THE : FUTURE : LABORATORY

Food & Drink Futures 2022



Cover: Embassy of Food, Dutch Design Week, The Netherlands. Artwork by **Paul Cochrane**

Introduction

‘Uncertainty’ has become the new normal, ‘recession’ the dominant word in our headlines, and ‘supply chains’, a term once found only in the specialist press, has now gone mainstream, with jokes about it appearing on TikTok

We have war in Ukraine to thank for this, as well as Brexit, Covid-19, the ongoing energy crisis and, of course, the ever-looming issue of climate change. But, as this report indicates, we also have the above to thank for turning the food and drink sectors into powerhouses of adaptation and change.

This, then, isn’t a story of struggling supply chains, bumbling Brexiteers or continuous energy crises, but one of ingenuity under pressure, innovation at its best and disruption at its most positive and powerful – to make things better, to design differently, and to create next-generation brands, products and services with purpose.

Think regenerative, think circular, think purposeful, but above all, think adaptive.

As The Future Laboratory’s strategic futures director Joanna Lowry puts it: ‘Food and drink businesses should be thinking about resources and resourcefulness.’ And, as we see here, in our 2023 Food and Drink Futures report, they are!

In our **Adaptive Appetites** macrotrend, for instance, we analyse the key market shifts and rising trends to be aware of – from Solar Sustenance and Staple Twists to Living Pantries and Frugal Influencers – while in our Trends Rising section we look at Re-engineered Indulgence, Tinned Tipples, Wit With Wines and Grotesque Grub – all examples of how scarcity, austerity and the need to be sustainable are driving innovation into new areas of opportunity.

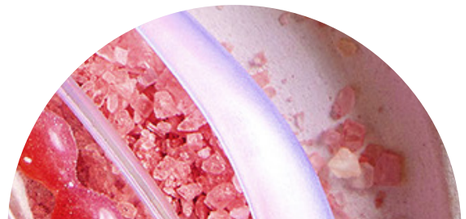
Already under way, these trends (page 10) and core market shifts (page 6) are set to continue and grow as household spending shrinks by 7% in the UK alone in the next two years, according to the Office for Budget Responsibility, while recession, that other spectre at the feast, looms in Germany and France – and indeed in mid-2023 in the US – as inflation continues to rise and take its toll.

Adaptation then, as a trend and a philosophy, is here to stay. But so too is austerity and a new sense of determination among consumers and innovators alike – to tighten belts, yes, but happily not to buckle down on imagination and invention, as this report indicates.

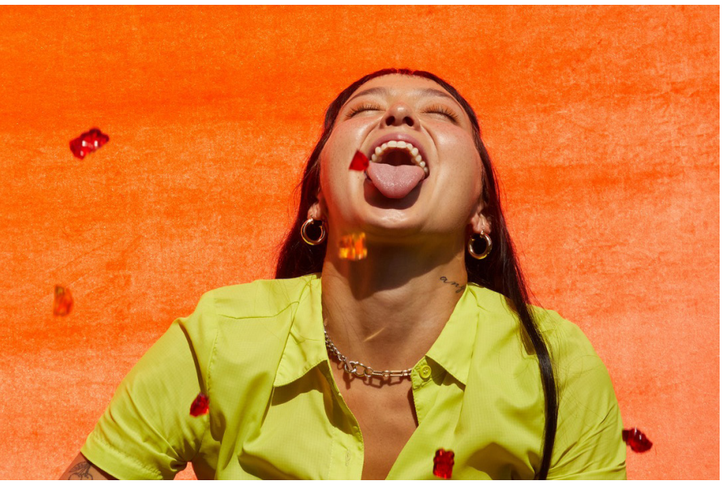
The Future Laboratory team.



Trends Intelligence
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Market Shifts

As inflation continues to drive down household spending across Europe and the US, food and drink brands are taking the lead by using everything from activist thinking to metaverse dining as a way to offer cash-strapped customers more for less

Activism Eating

In the face of widening inequalities and seismic social shifts, there's a growing movement to tackle food insecurity, which disproportionately affects minority groups. Research by **Feeding America** shows that 13% of people in the US face food insecurity since Covid, rising to 21% for Black people.

'Food is treated as a commodity in today's food system rather than a basic human right,' says Louise French, strategy director at The Future Laboratory. 'What role can brands play in creating fairer food systems for people and the planet, and in providing solutions that reduce systemic inequalities?'

Socially conscious chefs and restaurants are responding with initiatives designed to mitigate social issues and respect cultural food traditions. At New York supper club **Heart of Dinner** volunteers prepare meals for Chinese elders, paired with notes in their own language, while Cape Town vegan restaurant **Raw and Roxy** works with local Sackcloth people to bring this community's knowledge of medicinal plants to the table.

Others are taking an intersectional approach. Restaurant **Lil' Deb's Oasis** adopts radical inclusivity and LGBTQ+ fundraisers to support New York's chefs and food workers, while **Tall Grass Food Box** uses a community-supported agriculture model to support Black farmers to sell produce.



Hackney School of Food by **Surman Weston**, London

Indigenous Spirits

In a sector linked closely with heritage and provenance, spirits brands in emerging markets are reclaiming a share of a sector that has long been dominated by Western legacy brands. **Statista** data estimates that Mexico's alcoholic drinks market is expected to rise to £28bn ($33bn, €31bn) by 2025, while South Africa's alcoholic drinks sector is expected to grow by 26.3% in 2023.

'We've seen an explosion of interest [in sotol], which has naturally followed America's obsession with other Mexican spirits such as tequila, mezcal, bacanora and raicilla,' says **The Marfa Spirit Co**. The West Texas-based brand creates its Chihuahuan Desert Sotol together with heritage distiller **Sotol Don Celso** in Janos, Mexico, taking conscious steps in its production methods.

In Africa, small family-run distilleries are harnessing tradition, craft and unique local ingredients to service the burgeoning Indigenous spirits market. **Masau Spirits** uses locally sourced masau fruit as its central ingredient, hand-crafted and distilled by the Pofera family, who settled in Zimbabwe from Mozambique. The brand's methods and design reflect its dedication to circular values. South African drinks company **Distell** has launched its Amarula African Gin in Europe, using marula fruit, an ingredient native to Africa. Similarly, **Spearhead Spirits** is exporting its Vusa Vodka, made with African sugar cane, and Bayab Gin, made with fruit from the baobab tree, to international markets.



Bayab Gin by Spearhead Spirits, South Africa. Photography by **Jonathan Lavender**



The Love Fridge, Chicago. Photography by **Kathleen Hinkel**

Food Austerity Innovators

Households across the US, Europe and the Middle East are seeing daily essentials become unaffordable. The cost of cooking oil, for example, was up 36% in Yemen and 39% in Syria earlier this year, while the price of wheat flour jumped by 47% in Lebanon (source: **UN World Food Programme**). UK supermarket group **Iceland** has noted that it is losing customers to food banks, not competitors.

Innovators around the world are responding with initiatives that aim to mitigate the impact of rising food prices. Anti-austerity app **Ziscuit**, based in Atlanta, uses a reverse bidding system allowing customers to find groceries at the best prices, while Canada-based **Flashfood** 'rescues' food that would have been bound for landfill, selling it at heavily discounted prices. In the UK, **Olio** and **Kitche** help users reduce food waste through sharing.

Energy providers are also highlighting energy-efficient ways to cook food. Supplier **Ovo Energy** says 13.8% of the electricity we use in our homes goes on cooking our food, while a further 16.8% goes on keeping the food fresh. In response, both energy companies and grocers are launching guides and tips focused on recipes and cooking processes that are energy-efficient – in turn, reducing carbon footprints – such as budget dishes using slow cookers, batch cooking and choosing plant-based meals over meats.



Reclaiming RTD

De La Calle's tepache is a fermented probiotic drink that celebrates both traditional and modern Mexican flavours, as well as the spirit of street food

Betterverse Bites

With growing consumer interest in the metaverse – according to **Wunderman Thompson**, 74% believe it will affect the food and drink sector – chefs and restaurants are exploring new ways to create and sell food in the virtual realm.

'I have long said that food has a language of its own… and the metaverse only brings us closer together in a unique way in which we can share our culture and our food,' explains Supreet Raju, co-founder and CEO of **OneRare**, a Web3 platform that uses non-fungible tokens (NFTs) to provide meaningful access to culinary experiences and chef encounters.

Similarly, ghost kitchen and virtual restaurant company **Cordia Corp** supports independent chefs and restaurants with crypto-led marketing. Independent restaurants can tap into its Crypto Food Hall NFT Chef Collection to get access to chefs working across its virtual food hall. Some 20% of resale royalties from Cordia NFTs will be used to buy gift cards from independent restaurants that own them. These gift cards will then be distributed to members of the Crypto Food Hall Discord to use at physical eating establishments.



74% of people think the food and drink industry [items bought in a store or supermarket] will be affected by the metaverse

Source: Wunderman Thompson



Top: Supper Club is a Web3 eating community where users are rewarded for supporting their favourite restaurants; Below: Delli by Simon Beckerman, London. Photography by **Liam Hart**

Local Producer Communities

Community-based initiatives are helping to tackle food inequity and making it easier to find and buy groceries from local producers. Food and drink businesses large and small can play a major role in supporting these communities.

Created by **Depop** founder Simon Beckerman, **Delli** is a virtual food market that connects small-scale producers with customers via a drop model, launching limited runs of product via the app. Emerging in the wake of the pandemic, Delli aims to 'support the innovative pivots, the new localised networks and the fighting spirit that emerged amidst the storm'. In a similar vein to social media or shopping on Depop, users can follow their favourite producers to like, share and buy products, as well as placing pre-orders, helping to create a more intimate network between customers and sellers online.

The **Urban Food Forest** at Browns Mill in Atlanta is the largest in the US, and grows a range of fresh produce in an area identified as a food desert, bringing food equity to the urban environment. Meanwhile in Norway, **Powered by Ulsteinvik** is a future-facing vision of an urban growing landscape of community kitchens and generation gardens where citizens support each other and their independence through growing food.

Trends Rising

For 2023, brands are re-imagining what food and drink experiences can and should look like when innovators spoon a healthy dollop of awe and wonder on everything from tinned tipples to grotesque grubs

Re-engineering Indulgence

Imaginative ingredients are being used to break down and rebuild our favourite foods into guilt-free treats that don't sacrifice flavour and pleasure. With a recent UK study by salmon brand **MOWI** finding that 45% of people experience guilt after eating sugary snacks, this approach is challenging views on how treats are created and marketed.

Glonuts are vegan, keto and coeliac-friendly doughnuts that contain a single gramme of carbohydrates. They don't require baking, and use monk fruit as a zero-calorie, zero-carb sweetener, helping to redesign a junk food staple into something far healthier.

Created by start-up **Better Brand**, The Better Bagel contains double the protein and only a small proportion of the carbohydrates of the traditional version, with the sugar equivalent of a stick of celery. The company uses secret food science to completely re-invent how this product is normally made.

Inspired by the rise of lab-grown meat in recent years, **California Cultured** is taking a similar approach to re-imagining chocolate by growing cacao in the lab in a process that uses plant hormones from other foods, including tomatoes, coconuts and potatoes. The product is still in development and is part of a wider drive to ensure indulgent foods are not lost due to climate change – researchers predict that, by 2050, 90% of West Africa's cacao-growing country will become unsuitable for the crop.

• *Read more on LS:N Global*



Glonuts, US



Djuce Wines, Germany

Tinned Tipples

While for years canned wine has been associated with the cheap end of the market, climate change, resource scarcity and the cost of living crisis are accelerating a transition to tins in the wine industry. The rise of well-branded ready-to-drink (RTD) products in cans is helping to dispel consumer preconceptions, while the efficiencies of tins for cost and planet can no longer be ignored. Indeed, producing three 25cl aluminium cans instead of the typical 75cl wine bottle can help cut carbon emissions by 79%, says the **Financial Times**.

Newly launched direct-to-consumer (DTC) company **Canetta** is making a name for itself with its tinned natural wines, collaborating with a different wine-maker for each new release. Each can contains one and a half glasses of wine to encourage more moderate drinking.

Berlin-based **Djuce Wines** also promotes a moderate approach with its motto, 'drink less, drink better'. The company's 12 wines were each created with a Michelin-starred sommelier, helping to elevate the humble tin packaging and present a truly premium product to consumers.

London bar **Bo Kiri** focuses on the social and visual potential of tinned packaging. Billed as 'the first canned cocktail bar', the venue avoids selling perishable goods, instead proudly displaying more than 250 canned drinks in its refrigerators, including wine, beer and low- and no-alcohol options.

• *Read more on LS:N Global*

The US canned wine market is predicted to reach **£637m** ($725.5m, €729.2m) by 2030

Source: Globe Newswire



Hi Felicia, Oakland. Photography by **Patricia Chang**

Fine Dining Redefined

Restaurants are re-inventing the concept of fine dining, shifting the emphasis away from exclusivity and instead refocusing on community-orientated initiatives like France's **Le Saint-Hubert**.

Instead of competing with one another, a local community of chefs and gourmands support one another, sharing suppliers, foraging together and dining at each other's tables. The restaurant plans to open rooms upstairs to allow guests to crash after an evening of eating and drinking.

Californian restaurant **Hi Felicia** is also shedding stuffiness, boosting the social aspect of fine dining with an inclusive atmosphere and interiors that feel more like someone's house, with sofas, coffee tables and house plants. The restaurant's 12–14-course tasting menu is fine dining with a comfort food edge. 'My team, they're all artists and queer and non-binary people, and they love food and they love wine, and they love going deeper with me,' explains chef Imana, who uses only her first name.

Opened recently in New York, **Hags** is a fine dining restaurant for queers, by queers. It's built around the ethos of bringing friends, colleagues and communities together, building trust and community around eating, with a five-course tasting menu. The restaurant rejects exclusivity and creates a welcoming atmosphere for marginalised people.

• *Read more on LS:N Global*



Untitled designed by **Lefki Savvidou** and **Marios Karystios** for Vouni Panayia Winery, Cyprus

Pouring Wit into Wine

A new generation of wine-makers are casting aside old-fashioned stereotypes and infusing the wine market with unconventional comms that better align with younger consumers.

Maison du Vin, a new brand from **Off-Piste Wines**, uses labelling and branding to break away from the idea that French wine is complicated or pretentious. Created with specialist food and drink branding agency **Kingdom & Sparrow**, abstract line drawings create a relaxed modern feel, while tasting notes – simple, witty, knowing – appeal to younger drinkers' palates. It's all centred around the 'simple notion that wine should be fun', says the brand.

The **Vouni Panayia Winery** in Cyprus takes a social stance on the label of its Untitled wine, which is emblazoned with the statement: 'We are not drunk enough to survive the 21st century.' Created by Cypriot artist Lefki Savvidou, the statement will resonate with consumers embattled by ongoing social and economic uncertainty.

Canadian micro-winery **Plot Wines** is inspired by its founders' love of disco and funk music, with the simple strapline Good Times. Having met while DJing, the founders set out to create a brand that demystifies the wine sector for Millennial and Gen Z audiences, incorporating a playful and purposefully nostalgic look.

• *Read more on LS:N Global*



Party Pours

Austrian brand Poytonic serves an unexpected combination of wine and tonic water, offering a lighter, easy drink for parties. The brand uses design cues lifted from Disney, 1990s music videos and kitsch internet aesthetics to appeal to a younger audience

Grotesque Grub

With ongoing global crises piling on the social and economic pressure, we're witnessing a rise of nihilism and grossness – previously seen in beauty and luxury – spilling over into food and drink.

Canned water brand **Liquid Death** created a 45-minute horror movie, Dead Till Death, as a savage piece of marketing that flies in the face of the safe and sanitised brand landscape we're used to.

Sweets brand **Rotten Gummies** leans into nostalgic horror tropes for Millennials who grew up on Goosebumps books, with its cartoon packaging showing insects eating decaying flesh. The façade, while tempting adults and kids alike to indulge, hides a softer side. The gummies contain 70% less sugar than typical gummy sweets, while the packaging is home compostable, allowing it to return to the earth just as it says on the pack.

Meanwhile, Hana Betakova is the founder of **Rust Cakes**, a German independent bakery that specialises in creating the most bizarre looking cakes imaginable. The supernatural looking bakes – which are always vegan – incorporate colours from dark browns to earthy greens and strange squiggly icing patterns. Betakova strives to ensure that the cakes are not too sweet, in direct contrast to cutesy cake trends.

• *Read more on LS:N Global*



Horror Caviar by A24 is a recipe book brimming with dishes and essays inspired by gory movie releases, US



Front of House creates digital collectibles from the best bars and restaurants in a bid to support restaurants and make Web3 more digestible

Crypto Dining Clubs

The dawn of the Web3 era is creating opportunities for blockchain and cryptocurrency to forge and influence new food-centric communities online, allowing people to dine well and become part of a collective. These crypto dining clubs exist as decentralised autonomous organisations (DAOs) where members pool funds to create new physical dining and drinking experiences, co-created limited-edition products, and fresh produce.

Operating in New York and Portland, **Dinner DAO** uses Web3 tech to bring people together over food in real life. Prospective members must first buy a Dinner DAO NFT, with money raised pooled into a shared treasury for group dinners when the collective meet. Adding a layer of exclusivity, only eight memberships exist in each city.

Combining coffee connoisseurship and Web3, **Bored Breakfast Club** operates a community subscription service using blockchain to give members access to exclusive coffee blends. Created by digital design studio **Kléy** and Los Angeles-based roastery **Yes Plz Coffee**, access is gained by purchasing one of 5,000 NFTs.

Crypto-engineer and writer Nat Eliason takes cues from physical food co-ops, using the DAO model to help reduce the cost of quality food. **CowDAO** gives members access to discounts on high-quality meat by investing in a percentage of an animal rather than buying the whole thing. As the community grows, prices for the produce are expected to fall.

• *Read more on LS:N Global*

MACROTREND

Adaptive Appetites

As inflation and supply chain fragility send food and drink prices soaring, consumers and companies are adapting rapidly – embracing frugality, innovation and indulgence to navigate this uncertain landscape



Landless Food for Embassy of Food at Dutch Design Week, The Netherlands. Artwork by **Paul Cochrane**

The cost of living crisis across Europe and the US is powering a level of adaptation and acceleration in the food and drink sector in a similar way to how the 2020 pandemic and its associated lockdown measures ushered in new waves of unprecedented digital acceleration.

In the face of soaring inflation and fragile supply chains, food and drink businesses are now adapting to new technologies – from biotech to new kinds of solar sustenance – while consumers are re-evaluating priorities as budgets shrink, and food and drink become more precious and costly.

Against this backdrop, adaptation has become the order of the day, as economies, resources and tastes contract and force us to think, act and execute solutions differently.

‘There’s no silver bullet that solves all the problems,’ says Jo Barnard, founder of London-based design agency **Morrama**, which has developed sustainable packaging solutions for food brands including **Wagamama** and **Mimica.** ‘If there was, everyone would be doing the same thing and they’re not.’

Indeed, sustainability remains a high priority for consumers even as UK household incomes shrink by 7% and recession looms in the US, Germany and France. According to **Kantar**’s Sustainability Sector Index 2022, 65% of global consumers across 32 countries still want to shop in a way that’s better for the environment, but cost prevents them from doing so – all of which means that brands, while adapting shouldn’t look to cut corners when it comes to helping consumers save money, and the environment.

As The Future Laboratory co-founder Martin Raymond puts it: ‘Food and drink brands need to disrupt by extracting cost through the use of alternative materials, substitute foodstuffs, smarter data supply chain capture – but crucially by co-partnering with consumers themselves on how they can adapt and change their tastes to accommodate hitherto unknown grains, ingredients, drink types that may be unfamiliar, or on face value, unpalatable.’

adaptation

pronunciation: æd.əp'teɪ.ʃən

noun

: the process of changing to suit different conditions

: the process in which a living thing changes slightly over time to be able to continue to exist in a particular environment, or a change like this

: a film, book, play, etc that has been made from another film, book, play, etc

Pillars of Adaptive Appetites:

Frugality
Budget cuts mean doing more with less

Innovation
New ways of tackling old problems

Indulgence
Celebrating despite the difficulties

Adaptability
Changing practices and processes to meet new realities

Around the World’s Table is an art installation that depicts 100 metal totems that represent data on the global impact of food production and consumption by Pentagram partner **Giorgia Lupi**, US

Drivers

Uncertainty about supply chains, the cost of living crisis, sustainability mindsets and scientific innovations is driving the process of adaptation

Fragile Supplies

While much of the food crisis that has emerged revolves around logistics, in 2023 it will become one of supply, as economic and geopolitical factors massively disrupt production. Globally, an estimated 345m people's lives are in immediate danger from acute food insecurity, while 828m people go to bed hungry, according to the **World Food Programme**. This is a crisis that 'requires a comprehensive and well-coordinated approach to ensure complementarity and maximum efficiency in resource use,' says the **IMF**.

With the Russian invasion of Ukraine – the world's fifth largest exporter of wheat – disrupting annual sowing cycles, Ukraine president Volodymyr Zelensky warned on Twitter that 2023's harvest could be halved.

But the crises facing food and energy are closely intertwined. With farmers around the world using less fertiliser as prices soar – up 30% in 2022 on top of 80% rises in 2021, according to the **World Bank**, due to the rising costs of the energy needed to produce it – yields are forecast to fall, especially in countries heavily dependent on fertiliser imports such as Brazil and others in the LATAM region.

Global Driver: Dislocated World

A range of global factors encompassing war and the rising energy crisis are creating an incredibly complex situation for food producers, suppliers and manufacturers to navigate

What are drivers?

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

The Symbols of War by Nadia Iachini showcases the damage of conflict areas on the environment through a graphic language, The Netherlands



Above: Asda value range rebranded by **OurCreative**, UK; Right: Snoot by **Harriet Almond** is designed to reduce food waste through an aroma detector, UK

Global food prices were up by **8%** in October 2022 compared with the 2021 average

Source: UN Food and Agriculture Organization (FAO)

Indulgence Paradox

Despite this push to frugality in production, there's still a desire to take pleasure in eating, drinking and indulging. 'We're at a weirdly contradictory moment,' says Freddie Mason, creative strategist at UK-based food experiences company **Bompas & Parr**. 'On the one hand, people are beginning to indulge once again, with a certain degree of abandon in the joys of socialising and going out, revelry and fun. On the other, however, there's a great deal of financial anxiety around.'

And while The **World Bank** predicts that food prices will rise by 20% this year, consumers are still embracing micro-indulgences like chocolate, coffee or a bottle of wine. In a recent **Mintel** study, 56% of consumers said eating a premium chocolate bar is 'a good way to boost your mood'.

Yet the fact remains that while consumers will continue to crave indulgent foods, in the UK one in nine people are eating less to help pay for soaring energy costs, according to the **Money Advice Trust**, while rising ketchup prices from California to Croydon are turning what was once a staple into a much sought-after indulgence.

Global Driver: Evolving Demographics

Despite the financial difficulties faced, in the wake of Covid consumers are still looking for ways to celebrate



Green Guidance

As we've mentioned, consumers still consider sustainability a priority, even if they find sustainable choices difficult to afford. Despite this, confusion exists around food labelling, with 45% of Britons unsure about the meaning of 'best before' labels, according to social impact food platform **Too Good To Go**. 'Date label confusion is a major contributor to food waste at home,' adds co-founder Jamie Crummie.

When it comes to green guidance on packaging, **Morrama**'s Jo Barnard insists this should be central to product design: 'Make it really, really clear what the user is supposed to do with it at the end of its life. It should be so obvious. It's almost the first thing you see when you pick it up.'

We also need to redefine waste, according to Jamie Watson, strategy lead at **Taxi Studio**, an agency working with food and beverage clients such as **Coca-Cola**, **Byron**, **Costa** and **Carlsberg**. 'Waste is one of the biggest drivers of climate change when it comes to food. And as consumers are having to be even more cost-conscious, it's about time that people are not just more careful with their food – but more creative.'

Global Driver: Climate Change and Resource Scarcity

Shopper mindsets have shifted to prioritise sustainability, but there's a huge opportunity to continue to educate consumers in this area



Biotech start-up Brightseed delves into the world of phytonutrients and their power to revolutionise diets, US

Biotech Evolution

Food producers and scientists are urgently applying technology and data science to farming and production methods to boost yields and future-proof supply chains in a sustainable manner.

Using satellites and machine learning to safeguard the future of African farming against drought and climate change, the work of **NASA Harvest**'s Dr Catherine Nakalembe (our Futures 100 Innovators award-winner) is a testament to how the increasing crossover between technology and food production is key to securing abundant food supplies in the future.

Innovations in plant breeding are helping to create climate-resilient crop varieties, with US agriculture company **Corteva Agriscience**, for example, launching corn silage innovations that raise energy and milk production and adapted soybean varieties more suitable for higher latitudes in Europe.

While data science and AI continue to make conventional farming more efficient, minimise its environmental impact and improve water use efficiency, technology is also spurring the creation of entirely new forms of food with the potential to become future staples.

Global Driver: Accelerating Technologies

Scientists are presenting future-focused solutions that boost yields and mitigate the impact of climate change

Insight

In the face of shifting consumer expectations and multiplying supply chain challenges, companies are responding with solutions and initiatives that better align with people and planet

Solar Sustenance

A quarter of the world's electricity needs could be met by solar power by 2050, according to the **International Renewable Energy Agency (IRENA)**, and the sun is rising once again as a source of energy and inspiration in the food and drink sector.

Agrivoltaic solar farms combine green energy, food production and water conservation to mitigate solar energy's land use issue by growing crops and rearing livestock on the same land as solar panels. In hot, harsh conditions, this set-up even produces higher yields. One study by **Nature Sustainability** in Arizona found that cherry tomato production doubled, while a test plot in Kenya found that the shielding provided by the panels reduced water consumption by 47% and resulted in cabbages 24% larger (source: **University of Sheffield**).

Part restaurant, part environmental art experiment, Helsinki-based **Solar Kitchen Restaurant** is a pop-up concept where the sun cooks all the food. On sunny days it prepares barbecues and on overcast ones it serves salad or whatever can be cooked without heat, sparking conversations about energy and testing the adaptability of guests, who are at the mercy of the weather.

Similarly, **Heineken** created a solar-powered billboard in Rio de Janeiro that cools beer. While the company already uses 100% renewable energy in its production process, the goal of the marketing initiative was to make 50% of associate bars and restaurants fully powered by renewables.

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

Solar Energy Kiosk by Cream on Chrome uses solar energy to showcase how much power is needed to perform seemingly simple things like squeezing fruit, The Netherlands



Ecovado by Central Saint Martins graduate **Arina Shokouhi** and food scientist Jack Wallman, UK

Staple Twists

As supply chains suffer, producers are looking for alternative ways to create 'localised' staples – in doing so discovering new flavour profiles and non-Western solutions.

Nigerian company **Aldente Africa**, for example, makes gluten-free pasta using cassava, a root vegetable rich in vitamin C and minerals, adapting local produce to create unorthodox twists on popular ingredients.

Invasive species are also emerging as new flavours, creating something positive out of a damaging man-made environmental issue. Crab Trapper is a sustainable whiskey by **Tamworth Distilling** that derives its distinct briny taste from green crab, a species causing havoc along the New England coast. Similarly, **The Wild Beer Co** has released a new beer, Enso, created from wasps' yeast.

With some 50% of the world's calories reliant on just three grains, according to **FAO**, there is a resurgence of interest in drought-tolerant and nutritious ancient crops such as amaranth and fonio.

Founded by chef and author Pierre Thiam, **Yolélé Foods** is ramping up production to meet demand for its gluten-free flour, chips and pilaf products made with African grain fonio, expanding distribution across the US, while **Central Saint Martins** graduate Arina Shokouhi with food scientist Jack Wallman has developed the **Ecovado**, a replica avocado that combines broad beans, hazelnuts, apple and rapeseed oil to satisfy Millennial breakfast tastes.

75% of the global food supply originates from just **12** plant and five animal species. Only **three** [rice, maize, wheat] make up almost **60%** of calories from plants in the entire human diet

Source: WWF



New spirits company Mirchi is launching a natural spiced rum that prioritises real ingredients – and community, UK and Africa

Democratised Drinks

Localised shopping habits that emerged during the height of the pandemic are fuelling the rise of a new wave of community-based drinks brands.

UK-based **Bone Idyll**, an immersive distillery and bar, opened in Kingston-upon-Thames in July 2022 thanks to investment from local communities. In place of the traditional crowdfunded approach, founders were assisted by 50 local investors, allowing them to become an active part of the brand's success by embodying a truly **Neo-collectivist** approach to business.

Social spaces that reduce the focus on alcohol are also emerging, building inclusive communities and connections. In New Orleans, **Dream House Lounge** is an oxygen bar and wellness space designed for people of colour to interact without relying on alcohol as a social lubricant. Instead, a selection of non-alcoholic cocktails and a bottle shop allow customers to support Black-owned non-alcoholic brands including **Mocktail Club**, **Brooklyn Brewed Sorrel** and **Yoro**.

The trend is also surfacing online, supported by intrinsically decentralised Web3 platforms. Beverage brand **Taika** launched a project with online art collective **Friends With Benefits (FWB)** to create a new sparkling tea drink, neatly titled Mateverse, which involved testing different formulas with 100 FWB community members via **Zoom** tasting calls to gauge the community's opinion on which product to launch.

Community Cans

Zaddy's is a low-alcohol ready-to-drink gin-based brand that aims to create a sustainably minded community of drinkers who want to enjoy the social aspect of alcohol without the impact on the body and planet, US



Living Pantries

Extending the distribution and production of hyperlocal produce to the next level, living pantries are democratising access to fresh food and integrate it into the spaces where we live and work.

The **Patella Crescenda** is the latest offering from Dutch design studio **House of Thol**. This natural sprouting dish contains a reservoir reducing the need for daily watering, a simple design allowing users to grow fresh micro-greens at home all year round – as well as removing the need for a vegetable patch or daily maintenance.

Bringing fresh food to business environments, UK start-up **Square Mile Farms** creates and instals modular vertical farms for workplaces, boosting sustainability and wellbeing in spaces not traditionally associated with either. The systems can be fitted into spaces of any size, with plants and produce growing all year round.

Expanding this notion further outwards into urban environments and the community at large, the town of Andernach in Germany is part of the growing **Edible Cities Network**, a group of some 150 cities worldwide, from Havana in Cuba to Carthage in Tunisia, converting previously unused and overgrown tracts of land into community orchards and gardens. Citizens are encouraged to take part in maintaining the gardens, as well as to help themselves, free of charge, to the harvest.



Patella Crescenda by House of Thol, The Netherlands



Photography by **Anna Shvets**

Frugal Influencers

With annual inflation pushing up UK food prices by almost 12%, according to the **British Retail Consortium** and **Nielsen**, and an estimated 40m tonnes of food wasted each year in the US alone worth £189bn ($218bn, €217bn), according to the **US Environmental Protection Agency**, a new generation of 'foodfluencers' are helping consumers save money and stay true to their sustainability concerns.

Thai TikToker, Phattaradej 'Top' Luechai went viral in September 2022 by sharing bite-sized videos of his extremely frugal monthly meal preparation with his 100,000 followers of mostly middle-class Thais, helping them to build savings. Cooking all their meals on a tight budget of 4,000 baht (£95, $109, €109) a month, Top and his partner found that they had more money to spend on eating out.

Retailers can also help. With research by the **German Federal Ministry of Food and Agriculture** finding that private households account for up to 59% of food waste in Germany, supermarket group **Edeka** launched a food waste prevention initiative to help customers get the most from their shop, raising awareness of the issue and helping them feel the benefit in their wallets.

Extreme Experiences

With consumers dining out less often amid the cost of living crisis, it is more important than ever that restaurants provide more than a meal; unparalleled experiences and moments of escapism are the order of the day.

Focusing on pure entertainment value, multi-sensory design studio **Bompas & Parr** created a pop-up bar serving glow-in-the-dark sushi in Abu Dhabi, combining bioluminescent ingredients with ultraviolet light to create a unique array of sushi dishes in bright colours.

During **London Cocktail Week**, the studio re-invented poppers (a recreational drug popular on the gay scene) as exclusive upmarket cocktails at **The Standard hotel**, celebrating queer culture with a luxurious and hedonistic take on mixology. In Shanghai, **Taste of Dadong** bathes diners in blue light to turn dining out into a dream-like, almost psychedelic experience.

Elsewhere, **Restaurant 0** was created as a temporary dining space in Viljandi, Estonia, by design studio **Kuidas.works**. The team had only a week to create a space with zero budget and zero carbon footprint as part of local tv show **Restaurant 0**, using recycled materials for tableware and serving equipment, and locally sourced clay to create a communal table in the centre of the space.



Bompas & Parr's Forces of Nature experience marked the first time that diners could watch local produce being cooked from molten lava, Saudi Arabia

Foresight

By the 2030s, growing populations will necessitate a reset of our relationship with food, embedding production in architecture, creating individualised grocery shopping, forging new businesses and products from waste, and driving a new-found respect for soil

Metabolic Architecture

As the next evolution of living pantries, the concept of metabolic architecture will lead to food sources being embedded into our daily living spaces. This will range from community-embedded urban vertical farms to domestic spaces transformed into living eco-systems.

With this in mind, Dubai opened a 30,000-square-metre vertical farm – the world's largest – in 2022, that will be capable of producing over 900 tonnes of leafy greens each year.

Meanwhile, Singapore plans to produce 30% of its own food by 2030, with urban farms on carpark rooftops, retrofitted buildings and re-used outdoor spaces all playing a role. Shanghai's **Sunqiao Urban Agricultural District** will form a living food laboratory, with vertical hydroponics, algae farms and floating greenhouses in a 100-hectare urban farming district.

In the Arizona desert of the US, designer **Jessica Martin** created a rammed-earth structure designed as a refuge for humans, animals and plant life, with the potential for food production built into the structure of the building itself. As well as providing shelter from the harsh desert environment, the top layers of the building are packed with a mixture of local seeds. Over time, these seeds will either germinate or be eaten by local wildlife, providing a 're-seeding source for future vegetation around the site', according to Martin.

What is Foresight?

Foresights examine speculative future scenarios five to 10 years in the future. Building on the Insight section, they showcase new directions, divergence or developments



Papaya Chair in the Fruity series by Frank Jacobus, US

Wasteware

As the need to minimise our impact on the planet becomes ever more urgent, by the 2030s a host of businesses will emerge that use food waste as a raw material for production.

According to a 2022 report by **McKinsey & Co**, grocers and manufacturers could generate £69.8bn ($80bn, €80bn) in new market potential by building new businesses and products from food and by-products that would otherwise be wasted, while also cutting CO2 emissions by 4–9%.

Tokyo-based designer **Kosuke Araki** already takes food waste and recycles it into beautifully designed tableware including cups, bowls and glasses. Using his own household food waste, Araki has transformed some 315kg of materials into carefully crafted new items. Similarly, Austrian design studio **Barbara Gollackner** presented a collection of plates, bowls and cups made from industrial and personal food waste at **Vienna Design Week 2021**, highlighting the opportunity of using food waste as a raw material.

Restaurants will increasingly show guests the value of their food waste through circular initiatives. In Sweden, Gothenburg restaurant **Vrå** used rice starch, fish bones and oyster shells to create a bio-based terrazzo for making its own furniture: a dual-purpose side table and stool made by designer **Carolina Härdh**. Completing the cycle, leftovers from the production process of the biomaterial are used as fertiliser in the garden where the restaurant sources herbs and vegetables.

Wasteware by Barbara Gollackner in collaboration with Martin Kilga for Vienna Design Week

‘We in the global food system must ensure we don’t give up on progress because we are waiting for perfection’

Sustainable Markets Initiative



The Reclamation Project by **Margeaux Abeyta**, The Netherlands



Terra Nova by **Ryan Waterhouse**, UK

Sacred Topsoil

Long mistreated and taken for granted, topsoil will be revered and respected – with safeguards put in place to protect this precious resource as landowners and food producers finally merge Indigenous techniques with regenerative practices. Published in November 2022, a new action plan from the **Sustainable Markets Initiative** outlines key insights for scaling regenerative agriculture, helping to implement a shift in mindset while creating positive economic and environmental outcomes. ‘We must take action now to avoid more acute crises in the future,’ says the report.

This process is already beginning with innovations that will help shift mindsets to show respect for the soil. The **Terra Nova** is a soil-monitoring device created by design graduate **Ryan Waterhouse** at **Bournemouth University** in the UK. The hand-held gadget allows users to easily measure the moisture content of soil as well as levels of key nutrients including nitrogen, potassium and phosphorus. Data collected can be viewed on an accompanying web app, allowing users to track soil quality over time.

At **Dutch Design Week 2022**, creative designer and researcher **Gabby Morris**’s **Dish the Dir**t installation is designed to repair the relationship between the food society consumes and the soil it is grown in. Soil and food are presented side by side, along with a tasting menu evoking earthy tastes and smells, educating and empowering people with knowledge about why our soil is so precious.

Hyper-personalised Groceries

Advances in machine learning will drive the creation of hyper-personalised food services in the decade ahead. Just as digital platforms such as **Netflix** and **Stitch Fix** are harnessing predictive tools and data analytics to understand what customers want, hyper-personalised food services that anticipate our shopping lists and dietary needs will be a regular fixture by the 2030s.

AI-powered grocery delivery service **Hungryroot** is already pioneering this predictive approach to grocery shopping by helping to automate customers' orders based on their preferences with a system that improves over time, also helping to reduce household food waste.

Future iterations will go even further. At **Dutch Design Week 2022**, design studio **Nonhuman Nonsense**'s concept, **AI-Bert's Fresh Place**, envisages a supermarket run by artificial intelligence that shapes customers' shopping baskets based on their life experiences while taking into account ecological and societal factors, providing 'personalised products for life on a damaged planet'. Meanwhile, human-in-the-loop apps offer a different kind of personalisation, with platforms like **Buymie** now enabling customers to call on local personal shoppers to pick up their orders from stores, allowing them to note specific preferences, get a call from their personal shopper if items are out of stock, and have orders fulfilled in as little as an hour.

Fig is an app that allows users to personalise their shopping lists based on their individual dietary requiremenst and food intolerances, UK

Image credit to be placed here

71% of US consumers expect companies to deliver personalised interactions

Source: McKinsey & Co

Strategic Implications

With the cost of living crisis hitting consumer wallets and multiple global factors affecting supply chains, food and drink brands will need to embrace innovation and adaptability to thrive in 2023 and beyond



Baovan restaurant by Clap Studio, Valencia, Spain

Strategic Actions

As global food production and ingredients are re-explored and re-engineered, brands and businesses must adapt to these new innovations to redefine what we eat and how we eat in the future

Redefine indulgence for cash-strapped customers

The financial difficulties facing many consumers are paradoxically making moments of indulgence in food and drink more important than ever. Create offers that bundle little luxuries with essential items, presenting them as a reward they deserve rather than something unaffordable or off-limits. Look for opportunities to build loyalty and create feel-good moments amid the financial gloom.



Excalibur XO by Bompas & Parr, UK

Make sustainability affordable and accessible

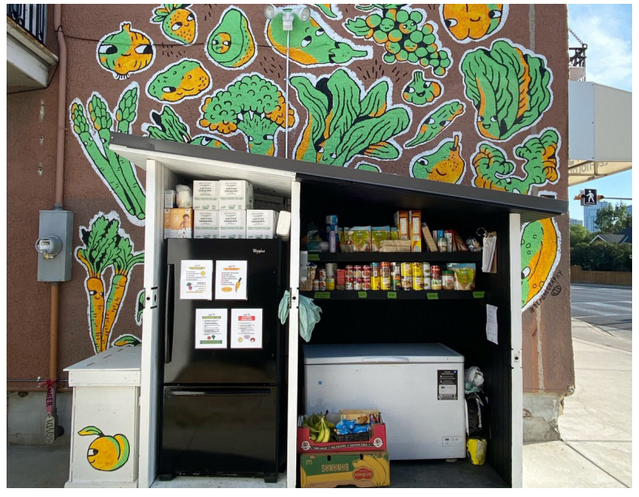
With cost proving to be the biggest barrier to shopping sustainably, consider how you can cater for consumers' desire to shop in a more eco-friendly way. Initiatives that help reduce food waste can also show the dual benefit of saving customers money. Consider the entire lifecycle of packaging – including where the product is likely to be consumed – and make sure that it's immediately obvious how and where it should be recycled or responsibly disposed.



Eager rebranding by **Ragged Edge**, UK

Tap into alternative and local supply chains

Amid struggling supply chains and consumer sustainability concerns, consider tapping into alternative supplies. This could include harnessing solar energy, creating a new product from an invasive species, using an alternative grain, approaching local producers or urban vertical farms, or exploring opportunities to use waste as a raw material.



Calgary Community Fridge, Canada

Thought-starters

With increasing awareness of the need to adapt and innovate, food systems and businesses must embrace new technologies and changing flavour profiles for long-term planetary and societal betterment

Build cultivation spaces

With Living Pantries and Metabolic Architecture poised to reshape cities and urban spaces, how could your brand give customers practical tips and advice on growing and cultivating herbs, fruit and vegetables?



Sik Mul Sung designed by **Unseenbird**, South Korea

Embrace sustainable technologies

As the need to minimise food waste becomes ever more urgent, how could your brand use data and AI forecasting to ensure more accurate ordering of perishable food and drink? What apps or platforms could you partner with to ensure surplus food and drink does not go to waste?



Photography by **Anna Shvets**

Create sensorial experiences

With increasing numbers of consumers choosing to abstain from alcohol, what could your brand do to build inclusive communities and foster connection? How could multi-sensory designs, immersive art and Instagram-friendly moments build excitement and newness around sober nightlife?



Moving Brands, UK

Related Macrotrends

2021

Elastic Brands

Forget advertising campaigns and branded content. All eyes are on the inner workings of your business – and how seamlessly it can adapt



Kiel Fragments by **Sven Hauth**

2021

Redemptive Diets

Brands and consumers are uniting to build future-fit food systems that support changing social values, protect precious resources and secure supply chains



Food is Power by Sky High Farm in collaboration with Playground Coffee Shop and Quil Lemons

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



Utopia is Possible by Kenzo. Photography by **Vicki King**

2022

The Paralysis Paradox

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



Zünc Studio for The Future Laboratory, UK

Strategic Worksheets

This strategic worksheet is to help you apply this macrotrend to your business

Victoria Ling for The Future Laboratory



Prioritisation

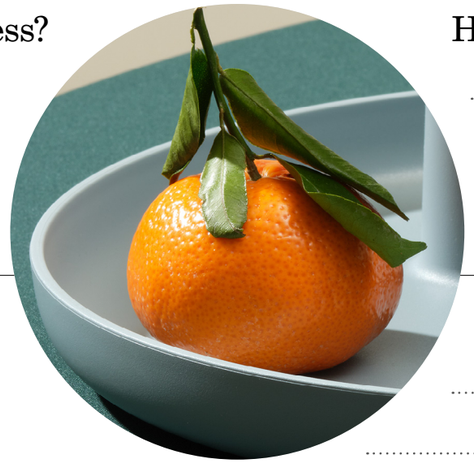
Consider the following:

Which human need is most relevant to your brand/business?

Attainment | Belonging | Curiosity | Identity | Purpose | Security | Fulfilment

Which driver will have the most impact on your brand/business?

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



Influence

Consider the following:

How will this trend affect how you fulfil that need?

What impact could these drivers have on the business?

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

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

How could you apply these insights to your business?

Which foresight scenario is your company least prepared for?

What is most surprising about this foresight scenario?



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





01 Culture

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

How do we add value to culture?

What will our consumers pay more for in the future?

02 Category

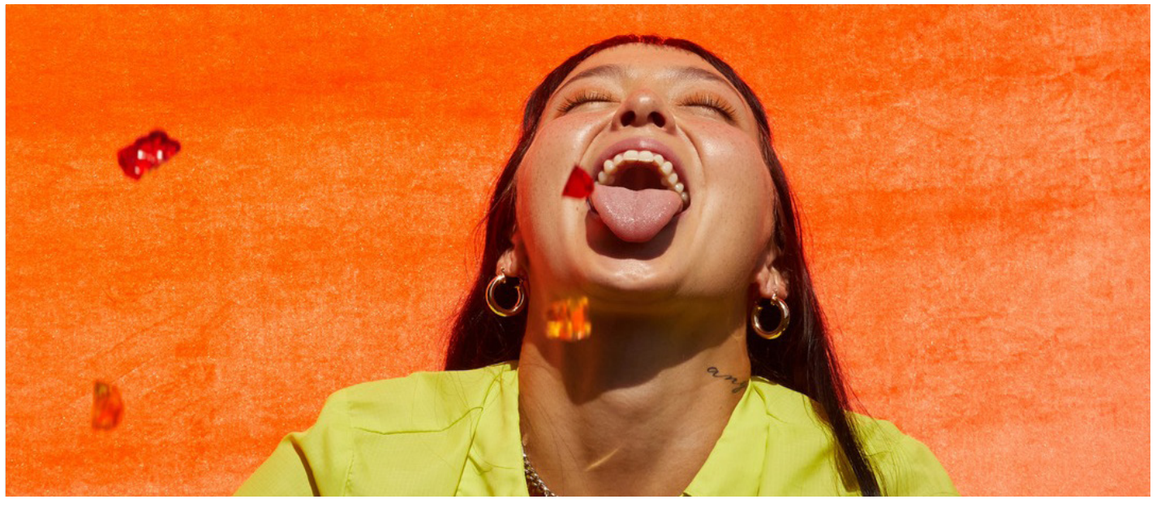
What's our greatest opportunity?

How is the competition evolving?

How can we differentiate?

Clockwise from left to right: Eager rebranding by **Ragged Edge**, UK; Family Kitchen & Shop Kew Gardens by **Mizzi Studio**, London

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





03 Consumer

What's our greatest opportunity?

How is the competition evolving?

How can we differentiate?

04 Business

What are our biggest challenges?

What part of the value chain will add the most and least value?

What are the strengths of the brand in this future?

Clockwise from left to right: Behave, US; Delli, London. Photography by **Liam Hart**

Planning

YEAR 1

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

YEAR 2

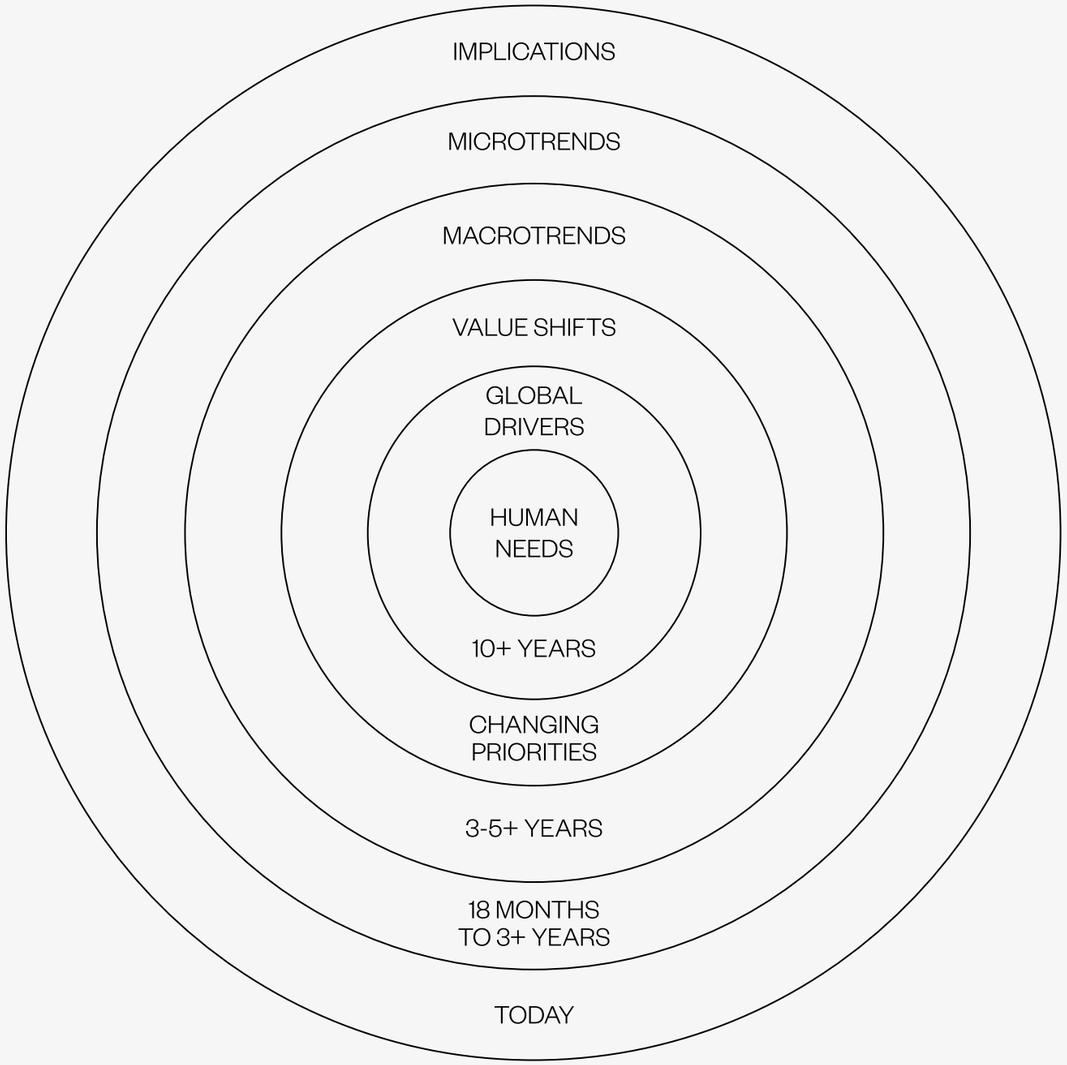
In three years, how will this macrotrend change the brand?

YEAR 3

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

Methodology

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



The Future Laboratory's proprietary foresight methodology

Introduction

Strategic foresight is the most valuable tool you can adopt to identify future prosperity. Despite our reputation for getting it right, we can't predict the future. There is no crystal ball.

However, our methodology enables clients to interpret and frame all their decisions about future risk within a brand, consumer or organisational context that is provable, practical and minimises uncertainty.

We do this by understanding the influence of six global drivers causing profound, consistent – and therefore relatively predictable – change.

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

This leads us to identify emerging macrotrends and microtrends, and ascertain what their implications are for the future landscape.

Futures Taxonomy

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

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



01 Human Needs

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

02 Global Drivers

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

03 Value Shifts

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

04 Macrotrends

The cultural manifestations of new and emerging attitudes worldwide

05 Microtrends

Influential short-term signals indicated by innovation

06 Implications

Future implications for brand and business growth



The Seven Human Needs

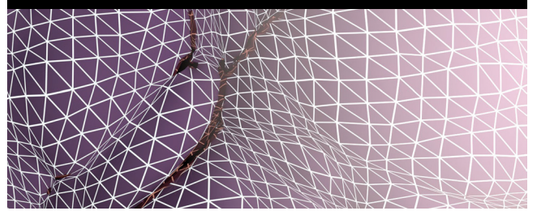
The seven human needs are timeless and universal. Based on a value system that supports human nature's physical and emotional programming, each human need is of importance to us as individuals and together they form the foundation of society as well as that of our methodology:

Why they matter:

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

The Seven Human Needs

Security

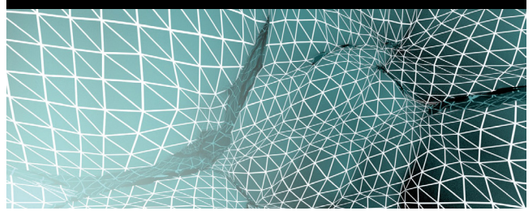


At the core of humanity is a fundamental need for structure, control, certainty and stability. It is a basic human survival instinct to protect ourselves and our loved ones from perceived physical, emotional and economic threats

KEY ELEMENTS

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

Fulfilment

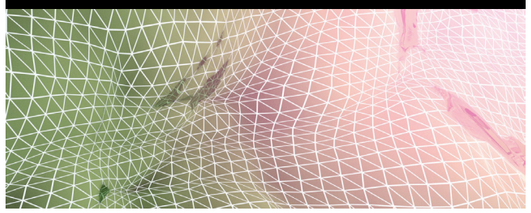


There is a human desire to direct our own lives, to create forms of freedom, and to find deeper meaning and balance in life. It is the psychological need to fully realise our personal potential with the resulting feeling of satisfaction

KEY ELEMENTS

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

Belonging

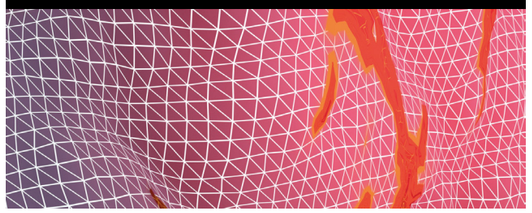


It is a social need to be physically connected to a group of like-minded people. We have an emotional urge, on an individual level, to create support systems and relationships that provide us with acceptance and approval

KEY ELEMENTS

Nationalism, Tribalism, Roots, Conviviality, History, Culture

Curiosity

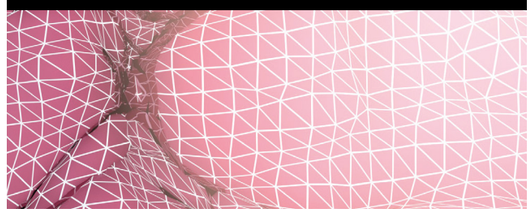


To both create and co-create makes us push the boundaries of what is ultimately humanly possible. Our in-built intuition makes us inquisitive beings with a shared inclination to discover or challenge the norm

KEY ELEMENTS

Exploration, Education, Connoisseurship, Discernment

Identity

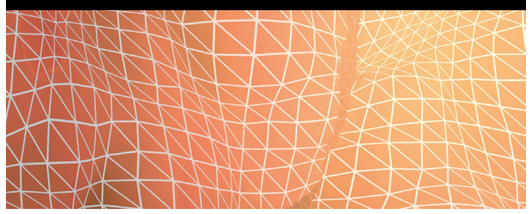


We have a need to distinguish our character or personality from others and to feel unique and respected for who we are. We build our sense of who we are through a personal exploration of gender, sexual orientation, ethnicity and age

KEY ELEMENTS

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

Attainment

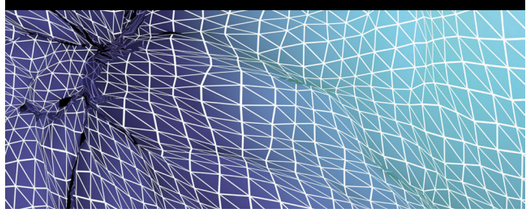


All human beings need to feel respected and recognised among their peers, which drives the desire to constantly express our significance and success, our knowledge and tastes, with our achievements often reinforced through the acquisition of symbolic goods

KEY ELEMENTS

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

Purpose



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

KEY ELEMENTS

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

The Six Global Drivers

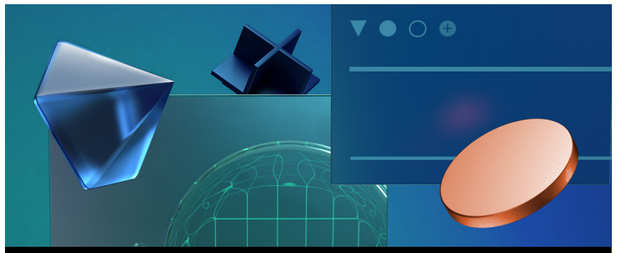
Global drivers represent the cultural, social, economic, political, technological and environmental eventualities reshaping the world we live in. They are factual, objective and long-term structural forces that are pervasive, powerful and transformative.

Why they matter: What's next

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



The Six Global Drivers



Accelerating Technologies

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



Climate Change and Resource Scarcity

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



Dislocated World

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



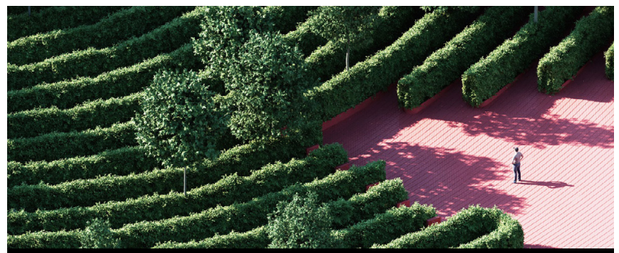
Global Versus Local

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



Evolving Demographics

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



Urban Mindset

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

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



The Value Shifts

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

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

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

Why they matter: What to plan for

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

Macrotrends

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

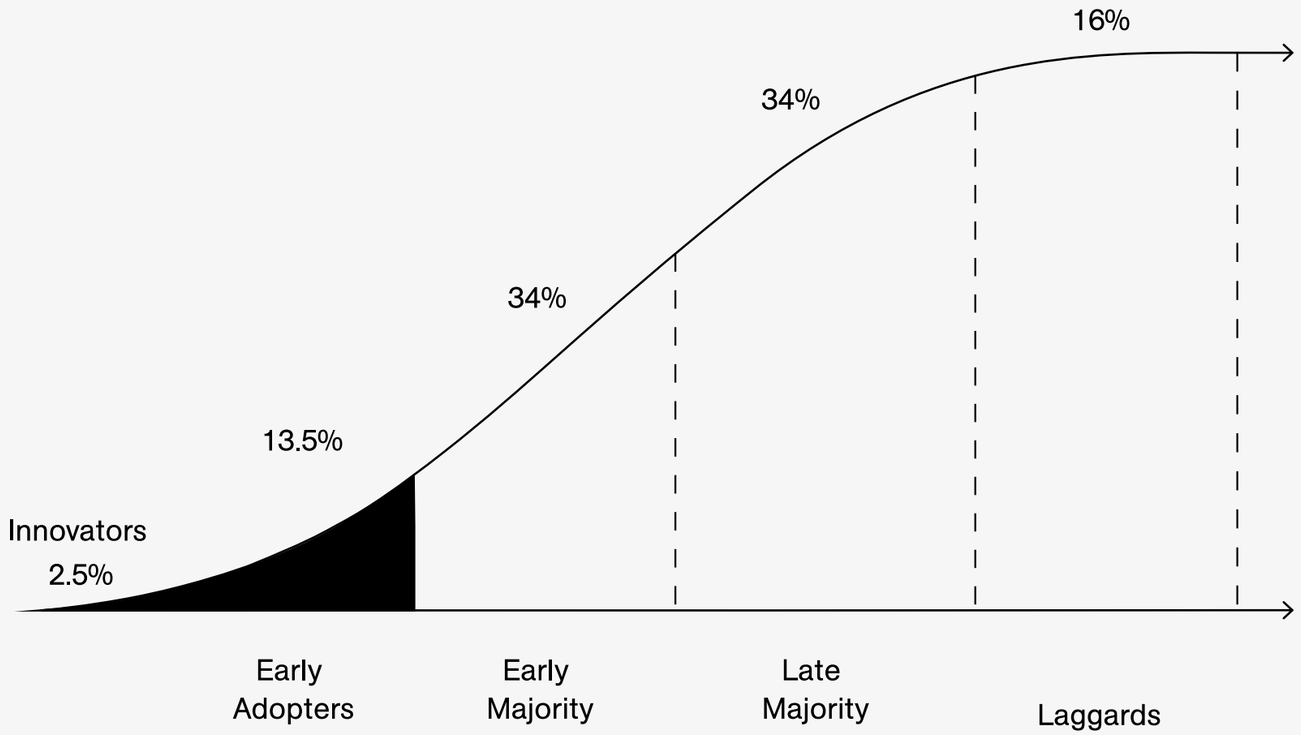
Why they matter: Where to play

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

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

The Diffusion of Innovation curve

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



DISCOVER MACROTRENDS



Microtrends

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

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

Why they matter: How to win

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

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

Strategic Implications

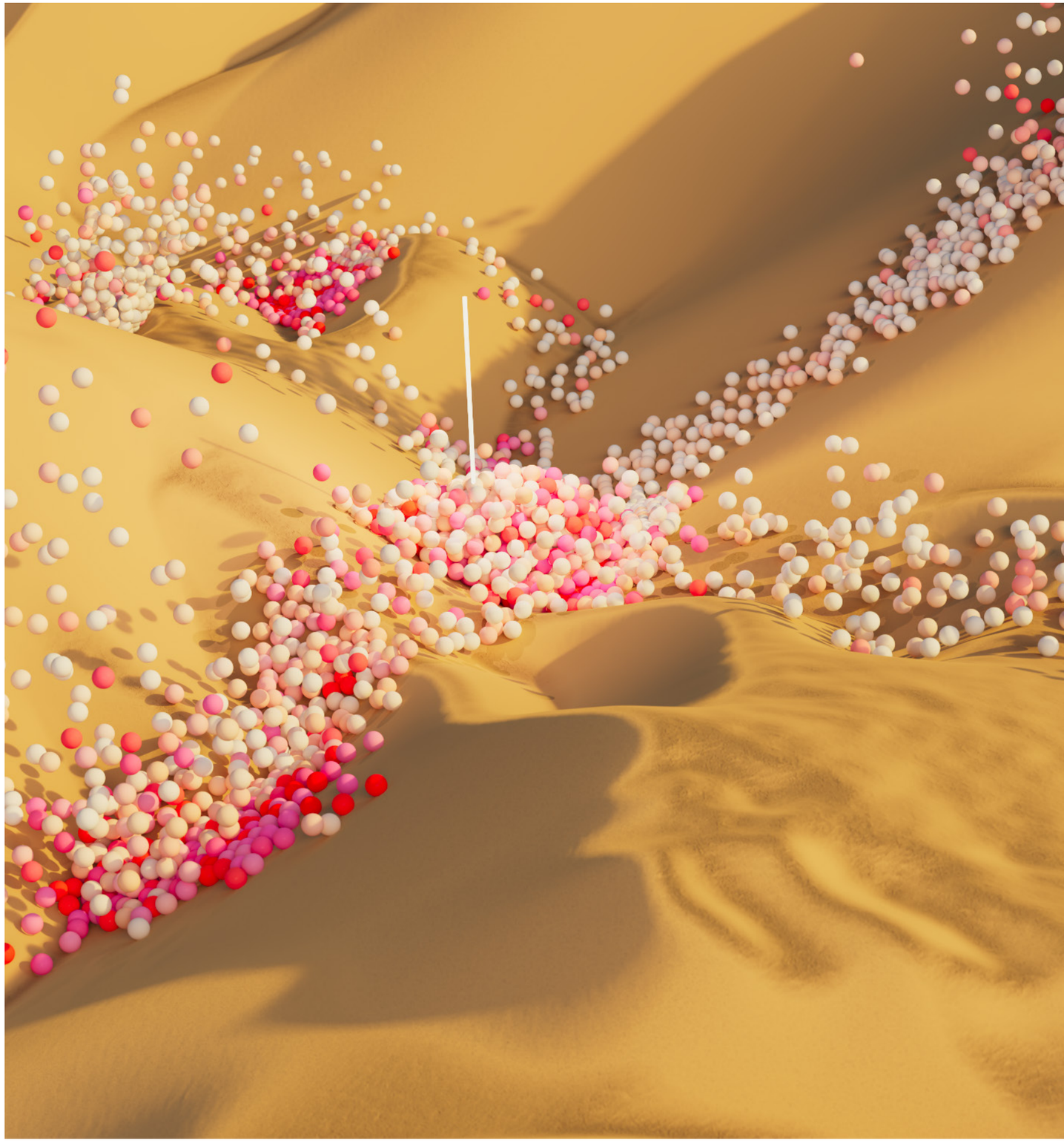
As you can see, we don't predict the future. But through Strategic Foresight we can track global shifts to understand the key drivers of change and mine the evidence of today's world to preview what the future could look like.

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

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

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

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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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