THE : FUTURE : LABORATORY

Future Forecast 2023



Introduction

Our future has never been so uncertain, or our path towards it so strewn and blocked by seemingly insurmountable obstacles – recession, cost of living crisis, inflation, and cultural, gender and equity wars that continue to divide and dog us

Our future has never been so uncertain, or our path towards it so strewn and blocked by seemingly insurmountable obstacles: recession, cost of living crisis, inflation, and cultural, gender and equity wars that continue to divide and dog us.

Yet the same path, when filtered through our 2023 macrotrend The Paralysis Paradox, becomes one that is alive with challenge and opportunity; we need to become better business leaders in the face of ongoing uncertainty.

This year has been a bumper year for innovation, patent registration and innovative disruption. In 2022, Q1 saw the highest growth in patent filings (21%) on record, with AI and data-learning innovations promising to unlock transformative, context-rich insights across industries.

This is what our Future Forecast, and indeed, our Futures 100 Innovators Award, celebrate: those first-to-market innovators that disrupt sectors, the innovations they use to disrupt them, and of course the trends that provide them with the headwinds of change to do so.

And this year, our analysts have been documenting wave after wave of disruption as innovators take on those challenges that are designed to make tomorrow different and crucially, to make it better and more regenerative. Consider Dr Catherine Nakalembe and her crop survey drone satellites (page 16) ,or sisters Alexia and Margot de Broglie and their women's and non-binary financial education platform, Your Juno (page 52).

As James Perry, one of the co-founders of the UK B Corp movement, tells us: 'The imperative to change the orientation of all business is now desperately urgent. By changing its purpose to create value for everyone – people and planet alongside shareholders – business can regenerate and renew, become part of the solution, a force for good.'

And it is this approach to making tomorrow better that we like to champion in our annual Future Forecast. Consider jewellery platform Finematter (page 33), which uses smart contracts to ensure that makers are paid proper royalties when their work passes into the burgeoning resale sector, or a new category hospitality offer from the Amilla Maldives (page 27) that focus on managing and alleviating the symptoms of the perimenopause.

Throughout the report we also identify those trends that are driving change and redefining the profit centres of tomorrow. In beauty, we are witnessing the rise of a new category we've dubbed cryo-longevity (page 7); in food, a shift towards more extreme dining (page 15); in luxury, the growth of medi-luxe and upscale IV vitamin drips (page 30); while in drink, we highlight the rise of canned beers, wines and cocktails that help us drink less at a time when one third of pub visits in the UK are now alcohol-free.

Finally, while our 2022 report highlighted many trends and innovators that placed trust, transparency and purpose at the core of their enterprises, this year science, technology, data and AI play a greater role throughout.

In this report, you will discover 50 cross-sector trends and innovations that we believe will continue to report on those new and next innovators that will certainly make tomorrow different – and better.

Martin Raymond, co-founder,
The Future Laboratory





Feels Like UGG. Photography by Arielle Bobb-Willis, US

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The 24-hour news cycle should empower and inform audiences. Instead, it's leading to higher stress levels, anxiety and feelings of powerlessness.

- **Next-gen Dating**
Dating apps are evolving beyond the swipe, with new entries looking to align more closely with Gen Z's relationship priorities and digital behaviours.

Beauty

In 2023, the beauty sector will simultaneously embrace hyperphysical experience and the growing potential of digital and dual-reality identities

From multi-sensorial product experiences to phygital products that ease the transition between real-world and digital representation, these are key sectors in which to innovate.

Beauty brands will embrace their roles as guardians of nature, turning to lab-grown natural ingredients in a move towards The New Clean. Scientific innovations will also drive forward the longevity market as consumers become more enthralled not just by looking better but also by living better – for longer.



Circus, UK

1 Super-sensorial

In 2023, the push-back to hyper-connectivity will influence many sectors. In the beauty category, scent innovations are being blended with auditory and spatial experiences to offer people physical and psychological grounding.

French crystal-maker and perfumer **Lalique** has collaborated with American artist **James Turrell**, known for his work with light and space, on two exclusive fragrances. Their artisan-made crystal flaçons combine artistic and olfactory sensibilities, which playfully diffuse and diffract light thanks to their architectural prism shapes.

Sensorial crossovers are providing intriguing category innovation that look to synaesthesia and experiences that enhance multiple senses simultaneously. In Japan, Koh-do is the practice of 'listening' to incense and intermedia perfumery **Folie à Plusieurs** has updated this with the **Co collection** of five olfactory experiences; each pack of incense sticks is sold with a link to download an album.

According to **Arpa** founder Barnabé Fillion (formerly skincare brand Aesop's 'nose'): 'Everything that I'm doing in perfumery is visual and related to my own synaesthesia, to convey not just a memory but a texture.' Arpa pairs each of its perfumes, packaged in a hand-blown, limited-edition glass bottle, with a unique sonic frequency, sculpture and photograph to convey its sensorial character.



Lalique and James Turrell, France and US

Lab Insight

Olivia Houghton
deputy creative foresight editor

'Identify your target audience and examine their wider interests – from leisure to music, art, media and sport. Who are the collaborators that could elevate or augment your offering?'



Colour Alchemy by The Unseen in collaboration with Schwarzkopf Professional, UK

2 Phygital Beauty Futures

As our digital identities shape-shift, so too will our beauty regimes. Product innovations will centre around cutting-edge formulas that react to temperature, light and body chemistry – taking inspiration from the chameleon identities that have drawn young consumers to virtual and gaming worlds.

A culture of **anti-aspiration** is giving rise to a beauty sector in which beauty is untethered from norms, allowing people to experiment with interchangeable identities. UK-based **Glisten Cosmetics'** rainbow-coloured eye products such as glitter and eyeliner have gained a TikTok tribe of influencers experimenting with how its formulas react to digital filters.

The Unseen founder Lauren Bowker's dual-reality approach to beauty has resulted in **Spectra**, a product that stands out when photographed with a flash and is embedded with reflective technology. Bowker's move into haircare in partnership with German brand **Schwarzkopf** has produced **Colour Alchemy**, the world's first holographic temporary hair dye that can react to heat and sunlight in real time, changing prismatic shades with the change of environment.

3 Guardians of the Natureverse

As companies face growing criticism for climate inaction, some organisations are paving the way forward by electing nature as a legal stakeholder. In the UK, Edinburgh-based beauty company **Faith in Nature** has hired a director, **Brontie Ansell**, senior lecturer in law at Essex Law School and director of **Lawyers for Nature**, to represent nature on its board. The decision will give the natural world a formal vote on the actions that will affect it in the future.

This comes as beauty consumers begin to lose trust in sustainability claims made by brands. Research agency **Provenance** surveyed 1,500 beauty shoppers across America and Europe, revealing that 79% of beauty and wellness consumers are unsure whether to trust the industry's sustainability claims and 15% of shoppers now consider information on sustainability to be the most important factor when purchasing.

Estée Lauder-owned UK skincare brand **Haeckels** is strengthening its status as a **Post-purpose Brand** with its anti-Black Friday sentiment and forgoing profits altogether. Instead of offering discounts, it gave over use of its retail spaces in Margate and London to small independent businesses. Making space for those creating change rather than pushing their own products shows how such philanthropic collaboration can be mutually beneficial.

Yvon Chouinard, founder of Patagonia, US

‘More than one in three UK consumers stopped doing business with a brand in 2021 because they had doubts about its sustainability’

Source: Deloitte

4 The New Clean

Consumers' understanding of wellbeing is evolving post-Covid as a renewed sense of bodily rehabilitation and hygiene is linked to the living environment; a healthy community is rooted in the quality of our soil, water and air.

Jolie Skin Co is a US-based beauty and wellness company focused on purifying the quality of water via a smart shower head that removes heavy metals from water to improve skin, hair and scalp health, while reducing reliance on anti-drying bathing products. Its founders believe that the water we wash with should be as clean as the water we drink, and that municipal water supplies have been compromised and no longer provide the clean, healthy water that people's minds and bodies need.

Accompanying this back-to-basics view is a re-assessment of what 'clean' ingredients actually are, with many naturally derived cosmetics ingredients having a damaging impact on the planet or facing supply issues. Swedish brand **Tiny Associates**' post-natural skincare products are microbiome-gentle and draw on molecules that naturally occur in human skin. 'Bio-technology could actually offer the cosmetics industry a frictionless transition to more sustainable ingredients,' explains David Koo Hjalmarsson, CEO and founder.



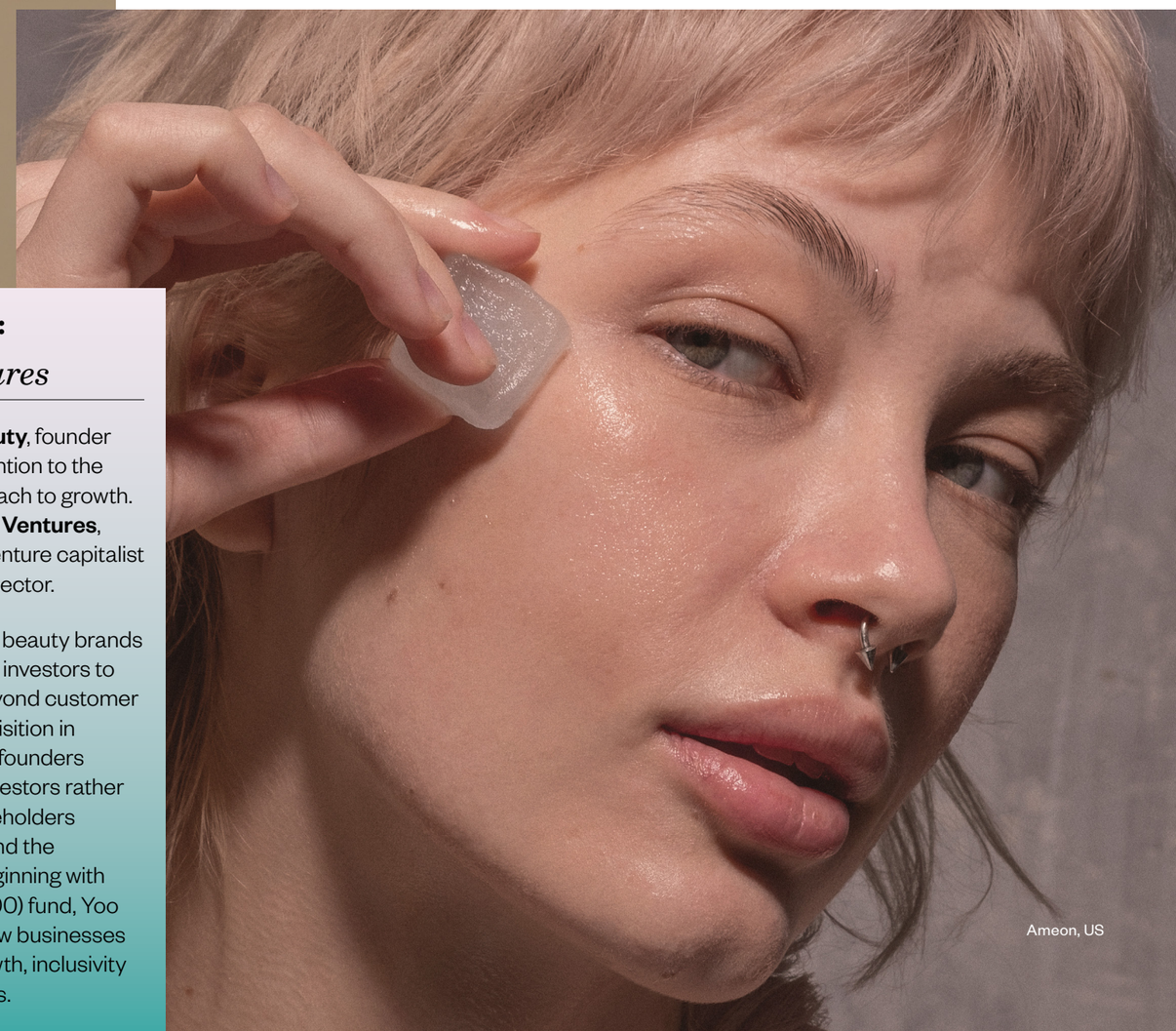
Jolie, US

5 Cryo-longevity

The 2022 **Global Wellness Summit** highlighted the burgeoning growth of the longevity industry, and in particular cryotherapy's links to building longevity-promoting resilience, which will have particular relevance for the beauty sector in 2023 and beyond.

From Wim Hof's eponymous method to whole-body cryotherapy chambers, cold therapy is reaching the mainstream. The beauty industry is translating this into at-home products. Inspired by make-up artist **Charlotte Tilbury**'s backstage beauty ritual of using ice cubes on models' faces to smooth and lift skin, her eponymous beauty brand now offers a **Cryo-Recovery Face Mask** and eye serum. Offering future-focused skincare backed by science and technology, **Ameon**'s **Supreme Energy Ice Cubes**, formulated with antiseptic and anti-inflammatory ingredients, are made to be kept in the freezer and applied to the face wrapped in gauze.

The cooling formula of **Boscia's Cryosea Firming Icy-Cold Cleanser** is a result of the brand's patented Cryosea blend, made with red algae, sodium hyaluronate, sea kelp extract, sea water and alpha-hydroxy acids (AHAs). These ingredients are known for their soothing effect, and provide a cold-as-ice experience that helps to tighten, firm and plump skin in preparation for additional skincare steps.



Ameon, US

Industry Disruptor:

Press Reset Ventures

After launching **KraveBeauty**, founder Liah Yoo is turning her attention to the industry's untenable approach to growth. She is behind **Press Reset Ventures**, aiming to fight the rise of venture capitalist (VC) culture in the beauty sector.

Indeed, many independent beauty brands come under pressure from investors to expand and accelerate beyond customer needs or to grow with acquisition in mind. 'I've seen many peer founders devote efforts to please investors rather than serving their key stakeholders – customers, employees and the environment,' she says. Beginning with a £745,000 ($1m, €889,000) fund, Yoo will invest in and mentor new businesses focused on measured growth, inclusivity and sustainable innovations.

'Across the globe, rain water has become too toxic to drink'

Source: Stockholm and ETH Zurich universities

Viewpoint: Aeir

Genderless, carbon-neutral, synthetic: luxury veterans Enrico Pietra and Rodrigo Caula are building the future of fragrance – with a little help from NASA technology

Tell us more about your backgrounds.

Enrico Pietra: We both completed the master's in Design for Luxury & Craftsmanship at ÉCAL, where we collaborated with brands like **Hermès**, **Cartier** and **Christofle**. In early 2018 we set up our own design practice, **NUOVA**, which stands for New Understanding of Various Artefacts. With NUOVA, we worked with companies wanting to explore new codes of luxury and gain a deeper understanding of sustainability and circularity.

Rodrigo Caula: With both of us coming from industrial design backgrounds, we have a deep understanding of how objects and materials are manufactured from A to B. Before co-founding NUOVA, I'd been responsible for managing **Tesla's** advanced colour and materials division, developing biomaterial and supply chain integration strategies for the company at large. Extending this ethos through NUOVA, we'd brought similar approaches to brands like **Seed**, **Yeezy** and **Rimowa**, where we oversaw **LVMH's** first Web3 launch before non-fungible tokens (NFTs) went mainstream.

Why, then, did you decide to launch a perfume?

RC: Working at the intersection of luxury, sustainability and biotechnology, and building brands for others, we asked ourselves: 'What would happen if we took the DNA of NUOVA and incubated a new company that used the most emotional piece of the human puzzle – smell – to express this narrative?' We created **Aeir** to express our vision for universal luxury.

Why have you chosen to use synthetic ingredients to formulate your perfumes?

RC: As designers, we have a responsibility to leave no trace behind in our journey through physical creation. By protecting the source and relying on biotechnology we can attain full circularity throughout the production process, from the packaging to the fragrance. We're working towards reducing, and someday completely eliminating, our carbon footprint through biomimicry by working in synch with nature and its operating systems. Extracting 350 tons of flower petals or chopping down ancient forests to produce a single oil for a single brand can cause severe environmental implications in the future. The perfume industry should take a step back and look at what impact it is having at scale.

'The perfume industry should take a step back and look at what impact it is having at scale'

Do you think that there is still a stigma attached to synthetic ingredients?

RC: 100% – there's still so much stigma attached to it, not only in fragrance but throughout the entire industry. It starts with education. Synthetics have always been associated with petroleum and plastic, fake and not real. If consumers knew that natural ingredients in perfume are not as strictly regulated, and the purity of biosynthetic ingredients causes less irritation and less destruction to the world, we could have a different type of conversation. If you could replicate the scent molecule of a palo santo tree instead of chopping down one that's 85 years old, why wouldn't you?



Aeir, US

Health & Wellness

Our mental wellbeing has become just as important as our physical wellbeing. In retail, physical spaces and brands will address the same care needed for our minds as for our bodies, such as with mental health gyms

Our **Neo-collectivism** mactrotrend highlights new spaces informed by traditional ideals of kinship that are turning care into the next pillar of wellbeing. In 2023, more digital tools will employ ambient, AI-driven tech, ushering us into an era of predictive care. AI innovation is also driving the femtech sector, as applied to the burgeoning perimenopause market and also to the need for life-long hormonal partners.



Kickback by Mother Goods, US

6 Retail Therapy

We are now witnessing a shift towards mental healthcare that is purposely situated in retail districts or aligned with retail destinations. It is a response to a gap in post-pandemic care, with the UK's state healthcare provider, the NHS, reporting that some 8m people in England have struggled to find mental health support as they're not considered sick enough to qualify.

In 2023, brands will need to build on innovations in 2022. In **The Anxiety Shop**, a pop-up store in Melbourne, Australia, Arie Rain Glorie, an artist and curator who identifies as living with obsessive compulsive disorder, curated products designed to remove shame and stigma around mental health. British retailer **Selfridges** launched **Superself**, a wellbeing initiative designed to help shoppers rest and rejuvenate, installing **SENSIKS** sensory mental healthcare pods.

'When you walk down the street in most major cities, you'll see a **Nike**, **Soul Cycle**, **Lululemon** – imagine what it would do for us as a culture to be as proactive about our mental health as we are about our physical health,' says Alexa Meyer, co-founder and CEO of mental wellbeing gym **Coa**, which plans to open local mental health 'gyms' in major cities and towns in the US. These spaces will be dedicated to group emotional fitness classes, events, therapy and community.



Superself by Selfridges, UK

Lab Insight

Holly Friend,
cultural strategist

'Care Collectives can evolve beyond grassroots communities to exist as legitimate business models, whether using paid-for subscriptions or an e-commerce site of beauty, wellness and even food products'



Philips and Nowatch have partnered to create a wearable that analyses cortisol levels and notifies users of their stress levels up to 60 minutes in advance, US

7 Predictive Optimisation

We're all familiar with trackers that monitor our physical health. But as we take our holistic health more seriously, and as AI tech develops, product designers will respond with ambient digital tools that drive predictive care. This will create opportunities to understand and help people in new and exciting ways.

Christel Errill Wolthoorn, managing director of **LovedBy Consulting**, a business, data and technology consultancy, predicts the next digital evolution will combine measurable data points about the user with wider behavioural lessons in order to make predictions. Heart rate, sleeping patterns, scrolling time, blood glucose levels and even environmental factors can be used to identify patterns of likely mental health outcomes, facilitated by algorithms that are constantly learning based on the individual.

'It's imperative to recognise some of the obstacles that come with measuring wellbeing in this predictive way,' says Wolthoorn. 'Organisations need to be razor sharp as it's such a vulnerable space. If data tells you that someone is suffering, you have an obligation to help them. As a brand, are you prepared for that?'

8 Care-full

With collectivism on the rise, as detailed in our **Neo-collectivism** mactrotrend, new spaces informed by traditional ideals of kinship are turning care into the next pillar of wellbeing.

This is driven by people still feeling let down by the support systems that society has assigned them. Some 70% of Black adults in the US believe the healthcare system often treats people unfairly based on their race or ethnic background, according to the **Kaiser Family Foundation**. What this leaves is a gap for new types of care structure based on reciprocal kinship.

Fed up with social media and its relentless obsession with self-care, Sara Weinreb launched her own alternative, **IMBY**. This is an anti-capitalist community centre with offerings ranging from bonfire chats to resource-sharing and merchandise, all designed to help people nourish one another in the online space. Applying this concept to the retail sector is Los Angeles-based virtual store **OEM**, a next-generation drugstore built around the concept of community care. This was inspired by the appreciation for family in Japanese culture, bringing together products – from soothing balms to soups – created to imbue people with a sense of being cared for.



‘The small gestures of care for which we once relied on family and friends have been slowly replaced by lonely strolls down overwhelming aisles’

Ceilidh MacLeod and Shun Kinoshita, co-founders, OEM

OEM, US

9 Hormonal Life Partners

The femtech industry is expanding to cater for later women's life stages, creating AI-driven solutions that will empower individuals with greater choice and transparency as they approach the perimenopause. In the coming years these technologies will shift from menopause- or menstruation-only to become life-long hormonal partners. Such innovations could prove transformative, enabling deep understanding of one's body and its changing needs.

The global femtech market is expected to reach £3.3bn ($3.8bn, €3.8bn) by the end of 2031, according to **Future Market Insights**. As the digitally native Gen Z reach this life stage, they will seek ownership of their healthcare journeys. Taking a 360-degree approach to mid-life health management, the **Midday** health app uses advanced algorithms, AI sensor technology and digital therapeutics to track hormonal changes and symptoms, alerting users to triggers and patterns, and offering tailored interventions in real time.

Harnessing the drive to more preventative healthcare solutions, **Eli Health** aims to give women access to their meaningful hormonal data across every life stage. Its proprietary device is an at-home hormone-testing cartridge that uses a saliva sample to capture hormone levels. Working in tandem with a smartphone app to visualise data, Eli provide users with daily health insights and an advice community.



IdentifyHER, Ireland

81% of gamers regularly eat or drink while playing video games

Source: Newzoo

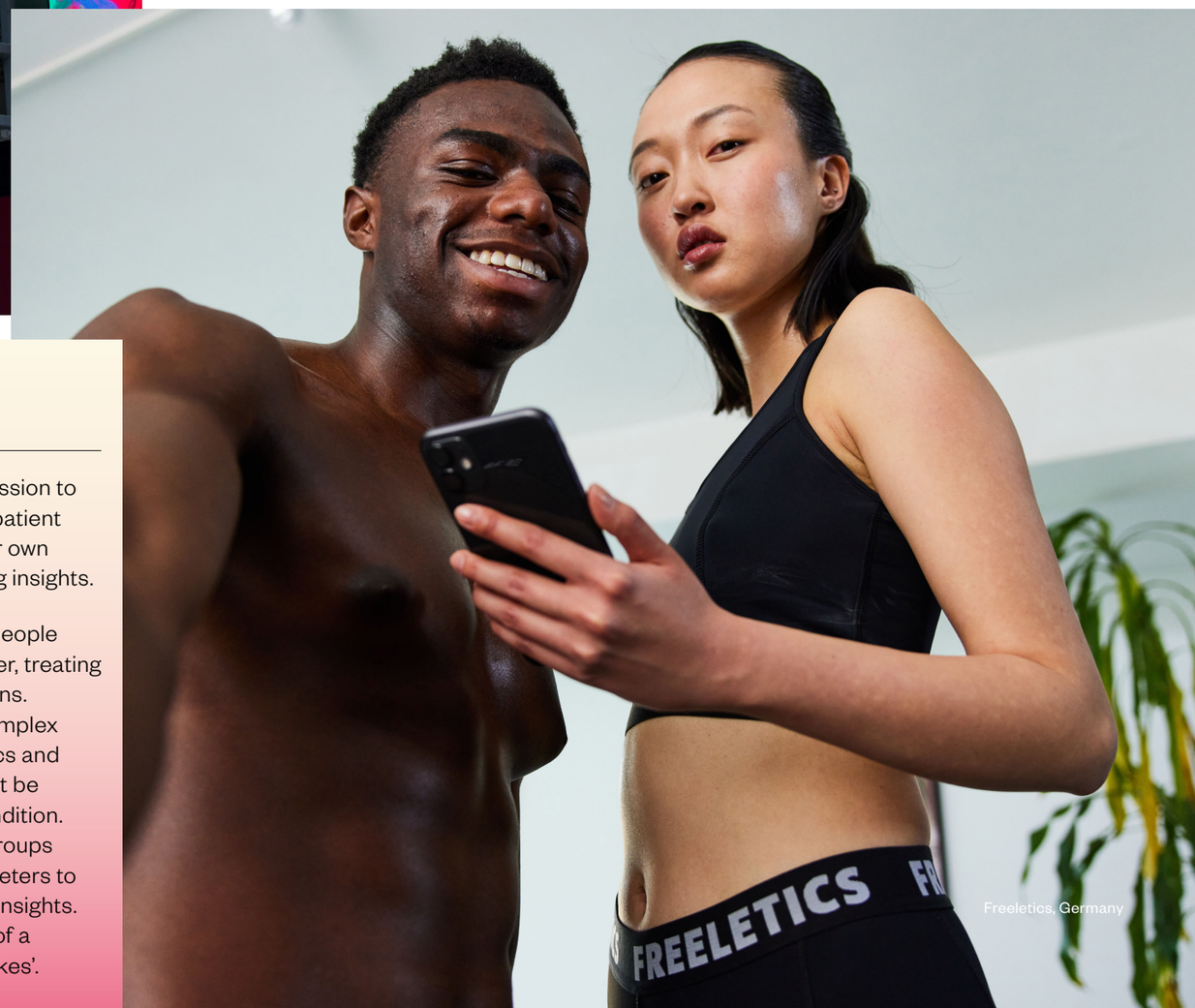
10 Game-fit

As esports' influence continues to challenge that of traditional sports, lifestyle brands are helping gamers to level up their physical and mental health. Brands need to ready themselves for the uptake from – and impact on – casual players.

One way brands are looking to nurture these stars is through new-trition. **CTRL,** a powdered meal replacement founded by esports gamers, is targeting those who game and stream with a new line of protein bars focused on nutritional value.

Gucci and **FACEIT** launched the **Gucci Gaming Academy** to back up-and-coming esports talent with full-time mental health support, financial aid and insight from the World Health Organization. Eyewear brand **Oakley** has signed a multi-year partnership with **Envy Gaming** where players will exclusively wear its Prizm Lens Technology, which promotes blue light filtration and enhances colour contrast, as well as a line of frames designed to be worn comfortably with gaming headsets.

Consider how your business can introduce the same products and experiences to the estimated **3bn** gamers across the globe, from food products that prioritise nutrition to home furnishings and eyewear that support players' health (source: Statista/DFC Intelligence).



Freeletics, Germany

Industry Disruptor:

Alike

Digital platform **Alike** is on a mission to unlock the untapped power of patient similarity networks, turning your own medical profile into empowering insights.

Traditional medicine lumps all people with the same problems together, treating patients based on generalisations. Human beings, however, are complex mixes of different characteristics and medical realities, and should not be managed based on a single condition. Using machine learning, Alike groups people based on shared parameters to generate precise personalised insights. Users can also engage as part of a community with their health 'Alikes'.

Viewpoint:

Sowvital

Jack Lewis, CEO and founder of London-based **Sowvital**, explains how the beauty-inspired fertiliser brand is cultivating a new form of self-care while offering an inspiring example of how to embed joy and integrity into the heart of a brand

Applying ritual to plantcare

Positioning itself as a plant sciences brand, Sowvital's three-step product package helps its customers care for and mindfully connect with plant life.

'Our philosophy is to create brilliant products that are easy to use and help you reconnect with your plants,' says CEO Jack Lewis. 'We designed the three-step cleanse, nourish, spritz routine, drawing on some of the enjoyable rituals and staples in our lives... We wanted to create something that made it easy for people to start caring for their plants as part of a regularised ritual and activity.'

Product efficacy and sustainability are key

Sowvital has put sustainability at its core, setting itself the challenge of finding innovative ingredients that are eco-friendly. 'We're lucky to be able to work with some great scientists using technology that recycles nutrients. Rather than the key compounds coming from mined sources, they come from recycled industry by-products, which significantly lowers the CO2 profile of the ingredients. It's also the materials we use. We focus on glass and sustainable paper.'

Imbuing joy and integrity into a brand

Sowvital has taken a slow and steady approach to development in order to ensure product quality. 'It's all about doing something that feels right and doing it with a sense of joy and integrity,' says Lewis.' Every detail – right down to the smallest ingredients to the box packaging and the designs that sit on it – are all thoroughly thought out, conceived, tried and tested. We don't rush; our goal is to create quality products that last and become respected staples.

Why brands should consider a synchronised approach to care

Lewis has placed significant importance on how Sowvital's products will sit with an informed consumer base already well versed in directives about self-care and mindfulness. 'When your product intersects with people's lives and routine, you should be super-cognisant of the impact it has. Brands that don't do that, or brands that are ignorant about that, resonate less with a consumer that's increasingly far more educated and far more choosy because they're informed.'.

Plant therapy

Sowvital is also engaged in its own research into mental health, serving to cement its values of expertise and integrity. 'We are currently in the process of authoring a report on the role of plants in mental health. It delves into everything that neuroscientists have discovered, right through to the way our brains light up when we see the colour green. Green is unique for eyes: it's the colour that we can perceive the most iterations of.'



Sowvital. Identity by Leslie David Studio, UK

Food

The post-Covid rush to be out, meet people and eat out has faded, dampened by rising living costs and global financial turmoil, which is set to continue in 2023

Dining spaces will need to offer escapism and cater for changing notions of indulgence. Food innovators must explore the digital tools and Web3 capabilities of the **Betterverse** to provide access to and education about food. Meanwhile, Adaptive Appetites – from both consumers and brands – for fostering agility will be key to navigating ongoing food, energy and financial turbulence.



IYKYK set by Omsom, US



Web-3 Café by Crosby Studios and Gaia Repossi, France

Lab Insight

Abi Buller
foresight analyst

'Food innovators must think beyond novelty marketing efforts, and instead recognise the vast potential of the Betterverse in building more equitable food futures'

11 The Foodverse

Food innovators must look to the metaverse and Web3 capabilities as positive tools to provide access to and education about food and build an equitable 'foodverse' in 2023.

Ghost kitchen and virtual restaurant company **Cordia Corp** has launched a **Crypto Food Hall NFT Chef Collection** hosting 1,000 virtual chefs, which can be purchased as NFTs by independent restaurants. Token-holders will then receive invitations to virtual and in-person events, as well as being offered discount codes for virtual restaurants. Cordia also pledges to use 20% of resale royalties from its NFTs 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.

Meanwhile, **CHFTY** is cultivating a community based around food and digital assets. The **CHFTY Pizzas** project is a collection of pizza-shaped NFTs that unlock benefits including masterclasses, merchandise and pizza parties with famous chefs. CHFTY plans to develop its platform to help chefs and independent restaurants to enter the Web3 space.

12 Extreme Dining

Hospitality spaces will turn to more extreme sensory experiences to elevate eating in new ways. Some are already engaging diners through sensory stimuli while others are exploring the extremes of materials, ingredients and lighting – offering escapism and indulgence.

UK-based gastronomy duo **Bompas & Parr** brought multi-sensory dining to AlUla, home to the UNESCO World Heritage Site of Hegra in Saudi Arabia. In the **Forces of Nature** dining experience, diners watched local produce cooked for them across a stream of molten lava at a temperature of 1,350°C. In Shanghai, **Taste of Dadong** is a dining space created by **AD Architects** that uses a single colour – blue – to turn eating into a 'dream-like' experience. Blue light reflects off curved stainless steel walls and large mirrored ceiling panels, designed to echo the nonsensical way in which dreams tend to flow.

For ultimate escapism verging on role play, look to **Walt Disney World**'s Epcot, home to **Space 220**, which takes guests on an other-worldly adventure. Its name references the experience of being some 220 miles above the Earth, with a trained astronaut accompanying visitors in a lift that carries them to the 'space station' restaurant.



Forces of Nature by Bompas & Parr, Saudi Arabia

13 The Indulgence Paradox

While household budgets are being squeezed by the cost of living crisis, there's a paradoxical desire to celebrate and take pleasure in eating and drinking, especially following two years of Covid restrictions.

'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.'

Global food prices have risen significantly in the past year, up 8% in October 2022 compared with the average figure in 2021, according to the **UN Food and Agriculture Organization** (FAO). This is conversely making little luxuries such as chocolate, coffee or a bottle of wine more appealing than ever. A **Mintel** study found that 56% of consumers agreed that a premium chocolate bar is a 'good way to boost your mood'. Amid the doom and gloom, it's more important than ever that people have reasons to celebrate. And food and drink is at the heart of this.



Gohar World, US

Industry Disruptor:

Dr Catherine Nakalembe

As Africa programme director at NASA Harvest, Catherine Nakalembe, our Futures 100 Innovator 2022 winner, is working to secure the future of crops and farming across East Africa – with a little help from satellites and machine learning.

Recipient of the 2020 Africa Food Prize, Nakalembe's work is protecting farmers from crop failure at a time when the climate emergency is pushing farming further north and demanding radical technological interventions combined with people-centric solutions. Her work with NASA uses data from farmers and satellite imagery to ascertain how crops are faring in countries such as Tanzania, Uganda and Kenya, giving instant insight to governments and helping to mitigate food shortages where crop failures could occur.

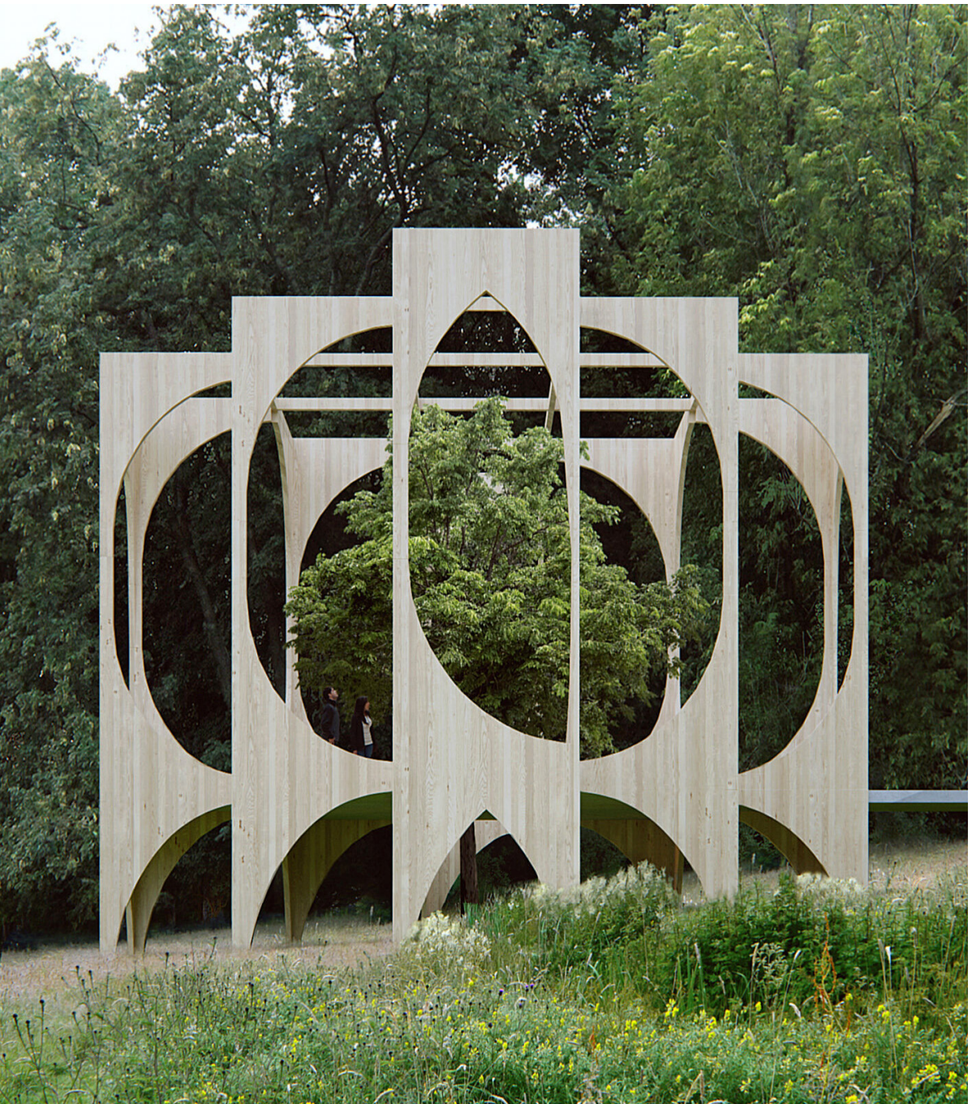
14 Activism Eating

Food activists are creating opportunities and connecting communities around provision and accessibility. Clear and substantial values will be expected of brands that want to play a role in **Activism Eating**.

With care and consideration, there might be capacity to lend expertise or funds to ensure food access for overlooked, elderly and underserved groups. In 2023, brands could also become bastions of protection for ancient food processes or skills transference.

Take the **Urban Food Forest at Browns Mills** in Atlanta, which is the largest in the US and is located in an area identified as a food desert. It produces a variety of fresh and healthy nuts, fruits, vegetables, herbs and mushrooms. Available for public consumption, it's a nod to the site's former farming owners, Ruby and Willie Morgan, who left excess produce from their farm on fence posts for neighbours to claim and enjoy.

In Norway, **Powered by Ulsteinvik** is a future vision for shared community kitchens and 'generation gardens' with an emphasis on people supporting each other, and reclaiming independence and security through activities like food-growing.





Left: Powered by Ulsteinvik by Kaleidoscope Nordic, Norway; Above: Nourish Hub by RCKa, UK

15 Austerity Innovators

Fostering collaboration between supermarkets, food suppliers, local government and energy companies will be vital in the coming year for those adaptive brands and businesses that are willing to find ways to help bolster food access – while fitting into people's daily lives and using familiar technologies.

In the US, nascent platform **Ziscuit** uses a reverse bid system in which people upload their grocery lists and local supermarkets bid to fulfil them at the best price, easing price pressures in food deserts. In Canada, **Flashfood** is an app-based marketplace that works with supermarkets to 'rescue' items bound for landfill, selling them at heavily discounted prices. Local councils in the UK are also responding. The London Borough of Bexley is working with food-sharing and anti-waste apps **Olio** and **Kitche** to help local families.

There is also scope for innovation in the product development area around energy use relating to food. Pasta company **Barilla** has released a new **Passive Cooking** campaign and Passive Cooker product that will help customers save on energy, and revolves around an ancient technique to cook pasta off the heat. While this is a small way to reduce energy, it will encourage people to implement minor changes to make a big difference.

Viewpoint:

OneRare

Supreet Raju, co-founder of **OneRare**, unpacks the potential that Web3 can offer food brands, chefs and the public by bridging digital and real-life experiences

What is OneRare?

OneRare is the world's first food metaverse – we call it the Foodverse. We're working to onboard the global food and beverage industry to Web3.

We have the chef zone, where you can meet real-life chefs, join their cooking classes or buy their cookbook NFTs. We also have the virtual restaurant zone, which allows global restaurants to make a metaverse restaurant. This is great for cloud kitchens, as the restaurant zone allows them to have a location they can be proud of, where they can get guests or customers to visit, interact, check out their latest menu and order online.

Finally, there's the gaming zone. Here, users can enjoy food games, build their own dishes, run a food truck and battle it out with others. OneRare is all things food on the blockchain.

Who are you targeting in terms of audience?

The platform itself connects food businesses to consumers, so our prime target is the consumer. We want to encourage first-time metaverse users not to be scared of blockchain, to make their wallet, to come and play their first game or enjoy their first NFT.

What opportunities exist for food brands, restaurants and chefs, or grocers in OneRare's Foodverse?

The core idea is that currently every chef – as famous as they can be – or every restaurant, however iconic, can only monetise at a very local level through people who come to their restaurant or if they have a cookbook. They aren't really able to reach their global fans, and that's how the food metaverse changes things. Here, you can present your restaurant the way you have always wanted it to be. You can create a marketing channel and you can have NFTs. I can give you a restaurant NFT, which you can use to go for a real-life birthday meal in London, for example. It just helps create a more global connection for brands.

What is your advice for food brands or chefs who are unsure about the potential of Web3?

The pandemic has already been so harsh on the industry, but it taught food companies the value of having a digital community. Such communities funded some restaurants through the whole lockdown. Yet, where Web3 is concerned, it can be so tech heavy that I completely understand a food business not wanting to get on board. But that's the experience we are looking to improve at OneRare. We want to be the tech partners for them in the decade of blockchain and the metaverse. It's a chance for food companies to embrace a new technology, to be an early mover.



OneRare, US

Drink

The beverage industry will increasingly see a wave of decolonisation, with new spirits brands emerging from regions like Africa and countries like Mexico

These challengers are locally produced and rooted in culture, leading existing brands to re-assess their Eurocentric approach to heritage. At the same time, the ready-to-drink (RTD) and no- and low-alcohol markets continue to grow, appealing to younger generations who wish to moderate their alcohol intake. In turn, the wine sector – rooted in heritage – is rethinking its appeal for younger markets with new branding and packaging innovations.



Poytonic. Branding by KR8 bureau Vienna, Clemens Schneider, Austria

16 Cultural Challengers

Cultural bias is rife in the spirits industry, so while local brands are doing what they can to promote their ingredients, flavours and heritage, there is plenty of scope for brands to challenge this in 2023 and beyond.

A new wave of diverse and culturally rich spirits are emerging from the African continent. In Zimbabwe, **Masau Spirits** uses the masau fruit, with products marketed online and distributed locally and globally. The spirits are hand-crafted and distilled by the Pofera family, who now farm masau fruit trees ready to launch their first African whisky in 2027.

South African drinks firm **Distell** has launched **Amarula African Gin** in Europe following **Heineken**'s purchase of a 65% stake in the group for £1.9bn ($2.2bn, €2.2bn). To date, the gin is the only expression made from marula fruit, native to Africa.

Spearhead Spirits is on a mission to put African spirits in every bar around the world with **Vusa Vodka**, made from African sugar cane, and **Bayab Gin**, flavoured with fruit from the baobab tree, which is native to the African savannah. 'Being produced on the African continent allows us to show the world what Africans have always known about their culturally and resource-rich continent, with products that compete on the world stage in taste and quality as well as innovation,' says co-founder Chris Frederick.



Lab Insight

Savannah Scott
senior creative foresight analyst

By challenging the lack of cultural diversity in the global spirits market, African brands are creating rich flavour profiles that breathe new life into a traditional sector'



Left: Spearhead Spirits, South Africa UK; Above: Jose Cuervo

17 Digital Drinks

Drinks brands across the board will venture further into digital worlds in 2023, exploring how digital ownership tools can facilitate community-building, co-creation and create brands that are of the people, not for the people – ensuring long-term brand loyalty.

Mexican mezcal brand **Ojo de Dios** has introduced an NFT membership programme, harnessing its existing Facebook and Instagram communities into a Web3 space.

The Odd Squad community enables members to access benefits including invitations to VIP events, limited editions and exclusive merchandise.

Tequila brand **Jose Cuervo** has launched the first-ever metaverse distillery in the 3D virtual world platform **Decentraland**. The 'metadistillery' will host virtual experiences, be a source for education on all things tequila, and act as a platform for limited-edition product launches and entertainment activations. Jose Cuervo also worked alongside multi-sensory experience designers **Bompas & Parr** to shape the aesthetic of the virtual world and design the visitor experience.

Coffee chain **Starbucks** has launched a Web3 experience for its Starbucks Rewards members. Starbucks Odyssey will enable members to collect and purchase digital assets to gain access to benefits and immersive coffee experiences. The platform won't require cryptocurrency or a crypto wallet to participate, making Web3 technology more accessible to ordinary users.

18 Vintage Fun

A new generation of winemakers are challenging the sector's stuffiness with unconventional branding and marketing that aligns with younger drinkers.

Maison Du Vin is a nascent brand from British company Off-Piste Wines, using its labels to deliver flavour notes and pairings that align with younger drinkers' palates, and go well with a bowl of salted popcorn. According to the brand: 'Maison du Vin starts from the simple notion that wine should be fun.'

Vouni Panayia Winery in Cyprus is embracing the bottle as a space to transform how wine is positioned to drinkers. Its Untitled wine replaces a paper label with the use of screen-printed type directly onto the glass, making the statement: 'We are not drunk enough to survive the 21st century.'

Amid growing Millennial and Gen Z interest in wine clubs, **Stompy Wine** is transforming the sector with a visually refreshing subscription platform. Amalgamating type, bold colours and illustrations, Stompy's new-look platform aims to broaden wine connoisseurship to new or novice wine-drinkers.

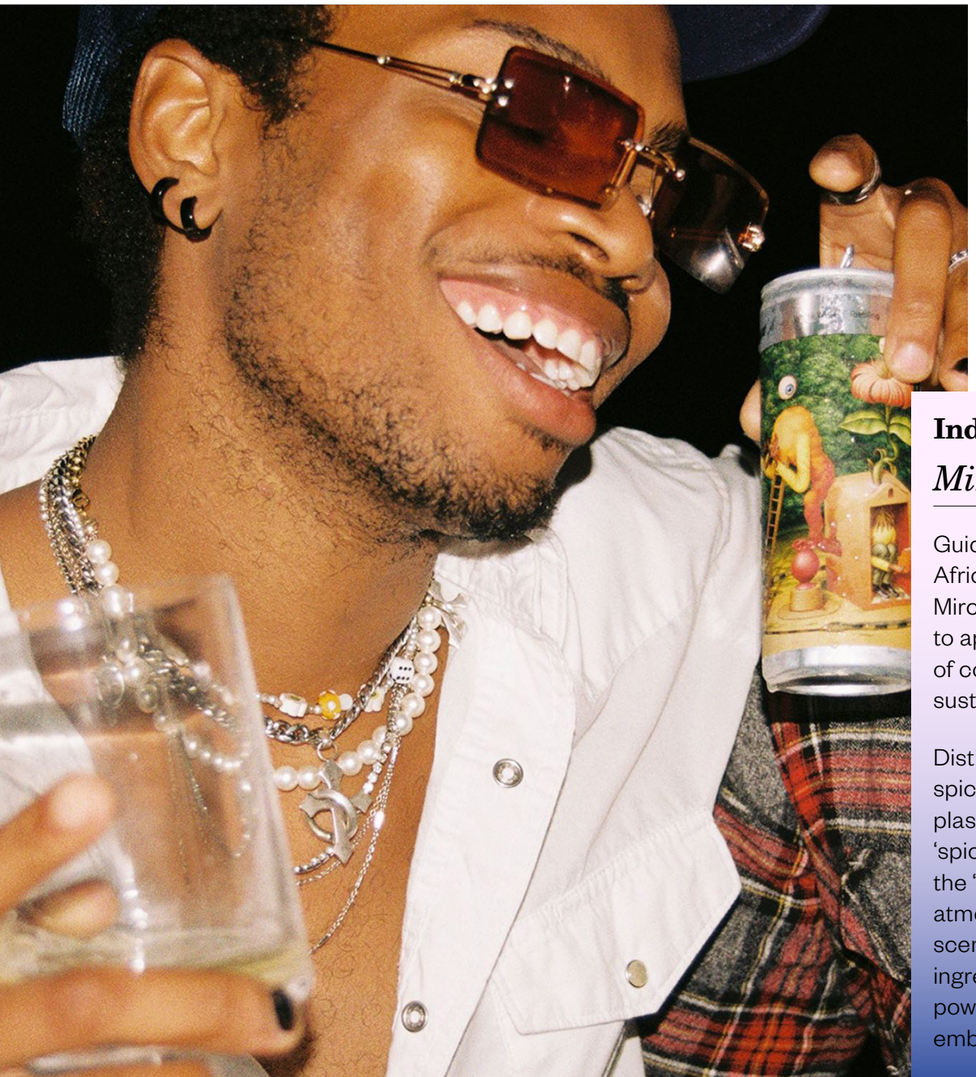
Poytonic. Identity by KR8 Bureau, Austria

19 Moderate Measures

No- and low-alcohol directions are set to further influence packaging innovations and brand activations. Younger generations are drinking less than their older counterparts. According to a report published in August 2022 by **KAM** and **Lucky Saint,** nearly one-third of pub visits in the UK are now alcohol-free.

For years, canned wine has been associated with cheap booze, but a recent flurry of well-branded ready-to-drink (RTD) beverages is helping to dispel that misconception. In addition to being more affordable and sustainable, the dimensions of the tin promote more moderate drinking. Moderation is also one of the cornerstones of Berlin-based company **Djuce Wines**, which promotes its canned products with the motto 'drink less, drink better'.

Finnish beer brand **Karhu** has also released a festival wristband that allows attendants to monitor their alcohol intake levels safely and conveniently. The wristband features an integrated alcohol meter that wearers can lick to reveal their blood alcohol concentration (BAC) levels swiftly and discreetly. With members of Generation Z making an effort to lower their alcohol intake, inventions such as this show how drinking can be enjoyed more responsibly and safely.



Industry Disruptor:

Mirchi

Guided by the founders' West African and South Asian roots, Mirchi interrupts a market that fails to appeal to young communities of colour and which often treats sustainability as an afterthought.

Distilled locally in the UK, the natural spiced rum is carbon-neutral and plastic-free. Mirchi, which means 'spice' in Urdu, encapsulates the 'beauty of Lahore and the atmosphere of the London night scene'. Combined with the hero ingredient baobab, an organic powder grown in Ghana, the spirit embodies a melting pot of cultures.



Left: Djuce Wines, Germany; Above: Excalibur XO by Bompas & Parr, UK

20 Breaking Taboos

Strained supply chains matched with a growing market for disruptive products that cater for ultra-sensory, boundary-defying experiences are paving the way for more new and unusual ingredients in the drinks sector.

The UK's self-styled architects of taste, **Bompas & Parr,** are re-inventing poppers such as amyl nitrite, making them into upscale and exclusive products. During the 2022 **London Cocktail Week** the pair mixed poppers into a curated drinks menu at The Standard hotel's Sweeties bar as part of the Excalibur XO activation. The project aimed to create an inclusive and educational space around pleasure and queer culture, while bringing an innovative ingredients concept to the food and beverage sphere.

Also in the UK, **The Wild Beer Co** is offering a different but equally challenging ingredients concept with its new beer collection which includes Enso, an ale made with the help of wasps. The beer uses a unique yeast strain found in abandoned wasp nests that delivers a sweet aroma that is impossible to replicate in lab-grown varieties. The wild fermentation process creates unusual flavours and a novel experience. With ongoing **changes to the environment** and supply chains pushed to their limits, brands need to continue to innovate when sourcing for products.

Viewpoint:

Pzaz

Gen Z aren't buying energy drinks but that doesn't mean they don't want their effects. New York-based entrepreneur Jonah Reider is taking on the energy drinks market with an innovative on-the-go energy mist targeting the Gen Z consumer

What is Pzaz?

Pzaz is a breath spray for on-the-go energy. My team spent a long time thinking about what a superior alternative to energy drinks, soda, and even coffee, might look like. Because, for us, the energy sector is the most interesting consumer goods category. It's huge and consistently growing. In the US, energy drinks sales increased by 26% from 2017 to 2021, according to **Clootrack.**

What's the story behind the brand?

I decided to look at the stores where I bought food and beverages: the corner shop, supermarkets, even petrol stations. It was in visiting hundreds of these stores that I became interested in the energy category because there were so many options, yet no one I know would ever buy them. They taste terrible, they make you feel bad and you can't choose how much caffeine you're getting in them, so you end up jittery. I started thinking about what a superior energy product would look like, not only as a brand but also its form and functionality.

Why did you decide to experiment with the format instead of making another energy drink?

I started collecting feedback from an untapped audience of next-generation energy consumers who have little resonance with any existing energy brand, even though they use caffeine all the time. Everyone was telling me they buy caffeine impulsively. They said: 'Wouldn't it be amazing if there was something more portable, more fast-acting and more precise?' That's why Pzaz delivers functional micro-doses of caffeine, vitamins and electrolytes that are absorbed through the membranes in your mouth and tongue, rather than being digested over several hours.

'I want to sit on the checkout counter with the condoms and candies. I'm very excited about how Pzaz can thank and support these convenience stores that drive our neighbourhood micro-economies'

What are some of the mistakes food and drink brands are making when targeting Gen Z?

Almost every new food and beverage company that has a splashy launch has the same matte packaging offering mood-boosting functionality like calming chocolate, inspiring tea or whatever. There's an opportunity to return to honest functionality instead of these over-promising nootropics. Gen Z consumers just want to live their best lives. So Pzaz is more about the journey of your day, rather than the destination. You don't use this product because it's going to transform you into a monster or a rock star, but because it will unlock the most awake, focused, excited you for a little burst of time.

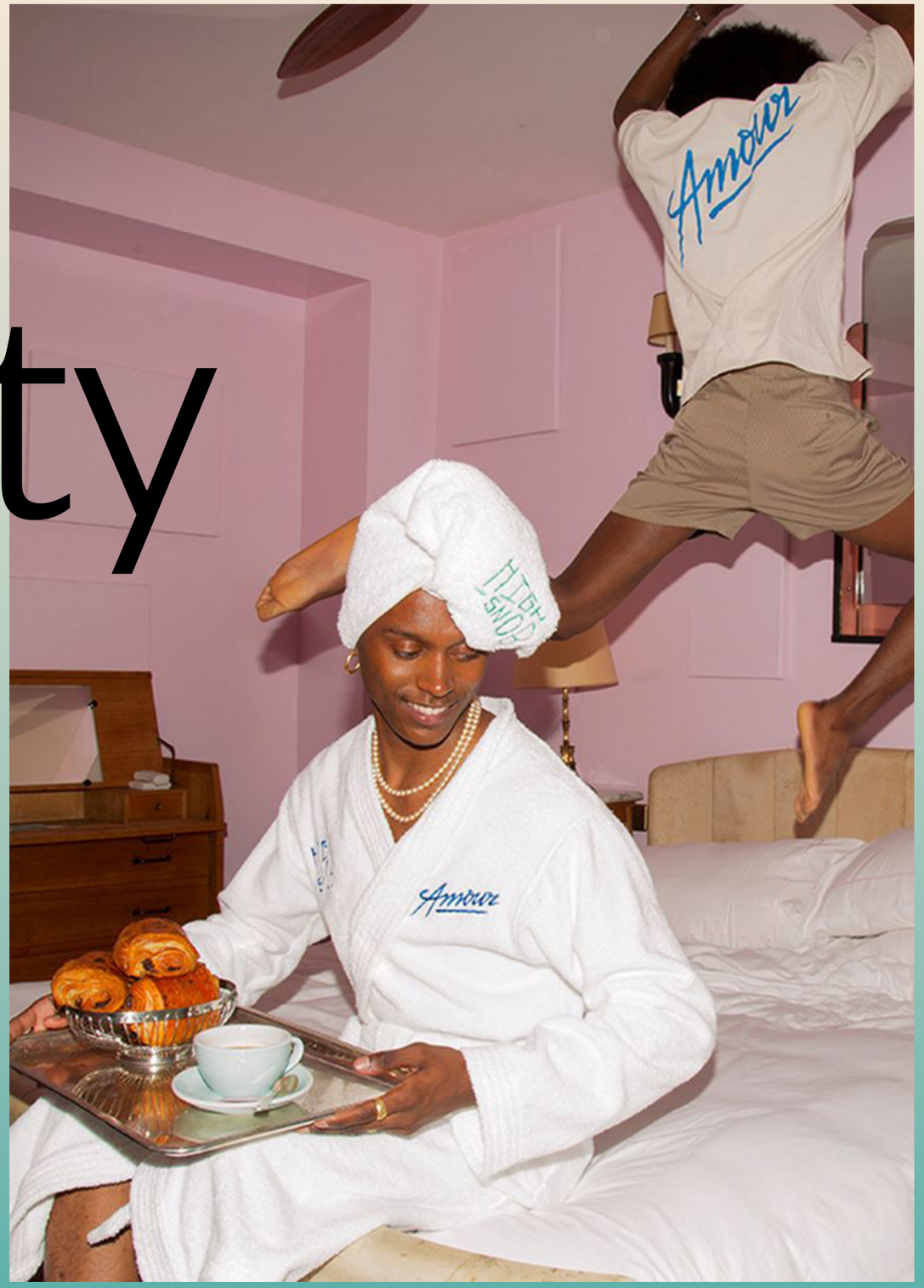
You've chosen to sell Pzaz in bodegas rather than follow the direct-to-consumer (DTC) route. Why is this?

I knew I wanted to make a convenience product for New York, where everyone loves bodegas. They're a major and very rewarding ritual, and being independently owned by large families, they essentially make up the fabric of the community. I wanted to make a product that would drive value for these retailers. I have the opportunity to revitalise convenience store culture, but not with a product that sits on the gentrification station with the vegan granola.



Pzaz, US

Travel & Hospitality



Hôtel Amour. Photography by Gil Anselmi for Highsnobiety, France

The future of the travel and hospitality sector is a challenging one, but those brands and services that allow individuals to enjoy the human qualities of travel once again will find a firm way forward

The emphasis will increasingly be on family-style services and venues that are built in harmony with the natural environment while regenerative growth will replace sustainability as travel and hospitality brands begin to understand the need to be proactive in their approaches to tackling the ongoing climate crisis.

21 Humanity Hospitality

The start-ups that promised to disrupt the hospitality sector are rapidly beginning to resemble the corporate monoliths they once aimed to overthrow. In an attempt to return to the original values of hospitality, a series of alternative online networks will continue to emerge in 2023. The emphasis will increasingly be on family-style services – in which profit is second to good will and where individuals are able to enjoy the human qualities of travel once again.

The Climate Homestay Network, which was launched by **Human Hotel** during the COP26 climate change conference in Glasgow, is now partnering with Greenpeace and Extinction Rebellion to bring its accommodation service to more change-makers.

Created as way to ensure that Scottish Islands' tourism spending remains in the local area, **IsleHoliday** is a lettings website launched by residents of the islands that is re-investing its profits into small businesses and local housing projects. Expect to see more initiatives aimed at reinvigorating rural populations using the power of Neo-collectivism.

Artist and social organiser **Amahra Spence** has imagined a hotel in Birmingham, UK, that replicates the experience of the family home. Translating as 'grandparents', **Abuelos** is a space inspired by her family living room for marginalised communities and artists to assemble.



Lab Insight

Martin Raymond
co-founder,
The Future Laboratory

'Travel and hospitality brands need to move on from using terms such as 'sustainable' when talking about their USP. For Gen Z clients especially, it is a term that sounds hackneyed and smacks of greenwashing. They need to demonstrate how and why they are regenerative and circular – not tell us about it'



Left: Yard. Photography by Thom Bartley; Above: Kisawa Sanctuary, Mozambique

22 Regenerative Tourism

As consumers become more conscientious travellers they will seek regenerative hospitality stays that minimise their disruption of local communities and natural environments. Hotels built in harmony with the natural environment will continue to emerge.

Located in the heart of Arizona's Sedona desert, USA, **Ambiente** is a luxury eco-resort designed to merge discreetly with local topography and has also restored an ancient waterway.

Taking a lead from the natural world, the architecture of the **Kisawa Sanctuary** in Mozambique was inspired by local sand dunes and built without the use of heavy machinery using natural materials that blend harmoniously with the environment. Founder Nina Flohr has also opened the **Bazaruto Center for Scientific Studies**, an on-site ocean conservation research centre.

Five minutes from Akureyri, one of Iceland's more northerly outposts, the **Forest Lagoon** was built using the natural world as its guiding design principle, embedded into the mountainside and surrounding woodland.



Gucci Valigeria at The Savoy, UK

‘We see the future of travel retail differently, where quality purchases and brand relationships of choice are forged with thought and meaning behind them’

Suzanne Mahoney, co-founder, LiBi

23 Branded Hospitality

More brands are moving into the hospitality sector to broaden their cultural relevance and establish new revenue streams. They are also turning hotels and rentals into immersive storefronts, ushering in a revival of souvenirs and emphasising the importance of ‘before and after’ travel experiences.

Sportswear giant **Fila**’s **Fila House** is a branded hotel in Shanghai, created in partnership with **Hyatt Group** and expected to open in 2024. Meanwhile, fashion and lifestyle publication **Elle** is opening two boutique hotels: a Parisian residency and spa, Maison Elle, located near the famous Arc de Triomphe, while a second hotel will open in 2023 in Jalisco, Mexico.

Expect to see more luxury pairings such as **Gucci** and London’s **The Savoy** hotel, which opened the **Gucci Valigeria** pop-up filled with exclusive travel leather goods.

UK-based platform **LiBi** uses QR codes to bring hospitality storefronts to life. From the mattress they sleep on to the paddleboards used during their stay, LiBi emphasises the emotional connection that people make to objects in their home-from-home.

Guests can access and buy anything they see using their smartphone camera.



Wander, US

24 Global Home

The opportunity is growing for brands and businesses to create incentives for remote workers to immerse themselves in local communities, while new travel networks offer wealthy global nomads new models allowing them to roam the world for the same price as their rent.

In September 2022, **Airbnb** released a guide outlining how governments and communities can benefit from the rise in remote workers. The introduction of a remote worker incentive programme in Tulsa, Oklahoma, for example, generated £18.5m ($20m, €20.7m) in gross domestic product, according to Airbnb.

Meanwhile, premium travel network **Wander** offers a curated network of smart rental homes designed for a new era of remote workers. Each home comes with a **Tesla** and a full desk set-up as standard.

Luxury travel service **Inspirato Select** is also targeting the Bleisure habits of affluent travellers with a new subscription model offering a simple and cost-effective way to buy, use and share luxury holidays. Trips booked as part of the subscription can be transferred to family or friends or used as business trips, recognising the need to offer malleable travel arrangements.

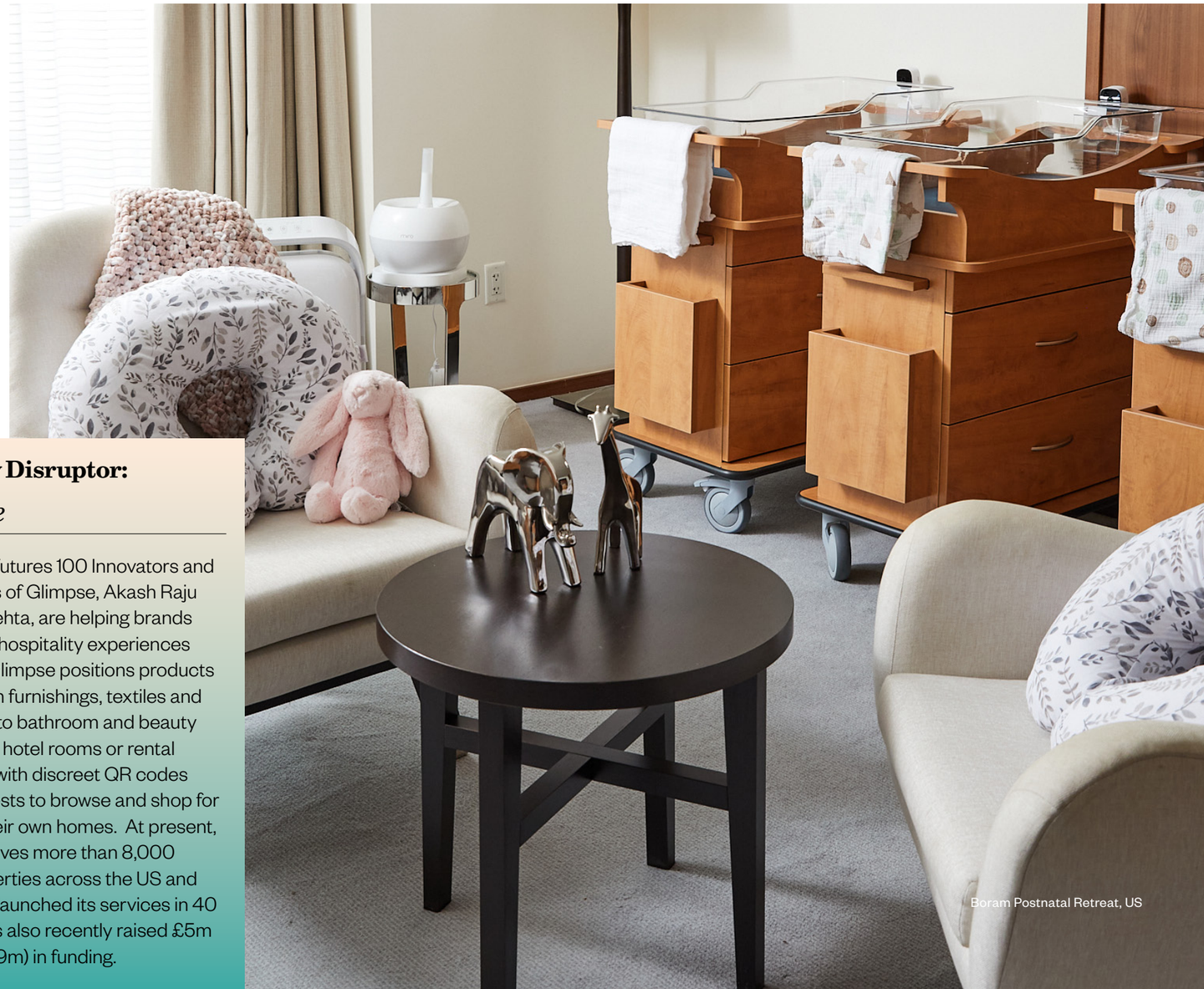
25 Transformative Travel

Post-pandemic hospitality experiences are evolving, adapting to a demand for health-driven stays and hyper-personal holidays centred around educational experiences and moments of personal growth.

Moving on from peaceful yoga retreats, expert-led medical stays that promote recovery and prevention are set to grow in line with demand; the wellness tourism industry is projected to be worth £1.08 trillion ($1.3 trillion, €1.27 trillion) in 2025 (source: Global Wellness Institute).

The **Amilla Maldives** retreat focuses on supporting guests experiencing perimenopausal and menopausal symptoms while the **Boram Postnatal Retreat**, located on the ninth floor of New York's Langham Hotel, offers physical and mental care for both new mothers and babies, easing the transition between the hospital and the home.

Post-pandemic travel experiences are also changing for luxurians, who are seeking hyper-personal holidays featuring educational experiences and opportunities for personal growth. The **Six Senses** resort in Ibiza, Spain, has introduced its Guest Experience Maker programme offering a dedicated consultation to maximise visitors' stay. Guests at the **Plaza Athénée** in Paris can sit down with the hotel's celebrity chef-in-residence, Jean Imbert, who will develop a bespoke menu, ensuring an intimate evening with a prominent culinary figure.



Boram Postnatal Retreat, US

Industry Disruptor:

Glimpse

Two of our Futures 100 Innovators and co-founders of Glimpse, Akash Raju and Anuj Mehta, are helping brands to combine hospitality experiences with retail. Glimpse positions products ranging from furnishings, textiles and electronics to bathroom and beauty amenities in hotel rooms or rental properties, with discreet QR codes allowing guests to browse and shop for items for their own homes. At present, Glimpse serves more than 8,000 luxury properties across the US and to date has launched its services in 40 states. It has also recently raised £5m ($6.2m, €5.9m) in funding.

Viewpoint:

Saira Hospitality

Harsha L'Acqua, the founder of hospitality training venture **Saira Hospitality**, explores how the sector is nurturing the next generation of talent

Tell us about Saira Hospitality and why you created it?

We work with a collective of hotels [including The Hoxton, CitizenM and Hilton] which are looking to hire local talent, believe in our mission and share common values.

To support these hotels, we engage with the local community. We work with job centres, non-profit organisations and youth empowerment centres to identify individuals who otherwise would not have had an opportunity to be hired by the hotels we're working with.

When I created Saira, I was looking for a way to combine lifestyle and luxury hospitality with a non-profit purpose. I wanted to focus on people of all ages, and to benefit both communities and hotel brands.

Why did it feel like now was a good time to introduce another school – this time based in London – to your growing portfolio?

The hospitality industry is in a talent crisis, so it's more important than ever to source local talent that are going to do justice to brands. A lot of hotels are also moving into a more conscientious space, where they're thinking about what they're doing to support their local community. Many hotels are recognising that their guests want to see brands that care about people and the environment they're in – not just taking resources without giving back.

This is where Saira Hospitality steps in, enabling hospitality brands not just to fill roles, but also to help them on a deeper level to establish a greater sense of purpose.

What do you foresee for hospitality and its purpose in the rest of this decade?

We're already aware that, for a lot of guests, it's important for hotels to offer some form of cultural programming. Many guests are asking themselves: what kind of trip can I take, where I'll come back feeling more enriched?

We've also been exploring the idea of a social credit card, which guests can use to connect with local communities. On the card, there would be a menu of ways to engage or donate funds or time. Guests could donate two hours or two weeks of their time to support the needs of local residents, for example. The idea of connection is going to be a huge one, whether you're connecting within hotels or within communities. It's definitely going to be a big need and focus for the next few years.



Saira Hospitality

Luxury

Luxury is once more becoming exclusive, guilded and hyper-curated. It is also about assets that can be traded and traced in digital as well as physical exchanges

Yet the notion of luxury itself is continually evolving and we see its future iteration as multi-sensorial – and increasingly linked to improving luxurians' health, wellbeing and sense of personal and cultural growth.



Moncler Poldo Dog Couture, Italy



26 Guilded Luxury

The power play between luxury brands and their clients is in flux. Having long been the gatekeepers of style, they are now learning how to foster more reciprocal and attentive relationships with their consumers.

This is giving rise to what The Future Laboratory calls **Guilded Luxury,** in which brands will create bespoke experiences for different kinds of consumers, offering personalised services that nurture a deeper sense of involvement and belonging.

For very important clients (VICs) this will mean providing exceptional access to rare moments and niche communities – a white-glove service that spans every aspect of their lives. For younger or digitally orientated audiences, virtual collectibles and tokens will provide new paths to luxury while building online communities.

In this way, luxury brands are transforming into members' clubs, with tiered levels of access offering different benefits and services, be they private boutiques for the highest spenders or NFTs for the digitally driven that deliver early access to new or bespoke products. Indeed, **Bain & Co** reports that by the end of 2030, digital assets and the metaverse will comprise 5–10% of the luxury market.

Brands will also become facilitators to satisfy the needs of individual luxurians and assist them in their pursuit of self-growth. 'For VIP clients, the luxury brand is transforming into a travel agent, hotelier and cultural compass, always providing a five-star concierge service,' says Christopher Sanderson, co-founder of The Future Laboratory.

Lab Insight

Fiona Harkin
foresight editor

'In future, luxury brands could even curate and tailor experiences – from diets to holidays – based on wearers' health data and needs'



Left: Raf Studio explores the possibilities of mixed reality for Glass magazine, China; Above: Gucci and Oura, Finland

27 Medi-luxe

By 2030, health will be considered a key metric of personal wealth and success. Amid ongoing global outbreaks and climate-induced ailments, wellness in the luxury industry will shift from holistic solutions to medical action.

Instead of providing elite wellness experiences, the sector will apply its core values of exclusivity, personalisation and white-glove service to the medical arena, with brands transforming into healthcare providers.

Already, luxury fitness club **Equinox** is making IV infusions aspirational. The company recently introduced poolside **NutriDrips** at its New York hotel, allowing health-conscious luxurians to re-energise with nutrients such as magnesium and taurine. In addition, on-site nurses are available to advise guests, blurring the boundaries between hospitality and hospital.

Health wearables will also become covetable accessories. **Gucci** is exploring this field through a collaboration with health technology company **Oura**. Together, they have created a limited-edition version of the Oura Generation 3 ring, a wearable that analyses sleep patterns, heart rates and can track periods.



Rares, US

28 Tradeable Luxury

Just as streetwear is being elevated to a luxury asset via auctions, and archival luxury ventures increase, the resulting growth in the resale market is also opening up the world of luxury to Gen Z. Financial nous has come to rival affluence for them, and new platforms signal a shift in the type of information and services that luxury shoppers as a whole will be looking for from brands in future.

Auction house **Christie's** hosted **Handbags x Hype** in 2022, framing streetwear items such as Air Jordan XIIIs as an investment opportunity, much like fine art or wines, with luxury collectables such as **Hermès** Birkin bags going under the hammer alongside streetwear.

Harnessing its reach as a streetwear platform, **StockX Vault NFTs** is a collection of NFTs that represent highly sought-after or rare sneakers. These NFTs can be held, sold or exchanged for the physical product, which StockX keeps in a vault like a traditional bank reserve. This brokerage represents a shift in the way people are buying fashion to a purely financial exchange decoupled from the need to physically own, hold or wear the product.

This use of digital nous to acquire financial acumen and an awareness of value is inherent in Gen Z, who are changing the meaning of aspiration in luxury. Gen Z's capacity to filter through the internet to uncover luxury artefacts or unique items reveals their concept of exclusivity.

29 Neo-craftsmanship

To counter rising inflation, material shortages and an ageing workforce, luxury companies will continue to explore how to safeguard supply chains and craftsmanship using a range of advanced technological tools.

By the end of the 2020s, high-speed internet combined with virtual and haptic technologies will not only protect production pipelines but also engage a new generation of digitally driven craftspeople.

Luxury craft recruitment will tip into virtual realms, as the requirement for skills becomes ever-more globalised – and brands themselves recognise the need to break free from the traditions of location-specific luxury manufacturing. **Mygrants** is a digital platform that is helping asylum-seekers in Italy to train and enter the often-cloistered world of luxury production.

VR and haptic technologies will be used to train craftspeople remotely or to experiment with the potential of mixed-reality fabrication. **Code Bothy** is a research project by the Material Architecture Lab at the Bartlett School of Architecture, London, that examines the idea of phygital craftsmanship. Constructing a brick building that would have been impossible for even the most experienced bricklayer to build by hand, it demonstrates how fusing digital technology and manual craft can inspire creativity and experimentation, with valuable lessons for the fashion and luxury industries.



Code Bothy by Material Architecture Lab at The Bartlett and Piercy & Company, UK



Industry Disruptor:

Sonic Luxury

With a title like the director of ambience, it's to be expected that one of our shortlisted Futures 100 Innovators, Arman Naféei, has a storied background in the luxury sector. Described as a musical taste-maker, he has acted as a musical director for the hotels of André Balazs, including **Chateau Marmont**, **Chiltern Firehouse** and the **Standard Hotels**. Outside of hospitality, he has also helped to define **Sonic Identities** for brands such as **Prada**, **Moncler** and **Chanel**.

'Companies in the luxury sector haven't really milked the impact that music has on brand-building,' Naféei tells Forbes. 'It not only influences customers' behaviour but also makes or breaks the right atmosphere.'

30 Rare Moments

Luxury brands are becoming curators of money-can't-buy moments, treating VICs (Very Important Clients) to lavish and sometimes far-flung private events. Invitations to these physical events are both scarce and highly coveted, representing a future of luxury brands as assemblers of people and cultural moments.

Luxury house **Louis Vuitton** flew clients to Marrakech to showcase its Spirit fine jewellery collection. VICs enjoyed a celebrity-studded evening with a private poolside dinner and early access to the collection. 'Customers are looking for an authentic physical relationship – they're not looking for Zoom,' explains Michael Burke, chair and CEO of Louis Vuitton.

Cartier organised a once-in-a-lifetime experience for VICs that included winery tours in Toledo, Spain, a private runway show of its **Beautés du Monde** collection and a concert by the Black Eyed Peas. Jewellery company **Piaget** sponsored a series of exclusive events in the AlUla region of Saudi Arabia, including an open-air concert in the desert.

'People who go on these trips fall in love with the brand, and for those who don't go on those trips, they want it,' explains Oliver Williams, luxury adviser and journalist at Forbes. 'They always ask me: 'How can I get on the list?"

Viewpoint:

FineMatter

Finematter is a circular platform for buying, renewing, recycling and re-using jewellery. It connects independent goldsmiths and jewellers across the globe with an online audience of jewellery customers and re-collectors. Caroline Chalmer, CEO and founder, discusses how the jewellery industry is changing in a digital landscape

How does Finematter choose the brands it wants to work with?

We've refined a set of selection criteria that we assess all independent makers against. One is about the design and the aesthetic. We don't restrict the styles that we bring on to the platform, but we recognise great independent design when we see it and designers that really stand for something aesthetically. We only work with real jewellery: pieces made from precious metals, semi-precious and precious gemstones that can last for a lifetime or more.

Why is Finematter planning to launch a resale platform?

People started reaching out to us to ask where they could resell their jewellery and what options they might have other than to resell – to remodel an inherited piece, for example. That brought about the idea of launching a jewellery-specific resale functionality, which would work differently from existing resale platforms, which are very fashion-focused, trend-based and revolve around one-off transactions. They're also typically not authenticated in terms of metal quality or types of gemstone.

How can blockchain technology change the jewellery industry for the better?

It solves a major pain point around trust and transparency by creating extreme clarity and trust around the origin and authenticity of a piece of jewellery, including documentation and materials. What precious metals or gemstones is a piece of jewellery made from? What's the provenance of those materials? They all affect the value of that piece in a secondary market. So what we're trying to do with our digital certificate is to create an unbreakable and 100% trustworthy record of that, so people know exactly what they're buying and can do so with full peace of mind.

There is also the opportunity to use smart contracts and for us to bake royalty fees for the original makers into secondary market transactions.

Are attitudes to sustainability shifting in the fine jewellery market?

Sustainability has always been an inherent part of the industry because of the longevity of a piece of jewellery and the opportunity to re-use and recycle materials almost endlessly, which is not the case for most other fashion or retail categories. This means that jewellery can be a front runner when it comes to the circular economy. All we've been missing so far is the infrastructure to make it happen.

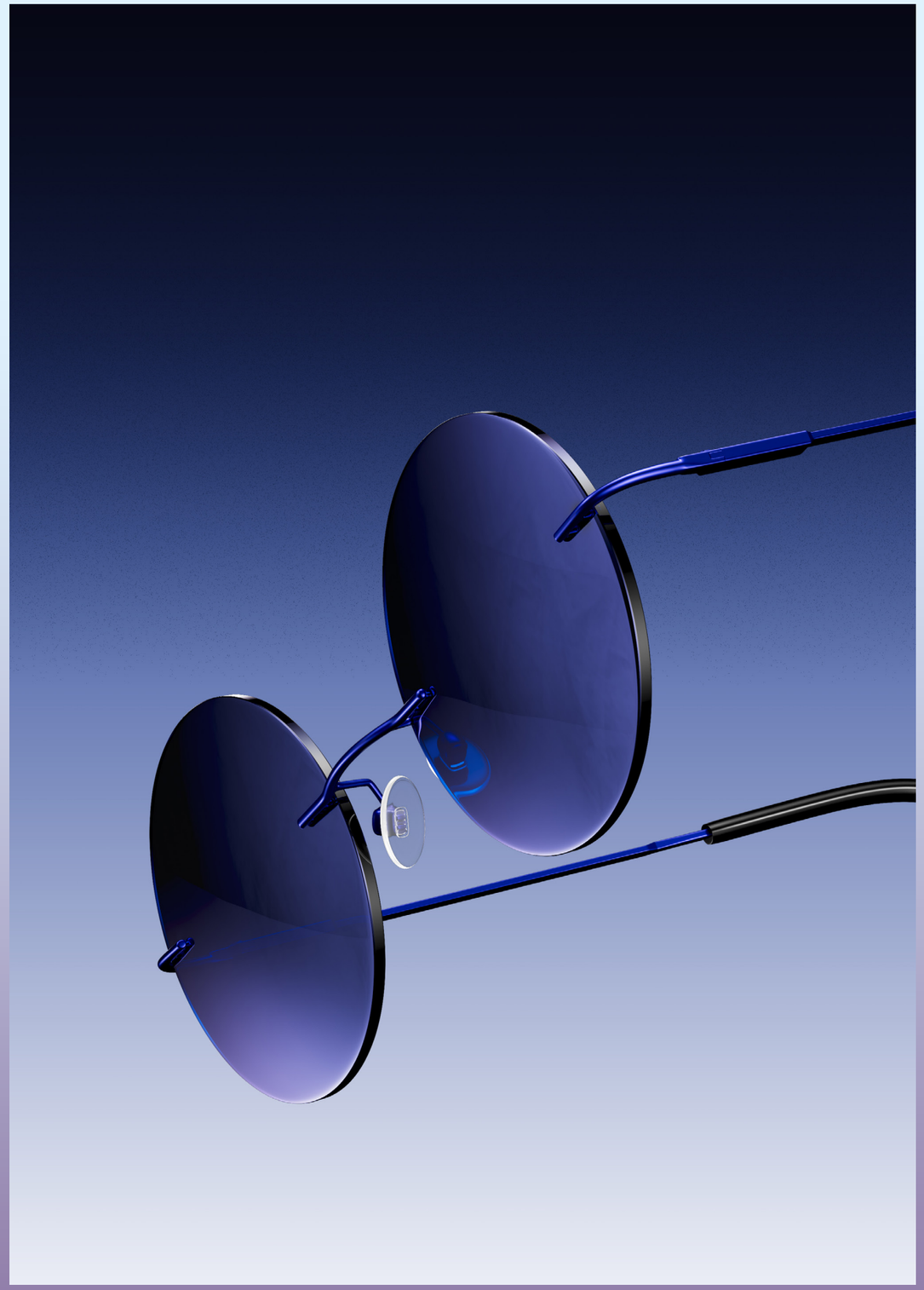


Finematter, UK

Fashion

There is an ease of interconnectivity in the way that Gen Z shop and consume across a growing number of digital resale platforms, while collective nostalgia is also inspiring brands to build archives

The adage – ‘waste is the new luxury’ – heralds the potential of lab-based textile alternatives in the luxury sector. Aesthetically, expect to see a swerve away from anti-dopamine dressing towards a more dystopian direction as we vent our collective, post-pandemic trauma. The industry will continue to forge an inclusive and resilient fashion system, one that supports more fulfilling relationships between ourselves and the beautiful materials we wear.



CO2Made eyewear by Pangaia Lab and Twelve, New York

31 Dressing for Dark Times

Driven by a gathering mood of pessimism, a new dark, dystopian and eerie aesthetic is emerging, infused with satire and subversion, at odds with Dopamine Dressing's uplifting and mood-boosting feel.

Its dark, oppressive ambience and apocalypse-ready apparel resonate with an increasingly disillusioned and cynical audience. According to **Allianz**'s aptly titled **United in Pessimism** report, Europeans have a bleak view of how the future will look – over 50% don't feel optimistic about future prospects.

To match this mindset, brands are crafting dystopian universes, as featured in **Burberry**'s autumn 2022 campaign film, Night Creatures, featuring a faceless, many-legged creature.

On **TikTok**, **#avantapocalypse** videos have amassed 6m views, where users share their eerie goth outfits, often deconstructing, repurposing and upcycling second-hand pieces in the process. On runways, spring/summer 2023 collections featured a profusion of punk and grunge looks. For 2023, expect the Doom Dressing trend to head towards more absurd and irreverent accessories and aesthetics.





Left: Spring Summer 2023 by Balenciaga, France; Above: Bot Initiated Longevity Lab by Nike NXT Innovation in collaboration with PCH Innovations, US

Lab Insight

Marta Indeka
foresight analyst

'The resale market is growing in volume but also in breadth. Where it used to be a subsidiary of fashion, it is now standing on its own. Economic appeal and circularity are key drivers, but the exclusivity and rarity variables are equally important. Collective nostalgia is also inspiring brands to build archives as many consumers are self-identifying as collectors'

32 Resale Redux

The resale market is enjoying a resurgence and is expected to grow by 127% by 2026, according to a report by US resale platform **ThredUp**. Some 5.3m new shoppers signed up to San Francisco-based luxury resale marketplace **The RealReal** (TRR) in 2022, taking its total user base to more than 28m. And with over 20,000 new items added daily, TRR promises an endless scroll of pre-loved fashion finds.

Fast fashion has found an opportunity to cast aside greenwashing accusations by embracing resale. Brands including **COS, Zalando** and **Pretty Little Thing** have all launched in-house resale initiatives over the past few years.

The latest integrated technology, such as **Reflaunt**, which recently raised £10m ($11m, €11.3m) in funding, allows these retailers to re-target customers with resale incentives and pull purchase data to be used for re-listing products.

There is an ease of interconnectivity in the way that Gen Z shop and consume across these resale digital platforms. This generation have blurred the boundaries between commerce and discovery, entertainment and entrepreneurship, and ultimately consumption. There's a huge opportunity for fashion brands to tap into the Gen Z change-maker mindset.

33 Bio-Fashion

Luxury fashion houses are experimenting with bio-textiles for a more sustainable future. The movement's increasing momentum will be highly appealing to those who want access to the most cutting-edge technology, specifically in the luxury sector.

According to **Transparency Market Research**, the bioplastic textiles market was valued at £511.7m ($599.7m, €588.1m) in 2021 and is expected to reach £1.5bn ($1.8bn, €1.7bn) by the end of 2031. Look to luxury conglomerate **LVMH**, which is collaborating with **Imperial College London** and **Central Saint Martins** to create lab-grown fur. If the project proves to be successful the technology could be implemented by brands across the LVMH portfolio.

London-based **Olivia Rubens** has collaborated with UK-based design studio **Post Carbon Lab** and London concept store **Machine-A** to create bacteria-infused knitwear that can emit oxygen and absorb carbon dioxide. Wearers are encouraged to nurture and care for their pieces as they would care for their plants. See also New York designer **Peter Do**, who has partnered with **TômTex,** a biotech firm working to create high-quality bio-based leather derived from seashell and mushroom waste. TômTex's motto – 'waste is the new luxury' – heralds the potential of textile alternatives in the luxury fashion industry.

Spring/summer 2023 by Botter, Amsterdam

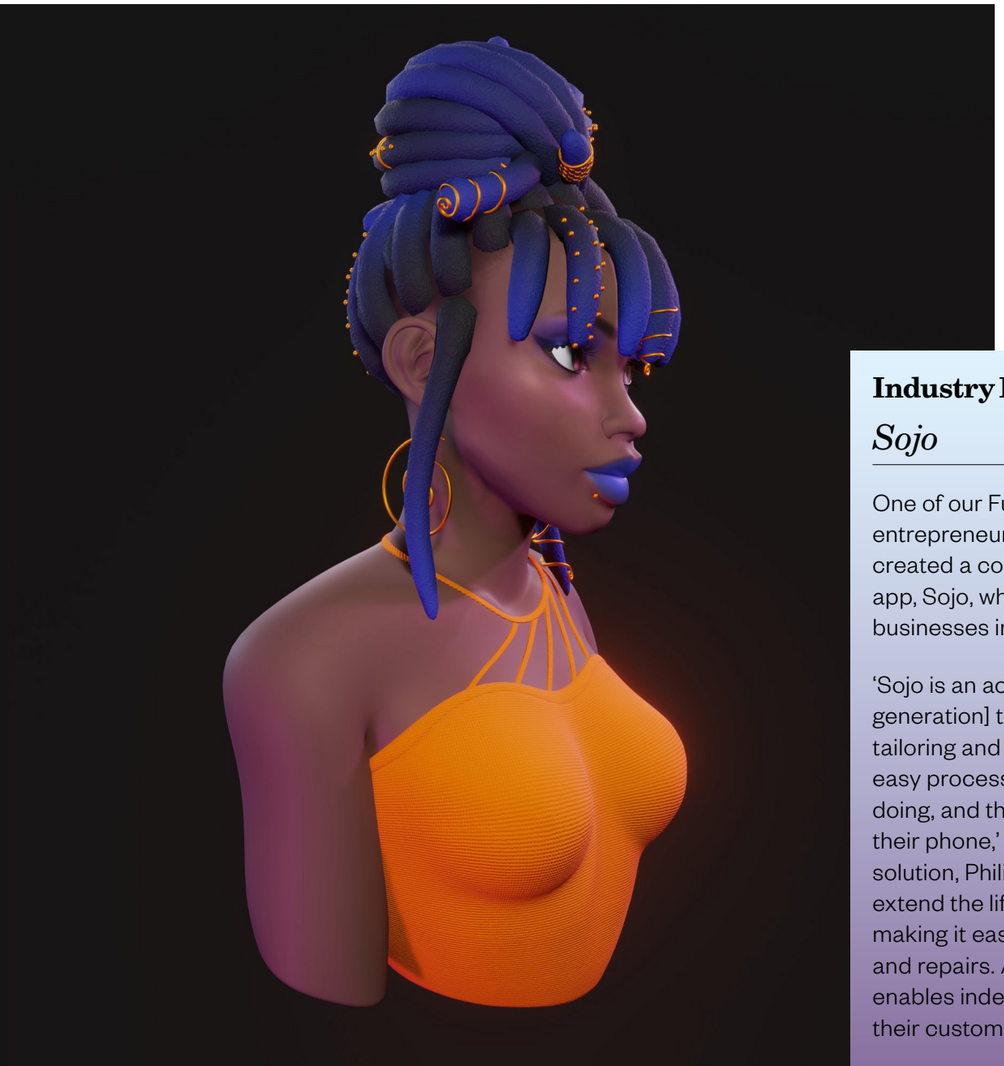
34 Meta-creation

As the line blurs between people's real-life personas and online avatars, netizens will increasingly seek digital fashion – billed as 'direct-to-avatar' style – that reflects their values.

Wunderman Thompson reports that UK gamers place almost equal importance on looking good in-game (61%) as they do on looking good in real life (65%). In turn, the **Proteus Effect** is a phenomenon that suggests a person's virtual world behaviours are influenced by the characteristics of their avatar.

Thus, with many netizens no longer distinguishing between their real-world and virtual selves, brands can explore how to use digital dress to communicate beliefs. As fashion designer **Charli Cohen** notes: 'There is no longer a line between the physical and digital 'us'.'

In reaction to this, game-maker **AM Darke** is working to improve and democratise representation of Black hair in video games by creating the **Open Source Afro Hair Library**. On the educational side, New York-based **Parsons School of Design** is partnering with gaming world **Roblox** to launch a 16-week production-driven course in spring 2023 teaching students how to create realistic 3D digital apparel.



Industry Disruptor:

Sojo

One of our Futures 100 Innovators, entrepreneur Josephine Philips, has created a convenient and accessible app, Sojo, which profiles local tailoring businesses in London.

'Sojo is an accessible way for [my generation] to be able to engage with tailoring and repairing through a really easy process which they're used to doing, and that's playing with an app on their phone,' says Philips. Through this solution, Philips empowers people to extend the lifespan of their garments by making it easier to access alterations and repairs. At the same time, Sojo also enables independent tailors to diversify their customer bases.



Left: A sculpture by Annabel Maokhamphiou for the Open Source Afro Hair Library created by AM Darke; Above: Buzigahill. Photography by Ian Nnyanzi, Uganda

35 Decolonising Fashion

Brands must begin to approach sustainability from a global, inclusive and equitable perspective. Current sustainability initiatives are failing to decolonise the fashion and textile industries. Can co-creation pave the way for holistic betterment in 2023?

'We need to shape a more inclusive and resilient fashion system, one that supports more fulfilling and flourishing relationships between ourselves and with the beautiful material culture that we wear,' Dr Francesco Mazzarella, senior lecturer at the **London College of Fashion**, tells The Future Laboratory.

With at least 89.3m people worldwide having been forcibly displaced at the end of 2021, according to **UNHCR**, the fashion industry must re-address the needs and aspirations of migrant communities and honour their diverse cultures. While UK fashion players – from **Marks & Spencer** to **Asos** – have pledged to create jobs for Ukrainian refugees, many brands are failing to embrace the culturally informed design skills that such employees could offer.

'Part of the problem with alliances today is that they are still, at their core, about getting new knowledge that can benefit people in power. Instead, it should be about equity and lifting people up in very direct ways,' says Moussa Mchangama, co-founder of consultancy **In Futurum**, who points to one key player operating in the US, **Slow Factory**, a school and climate innovation laboratory.

Viewpoint:

Veshin Factory

Joey Pringle, co-founder of alternative leather manufacturer **Veshin Factory**, explains how plant-based leathers can disrupt the luxury sector, and why vegan leathers are 'complete nonsense'

Veshin Factory is based in China. What are some of the local advantages that this setting provides?

From a government perspective, China is pushing a higher level of sustainability initiatives. We'll be relocating to a new factory soon that has been given to us rent-free for the next five years based on our sustainability standards. In my opinion, China will become the greenest country on the planet in the next 10–20 years, because when it clocks onto something, it moves very quickly.

Can you explain the difference between vegan and plant-based leathers?

Most of the time, the word vegan in fashion is complete nonsense. It's become a marketing word for greenwashing purposes. Right now, most vegan leather is polyurethane (PU), which is not a planet-friendly alternative. The key with vegan leather is to eliminate plastic as well. There's no point creating one problem and starting another one.

Are luxury brands receptive to plant-based leathers?

We work with Piñatex, which is a material made from the by-product leaves from pineapple production. But the hand feel of Piñatex is different from animal leather. The fact that plant-based leathers don't always feel like the real thing is probably one of the biggest barriers for traditional leather clients or brands that rely heavily on leather. But then, you have brands like Hermès that are starting to use mycelium, which is amazing. I definitely think that heritage brands see that this is where the future is.

Do you see premium plant-based leather entering any unexpected sectors soon?

Plant-based leathers have the potential to enter any industry where leather is used. In fact, they're already entering at pace. The automotive sector, for example, has its own cactus leather made by a company called **Desserto**. It has already worked with **Mercedes-Benz** and **BMW**. All of these big suppliers are focusing on automotive. On top of that, you have the home and décor space. We're changing our model to create home accessories, pillowcases, coasters and small leather goods. You might also start to see plant-based leathers in the cosmetics industry, with smaller accessories and packaging.

When do you expect plant-based leathers to really take off?

Right now, these materials are still so expensive. That's because innovation is expensive. But we're close to be able to push them on a commercial scale. I think that 2023 or 2024 is when it's going to blow up. Already, people are asking questions about where their leathers are coming from, which tanner, and how the animals are being treated. The demand for transparency is just going to keep generating more hype.



The Soil Project by Yuhan Bai, The Netherlands

Retail

As talk of Web3 retail grows, retailers will explore its potential in 2023 – but it's not there yet. Onboarding customers into a Web3 experience is currently an ugly process, but expect this to become smoother in the next year

At the same time, digital-first brands are unlocking new physical retail opportunities while bricks-and-mortar retailers are rethinking stores to be hyperphysical – more engaging, sensorial and memorable. Shielding themselves against recession, luxury brands are opening private boutiques as they expect further growth throughout 2023 buoyed by those VICs (Very important Customers) who continue to spend their way through the global financial downturn.



Atelier100, UK

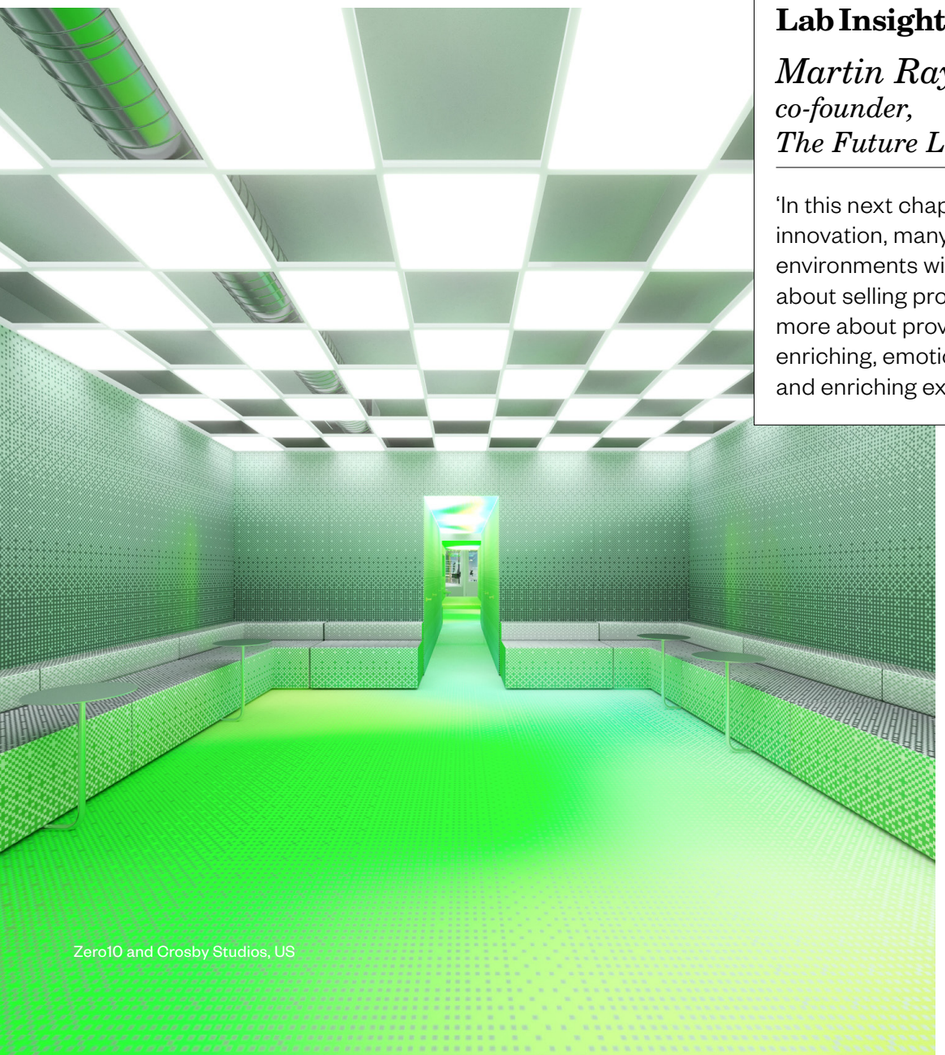
36 Meta-phygital

By hosting events and product launches that bridge the gap between the physical and virtual realms, digital-first brands are unlocking new retail opportunities. At the same time, bricks-and-mortar retailers are rethinking stores to be hyperphysical – more engaging, sensorial and memorable.

Metaverse retail concepts are giving brands new ways to interact with audiences while boosting footfall in pop-up stores and other physical retail locations. One example is AR fashion platform **Zero10** and **Crosby Studios**, which collaborated to create a physical pop-up store stocking a six-piece virtual collection.

For real-world retail, try-before-you-buy services embed their brand in immersive experiences. In Brazil, interior architecture studio **Estudio Guto Requena** has created an experiential store for mattress brand **Zissou**. A 'dreaming bedroom' in the store invites shoppers to lie down on a Zissou mattress, while enjoying a meditative soundscape.

To heighten the connections that customers feel with stores, they will increasingly transform shops into event spaces and venues. Digital-first streetwear brand **Hypebeast** has opened its HBX flagship store with consumer-facing spaces fluid enough to hold pop-ups and events.



Zero10 and Crosby Studios, US

Lab Insight

Martin Raymond
co-founder,
The Future Laboratory

'In this next chapter of retail innovation, many store environments will be less about selling products and more about providing us with enriching, emotional, ethereal and enriching experiences'



The Plus designed by Bjarke Ingels Group for Vestre, Sweden

37 Open-door HQs

Retailers will increasingly be expected to open their operations to the public, turning them into destinations for storytelling, transparency and deeper customer connections.

With a recent **Shopify** survey finding that 40% of brands are prioritising experiential retail in the year ahead, a number of retail brands are transforming their headquarters into visitor destinations to allow customers to get closer than ever to their brands. Behind-the-scenes access also helps to satisfy customer curiosity about how brands function, giving them an understanding of companies' working culture and opening new avenues for feedback.

Capitalising on the location of its Global Innovation Centre at the Pinehurst Resort No 8 Course in North Carolina, USA, sports equipment brand **Golf Pride** has opened its Retail Lab concept to members of the public. Customers visiting the course can drop into the lab to try out gear and have clubs re-gripped, while learning more about the products from the brand's expert technicians.

In Portugal, sustainable fashion brand **ISTO** is opening its factory doors to customers, giving them unprecedented access to its eco-conscious practices. Inspired by food and wine tours, its Factourism concept is marketed as a day trip that guides visitors through the process of how its organic cotton clothes are made.

38 Gated Retail

As the race to court very important clients (VICs) heats up, luxury brands are opening private boutiques for their top-spending customers. Gated Retail is also a strategy for luxury brands to shield themselves against the recession. The luxury industry typically performs better than other sectors during economic downturns, and while high-income consumers will also feel the pinch during recession, they are less likely to forego purchases.

In 2021, the revenue of luxury company **Chanel** rose 23% over pre-pandemic levels, and the firm now has plans to build VIC boutiques for its top-spending customers in 2023 and beyond.

Luxury brand **Dior**'s latest boutique is in the **Place Vendôme**, a sprawling luxury retail mecca in Doha, Qatar. Accessible only by appointment, the store is designed by Milanese architecture and design studio **Dimorestudio**, and serves as a gateway to the luxury house's most rarefied creations. Meanwhile, on the ninth floor of a building just off 5th Avenue in New York, the **Casa Cucinelli** is a private boutique for the top clients of luxury brand **Brunello Cucinelli**. The shop recreates the feeling of stepping inside the designer's home, only everything on display is for sale.

'Our biggest preoccupation is to protect our customers… We're going to invest in very protected boutiques to service clients in a very exclusive way'

Philippe Blondiaux, chief financial officer, Chanel

Dior 30 Avenue Montaigne, France



Early Majority Lookbook June 2022, UK

39 Membership Models

Membership models are set to become more numerous in the coming years as a wave of apparel brands are shunning mass selling in favour of membership models, in turn reducing product waste and cultivating stronger communities.

Commenting on the power of membership models for consumers, retail futurist **Doug Stephens** reflects: 'People will be asking the question: if it's not just about more stuff, what is it about this brand that's going to give me a more cultural experience? How is this going to make the world a better place or my life better?'

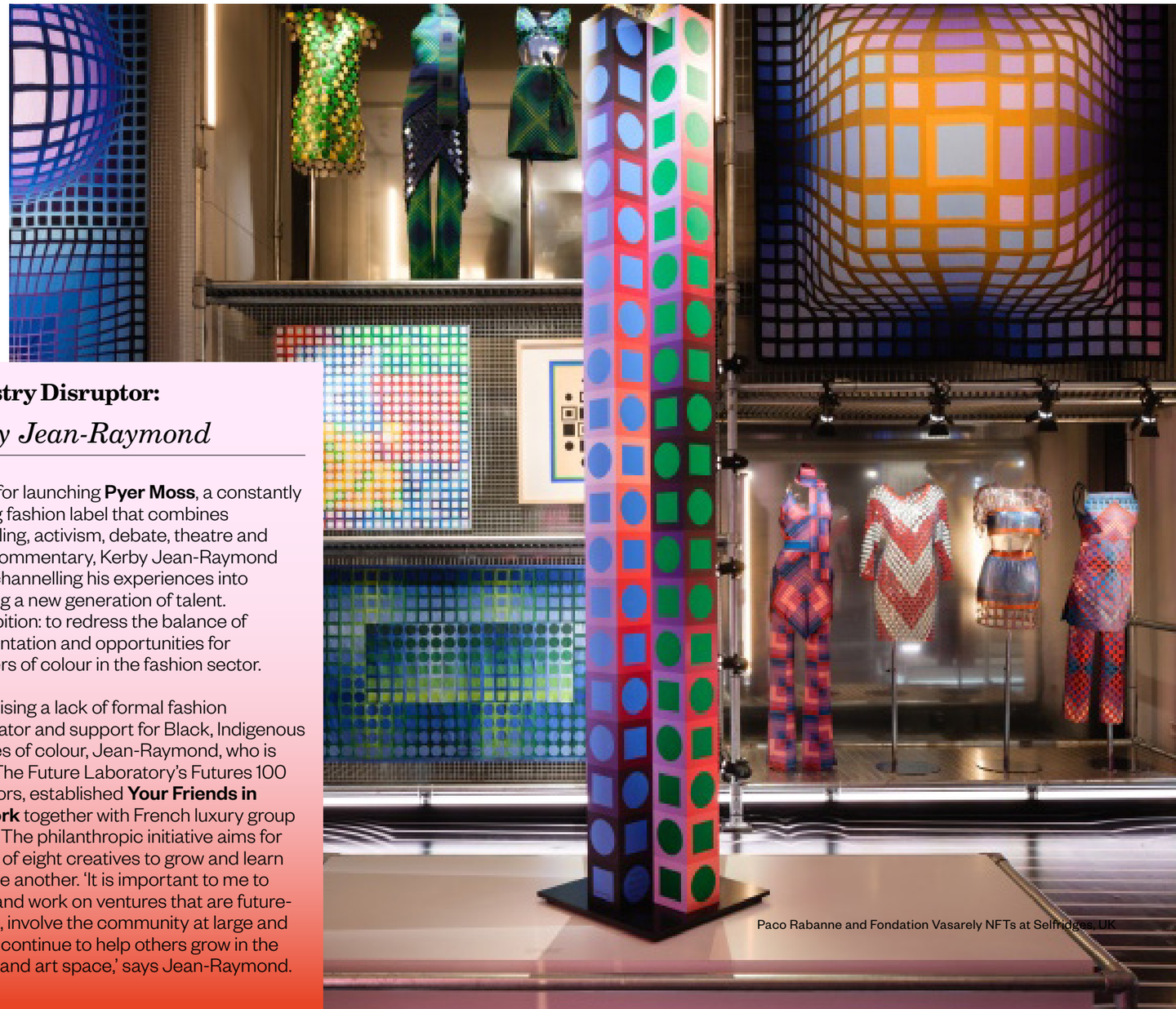
Some membership approaches are building strong communities and brands before any products are even released. Technical outwear label **Early Majority**'s ecological membership scheme ensures the brand meets its aims of producing the fewest number of products for the maximum possible number of customers. For a limited time, shoppers were offered the option to invest £358 ($440, €416) for a lifetime membership to the brand, with Early Majority pledging special content, prices, exclusive products and goods that are circular and ethical for sign-ups. Customers outside of the membership model are required to pay a 60% premium for its garments.

40 Web2.5

If Web3 is positioned as having the power to unlock community based on the fact that consumers are more engaged when moving from being a brand-loyal fan to an owner-owner relationship, then the retail sector will further explore this potential in 2023 – but it's not there yet.

A real-world storefront for a Web3-ready, decentralised autonomous organisation-owned retail concept is what San Francisco-based Datz Itsuki Daito calls a 'step into Web 2.5'. Datz is not planning a new retail chain with his project, **De:Store**, but is instead looking to develop and sell the software behind it to other retailers as a tool for building a next-gen community, acknowledging that the tipping point into Web3 is some way off.

'Not everyone has experience of, or is on board with, the world of Web3,' explains Daito. 'Some people hate it – along with crypto[currency]. We are more real life-centric. The reason we have an app is to make the onboarding experience as easy as possible, integrate third parties easily and make it easier to purchase NFTs, even if you don't have a digital wallet. We want to make the experience like Web2, but with a next-level UX. It's more like we're taking it into Web2.5, then towards Web3 as the world eventually changes.'



Paco Rabanne and Fondation Vasarely NFTs at Selfridges, UK

Industry Disruptor:
Kerby Jean-Raymond

Known for launching **Pyer Moss**, a constantly evolving fashion label that combines storytelling, activism, debate, theatre and social commentary, Kerby Jean-Raymond is now channelling his experiences into nurturing a new generation of talent. His ambition: to redress the balance of representation and opportunities for designers of colour in the fashion sector.

Recognising a lack of formal fashion accelerator and support for Black, Indigenous creatives of colour, Jean-Raymond, who is one of The Future Laboratory's Futures 100 Innovators, established **Your Friends in New York** together with French luxury group **Kering**. The philanthropic initiative aims for a group of eight creatives to grow and learn from one another. 'It is important to me to create and work on ventures that are future-forward, involve the community at large and that will continue to help others grow in the fashion and art space,' says Jean-Raymond.

Viewpoint:

Virtual Brand Group

Justin Hochberg, CEO of **Virtual Brand Group**, explains the untapped benefits of the metaverse, from R&D to phygital marketing and avatar behaviour analysis

What does Virtual Brand Group (VBG) do and which gap in the market are you catering for?

We're a metaverse creation company. We have identified a market gap, which is that global brands from **Porsche** to **Polaroid** are all dazed and confused about the metaverse. While the technology behind it isn't new, it is new to consumers and brands, so we sit at the intersection of the technology, storytelling and brands. Working with brands, we own and operate their intellectual property in the metaverse as a partner.

What are some of the misconceptions retailers have about the metaverse?

People say: 'Great, it's just like e-commerce, we'll sell in Roblox.' And I have to tell them: 'No, the goal is not to sell in Roblox or Decentraland or The Sandbox. The goal is to take the metaverse and wrap it around all of your other experiences.' In that vein, we have created the idea of Infinite Loop Marketing – a trademarked term that we own. It is the idea that one world pushes to the next, and then activates back into that world.

When marketing brands in the metaverse, what are the tangible benefits for shoppers?

If you visit the **Forever 21** store in Roblox, for example, and buy an item, this issues a code that you can use on Forever 21's website. It's a call to action that encourages shoppers to move from Roblox to e-commerce, where they can buy their avatar the same fashion as they own in real life.

How does this work in practice, connecting physical and meta-retail?

Now, in the Forever 21 case, when you're on the brand's e-commerce site, you see both the real-life and avatar garment, which can be worn in a metaverse. You can firstly save money by choosing a bundled package of clothing that buys both outfits at a discount. Then, if you shop in a physical Forever 21 store, for example, there could be a code on your receipt which, if you collect enough, could unlock a special item or experience on Roblox. It's a constant loop, back and forth, between spaces.

Consumer behaviour can also be tracked in the metaverse. What type of insights or data are you uncovering?

This is known as spatial data analytics. Every item [the shopper] looks at or walks away from, we are able to track this through our technology in the metaverse. And that data capture, in terms of understanding consumer behaviour, is at an exponential level for brands in that it will lead to new insights and new innovations.



Forever 21 Shop City on Roblox, created by Virtual Brand Group, US

Youth

Youth culture is no longer just about young people. Youth culture has entered its flat age. It's lateral, not vertical. It's based on values not demographics – a state of mind not an age

Zalphas are wise beyond their years, so brand communications must reflect this, championing their awareness and maturity. For aesthetic directions, think future-facing, high-shine surfaces and kaleidoscopic colours that are more in step with their attitudes. There is also an opportunity to help Generations Z and Alpha navigate and shape the future of work and yet-to-exist job roles.



The Feel Good Marketplace by Woo, UK

41 Flat Agers

TikTok trends were once thought of as the epitome of youth culture. Now, senior creators and retirement hobbies are blurring the lines between old and new generations. 'There's no shortage of generational diversity on TikTok, and youth audiences are not just welcoming them to the platform but embracing them with open arms,' Ruby Ktori, strategist at global brand experience agency **Amplify**, tells LS:N Global. This behaviour is testament to Gen Z's open-mindedness and refusal to put anyone in a box.

'Instead, they're amplifying older people's rebellion against ageist stereotypes of technophobia and frailness… whether through defying stereotypes, making light of age-related vulnerabilities or calling out ageism,' adds Ktori.

Look to ad agency **Dentsu UK** which, in partnership with over-50s work and lifestyle membership platform **55/Redefined**, is committed to several initiatives to become an age-aware employer including re-skilling and apprenticeships. The move is a response to the fact that just 6% of Dentsu's workforce in the UK are aged over 50.

Expect to see more older talent break into the brand space in the coming years. Whether it's Jeff Goldblum on the runway for **Prada** or Gerald Stratford, the 'Twitter king of big veg', digging up vegetables with **Gucci**, there is one clear takeout: youth culture has nothing to do with age. It's an attitude.





Lab Insight

Carmela Vecchione
trends analyst, Box1824, a partner of The Future Laboratory

'Education is no longer a gate-kept experience or privilege – it is becoming a community-driven pursuit'

Left: Go for a Lacoste Polo campaign, US; Above: Photography by RF._.studio

42 Zeducation

Aligning with changing youth ideals and shifting global forces, educational spaces and programmes are beginning to evolve. While many conventional universities encourage specialist learning paths, **The London Interdisciplinary School** (LIS) is promoting cross-sector education. Focusing on problem-based learning, students work on real-time societal concerns, such as global food waste or societies' levels of unhappiness.

In Latin America Edtech is being positioned as the future of education, being budget-friendly and bite sized in format. Edtech is now evolving into **Social Learning Networks**, imparting knowledge and lessons via everything from WhatsApp to Reddit-style forums. Look to Colombian platform **Platzi**, which offers pre-recorded seminars led by industry experts, supported by a Reddit-style forum.

There are growing opportunities for brands to act as career advisers. As well as developing a tool for young people to find jobs via the platform, TikTok is ramping up its career content in the Middle East and North Africa (MENA) where, by 2040, an estimated 127m young Arabs are expected to join the workforce (source: Oliver Wyman). TikTok has also released a series of bite-sized videos spotlighting the skills needed to work in emerging fields, from artificial intelligence to the green economy and digital marketing.

43 Zalpha Playscapes

Inspired by Generation Zalpha's productivity, an energetic and assertive visual language is emerging that reflects their can-do attitude and capacity to dream. As examined in our youth macrotrend, **Zalphas** – the youngest of Generation Z and eldest of Gen Alpha – are children with an innate sense of digital nativism, social good and will power.

Emerging now are branding, messaging and playscapes that balance excitement, optimism and maturity. Gone are the gentle, pastel hues associated with child-like innocence. Instead, contrasting, vibrant colours, blown-out typography and malleable textures reflect this generation's fearlessness, enthusiasm and passion for change.

Wieden + Kennedy London transformed Niketown in London's Oxford Circus into a technicolour stadium, crucially imagined by Zalphas themselves. The space showcases the rebranding of **Nike Kids**, while a submission station allowed children to suggest their own games for Nike to develop.

Never Done Playing by Soursop for Nike Kids, London and Amsterdam

44 Sports Rebranded

Traditional sports and associated brands have an opportunity to use branding and campaigns to connect meaningfully with Gen Z by highlighting both the physical and mental health benefits of sport – and opening them up to everyone.

Recent insight from **Nielsen** shows that usage of **TikTok** and **Twitch** for sports news and content among Gen Z has grown by 30% and 21%, respectively. Now is the time for sporting bodies and brands alike to redefine what sport means and stands for – from visual identity to the kind of sportspeople we venerate.

Team Powered, for example, is an energetic rebranding of women's rugby by creative agency **DesignStudio** for **World Rugby** and **Women in Rugby**. It aims to build on the rapidly growing sport's momentum and help it break into the mainstream. Vibrant imagery by Argentinian illustrator Xoana Herrara celebrates the sport's supportive social environment, focusing on community and positivity.

Consider the opportunities to help Gen Z engage directly with players and sports personalities through fandom moments – they expect to be as intimate and engaged with them as they are with their friends on TikTok, Twitch or **Clubhouse.**



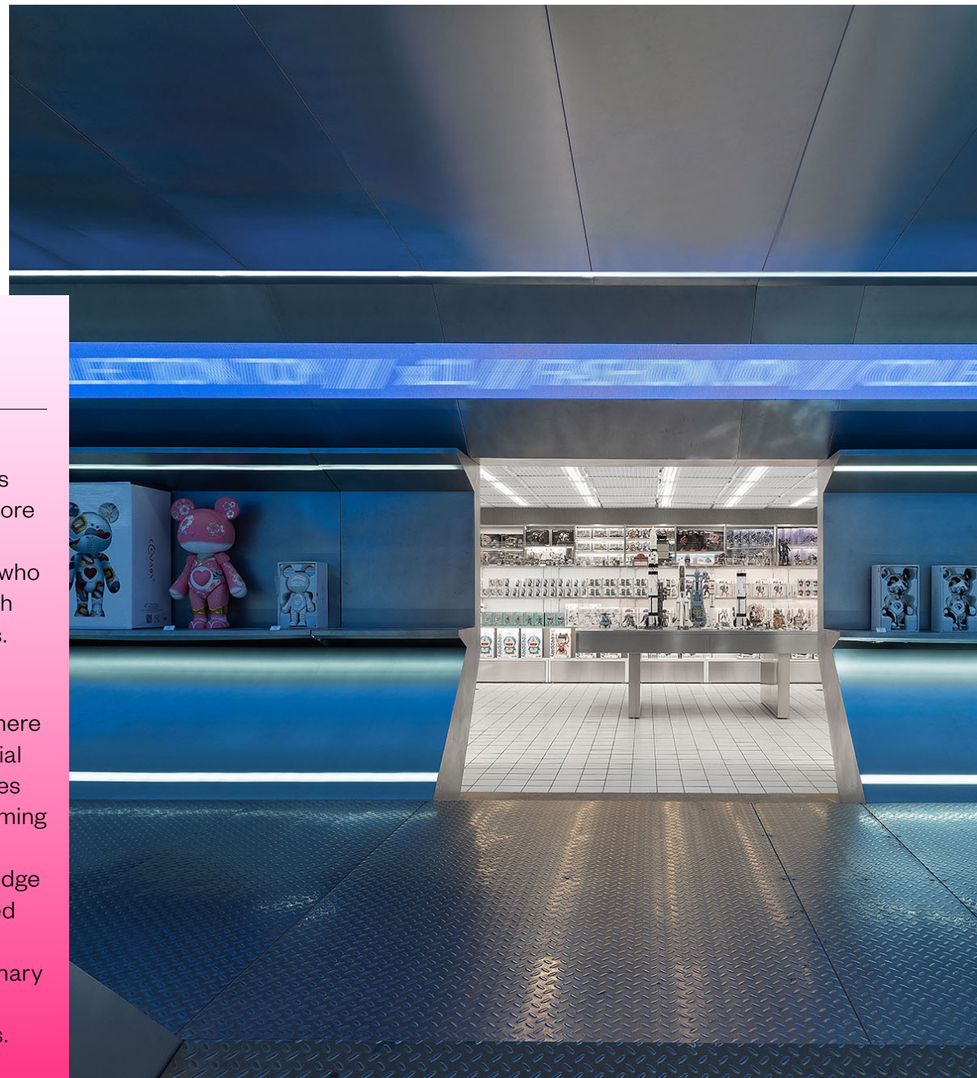
Above: Your Court Your Rules by Lawn Tennis Association (LTA) and The&Partnership, UK; Right: X11 global flagship store by BloomDesign, Shanghai

45 Gen Z Parents

Think Gen Z are teenagers? Think again. The eldest of this generation will be turning 30 in just two years' time. Members of Generation Z are having kids of their own, driving the parenting sector in unexpected new directions. Nearly one in 10 Gen Z in the US are parents, with 71% believing it's still possible to enjoy your youth while being a parent, according to **Vice Media**.

As they start their own families, this generation won't hesitate to transform parenting culture. After all, they've so far rebranded everything, from education and activism to wellbeing. Even new cultural markers such as Rihanna's much meme-ified pregnancy maximalism signal the end of a Millennial parenting style defined by gender reveal parties, wellness goddesses and pastel-hued minimalism. Instead, young parents will expect brands to help them meet the challenges of family life with the same verve of youth culture campaigns.

Look to **The North Face Japan**'s collection of convertible maternity performance wear as an example. Then there's **Herawares**, the world's first maternity streetwear brand, which taps into Gen Z's renowned blending of functionality and fashion.



Industry Disruptor:

Boys Club

Another of The Future Laboratory's Futures 100 Innovators, Deana Burke's ambition with **Boys Club** is to bring more women and non-binary people into a space currently dominated by men – who in turn, are accruing most of the wealth related to cryptocurrencies and NFTs.

Burke and Boys Club host a Discord server of more than 800 members where no question is a bad one, while its social media posts brim with irreverent guides to crypto-slang. There are also welcoming real-life events, where guests ask questions, sip cocktails, share knowledge and explore the future of decentralised finance through the lens of real-world businesses run by women and non-binary people – a world away from crypto-cliques and gated online communities.

Viewpoint:

Dola

What does it mean to be young and African today? The co-founder of modern African lifestyle platform **Dola**, Yannick Do, unpacks the vast opportunities for brands to connect with the world's youngest continent

How would you describe Dola?

Dola is a digital platform and e-shop. The shop element is something my co-founder [Fayçal Lazraq] and I wanted to be honest about. We want to share our culture with everybody. I was born and raised in Paris, but my parents are from Togo, and my co-founder's parents are from Morocco. Every year when I was young, we went to Africa for the summer, and I developed a second identity. My first one is Parisian, and the second is Togolese and West African. With Dola, we wanted to show people something fresh and truly African. If you come to Africa, you're going to see young people are the same as London kids. They wear the same clothes, they listen to the same music. We wanted to show the reality of Africa in terms of fashion and design.

'Five years ago, Kendrick Lamar would go to New York or Los Angeles... but now the place to be is Africa, because he knows it has a young and cool audience'

Why was the branding and the visual side of things so important when building the platform?

I was a former creative producer at **Nike** so my experience is in branding. Right now, we're living in a world where everything needs to be branded correctly. If you're into Japanese things, for example, you know where to go if you want to buy something very niche and Japanese, but for Africa, you don't have this. Dola came from a necessity to represent Africa away from Western clichés. With regard to African fashion, for example, people mostly think about wax fabrics and traditional outfits or primary colours. That's why we decided to work with one of the best graphic designers in Paris, to design something fresh that's also African.

As the youngest continent in the world, do you see Africa becoming a hub of youth culture in the way that America maybe used to be?

Yes, and it's just the beginning. Africa is experiencing a new creative wave, thanks to the quality of its talent and the digitalisation of communication. Africa is a very big continent, so if you win in Africa, you win everywhere.

In future, how do you see brands successfully entering the African market?

I think we need to build the bridge between Africa and the West in terms of collaboration. Maybe **Supreme** or **Nike** will work with a very niche African brand, for example. Every brand needs to be close to Africa because this is a new market. The older mindset was that brands wanted to sell their products to Africa; now they need to buy products from Africa. You can't come to Africa and say: 'We are Nike, and we're going to put a new shop in Accra.' You need to have a local brand to work with and have real African credibility to be in business.



Dola, Africa

Media & Tech

In 2023, the question won't be: what does the metaverse mean for my business? Instead, ask: what else could it be? A space for activism, for aid, for support or for democratised access to services?

This move to a Betterverse is increasingly being driven by growing challenges to the unregulated dominance big tech has on society. Developments in previously disjointed fields such as AI, robotics, nanotechnology and 3D printing are building on and amplifying one another in a Fourth Industrial Revolution (4IR).



The Energy Show at Het Nieuwe Instituut. Photography by Mirka Laura Severa, The Netherlands

46 The Betterverse

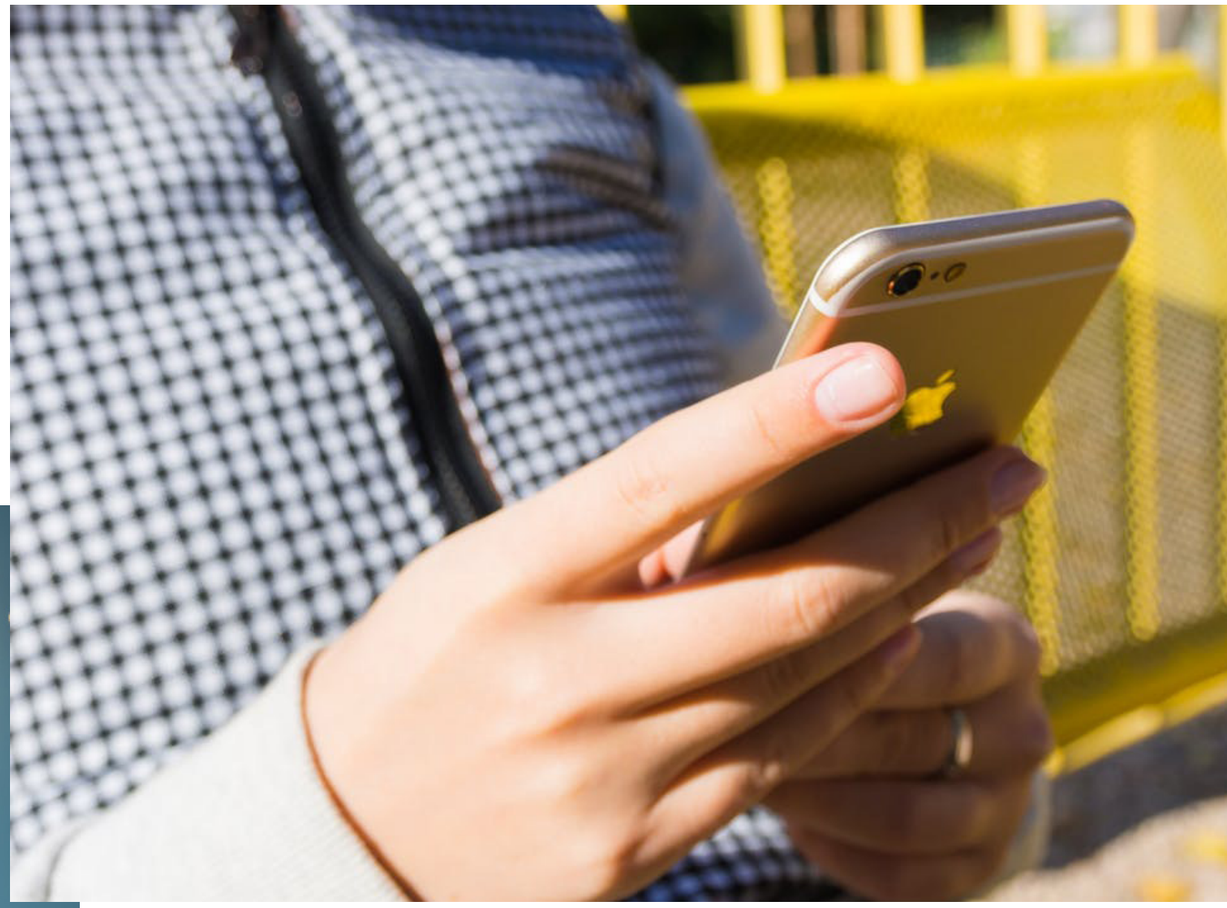
The metaverse has become the new multi-trillion-dollar digital frontier for all that is immersive, engaged and virtual. In the year ahead organisations large and small will move towards building a **Betterverse** by placing people and ethics first.

The old gatekeepers of authority and ownership – governments, mass media and big tech – are rapidly losing their status. Gens Alpha and Z are harnessing the tools and technologies of Web3 and the metaverse to spotlight injustices, project regional narratives on a global scale and create networks that are protected from traditional media.

More and more of these spaces are finding a home in the metaverse. **Roblox** – where 67% of the users are under 16 – has over 202m monthly active users, with 9.5m creators using the platform to create their own games. Meanwhile, **Minecraft** – with over 130m monthly users – has in the last year evolved from a gaming platform into a space for remote education, teaching financial literacy and safeguarding the work of censored journalists.



Build the Change by Lego, UK



Photography by Pixabay

47 Budget Bots

With an emerging need to track everyday expenditure, AI and machine learning (ML) capabilities are combining with data shared by users to produce Budget Bots: apps, mobile wallet platforms and virtual money assistants that continually monitor their spending, subscriptions, budgets and bills. Finding their space in a cost of living crisis, these platforms will become more numerous, gently nudging individuals towards behaviours or decisions that will support their money goals.

AI chatbots such as **Cleo AI** are providing personalised spending advice to younger users, taking a more playful and engaging approach to money advice. Users can share items they might like to purchase with Cleo, which answers questions on whether they can afford it.

Reflecting its name, **Trim** exists to help people pay bills on time, while also pinpointing any underused subscriptions or memberships they might have – and should therefore cancel. It can also help users to negotiate medical costs, internet and phone bills. Meanwhile, **Cushion** helps US citizens to recover fees from banks automatically on behalf of users, in some cases saving them up to £9,810 ($12,000, €11,525) in fees.

48 Industry 4.0

Developments in previously disjointed fields such as AI, robotics, nanotechnology and 3D printing are building on and amplifying one another. This Fourth Industrial Revolution (4IR) is expected to create up to £3 trillion ($3.7 trillion, €3.5 trillion) in value by 2025, says **McKinsey & Co.** But at the same time, awareness is growing of how our digital lives can affect the planet.

Gartner says specialist chip sales for AI will total over £28bn ($34bn, €32.7bn) by 2023. The **International Data Corporation** estimates that the number of 5G connections will reach 1.01bn by 2023.

The flipside to this 4IR coin is that 61% of people in developed markets believe technology companies have too much power, according to global communications firm **Edelman**. Not only that, the transmission of data via the internet is starting to be recognised as a type of pollution, contributing to nearly 4% of global greenhouse gas emissions, according to the **BBC**.

As technology becomes more intertwined with our lives, the onus will be on brands and businesses to mitigate the effects of this evolving revolution and hard-bake solutions into new tech.

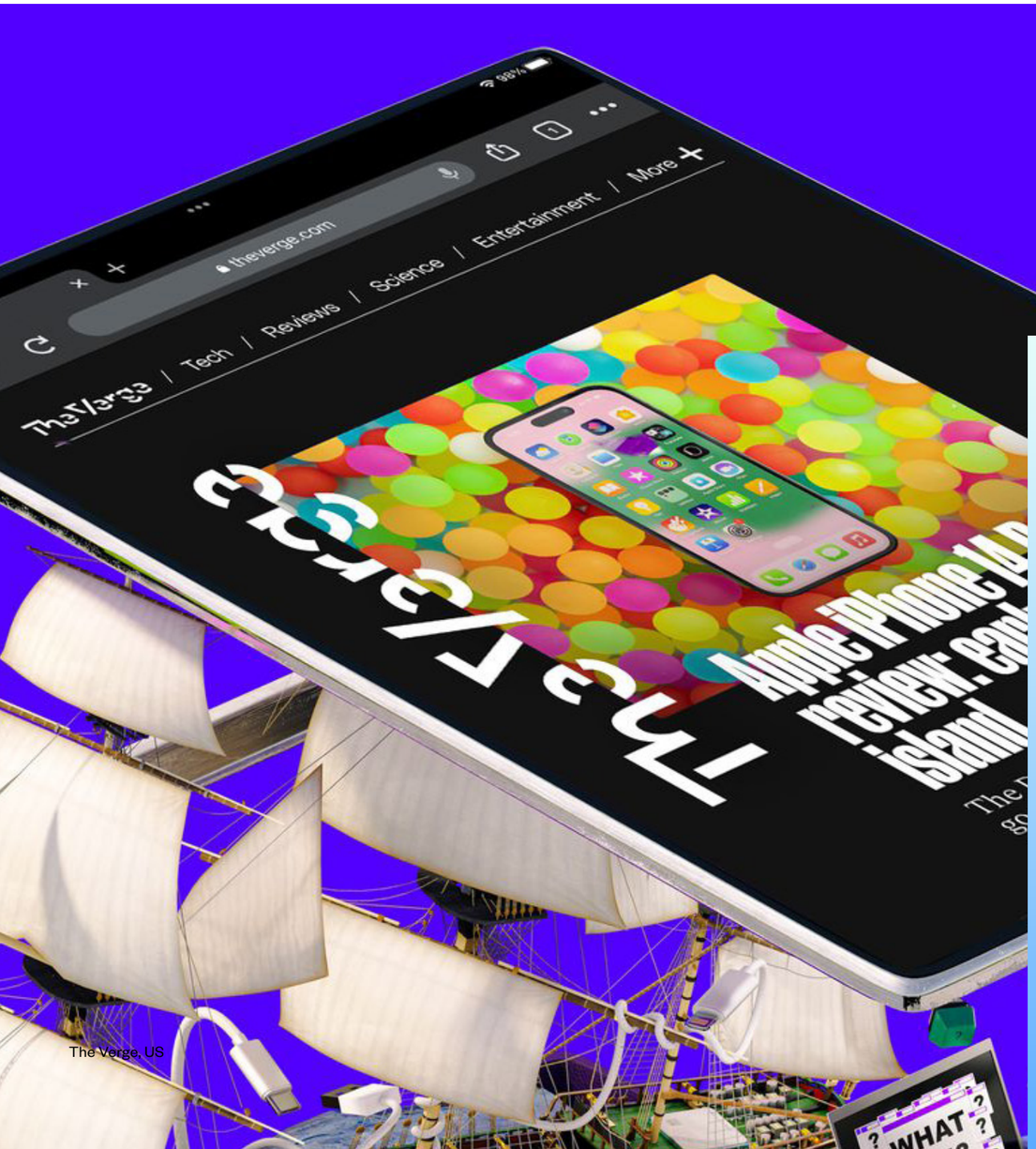
Cosmic Balance by Edhv. Photography by Roland Smit, The Netherlands

49 The New News

The 24-hour news cycle should empower and inform audiences. Instead, it's leading to higher stress levels, anxiety and feelings of powerlessness. According to **Gallup,** 28% of American adults claim they don't have much confidence in newspapers, tv and radio, while 38% have none at all. Nearly a quarter of US adults under 30 rely on TikTok for news (source: **Quartz**).

Vox Media's platform **The Verge** has redesigned its website to appeal to a new generation of readers. The editorial team have decided to stop covering the countless minor events that make up a typical news day and instead direct readers to rival publications where they were originally discussed. By including stories from rival outlets, the website is also becoming a portal to some of the best technology writing across the web.

Aiming to provide an alternative to the polarised press, **Semafor** is a digital news platform co-founded by Justin Smith, the former CEO of Bloomberg Media, and Ben Smith, a former columnist at The New York Times and editor-in-chief of Buzzfeed News. Written by a stable of respected journalists, each article is divided into different components, beginning with a factual account, followed by the reporter's opinion, an opposing viewpoint, as well as a look at what's next.



The Verge, US

Industry Disruptor:

Your Juno

Alexia and Margot de Broglie are the brains behind **Your Juno**, a UK-based fintech company launched in 2020. As a financial education and community platform for women and non-binary people, Your Juno acts as a reference point for anyone who has a question about money – a key aspect of adulthood that is often forgotten about in the mainstream education system.

Described as the 'Duolingo of finance', the sisters, who are two of The Future Laboratory's Futures 100 Innovators, use gamification to make the financial experience more playful, which is especially important at a time when only 33% of women see themselves as investors (source: Fidelity). '[If] you look at cryptocurrency... women only make up 7% of cryptocurrency holders,' explains Alexia de Broglie.



Taco Bell

50 Next-gen Dating

Dating apps are evolving beyond the swipe, with new entries looking to align more closely with Gen Z's relationship priorities and digital behaviours. Novel formats that prioritise finding real connections will be key.

Rather than inviting users to swipe through potential matches one by one, **Summer** features a grid showing lots of users at the same time. The idea is to replicate the feeling of entering a crowded place like a bar or a party in real life and scanning many faces at the same time before someone catches the eye. Minimal swiping is designed to increase the possibility of chance encounters.

Schmooze is a meme-based dating app designed to match users who share a similar sense of humour, with the logic being that people who find the same memes funny will make each other laugh. Gamer-focused dating app **Kippo** has updated its platform with new features allowing users to create avatars and meet via its in-app virtual world. The Los Angeles-based platform says 93% of its users play games together before meeting in real life, exchanging gamer tags before phone numbers.

Viewpoint:

Arup Paul

How will the digital world transform healthcare in the coming year? Dr Arup Paul, clinical director at digital healthcare platform **LovedBy**, explores healthcare's opportunity to improve access, safety and efficacy through immersive, virtual channels

What does the metaverse mean for healthcare?

There is currently no single definition of the metaverse, but the broad consensus is that it will result in an augmenting of the real world, shaped by wearable technology and personal data. Considering this notion, I am confident that the potential applications for healthcare are immense.

Digital healthcare has been gaining momentum in recent years, with the acceleration of high-quality digital consultations and prescribed treatments throughout the pandemic. If developed in the right way, the metaverse will build upon this growth to impact the whole continuum of health, including early diagnosis, managing illness and recovery.

How is LovedBy effectively using digital communication?

At **LovedBy**, we've seen how powerful effective digital communications can be in healthcare. Our behaviour change platform Nudg, for example, delivers personalised nudges into the native channels of adolescents with type 1 diabetes.

Elsewhere, we've already witnessed the success of innovations such as virtual reality (VR) therapy as a replacement for pain medication. A trial involving Oxford professor Daniel Freeman demonstrated a 38% decrease in anxiety after six weeks using VR therapy (source: basis health).

But can the metaverse really deliver high-quality healthcare?

Traditionally, healthcare bodies define 'quality' in three pillars: access, safety and efficacy. And I believe that the metaverse has potential in all three. Companies investing in the metaverse need to act ethically, engaging and respecting users' global perspectives.

> 'With appropriate data systems and well-designed virtual environments, the metaverse will allow people to access support in a more convenient and personalised way'

Wraparound healthcare is the future for younger generations

Most current healthcare systems are based on a universal cost-benefit analysis, taking a standardised approach to reach as many people as possible. But as the most diverse generation on Earth, Gen Z need personalised healthcare that exists in the places they inhabit. With young people increasingly engaged with virtual environments, the metaverse could be the answer.

Resonate LightVision. Designed by Layer, US

Make a better future happen

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