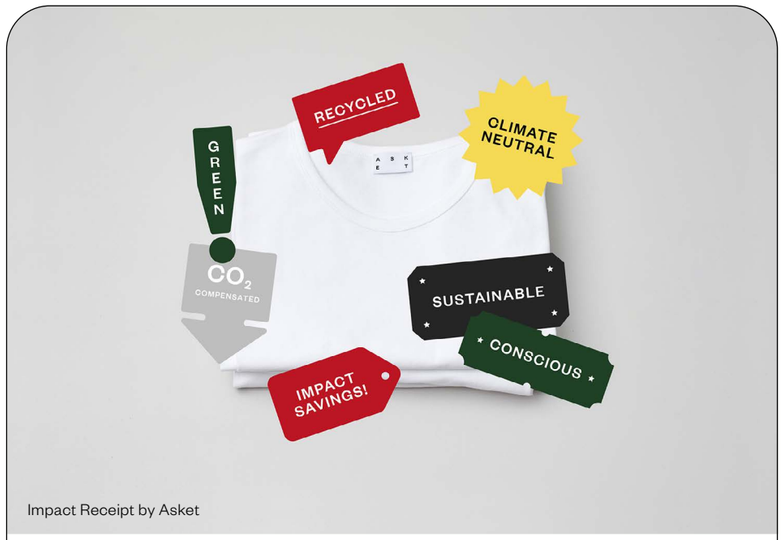
Strategic Opportunities



Tukisonga, Kenya

Curate community

Consumers are craving real-life experiences and brands that can facilitate social connection. Invite VICs (very important customers) into stores for exclusive events, host clubs or groups, or transform an area of your store into a third space for the local community



Impact Receipt by Asket

Owning up

Consumers are tired of the need to research every purchase. Win their loyalty by offering clear, honest communication about your brand's practices and progress – not perfection



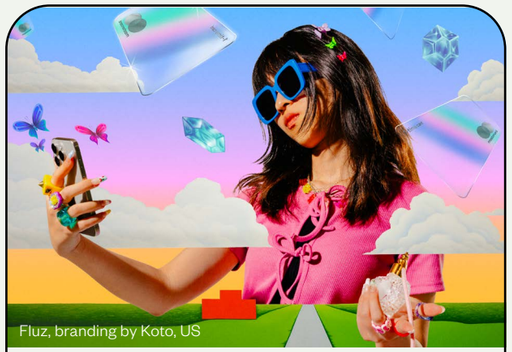
Sweden, Third Culture Deli, London

Independent spirit

Big brands can tap into small-business thinking. Embrace hyper-locality in everything you do and look for ways to collaborate with other local businesses to add value to your offerings and establish long-lasting brand loyalty

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

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Fluz, branding by Koto, US

New Codes of Value

In this new era of scarcity, new codes of value are emerging in which richness is expressed through rituals, and abundance is found in regenerative pursuits and deeper connections.


Klarna, Sweden

Gen Z's New Value System

Between self-optimisation, mischief and activism, Gen Z are rewriting the rules of value. Bulletproof's chief growth officer Andi Davids tells LS:N Global how brands can keep up.


Zalando and Adidas, Germany

Generations Report

From Baby Boomers and Gen X to Millennials, Gen Z and Gen Alpha, in this report we dive into what unites and divides consumers across generations.

Want to know what this analysis means for your business?
The Future Laboratory team can work with you in a number of ways, from in-person presentations to strategic workshops and bespoke reports.

If you want to find out more, say

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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 10 industry sectors.

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