LS:N GLOBAL THE : FUTURE : LABORATORY

Future Five 2025

Unpacking the most important topics of tomorrow, relevant for today

Introduction

The world is changing at an unprecedented rate. Technology is advancing daily and the cultural and demographic landscape shifts so rapidly that comprehending the present is challenging enough for brands and businesses, let alone planning for the future.

That's where The Future Laboratory and our LS:N Global content comes in. This Future Five 2025 report is a trend briefing designed to help you navigate the key insights, opinions and future opportunities crucial for your strategic planning in the year ahead and beyond.

Future Five builds on LS:N Global's Topics section, which includes insight, foresight, trend forecasting and strategic analysis across the key areas where we believe brands and companies should be focusing their attention.

At the core of this report is a unifying concept: the search for balance. Through five carefully curated topics, we emphasise the importance of harmonising the vast potential of technology – particularly AI – with the irreplaceable aspects of human creativity and emotion, as well as the need to embrace a holistic approach to wellness and balance progression with adaptability in designing future spaces.

These are the five topics we think are crucial for brands to understand and address in 2025:

: **Artificial Intelligence**: As humanity embraces an inevitable partnership with AI, we focus on the need to create a protopian future in which technology empowers rather than enslaves us.

: **Future Spaces**: We explore how wellbeing, sustainability and technology will all be key in creating adaptable, people-centric and future-proof spaces that allow communities to thrive.

: **Gaming**: As the gaming community extends beyond the stereotypical image of the white, male gamer, we consider the industry's diversity challenges and highlight opportunities for engaging Gens Z and Alpha.

: **Longevity**: With global spending on wellness spiralling upwards, we spotlight the need to eradicate the historic gender health gap while addressing trends such as GLP-1 weight loss drugs and consumer demands for elevated wellbeing experiences.

: **Sustainability**: We emphasise the need for brands to up the ante in their climate activism, creating tangible positive change in the fashion and luxury industries rather than merely minimising harm.

We hope this report provides ample insight and inspiration as you continue to develop your strategies for the future. On LS:N Global you'll find additional news stories, microtrend and macrotrend reports on these topics and many more, including the cost of living crisis, the future of work and mobility, and the latest shifts in home, family life and consumer identities.

Use your LS:N Global membership to delve more deeply into all of these topics and more. If you don't know your login details or wish to set up a new membership, email hello@thefuturelaboratory.com. Or if you'd like to explore what these emerging trends and topics mean specifically for your business, we'd love to hear from you.



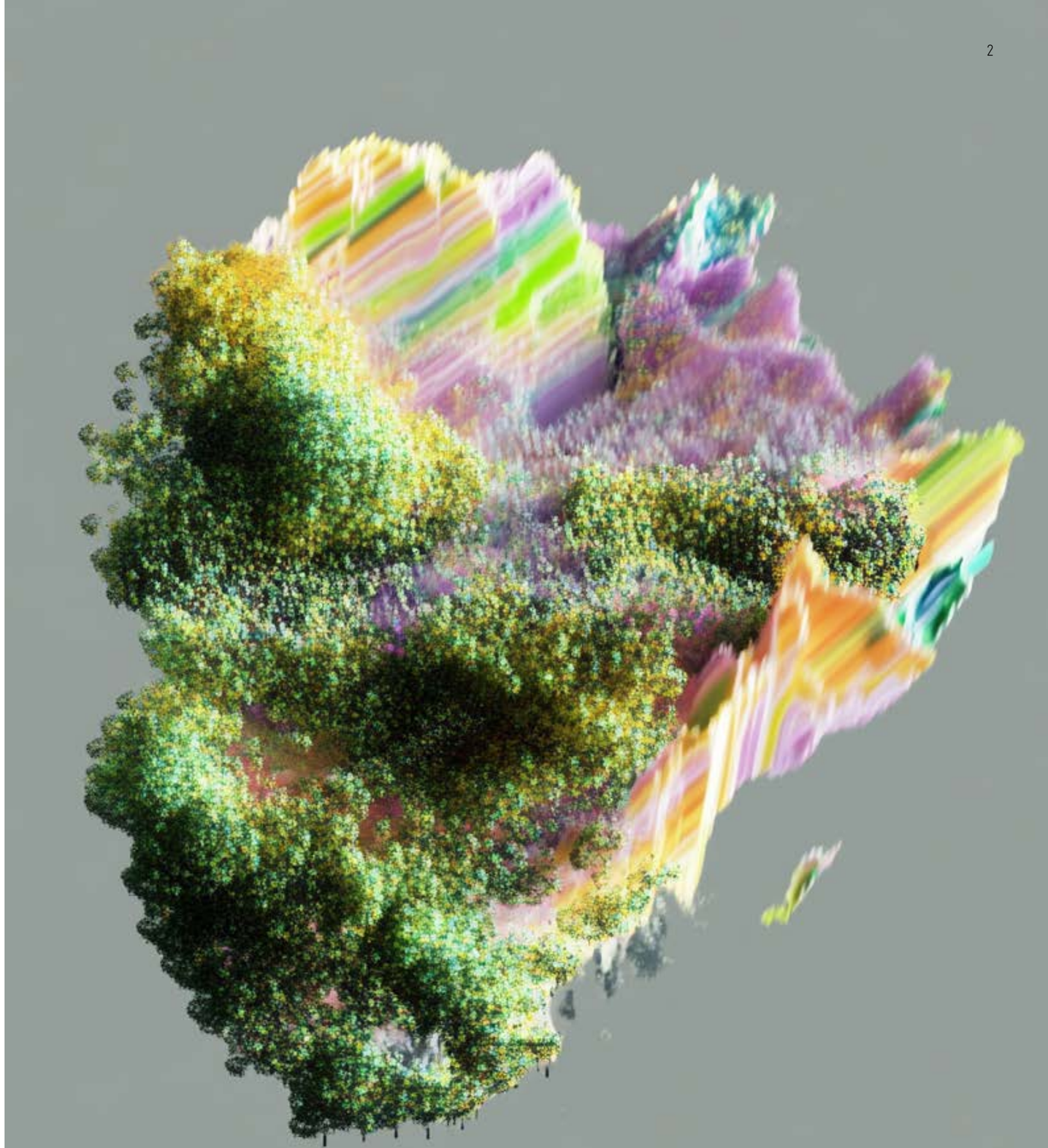


Trends Intelligence
powered by LS:N Global

LS:N GLOBAL

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Cover: Google DeepMind; Above: AI imagery by The Future Laboratory, UK

Artificial Intelligence

As AI continues to dominate tech innovation, it becomes essential to consider how our inevitable partnership will shape the future. We predict the dawning of The Synthocene Era, a protopian near future when humans will embrace synthetic intelligence and be supercharged, not enslaved, by AI

In the shorter term, by 2025 we expect wider adoption of empathetic AI that acts as a companion and mentor. Despite Apple Vision Pro's commercial failings, this will inspire entertainment brands, retail brands and beyond to explore spatial computing's capacity to create unique and differentiating moments that wow consumers.



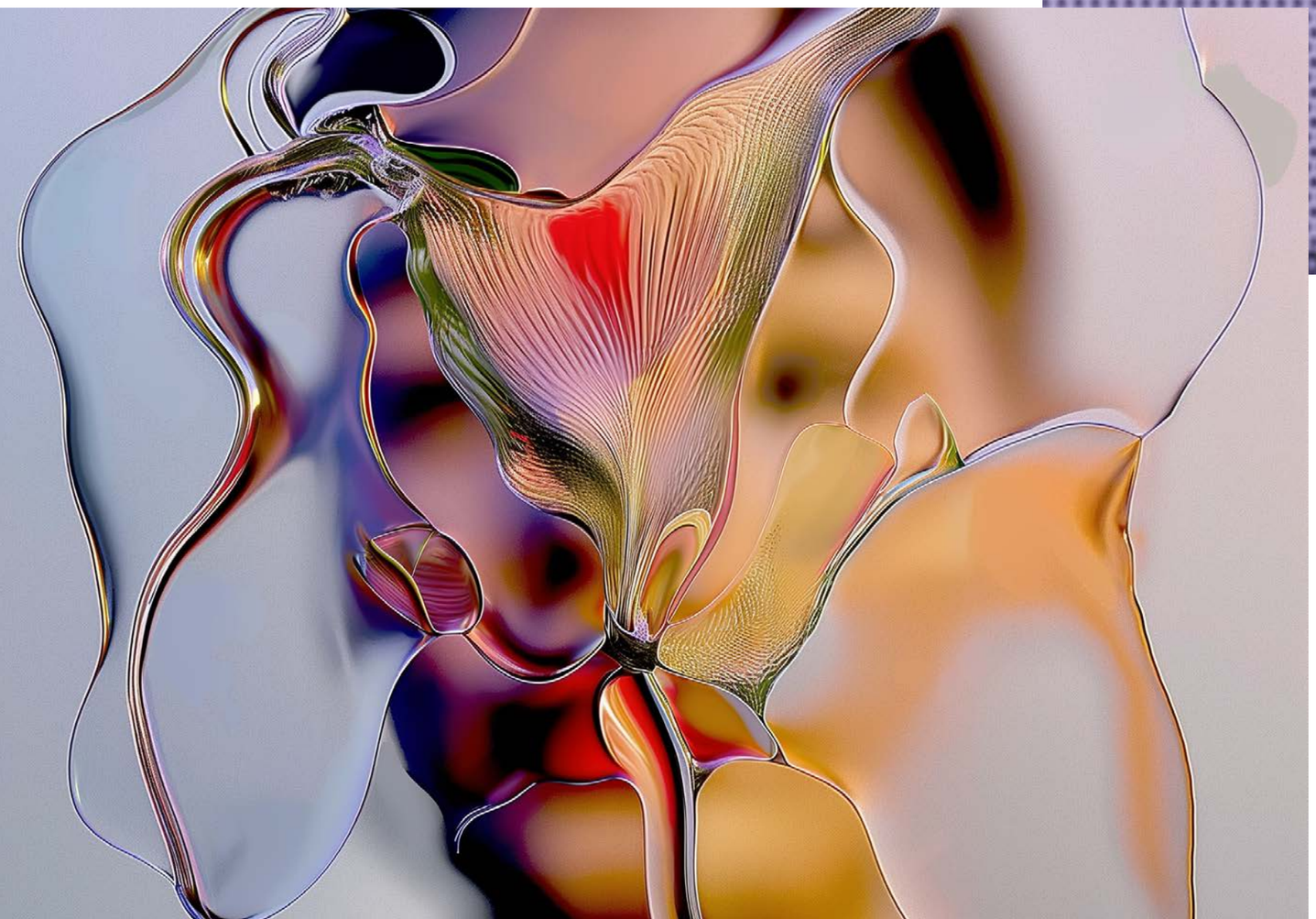
AI imagery by The Future Laboratory, UK

Welcome to The Synthocene Era

Today, the term ‘intelligence’ frequently comes with the prefix ‘artificial’. But, as humans harness advancing technologies – from AI and quantum computing to biotech and genetic engineering – what are the prospects for human intelligence in 2025 and beyond, and what does this mean for the way individuals think, behave, work and live? We believe it is time to acknowledge the beginning of a new synthetic era, powered by our inevitable partnership with AI, and to begin building towards a protopian future where humans are supercharged, not enslaved, by technology. During this Synthocene Era, Expanded Humans will be empowered by the synthetic layers and intelligence of technology as they find new solutions to the biggest macro-threats facing humanity and navigate the day-to-day challenges of life with added seamlessness, confidence and individuality.

This era is already upon us, with AI-powered solutions that are better for people and the planet beginning to abound. Chilean food tech company NotCo, for example, recently became the country’s first unicorn when it was valued at £1.17bn ($1.5bn, €1.39bn). NotCo uses AI to find unexpected combinations of plant-based ingredients to create healthier and more sustainable alternatives to animal-based products. Synthetic technology is revolutionising healthcare too. L’Oréal is partnering with the University of Oregon to use its latest skin technology to create customisable skin grafts for burn victims and patients with skin diseases. Investment banking firm **Morgan Stanley** forecasts that, over the next decade, the use of AI in early-stage drug development could translate into an additional 50 novel therapies worth more than £39bn ($50bn, €46bn) in sales.

In The Synthocene Era, technology will also empower us to live more productive and healthier everyday lives. Roblox has rolled out an AI translation model that converts text chats between 16 different languages, allowing users all over the world to converse effortlessly. Elsewhere, OpenAI CEO Sam Altman and author Arianna Huffington are both supporting the launch of Thrive AI Health’s personal AI coach, which offers ‘real-time nudges and recommendations unique to you that allow you to take action on your daily behaviours to improve your health’. As technology becomes more human than ever before, we must pierce our fear bubbles about AI and embrace innovations like these that enhance our human premium.





Lab Insight

Alice Crossley

senior foresight analyst

‘We are moving past the fearmongering around AI as a threat to humanity and instead considering how this technology can be used to improve the human experience. Businesses that enhance this synthetic partnership and look to the opportunities in optimisation as well as automation will lead The Synthocene Era’

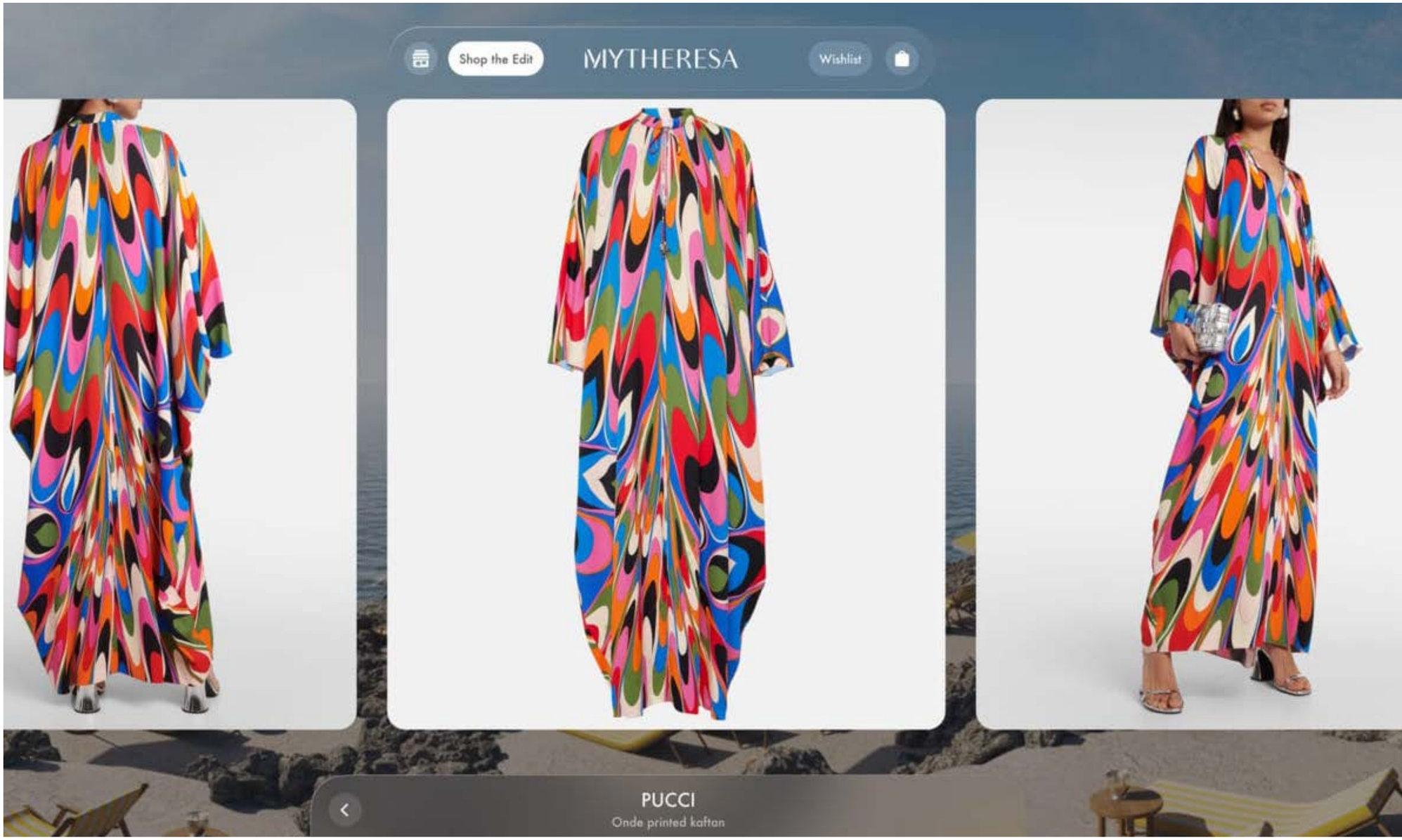
Above: Google DeepMind; Left: AI imagery by The Future Laboratory, UK

Supercharged Spatial Computing

Apple launched the Vision Pro mixed reality (XR) headset in February 2024, hailing the dawn of a 'new era of spatial computing'. For the first time, it claimed, consumers could access a spatial computer that can layer digital content onto their physical surroundings and immerse them in surround sound, while they intuitively control their blended reality with hand and eye movements.

Hampered by its lofty price tag of £3,499 ($4,490, €4,155), Apple halved its global sales forecast mid-way through 2024 (source: **Ming-Chi Kuo**). But while the Vision Pro can't be hailed as a commercial success, its launch has highlighted the potential of spatial computing in creating differentiating and immersive moments that wow consumers. Disney, identifying the potential for entertainment brands, is making 150 films available in 3D on the Vision Pro, while NatWest has made its banking app compatible to consider how it 'could allow customers to visualise their finances in a more immersive way' (source: **NatWest**). German luxury e-commerce giant **Mytheresa** is also creating unique, elevated shopping experiences in hyper-realistic, iconic environments.

With Google and Samsung said to be developing a new XR platform and Accenture reporting that **92%** of executives plan 'to create a competitive advantage leveraging spatial computing', now is the time to consider how this can supercharge your key moments with consumers.



Mytheresa Immersive Luxury app for Apple Vision Pro by Obsess, Germany

'Selling luxury products needs emotions and unique experiences for customers. That is why we are keen and proud to lead the way as one of the very first luxury brands on Apple Vision Pro'

Michael Kliger, CEO, Mytheresa

Empath-AI Tech

While discussing its latest research project, Tenderithms, at the Softer Digital Futures tech conference, design collective **Feminist Internet** posed the question: 'As our physical and digital selves merge deeper, how could we add more tenderness to technology and what would an algorithm that looks after you look like?' This is quickly becoming an essential question as we become increasingly comfortable with the idea of having empathetic relationships with AI.

Amsterdam agency **Modem** considered this as part of a collaboration with first-time parents and Danish art and design duo **Wang & Söderström** to imagine a future in which children will learn from intelligent and personalised tutors. Its My First AI project envisages AI-powered stuffed animal GPTeachers offering personalised exercises that correspond to a child's developmental stage, personality, mood and learning style.

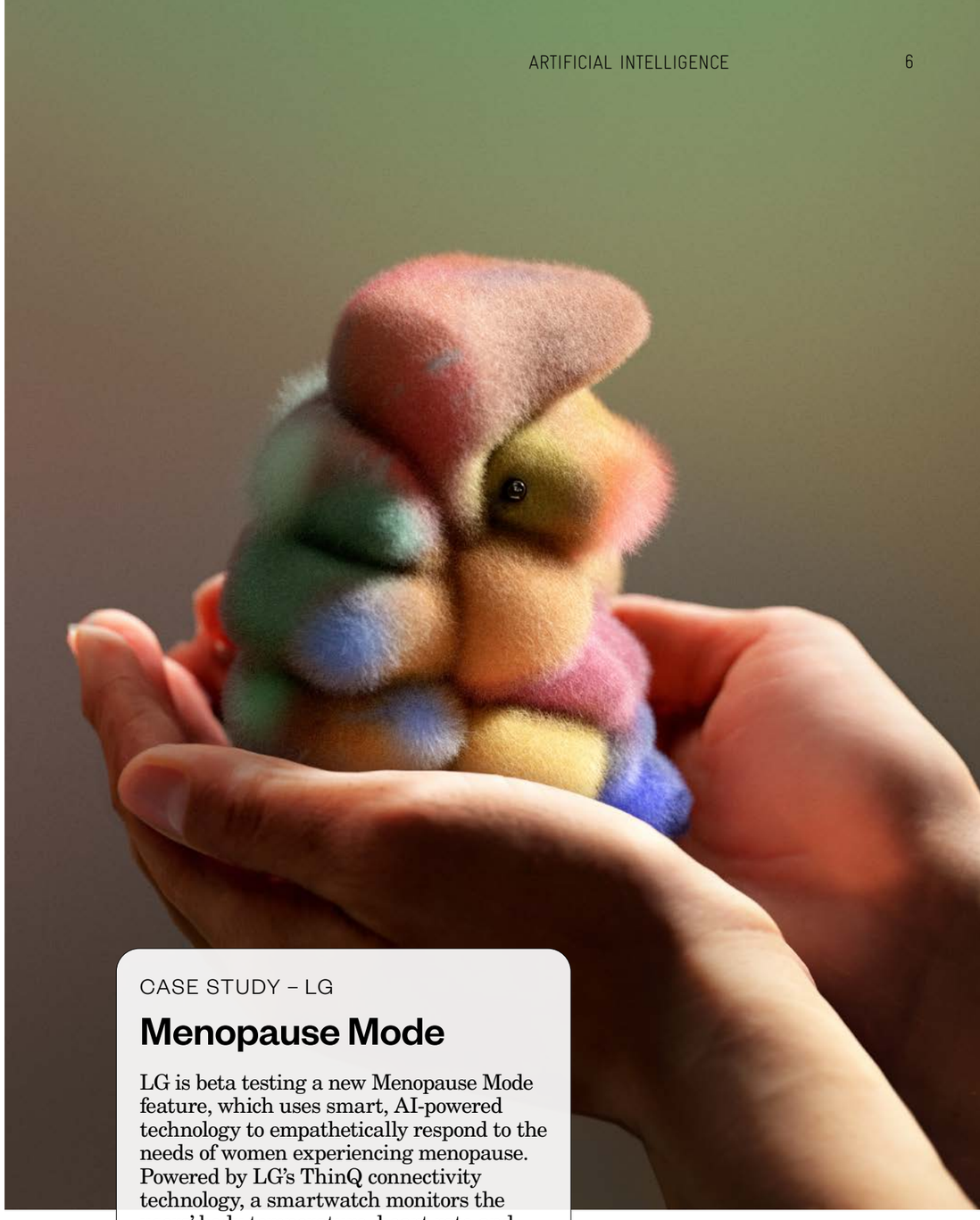
Nvidia and Hippocratic AI have already launched AI-powered healthcare agents, which they claim now perform better than human nurses when it comes to bedside manner, empathy, trust and rapport. The AI nurses provide real-time support for pre- and post-operation check-ins and act as loneliness companions. Similarly, Microsoft is using its GPT-4o-powered companion Copilot to offer solo Minecraft gamers the same social dynamics of gaming with friends. Copilot's use of natural and conversational language seamlessly integrates with the game play while offering real-time guidance.

Empathetic AI is also starting to play a role in romantic relationships. More than three-quarters of Millennials (76%) and 81% of Gen Z would use an AI bot to help them flirt on a dating app, according to **a report** by Cosmopolitan magazine and dating app Bumble, while some 10% of interactions with AI chatbots have an erotic undertone, according to ZDnet. A new genre of AI chatbots has been developed in response to this demand. German audio erotica platform **Bloom** has introduced a chat feature allowing users to engage in interactive role play with various AI characters, for instance.

Empathetic AI has the potential to add companionship, mentorship and support to offset the loneliness epidemic while filling intimacy gaps, but there are ethical concerns to consider. While privacy is a potential problem, we must also ensure that the technology is supporting and empowering people, rather than controlling or alienating them.



Above: Minecraft; Right: My First AI by Modem and Wang & Söderström, The Netherlands



CASE STUDY – LG

Menopause Mode

LG is beta testing a new Menopause Mode feature, which uses smart, AI-powered technology to empathetically respond to the needs of women experiencing menopause. Powered by LG's ThinQ connectivity technology, a smartwatch monitors the users' body temperature, heart rate and blood oxygen level in real time to predict when they are experiencing hot flushes. When detected, a command is sent to the LG Dual Inverter +AI air conditioning unit, which cools the room for 10 minutes to help ease symptoms.

'Menopause Mode is taking the smart home to the next level. For the first time, it will react to the body's vital signs,' said Lilian Cavallini, head of creative technology at AlmapBBDO.

Future Spaces

In the face of climate threats, global housing crises and mass migration to cities, one of the great challenges of our time is the need to create adaptable, people-centric and future-proof spaces that allow communities to thrive

In 2025, we expect placemakers to reconsider the need for wellbeing environments that heighten our emotions, as well as soothe them. Immersive technology will add extra levels of personalisation and adaptability to the home and the public sphere, while the design principles of modularity and retrofitting will proliferate in neighbourhoods around the world.



AI imagery by The Future Laboratory, UK

Healthy Hedonism

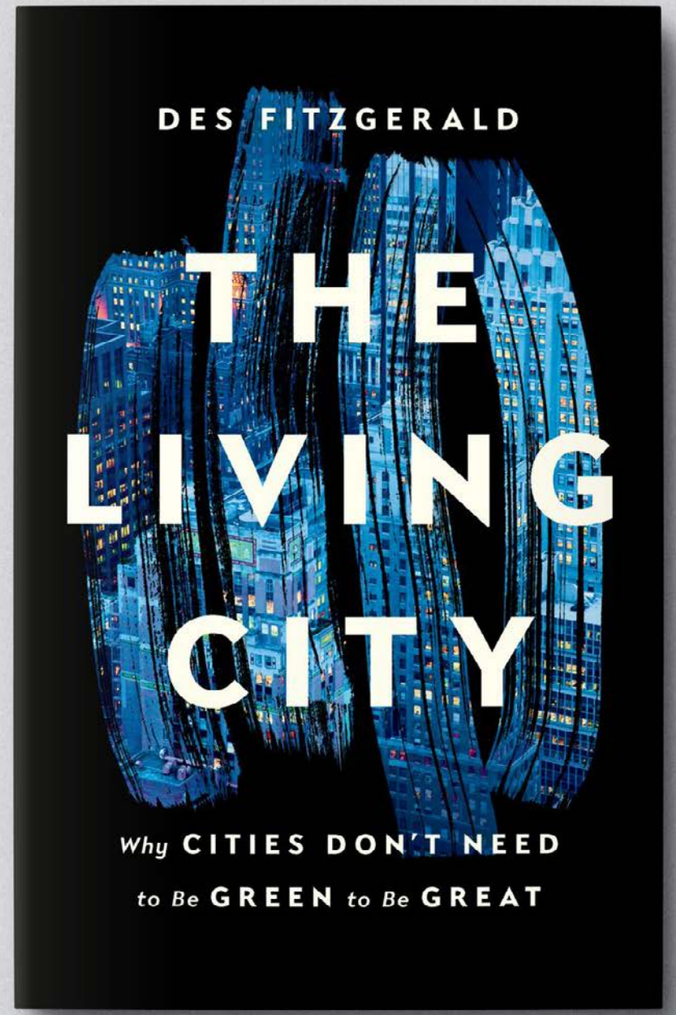
The latest projections from Statista suggest that the global wellness market will be worth £5.32 trillion ($6.82 trillion, €6.3 trillion) by the end of 2024 and will grow to £6.6 trillion ($8.47 trillion, €7.82 trillion) in 2027. Going hand in hand with this unstoppable rise is the almost unchallenged consensus that wellness equates to calmness and spending time in green and blue zone spaces. But when creating spaces to help people thrive we must complement these calmer pursuits with environments that get our pulses racing and provide a more rounded approach to wellbeing.

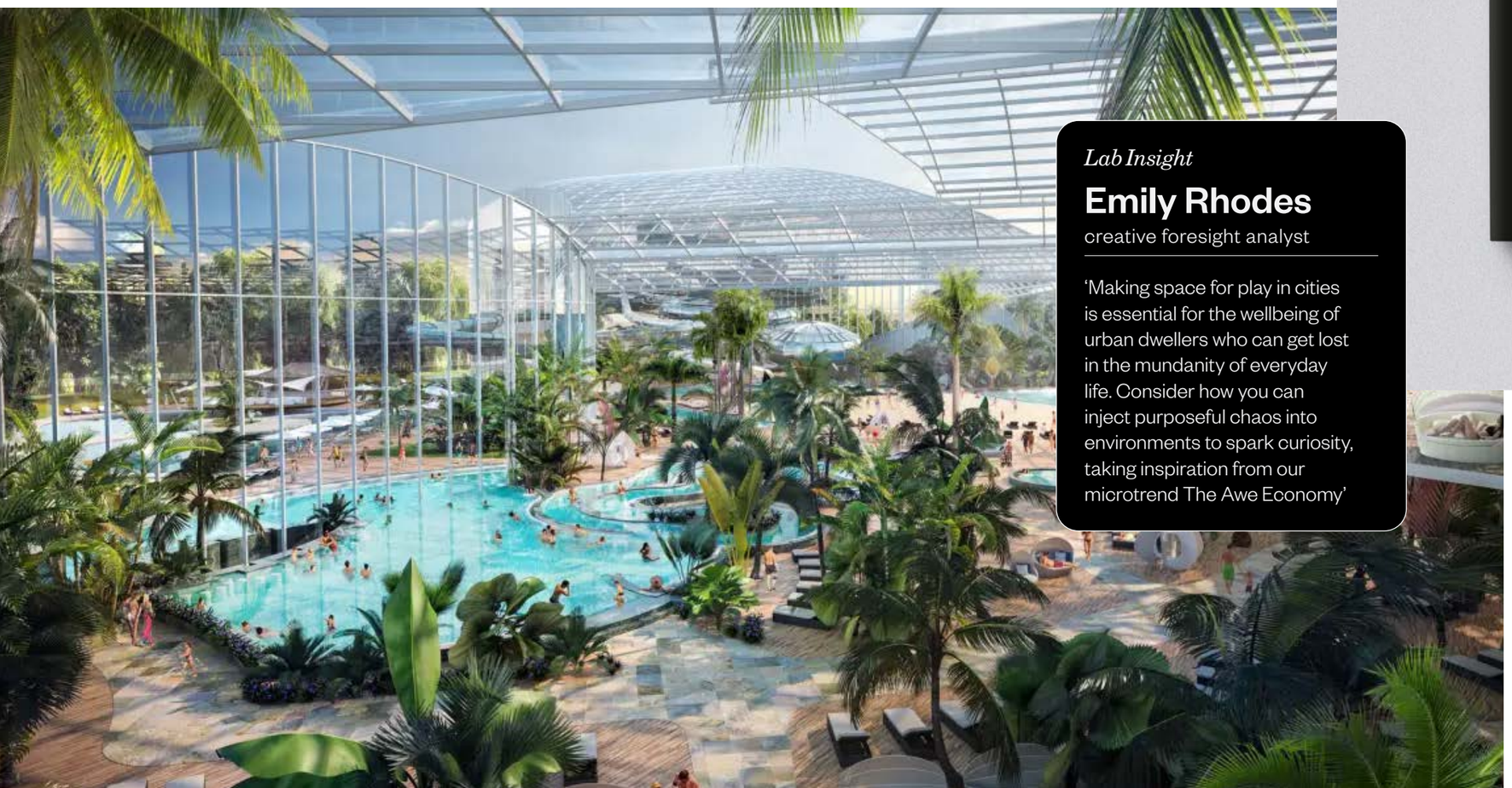
Professor Des Fitzgerald, the author of The Living City: Why Cities Don't Need to Be Green to Be Great, believes this fixation with calmness is shielding our attention from other valuable aspects of wellbeing. Discussing placemaking in cities on The Future Laboratory's Back to the F**kture podcast, he argued: 'We need to consider how the more excitable, heightened emotions can actually be critical for people too in maintaining psychological wellbeing.'

This underlines the wellbeing value of spaces and experiences that heighten our emotions, releasing adrenaline, endorphins and oxytocin, or which provide moments of effervescence via cheek-by-jowl communal opportunities. Dr Tasha Golden, director of research at the International Arts and Mind Lab at Johns Hopkins University, also believes that art plays a key role in delivering complete wellbeing. Her Art on Prescription field guide highlights the transformative impact that art, music and dance can have by 'connecting people with opportunities to express, to connect, to pursue something that's meaningful to them'.

Having a full-spectrum, holistic view of wellness doesn't denigrate or downplay the importance of blue and green zones, but re-affirms that they will play a crucial part in the wellness spaces of the future in concert with more arousing elements. Global wellbeing organisation Therme is set to open the UK's first city-based blue zone wellness resort in Manchester in 2025, drawing on 'deep-rooted traditions of wellbeing based on water and heat' combined with 'modern evidenced-based wellbeing, technology, culture and nature'.

It is by juxtaposing moments of calmness and reconnection with nature with experiences that excite us and elicit cultural creativity that we can build spaces supporting the complete wellbeing of people.





Lab Insight

Emily Rhodes

creative foresight analyst

'Making space for play in cities is essential for the wellbeing of urban dwellers who can get lost in the mundanity of everyday life. Consider how you can inject purposeful chaos into environments to spark curiosity, taking inspiration from our microtrend The Awe Economy'

Above: The Living City: Why Cities Don't Need to Be Green to Be Great by Professor Des Fitzgerald; Left: Therme, Manchester

‘The growing capabilities of digital means the physical shape of our buildings might start to change’

Matthew Cockerill, design innovation consultant



Sphere Entertainment, Las Vegas, US

Blended Digi-realism

As digital artist **Refik Anadol** showed in creating the visuals for entertainment venue **Sphere’s** inauguration in Las Vegas, we are leaving behind an age of analogue architecture and moving towards buildings whose surfaces shift, entertain, communicate and offer content. Joshua Vermillion, an architecture professor at the University of Nevada, told **Smithsonian Magazine** that innovations like Sphere ‘up the ante on how our built environment can interact and change’.

At the same time, this tech-powered functional and emotional adaptability is quickly becoming a reality in our homes too, with the smart home market expected to expand at a CAGR of 10.67% from 2024 to 2028 (source: **Statista**). With this growth comes the ability to transform living spaces with digital overlays, allowing users to change room aesthetics, display interactive art or simulate environments that elicit different emotional reactions.

These advances have the potential to create an enhanced human reality inside our homes and outside on our streets. But, as Holition CEO Jonathan Chippindale warns, it is essential to find the right balance between digital immersion and human imagination. ‘We should ask whether this technology really is humanising or is putting ring fences, rails and gates around people and preventing them from connecting,’ he says.





Above: Living Lab 040, artwork by Kaiser VR, Eindhoven, The Netherlands; Right: Living Lab 040, artwork by Kaiser VR, Eindhoven, The Netherlands

CASE STUDY

Crate & Barrel

American furniture and home décor company **Crate & Barrel** is embracing the need to help consumers retrofit and upgrade their homes with the release of its first offering in the home renovation sector. Focused on functionality and ease of fitting, the collection allows seamless integration with no demolition or contractor work required. The extensive 'no-demo reno' collection includes more than 400 items, from bathroom and kitchen essentials to light fixtures, textiles, furniture and hardware. According to **Houzz**, 55% of home-owners planned renovations in 2023, and the range provides transformative living space solutions without massive budgets, contractor conflicts and other obstacles related to big projects

Regenerative Modularity

Once reserved for eco-anxious high-end clients or architects creating stunning and sustainable single dwellings, regenerative design is now a mainstream necessity as we tackle the housing and climate crises of the coming decades. According to a **UN report**, two out of three people are expected to live in cities or other urban centres by 2050, as temperatures rise and scarce resources accelerate the global exodus from rural spaces. This will worsen the current housing crisis in densely populated cities such as Tokyo and New York, heightening the need to embed regenerative thinking into entire cities and neighbourhoods.

This growing need is illustrated by the projected rise of the global green buildings market during the next decade. Estimated to be worth £402.5bn ($516.6bn, €477.2bn) in 2023, it is expected to be around double that size by 2033, increasing to £982bn ($1.26 trillion, €1.16 trillion) (source: **Precedence Research**).

Architectural and design firms are rising to the challenge to create next-generation developments that are both energy-efficient and more adaptive to the needs of people and the planet. In February 2024, development company **Human Nature** received planning approval to transform a former industrial site in Lewes, UK, into 685 timber-based homes. As well as using locally sourced timber and biomaterials such as hemp in its construction, it will be powered by renewable energy sourced from on-site photovoltaic panels and an off-site renewable energy facility, making it the UK's most sustainable neighbourhood ever.

Living Lab 040 is an experimental neighbourhood in Eindhoven, The Netherlands, where residents play an active role in future-proofing the area. Rather than being set up with a rigid master plan, it is built to grow and evolve organically based on emerging needs. Its smart building system makes it easy for all dwellings to be assembled, disassembled, reconfigured or integrated with electrical cables and water pipes, as required.

This always-in-beta mindset that leans into the principles of modularity, retrofitting and community decision-making will be essential to creating regenerative spaces that are adaptive and people-centric enough to meet the challenges ahead. Brands also have an opportunity to help consumers embed these ideals into their living spaces.

Gaming

The thriving world of gaming is full of exciting opportunities and big challenges for brands. With the global market expected to finish the decade twice the size it was in 2019, gaming platforms have established themselves as the go-to places to engage with and build long-term loyalty with younger consumers (source: **PwC**)

Brands across all sectors will take advantage of that opportunity in 2025, while the need to double down on diversity and build experiences and game play that are more representative of the community remains a priority. This is particularly true at a time when women gamers look poised to become gaming's dominant demographic.



Aurora Gaming Collection by Logitech G, Switzerland and US

The Future of Gaming is Female

While the tired stereotype of the typical gamer as an energy drink-fuelled male sitting in a dark room lit only by the light of their monitor proliferates, the rise of **the female gamer** is in full flight and is helping to reshape the future of the sector.

A report from the Geena Davis Institute on Gender in Media found that women now make up **almost half of gamers globally**, including 46% in the US, 47% in Europe, 48% in Australia and 37% in Asia. **SupplyGem** estimates that there are now 1.39bn female gamers in the world, while it is also predicted that the women gamer demographic will continue to grow at an unprecedented rate of 33% annually (source: **Forbes**). This suggests that we are fast approaching the tipping point when **Women who Play** will become the dominant demographic in the gaming industry.

This changing of the guard is shaking the foundations of gaming, re-imagining where, how and why people are gaming. A key driver of the change has been the accessibility of mobile games, which account for 61% of the entire gaming market (source: **Data.ai, International Data Corp**), with nearly half of mobile players now women (source: **Forbes**).

Self-expression is a key driver of why women game, and research has shown that they spend more money on games consoles, downloadable content and gaming accessories than men, averaging £280 ($359, €331) annually on downloaded content and accessories (source: **Treasure Data**). Thus, games that offer more extensive in-game personalisation, such as skins and character customisation, are more attractive to women gamers, with 85% of female Fortnite players purchasing downloadable content (source: **Treasure Data**). Fortnite capitalised on this appeal with its Celebration of Women campaign in late 2023. In addition to a series of cosmetics rewards, it unveiled seven islands (maps) created by women from the Fortnite community. In this way, Fortnite not only gave users greater control over their individual characters, but also allowed women gamers to create their ideal in-game experiences.

Turning their backs on the high-octane roots of gaming, women gamers are also using their play time as an extension of their broader wellbeing routines, with 67% in the US and UK saying gaming has become a vital source of 'me time' (source: Pollfish, **Pocket Gamer**). This coincides with the rise of more mindful, cosy gaming, which typically involves slow-paced, gentle game mechanics with calming music and relaxing 'missions'.

Brands have an opportunity to help women gamers reshape the industry. Co-creation with communities is the first step in empowering women gamers to express themselves, while giving them the tools to create the spaces, characters and representation that they want.

Women now make up almost **half** of gamers globally

Source: Geena Davis Institute on Gender in Media

Lab Insight

Gabriela Białkowska

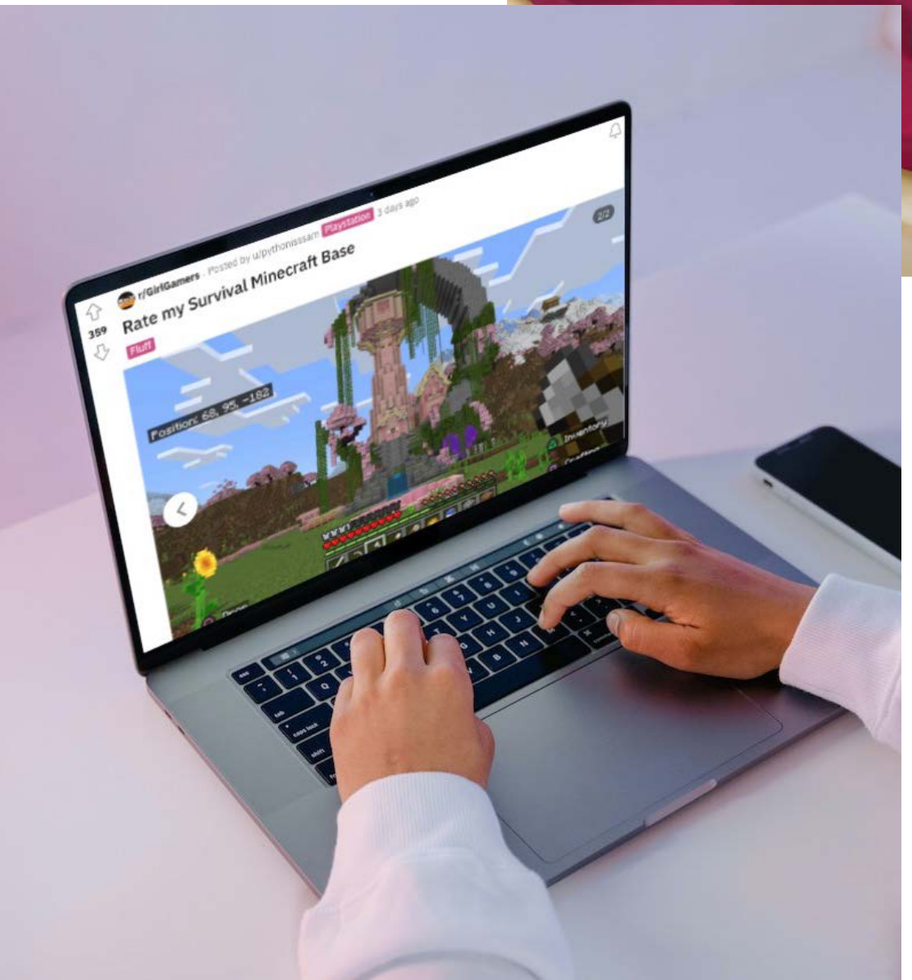
creative foresight analyst

'As the gaming community expands, the demand for representation and inclusivity is becoming a critical driver of change. Brands should actively involve communities in the creative process, prioritising diversity and customer feedback to strengthen connection with player bases'

At Viva Tech France, Zepeto and Roblox teamed up to create Avatar Looks, offering digital fashion experiences and customisable virtual outfits for users, France



Below: GirlGamers subreddit is a community space for women to discuss topics around gaming, geek culture and their experiences that occur as a result of their gender; Right: NARS launched the Insatiable Sweep mini-game in the Sweet Rush Roblox experience, where players explore vibrant virtual worlds and beauty-themed challenges



‘Seeing yourself, someone like you, someone you can identify with or someone you want to be like is so powerful and important in terms of identity formation’

Ashlee Bird, digital culture scholar and Native American video game designer

Gaming’s Diversity Mission

One of the big battles in the gaming world is the continued push for diversity to make all gamers feel safe, represented and empowered, irrespective of their colour, ethnicity, gender or sexuality. The first-ever report on LGBTQ+ inclusion in video games found that LGBTQ+ gamers now account for 17% of the US gaming population, yet only 2% of games feature openly queer characters (source: **Gay & Lesbian Alliance Against Defamation**). Twitch streamer and founder of BlackMinecraft, JaneyLaney, also reports having to pay extra for Black skins, and the overwhelming majority of Black gamers (85%) believe that video games poorly represent textured hair (source: **Edelman for Dove**).

To improve the representation of Black hairstyles in its games, **Maxis**, the studio behind The Sims, worked with L’Oréal beauty brand **Dark & Lovely** and gaming content creator **Danielle ‘Ebonix’ Udogaranya**. Unilever’s Dove also teamed up with the Open Source Afro Hair Library to create a free guide for coding natural hair. The Sims 4 continues to set new standards for representation by introducing the options to portray characters with vitiligo and to engage in polyamorous relationships. But with 71% of Gen Alpha believing diversity in games matters, such inclusive innovations must set the standard for the industry (source: **The 2023 Newzoo Global Gamer Study**).

The Business of Gaming

As brands explore new ways to engage with consumers, particularly Gens Z and Alpha, the potential of gaming as a key channel for brand-building and sales continues to grow at pace. Gaming engagement spiralled upwards during the pandemic, but unlike other Covid behaviours that have since receded towards the norm, the market continues to show remarkable growth. Global video games revenue reached £177.3bn ($227.6bn, €210bn) in 2023, up 4.6% from 2022. PwC puts it among the fastest-growing entertainment and media sectors, and projects that it will be worth more than £233.7bn ($300bn, €276.9bn) in 2028, which is more than double its level in 2019 (source: **PwC**).

As the market gathers pace, the potential to connect with consumers through gaming culture will increase. It's no surprise, then, that big technology and entertainment brands are doubling down on their investment. Disney has made a seismic entry into the gaming world by investing £1.2bn ($1.5bn, €1.4bn) in leading games developer Epic Games due to what CEO Robert Iger called 'significant opportunities for growth and expansion'. Following its acquisition of games producer Activision Blizzard, Microsoft plans to ramp up its efforts to produce more titles, while Netflix has also recently announced 14 new video games, expanding the appeal of some of its best-loved titles with immersive and interactive gaming content.

Lifestyle and traditional retail brands are also devoting more effort to resonating with gaming communities as part of long-term brand-building strategies. Walmart Realm, launched to complement rather than replace the retailer's e-commerce site and app, includes fantastical worlds designed by virtual store specialist **Emperia**, where gamers can buy digital doubles of selected products available in real-life stores. Beauty brand Elf has also launched a virtual kiosk in Roblox where visitors can purchase physical products that highlight its cruelty-free commitment, including the Elf Up! Pets Hoodie. In the first seven months, the virtual kiosk received 12m visitors.

When creating a link between gaming experiences and product purchases, storytelling and the brand education of young consumers are key, priming them to become the loyal brand advocates of tomorrow. This is the true value of gaming.



Walmart Realm, US

'If I look at it, the amount of time people allocate to gaming is going up and Gen Z are going to do more of that'

Satya Nadella, CEO, Microsoft

CASE STUDY – IKEA

The Co-Worker game

Ikea is pioneering metaverse recruitment with the launch of **The Co-Worker game** as part of its upcoming Ikea on Roblox virtual universe. Using the potential of gaming to court Gen Z consumers, the Swedish furniture store group will be hiring real people to work in its new virtual store, where they can earn £13.15 ($16.88, €15.59) an hour assisting virtual customers across various departments, including serving meatballs in the Swedish Food Market. The Roblox experience, designed by Swedish game design company The Gang, marks the beginning of Ikea's Careers Done Different campaign, which aims to attract the next generation of employees

Longevity

As 82% of US consumers and 73% of UK consumers now consider wellness a top or important priority in their everyday lives, longevity continues to be the topic du jour of the health and wellness sector (source: **McKinsey & Co**)

In 2025 we expect brands in many categories to adapt in response to the opportunities and challenges of the age of GLP-1 diet drugs, while hospitality and lifestyle brands will reposition their products and services to help consumers reach elevated wellness peaks. Healthcare companies must also prioritise innovations in women's health, working to eradicate the gender health gap.



Neko Health, Sweden



Above: Daye, UK; Right: HerMD, US

Lab Insight

Olivia Houghton

deputy creative foresight editor

‘The pursuit of optimisation has been re-ignited, inspiring individuals to biohack their bodies by harnessing science, technology and self-experimentation to boost their natural capabilities. As wearables, nootropics and advanced age and weight management techniques gain traction, the emphasis is moving from conventional medical treatments to a future when health will be increasingly proactive and technologically sophisticated’

Eliminating the Gender Health Gap

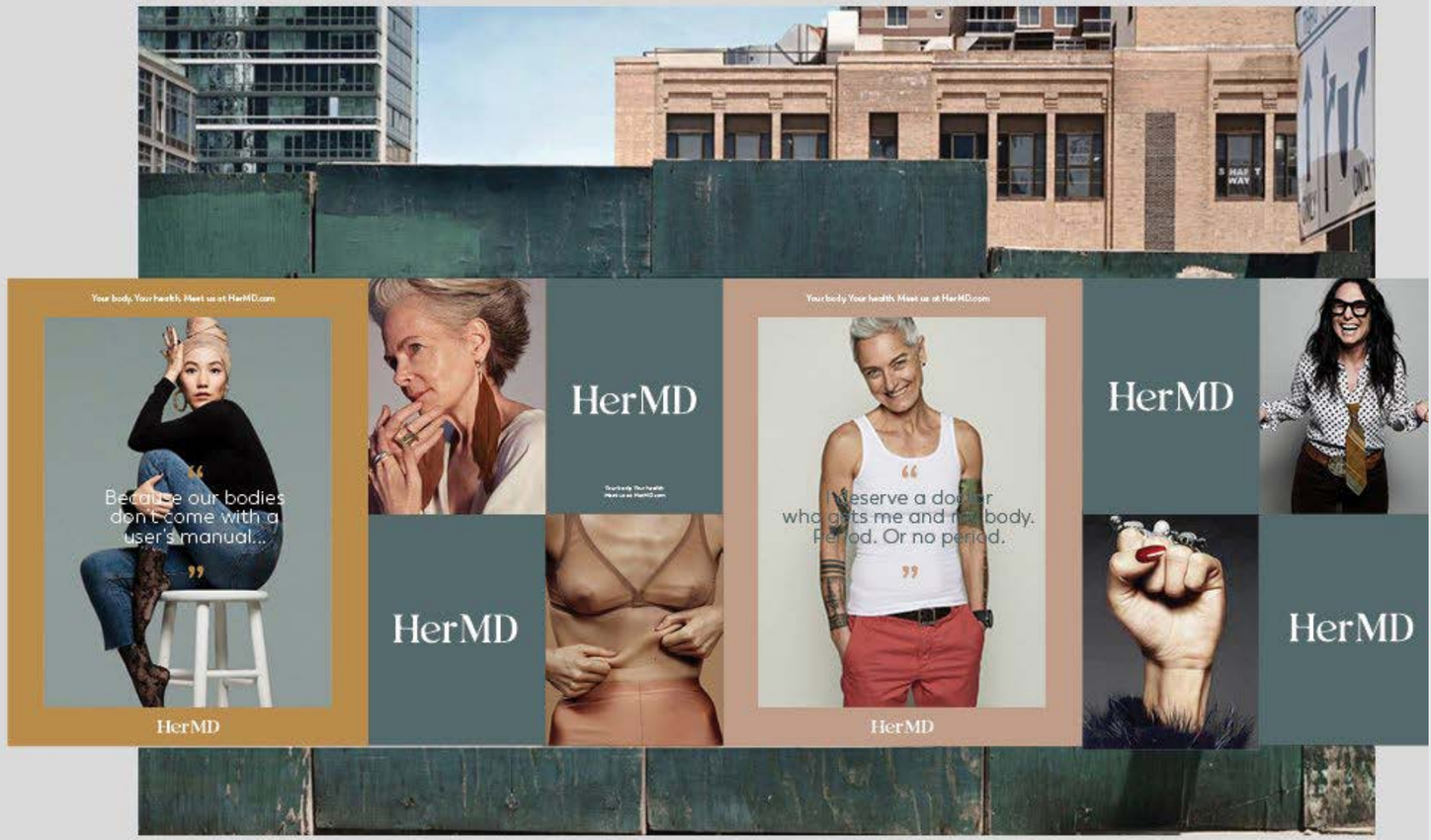
A long overdue healthcare revolution is gathering pace that aims to eradicate the gender health gap by prioritising research, innovation, products and services specifically focused on improving women’s health.

While women’s health may vary across the globe, one universal truth is evident: the current system has let women down, leaving them underserved by male-focused mainstream medical services and brands. Dr Somi Javaid, founder of US-based women’s health clinic **HerMD**, which aims to reverse this historical trend, uses the inadequacy of US menopause care to highlight the wider problem. ‘We’re going to spend 40% of our lives in menopause,’ she says. ‘And yet fewer than 20% of US providers are trained and 93% of medical residents graduate saying they’re not comfortable taking care of patients in this area.’

A new generation of femcare innovators are emerging to empower women to take charge of their health and wellbeing. Central to these innovations is data-powered, personalised insight based on a more nuanced understanding of life-stage biologies and physiologies. Femtech start-up Daye, for example, has opened a digital period pain clinic to help accelerate the path to diagnosis for gynaecological issues. After answering a questionnaire, users receive support for conditions such as endometriosis and PCOS, and advice on how to reduce the intensity and duration of menstrual cramps.

There is also an increased focus on hormonal health. In the UK, self-care-focused wellness brand Eyeam sells Hormone Check Drops that, taken once a day, promise to regulate hormone levels. Similarly, Fewe offers a range of products based on the varying hormonal needs of women during what it defines as the four stages of the menstrual cycle. With advances in science and AI, it is easy to imagine a future when personalised formulations based on hormonal testing will be available on demand to respond to women’s long-term and real-time needs. This must include a much more considered and tailored approach to making testosterone, still considered the male hormone, easily available to women.

It is time to prioritise the inclusion and comprehension of women in healthcare, engaging in direct communication and tailoring designs and services to provide accurate and life-enhancing healthcare.



Ozempic Tremors

A recent report from **Goldman Sachs** suggests that there could be 70m global users of GLP-1 weight-loss drugs like Ozempic by 2028, while **Bank of America** is forecasting that one-seventh of the US population (48m people) could be using them by 2030. With these medications reducing calorie intake by up to 30%, according to Morgan Stanley, an adoption curve this steep promises to send tremors across multiple consumer categories.

A study by **Bernstein** examining the dietary preferences of GLP-1 patients reveals a shift towards protein-rich, low-carb options and home-made meals. Another study confirmed that people using GLP-1 medication spend less money in grocery stores, mainly cutting back on bakery items and snacks (source: **Numerator**). In addition, a survey by **Morgan Stanley's** AlphaWise research unit revealed that 62% of GLP-1 users have cut their alcohol consumption, with 22% now abstaining entirely.

These significant consumer preference swings create big implications for fast moving consumer goods (FMCG) and consumer packaged goods (CPG) food and beverage and fast food brands. Nestlé is one of the first global giants to respond by developing the Vital Pursuit range of portion-controlled meals to provide GLP-1 patients with nutritional support.

With other analysts predicting implications for airlines, fashion labels and plastic surgeons, all brands must keep an eye on Ozempic tremors to spot the potential challenges and opportunities (sources: **Bloomberg** and **Vogue**).

'As the use of medications to support weight loss continues to rise, we see an opportunity to serve those consumers. Vital Pursuit provides accessible, great-tasting food options that support the needs of consumers in this emerging category'

Steve Presley, CEO, Nestlé North America



Hers offers a prescription weight loss kit featuring GLP-1 medications to help regulate appetite and support long-term weight management, US

Recovery Hacking

The overwhelming majority of consumers now consider wellness a priority in their everyday lives (source: **McKinsey & Co's Future of Wellness Survey 2024**). It found that 82% of US consumers, 87% in China and 73% in the UK prioritise their wellness, while Gen Z and Millennials are driving growth in the key categories of nutrition, sleep, mindfulness, fitness and appearance (source: **McKinsey & Co**).

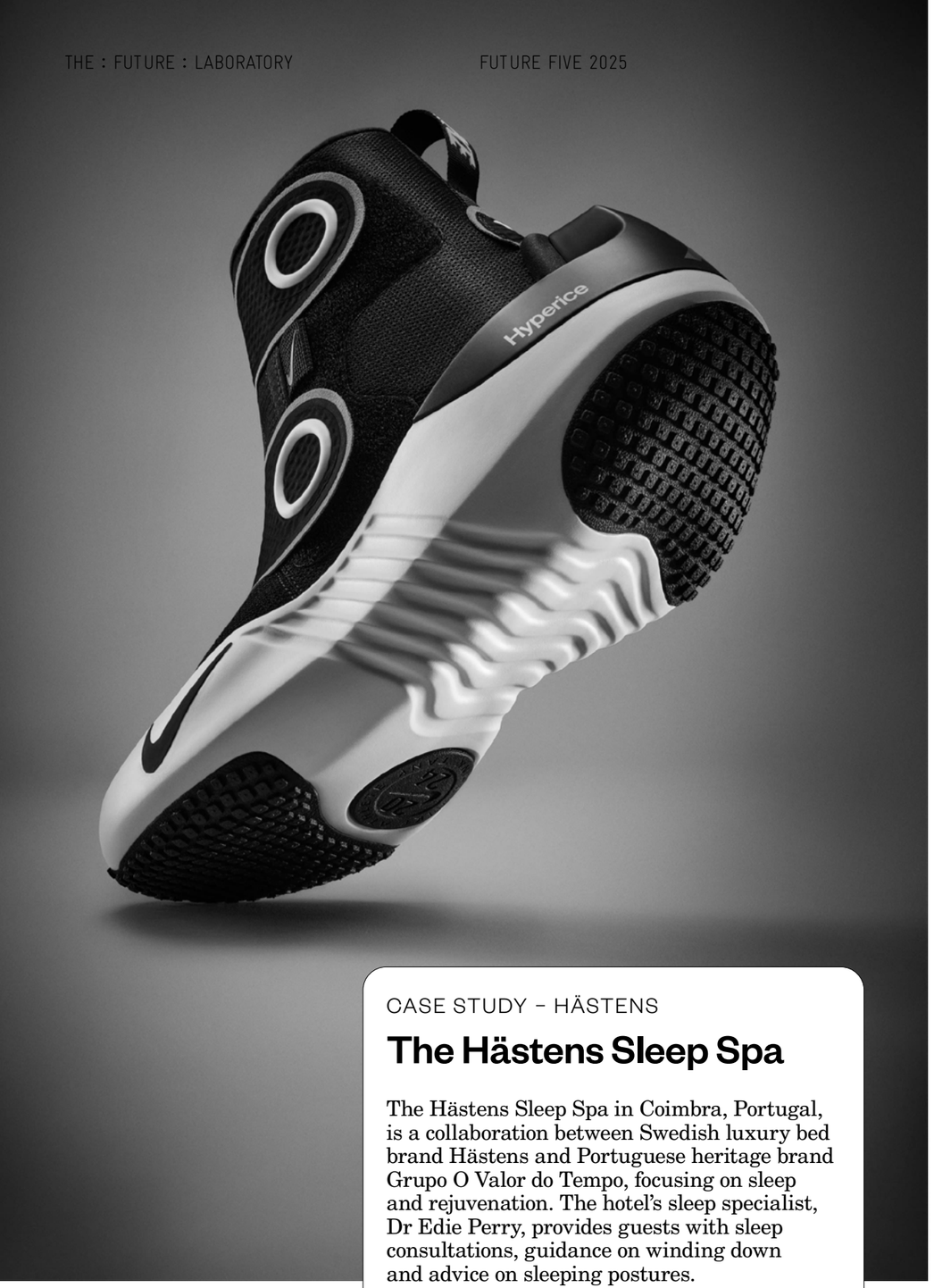
Travel destinations and brands are leaning towards elevated and hyper-luxury wellness offerings to meet these heightened expectations of consumers. Singapore has cemented itself as a leading wellness destination in recent years by launching the **Wellness Festival Singapore**, a platform to test innovative ideas, including fitness and wellness sessions at prominent locations, such as the HSBC Rain Vortex in Changi Jewel, the world's tallest indoor waterfall.

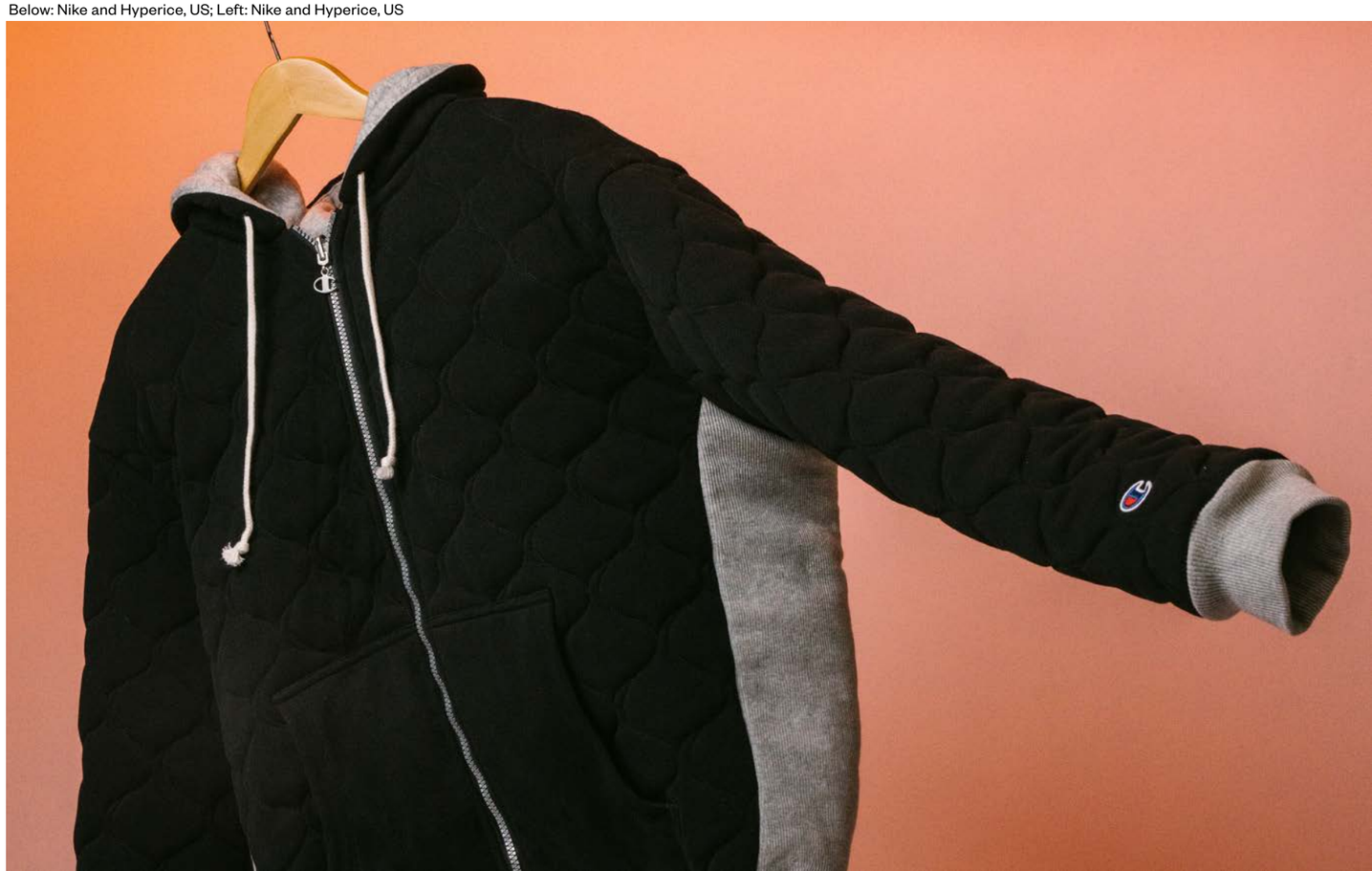
Hospitality group **Six Senses** places a significant emphasis on mindful wellness, specifically delving into the interplay between mental and physical wellbeing. The company is actively exploring the concept of sense-hacking through initiatives such as scented sculptures and personalised plant music, led by in-house wellness pioneer Anna Bjurstam. On the other hand, the SIRO One Za'abeel hotel in Dubai targets optimisation-focused guests and is billed as the ultimate destination for wellbeing and recovery. Combining digital technology with expert athlete guidance, the hospitality venue aims to help travellers achieve peak mental and physical performance through a suite of bespoke training programmes, nutrition plans and mindfulness coaching.

This pursuit of elevated wellness permeates beyond hospitality too. Nike teamed up with health tech company Hyperice to create a cutting-edge boot and vest to help athletes at the 2024 Olympic Games in Paris optimise their warm-up and recovery regimes. The compression and temperature-enabled products are intended to passively warm or chill wearers and get their blood flowing as they go about their daily routines. Similarly, premium athleisure brand Elastique's L'Original 'wearable massage' leggings include 'supportive gradient compression and unique MicroPerle™ beads' to stimulate lymphatic flow and boost the circulation of wearers as they work out.

Brands must consider how their products and services can be positioned to help consumers reach these new elevated wellness peaks.

Below: Nike and Hyperice, US; Left: Nike and Hyperice, US





CASE STUDY – HÄSTENS

The Hästens Sleep Spa

The Hästens Sleep Spa in Coimbra, Portugal, is a collaboration between Swedish luxury bed brand Hästens and Portuguese heritage brand Grupo O Valor do Tempo, focusing on sleep and rejuvenation. The hotel's sleep specialist, Dr Edie Perry, provides guests with sleep consultations, guidance on winding down and advice on sleeping postures.

At present, resident sleep doctors and REM consultants may be reserved for specialist sleep clinics. Harley Street hypnotherapist and sleep expert Malminder Gill explains: 'Guests want more than just a bed for the night. They want an experience and something that enhances their wellbeing. Better sleep has numerous positive effects on the body and psyche'

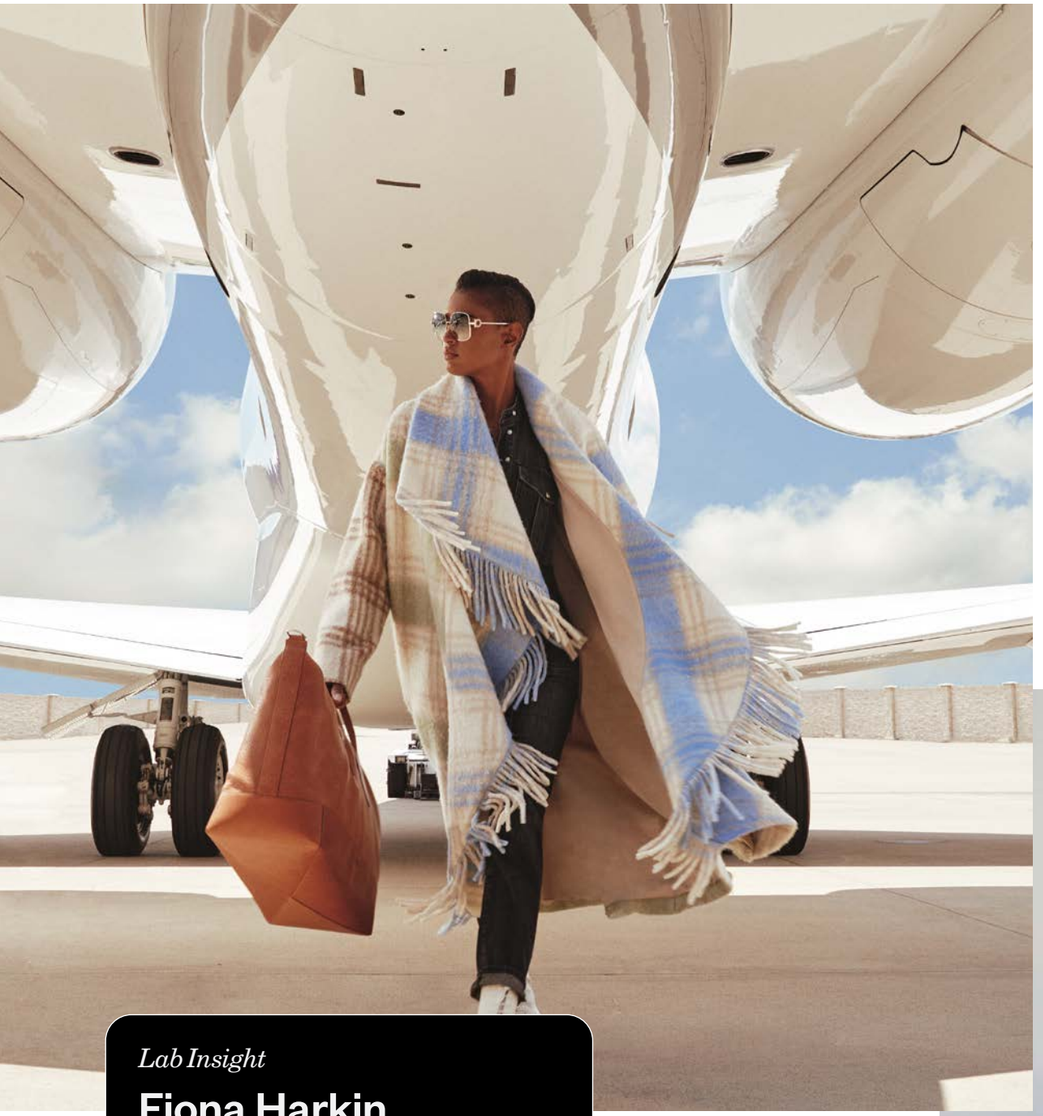
Sustainability

With the climate battle far from over, sustainability will continue to be a key priority for both consumers and brands across all categories in 2025

In fashion, we hope to see the dawn of a new era of bold leadership to break through the current malaise and re-orientate the industry around circularity. In the travel and hospitality sector, we expect brands to innovate to absorb the shock of climate-related changes in consumer travel behaviour and believe more brands will embrace softer design codes to lure Gen Z outdoors and engage them in conservation and climate activism.



How&How amplified ‘the whispers of Mother Aruba’ for Aruba Conservation Foundation’s new identity, Aruba



Lab Insight

Fiona Harkin

director of foresight

'Increasingly hot summers in the Mediterranean, combined with growing anti-development and anti-tourism sentiment from local communities in classic European destinations, are direct examples of the drivers behind a shift towards new, alternative destinations – and key travel periods – in this market. Hospitality options that bring sustainability and community to the fore will make the most of this opportunity'

Climatarian Travel

The cumulative effect of climate change and consumers' increasing awareness of the carbon footprint of their holiday plans are leading to a significant shift towards conscious travel. Three-quarters (75%) of Americans include sustainability among their priorities when travelling (source: **Washington State University**). And 60% of global consumers have chosen more sustainable travel options in recent years (source: **World Travel & Tourism Council**).

At the same time, a technical report on the regional impact of climate change on European tourism demand predicts that Europe's southern coastal regions will attract 10% fewer tourists than in summer 2019 if there is a 3–4°C temperature increase (source: **EU Joint Research Centre**). The impact of this will be two-fold, changing both when and where consumers travel. The same study found that demand in summer will be offset by increases in spring, autumn and winter, with April expected to see the highest increase in tourist flows. European travel companies are already noticing a northwards shift. Carolyn Addison, head of product at Black Tomato, revealed that their Scandinavian bookings were up 175% for summer 2024, compared with 2023 (source: **LS:N Global**).

In this new paradigm, consumers are also rethinking how they travel, leading Google to roll out a series of new search tools to help people find low-emission flight options and train-based alternatives.

Brands in the travel and hospitality sector must consider how they can innovate to absorb the shock of these changes in consumer travel behaviour. Virgin Atlantic, for example, has trialled the first transatlantic flight using 100% Sustainable Aviation Fuel (SAF), which saved 95 tonnes of CO2 – the equivalent of 64% of the emissions of a standard London Heathrow to New York JFK flight. We also expect the rise of ultra-premium travel experiences that combine luxury and sustainability. Grands Espaces, for example, a renowned French eco-tourism company founded by Arctic expert Christian Kempf, has announced plans for silent and eco-friendly aerial exploration of the Arctic. Using British-made Airlander 10 airships, the voyages are slated to start in 2028, ushering in a new era of luxury Climatarian Travel.



Above: Airlander by Hybrid Air Vehicles, US; Left: Neiman Marcus launched the Re-introduce Yourself campaign to showcase how the brand evolved over the past year in response to global changes, UK

Rebranding Planet Earth

When it comes to planet Earth, the attitudes and actions of Gen Z don't align. Some 59% are 'very' or 'extremely' worried about climate change (source: **Preprints with The Lancet**). Yet one-third also describe themselves as addicted to fast fashion (source: **ThredUp**).

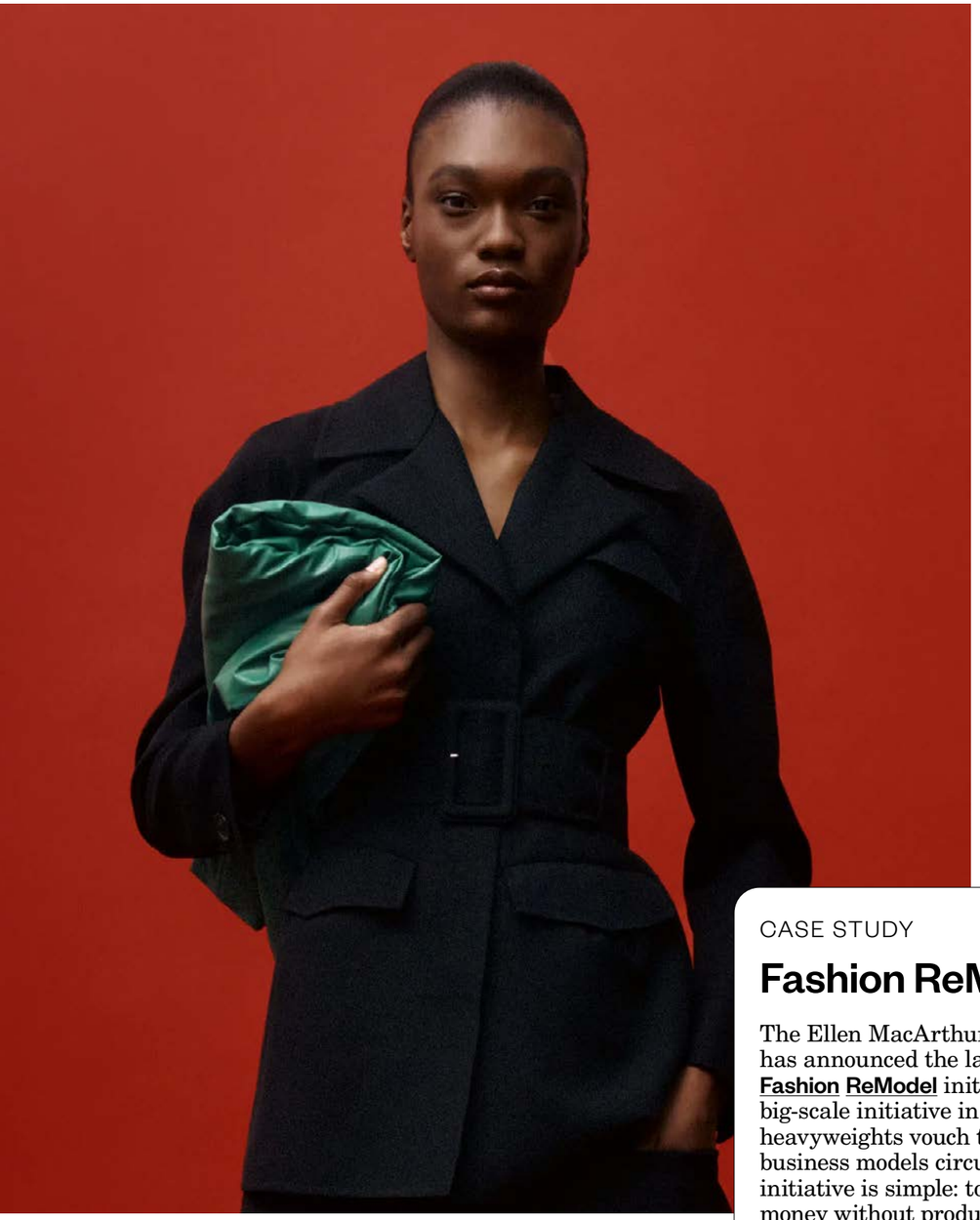
But the staying power of the gorpcore apparel trend and the popularity of groups like the **Flock Together** birdwatching collective show that there is a desire among young consumers to engage with nature, as long as it is packaged in the right way. This insight has given rise to a new design movement that is **rebranding planet Earth** itself to lure Gen Z outdoors and to engage them in conservation and climate activism.

Innovative organisations in the travel, leisure and sustainability sectors are adopting a new design language of terra tones, organic motifs and surreal serif typefaces to craft this new approachability towards nature. This is personified by Wolff Olins' rebranding of the Bronx's **New York Botanical Garden**, which stresses the importance of the natural world, without overwhelming Gen Z with climate crisis doomerism.

The design shift aims to cultivate a sense of warmth, authenticity and accessibility, inviting young people to connect with the natural world while signalling a commitment to environmental stewardship.



How&How amplified 'the whispers of Mother Aruba' for Aruba Conservation Foundation's new identity, Aruba



Above: Another Tomorrow is a circular fashion brand that focuses on sustainable and ethical development of apparel, US; Right: In collaboration with Pitch Studios™ and 3D artist Bérénice Golmann, Ganni introduced Celium™ – an eco-friendly fabric created from bacteria fed with fruit waste. It can be dyed, embossed and tanned using traditional methods, reducing environmental impact

Positively Good Fashion Futures

At the 15th **Global Fashion Summit** in Copenhagen in May 2024, there was a palpable frustration among the industry's big hitters about the lack of progress made on sustainability since the inaugural event in 2009. Sustainability author Brooke Roberts-Islam best summed up the mood of resignation, saying: 'We're going to talk about all the same things we talked about last year. The footprint of the industry has gone up. Isn't that what we're trying to stop? What are we actually achieving?'

Despite survey after survey highlighting consumers' demands for sustainable fashion, the fast fashion market continues to grow at an alarming rate. Statista valued the global fast fashion market at £82.5bn ($106bn, €98bn) in 2022, and it projects that it will be worth nearly £144bn ($185bn, €171bn) in 2027, more than double the size of the market at the start of the decade (source: **Statista**). And it isn't just wavering consumers who are to blame for the lack of progress; just 38% of brands are transparent about their circularity programmes, while 88% refuse to disclose production volumes (source: Fashion Revolution's **Transparency Index 2023**).

These disparities underline the need for a new era of bold leadership in the fashion sector where the businesses themselves must effect change and re-orientate the economics of the industry. Former CEO of Unilever, Paul Polman, believes companies are using sustainability targets as a smokescreen to avoid real action. 'ESG agendas are being hijacked, pushing many companies into mere compliance,' he argues. 'We need ambition. Less bad is not good enough.' This mirrors the views of Diana Verde Nieto, the author of Reimagining Luxury, who calls on brands to chase 'positively good' outcomes, rather than simply focusing on achieving 'less bad'.

Vanessa Barboni Hallik, the founder and CEO of sustainable clothing brand Another Tomorrow, believes fashion needs to take inspiration from the automotive sector and re-align the economics of the industry around circularity. 'Commitments to decouple a viable economic future from rising production volumes are essential,' she says. 'This type of transformation has a precedent in the car industry where both resale and service or repair make up significant revenue.'

The gauntlet has thus been thrown down to fashion leaders, who must take meaningful action now to create a brighter future.

CASE STUDY

Fashion ReModel

The Ellen MacArthur Foundation has announced the launch of the **Fashion ReModel** initiative, the first big-scale initiative in which fashion heavyweights vouch to make their business models circular. The aim of the initiative is simple: to help brands make money without producing new clothes, via circular business models like rental, resale, repair and recycling. Arc'teryx, Reformation, Primark and Zalando are some of the first businesses to sign up, alongside the H&M Group's Weekday, Cos and Arket brands. Speaking at the Global Fashion Summit 2024, Vanessa Friedman, chief fashion critic at The New York Times, backed the general principle, saying 'making less stuff doesn't mean making less money'



This report draws on insights and case studies from The Future Laboratory's trends intelligence platform, **LS:N Global**

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