LS:N GLOBAL

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Gen Z

Global Youth Atlas

Introduction

One only needs to look at Gen Z across five continents to see that innovation speaks all languages. In this exclusive report, The Future Laboratory travels from Brazil to South Korea, and Kenya to India, to analyse what local Gen Z think, need and dream of – and what your business can learn from them.



In 1841, on Réunion Island, a 12-year-old enslaved boy named Edmond Albius discovered how to hand-pollinate vanilla orchids; a scientific breakthrough that solved a long-standing mystery.

Until then, vanilla could only be grown in Mexico, where its natural pollinators lived. Thanks to Albius, cultivation spread worldwide, from Madagascar to Indonesia and beyond. The innovative spirit of one teen boy off the coast of East Africa birthed a global agricultural industry. Yet Albius died in poverty, denied recognition. Some French botanists even questioned whether he deserved credit.

Inspired by the legacy of Edmond Albius, this report shines a light on how young people in the Global South – from Nairobi and Jakarta to São Paulo and Seoul – are reshaping markets, behaviour and culture. It's their pulse that all brands want to have their finger on. This cohort – born between 1997 and 2012 – shows how trends don't always originate in the West and can, in fact, teach many western brands what's new and next for them.

Emerging Youth draws on research conducted in 11 countries and the perspectives of nearly 40 contributors.

In these pages, you'll access a snapshot of each cohort, packed with insights, stats and case studies that help you step into the shoes of a 20something Saudi, Singaporean or Canadian. The report also features strategic opportunities to help you and your team understand how these signals can inform your next business strategy.

For global brands, these dynamics carry important lessons. Live-stream shopping in West Africa and APAC foreshadowed the rapid adoption of TikTok Shop in Europe and North America. Gen Zers in Thailand, Southeast Asia, and East Asia kicked off the Labubu craze in the summer of 2024. In trend forecasting terms, London was a Labubu laggard. And those dreamy, colourful TikTok edits seen during recent presidential election campaigns in the US, France, Chile and Indonesia? They were fan-made video montages, first popularised by the K-pop community in the 2010s to celebrate their favourite idols. Those teens did it first.

When The Future Laboratory launched LS:N (Life Signs Network) Global in 2007 – shifting its signature print publication into the digital realm – it already had 'Global' in its name. Since then, our team of foresight analysts and editors have travelled the world and partnered with international contributors and experts to ensure our reports spotlight innovators and trends from every corner of the planet.

Curiosity remains the driving force behind The Future Laboratory and its community. With this report, we're getting even more curious about others – those we know little about simply because they live far away, in countries some of us couldn't find on a map. We saw that coming, there's one for you on page 4.

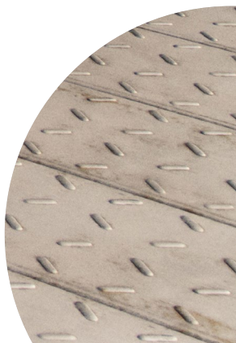
As our fragile democracies and big tech continue to reward fear of 'the other', this report reminds us that to build better futures, we must recognise what connects us all. The chapters that follow examine these shifts in detail. They connect lived experiences with actionable strategic implications and show how youth culture is reshaping the global landscape of consumption, engagement and creativity. To study these movements is to study the foundations of the future. Fasten your seatbelt and bon voyage.

Dan Hastings-Narayanin,
deputy foresight editor

Consumer Foresight and Trends Intelligence, powered by LS:N Global

LS:N GLOBAL

Cover: Feels Like UGG. Photography by Samuel Bradley, US



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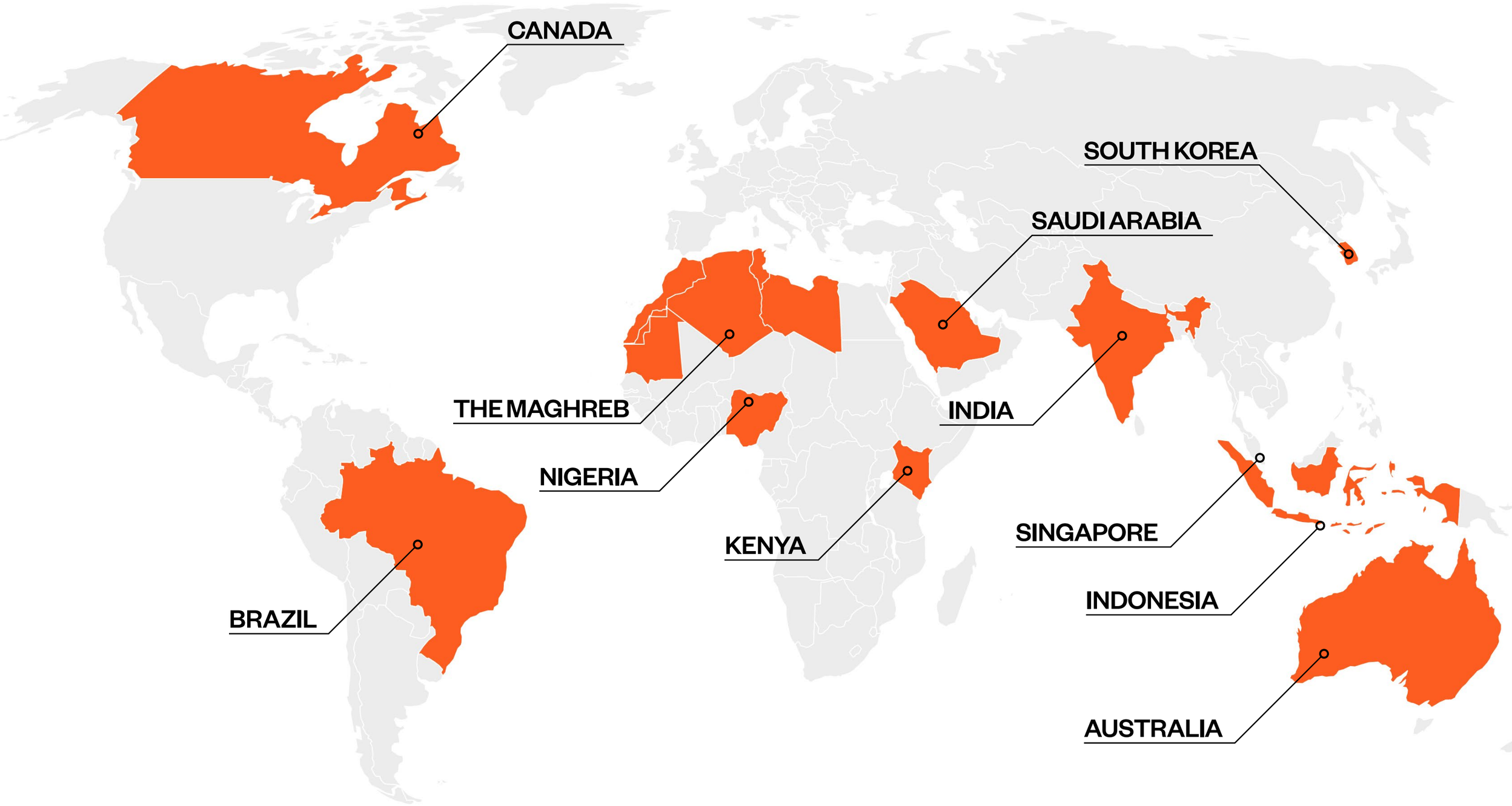
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Market Insight

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Global Youth Focus



Key Statistics

Across Latin America,

77%

of Gen Z dreamed of owning their own business in 2024 (source: Caju, CNN Brazil)

44%

of Gen Z Canadians are willing to pay more for sustainable clothing (source: Vividata)

63% of Gen Z

Singaporeans report feeling anxious about climate change and 24% have changed jobs or industries due to environmental concerns (source: Deloitte)

43%

of all luxury goods consumers in South Korea in 2023 were Win their 20s or 30s (source: Lotte Members, Vogue Business)

66.8%

of Gen Z in India are aware of Pride Month, with 52% supporting the growing acceptance of the LGBTQ+ community (source: The Hunch)

73%

of 18–29-year-old Australians said they would vote 'yes' in the October 2023 referendum on having a First Nations Voice in Parliament (source: Australia Institute)

63%

of Kenyan Gen Z say they're 'very involved' in politics or public affairs, their social consciousness has an influence on civic behaviour (source: GeoPoll)

Nigerian Gen Z are fuelling the rise of Web3 and crypto, with

68%

wanting more Web3 education in schools (source: Boss Beauties)

95%

of affluent 18–34-year-old Saudis think it is important to support and engage with Saudi-first enterprises and celebrate local craft and design (source: FuturePoll™)

Executive Summary

Five Gen Z Trends for a Global Future

Anxious Resilience

Riddled with anxiety and burdened by a fragmented world they did not create, Gen Z are nevertheless emerging as remarkably resilient. While South Koreans grapple with disillusionment, Indian and Maghribi Gen Zers are becoming increasingly climate-conscious and Kenyans are demanding accountability from their elders. Global warming, war, distrust in their leaders and the media, and, in some regions, soaring youth unemployment have contributed to an age of constant vigilance and scepticism. In difficulty but never defeated, Gen Z have turned the uncertainty into motivation to live in the moment and prioritise mental health, physical wellbeing and joy.

What this means

Gen Z demand trust and authenticity from the brands that market to them. Do not underestimate their capacity to investigate and publicly challenge brands over inconsistencies or a lack of transparency.



ZZZN Sleep Apparel System, Japan

Nike x NorBlack NorWhite, Indiaw

Executive Summary

Five Gen Z Trends for a Global Future

Heritage Wave

If China pioneered the Guochao (national pride) movement, the rest of the world is now embracing a similar inward gaze. Gen Z are on a perpetual quest for identity and are reclaiming nationalism from populist conservative narratives, reframing it as pride in local know-how, talent or scents and tastes that are part of their origin story and make them who they are. In Australia, the women's national football team, the Matildas, inspired young Australians to wear national colours on the stands. Meanwhile, in Indonesia, local e-commerce company Tokopedia boosted engagement by serving banana milk and traditional dishes to K-pop band BTS during a live stream.

What this means

Gen Z are going beyond localised marketing by offering an antidote to the toxicity of nationalism. As the main protagonists of their own story, they take pride in where it began.

Executive Summary

Five Gen Z Trends for a Global Future

Generation Agency

Although they take pride in their heritage and are connected to their roots, Gen Z refuse to be restricted by traditions. This rebellion stems from nearly free and unrestricted access to the world and information via the internet, which has shaped their perception of the past. From Canada to Australia, Gen Zers are campaigning for Indigenous rights in an attempt to fix their elders' macabre past. Young Indonesians practise an inclusive Islam that promotes interfaith dialogue and tolerance. Entrepreneurship is also the dream career for youth in Brazil and the Maghreb, where the uncertainty of building a business is feared by parents yet romanticised by Gen Z.

What this means

Gen Zers embrace diverse identities, challenge tradition and prioritise individuality and purpose. They expect to be heard and respected on their own terms – even if it unsettles older generations.



Tukisonga, Kenya



adidas Originals and Edison Chen, Germany

Executive Summary

Five Gen Z Trends for a Global Future

Belonging Fusion

From fashion to music and food, Gen Z around the world are embracing a hybrid culture that blends the local and familiar with global influences. Saudi brand Abadia merges traditional weaving with luxury womenswear, while Morocco's itsmeddcom teamed up with Adidas to reinvent the classic babouch slipper. In Canada, artists like The Weeknd, Daniel Caesar and Kaytranada infuse Haitian, Ethiopian and Jamaican sounds into their music, reinforcing the country's multicultural edge. In Brazil, hybridity goes beyond products; Gen Zers are shedding the 'stray dog complex', a lingering sense of inferiority, and placing their culture on equal footing with the West.

What this means

Gen Z's curiosity for fusion cultures doesn't mean that adding a hint of local relevance to a western product will suffice. In their new world order, heritage comes first and western no longer means neutral or modern by default.

Executive Summary

Five Gen Z Trends for a Global Future

The Power of Joy

K-pop! Labubu! Raves! Amid the gloom, Gen Z around the world are chasing dopamine hits and the comfort of community. While young Brazilian women join money-saving challenges and Canadians adopt pragmatic spending habits, Gen Zers still seek instant gratification – whether buying mini beauty products in Korea, splurging on fashion at Singapore malls or embracing the booming music festival scene in India. With adulthood delayed by Covid-19 lockdowns, many find comfort in nostalgic childhood throwbacks like anime conventions in Brazil. For others, across Nigeria and the Maghreb, nightlife – including flamboyant underground LGBTQ+ raves – has become the new playground.

What this means

Gen Z are walking paradoxes – embracing 'little treat' culture while hunting for the best dupes and low-cost alternatives. To capture their attention and wallets, brands must become engines of dopamine and joy.



Miffy x Mulberry capsule collection, Global

Brazil

Putting the P in Purpose

Driven by a quest for purpose, Brazil's Gen Z are honouring their roots in inventive ways – raising the bar for inclusive fashion, global fandom and financial literacy.

It Favela

Peripheral communities as creative originator

Drivers:

what's happening

Making up 20% of the population, Brazilian Gen Z are stepping into adulthood with little patience for outdated systems. Members of this cohort aren't afraid to challenge tradition at work by making mental health, flexibility and purpose non-negotiable.

Entrepreneurship is also top of mind for young Brazilians. Across Latin America, 77% of Gen Z dreamed of owning their own business in 2024 (source: Caju, CNN Brazil). In Brazil, the number of entrepreneurs aged between 18 and 29 grew by 23% between 2013 and 2023 (source: Sebrae).

Ultra-connected, Brazil is the number one market in daily time spent on social media – with an average of 3 hours 49 minutes in 2023 (source: GWI). Yet, despite Brazil's connectedness, loneliness has emerged as a significant public health issue, according to research from the Federal University of Minas Gerais.

In response, young Brazilians are craving a sense of community and turning to shared passions as a pathway to belonging. In São Paulo, whether it's a BookTok pop-up on Paulista Avenue or a special activation with Grimace and Minecraft at the 1,000th McDonald's franchise in Brazil known as Méqui 1000, physical spaces powered by internet culture are becoming hubs for real-world connection.

Brazilian Gen Zers embody a flamboyant resilience in a system not built for them or their values. From fashion to pop culture, they are on a quest for *propósito* – purpose.

Vini Jr. in Nike's Why Do It? campaign, Brazil

Signals and shifts

what's new



Left: Tasha & Tracie, Brazil; Right: Arena, Rio de Janeiro, Brazil

CASE STUDY

Tasha & Tracy

Tasha and Tracie are twin rappers, DJs and entrepreneurs from São Paulo who coined the term 'It Favela' to describe how Brazil's peripheral communities set global fashion trends long before they reach catwalks. From football shirts to Y2K denim and micro-skirts, favela style has shaped everything from Nike campaigns to luxury houses like Balenciaga and Miu Miu. The duo repositions the favela as a creative originator, demanding recognition for cultural innovators too often overlooked.

Heritage Fashion

With a new collection inspired by nostalgic Brazilian folklore, Le Shay reflects a Gen Z desire to reconnect with Brazil's history and replace logos with legacy. Gabriela Helito, founder and creative director of Le Shay, tells The Future Laboratory: 'Brazil has a diversity that shines through in our faces… Everyone looks Brazilian, we are not homogeneous people. Therefore, the brands we create tend to embrace the aesthetic diversity we see every day.'

Labels like Dendezeiro, founded by Hisan Silva and Pedro Batalha, are bringing Afro-Brazilian narratives from the Northeast region to fashion. As Batalha told Harper's Bazaar Brazil, the country's fashion future lies in brands that include, rather than exclude.

Elsewhere, artists like Tasha & Tracie are using their platform as musicians and creators of It Favela to spotlight the style and creativity born in the favelas. Long sidelined in the mainstream, these impoverished neighbourhoods are cultural incubators for Gen Z talent.

Global Fandom Carnival

Long shaped by early immigration and home to the largest Japanese and Lebanese diasporas outside their home countries, Brazil has always been a cultural chimera wired for multiculturalism. Local consumers are fluent in global culture – K-pop, anime, Ru Paul's Drag Race – and rework it with a distinctly Brazilian twist. Fusion is second nature: think Brazilian manga, or the country's take on afrobeats with funk carioca and various Afro-Brazilian styles.

More than a meme, Come to Brazil reflects the nation's powerful demand for international talent. Mega concerts have proven that point: in May 2025, Lady Gaga drew over 2m fans to Copacabana before Madonna followed with 1.6m fans in Rio.

Governments and industries are taking note. South Korea recently opened a cultural centre in São Paulo in a bid to build audiovisual partnerships with a Gen Z audience that's eager, vocal and globally savvy.

Femfin Samba

Once dominated by men, Brazil's dynamic financial landscape is being reshaped by a new generation of women. The number of female Brazilian equity investors surged from 165,000 to more than 1.3m in 2023 – a 658% increase. Most are aged between 25 and 39, making up 46% of the total, followed by those aged between 40 and 59, at 34% (source: B3, InfoMoney).

As explored in our Cultural Capital report, TikTok is driving this shift. Finfluencers are democratising finance through gamification and simplified content, reaching audiences previously excluded from financial education.

Nathalia Arcuri, through Me Poupe!, pioneered female financial literacy in Brazil, reframing it as empowerment. Creators like Karlla Freitas ('your rich BFF') use hyper-feminine aesthetics and cultural cues to make investing feel inclusive and fun. Similarly, Nathália Rodrigues (aka Nath Finanças) blends pop culture and clear explanations to break down financial concepts for beginners.



Mamba Negra, Sao Paulo, Brazil

Analysis:
what this means

'As a generation that can be anything, Gen Z want to understand what and who they are,' Helito says of young Brazilians who are seeking identity in an oversaturated world of options. Ostentatious posts on social media from lifestyle influencers, for instance, have created a cycle of aspirational yet unachievable content creation.

Their quest for authenticity and belonging has led them to reconnect with their culture. 'We are losing our stray [dog] syndrome,' says culture journalist and fashion and lifestyle brand consultant Victória de Ranieri. To her, the tendency of older Brazilians to view the US and Europe as superior is diminishing.

In culture, Brazil is making major waves across creative industries, with global recognition mounting fast. Brazilian funk is on the brink of a global breakout, with its beat already seeping into international acts such as K-pop group Meovv. Meanwhile, Brazilian female rappers like MC Luanna and Ajuliacosta are rising fast.

This third culture phenomenon allows Brazilian Gen Z to rebuild a sense of national identity collectively. Beyond the search for an antidote to loneliness, community is the answer Gen Z has found to rebuild the world they have inherited – they will expect brands to show the same clarity of purpose to attract and retain them.

Strategic opportunities



Secret is You by Jägermeister, Europe and Brazil

Develop community-led spaces

Consider how to create hybrid physical-digital environments where young Brazilians can connect around shared passions (books, gaming, music, fashion). This could include retail as social clubs, cafés as fandom hubs or co-working spaces for entrepreneurs



KPop Demon Hunters, Courtesy of Netflix, Global

Channel the power of fandoms

Brazil's status as a global fandom capital (from significant fandoms revolving around the likes of K-pop to Madonna) can be harnessed for scalable entertainment and merchandising



Your Bites, Your Rights by Pepsi, Brazil

The glocal marketing opportunity

Recognise that Brazilian Gen Z seek cultural connection through collaboration, not appropriation. Partner with local creatives to foster respectful cross-cultural exchanges that honour Brazilian heritage while linking it to global stories

South Korea

Status Hunting

Amid a collective melancholy rooted in structural disillusionment, Korea's Gen Z are chasing dopamine hits through K-pop, K-beauty and K-idult purchases.

Mini Bobusang

Obsession over miniature beauty products, from skincare to fragrances and colour makeup.

Drivers:

what's happening

In the words of Shim Jae-yun, chief editorial writer at The Korea Times, Korean Gen Z are trying to escape 'Hell Joseon' – the heavy expectations of society, their parents and elders. Gen Zers are also the first cohort in the nation's history to experience low economic growth, a declining population, volatile employment and high housing costs.

Often only children and with 81% still living at home (the highest rate among 32 nations surveyed), they face 'overparenting' well into adulthood (sources: OECD, Korea JoonAng Daily).

Korean Gen Z value emotional wellbeing and reject conventional milestones such as homeownership or executive careers. Instead, they prioritise work-life balance and mental health. More than half of local Millennial and Gen Z workers do not want to be promoted to executive positions, opting for 'conscious unbossing' to avoid burnout (source: Korea JoongAng Daily).

Disillusioned by the unattainable, they're embracing *gasimbi* – spending based on emotional value – rather than the older notion of *gaseongbi*, which focused primarily on price.

Embracing the Wonyoung-style mindset – named after K-pop superstar Jang Wonyoung of girl group Ive – they value emotional resilience and optimism, and face challenges gracefully while believing in themselves.



Photography by Young Chul Kim, South Korea

Signals and shifts

what's new

K-beauty in miniature

Amid inflation and limited disposable income, Korean Gen Zers have adopted a try-before-you-buy mindset, fuelling a boom in mini-sized packaging – known locally as the mini *bobusang* trend. Pocket-sized serums, perfumes and skincare treatments allow them to sample widely without long-term commitment. This behaviour reflects a wider barbell pattern: switching between high-end indulgence and ultra-cheap experimentation.

Retailers have quickly adapted. At discount chain Daiso, Aekyung's 10ml spot treatment sold out quickly, while VT Cosmetics' popular Cica serum is now available in 2ml sachets, favoured by students. Convenience store GS25 saw sales jump 124% after launching Mediheal's tea tree pad samples (source: Korea Product Post). Vegan brand Muzigae Mansion also sells 6ml liquid lip tints in exquisite packaging.

This culture of trialling keeps Gen Z in constant discovery mode – rewarding brands that release frequent, limited or photogenic products. Indeed, cute, collectable minis also thrive on Instagram and TikTok, aligning with Gen Z's aesthetic sensibilities.





Left to right: Muzigae Mansion liquid lipstick 6ml, South Korea; Heavenly Jelly, South Korea

Cute spending for emotional survival

Before the success of Pop Mart's Labubu blind boxes – popularised by K-pop mega star Lisa of Blackpink – young Korean women were obsessing over Monamhee plush bag charms. In June 2025, Pop Mart Korea even suspended sales of Labubu toys over safety concerns due to excessive queues.

Cuteness functions not only as a mode of self-expression but also as a psychological buffer – a form of soft armour that allows Gen Z to retreat, play and recharge.

In 2025, beauty brand Mamonde enlisted the cute Mint Choco Monster on Instagram to promote its Cleansing Balm. Earlier in February 2025, Mamonde was 'overflowing with cuteness' when it debuted its Tom and Jerry limited edition. The adorable characters are featured on the packaging of creams, cleansing balms and masks.

The collection also highlights special items like a Jerry-themed face-washing headband and a cheese-shaped pouch. The brand's Glossy Sun Serum also serves as a cute flower-shaped keychain designed to be carried everywhere.

K-pop as a lifestyle

Hyper-connected through social media, young South Koreans are highly responsive to the ‘idol effect’: if a K-pop star wears or endorses something, it can sell out within minutes. In addition to global phenomena BTS and Blackpink, groups such as Twice, Stray Kids, NewJeans, Ive, Exo, Seventeen and Aespa dominate youth culture.

Brands are tapping into this influence to gain cultural relevance. After releasing the tune Zero to promote Coca-Cola Zero, NewJeans dropped a remake of the 1980s Seoul Olympics Coca-Cola advertisement song I Feel Coke in March 2025. Similarly, K-pop group QWER released Play, We, Dew to tease Mountain Dew’s upcoming sugar-free line in April 2025.

Nike, Adidas and luxury houses from Dior to Louis Vuitton enlist idols as ambassadors, with more than 30 K-pop stars appointed by fashion brands in 2023 alone (source: Vogue Business). Even tech companies have tapped into K-pop. In June 2025, Apple released a performance video of Aespa shot on the iPhone 16 Pro.

‘It’s all about belonging now, and ironically, no one belongs anywhere. Before, you had clubs and you didn’t know who would be there. If you got in, even when it was full, it felt much freer. Now, you have some parties here and there, but that element of the unknown is gone’

Victória de Ranieri, culture journalist and fashion and lifestyle brand consultant

KPop Demon Hunters, South Korea

CASE STUDY

Mountain Dew

PepsiCo first partnered with K-pop group QWER – comprising former gaming streamers – to promote Mountain Dew in South Korea in 2024. The campaign drove sales up by 16.7 times, with one superfan purchasing 1,600 cans to support their idol, according to Yun Heon Lee, general manager at PepsiCo Korea. The long-term partnership continued, and in April 2025, the band released a song and music video titled Play, We, Dew to tease Mountain Dew’s upcoming sugar-free line.



Photography by Young Chul Kim, South Korea

Analysis: *what this means*

Brands hoping to win the loyalty of young Koreans must go beyond superficial messaging and instead tap into their desire for joy, emotional connection, stability and a sense of control.

Yet contradictions define them. They practise extreme frugality – tracking spending with finance apps or doing envelope-style TikTok cash challenges – while also driving South Korea's luxury boom. Nearly half (43%) of all luxury goods consumers in South Korea in 2023 were in their 20s or 30s (source: Lotte Members, Vogue Business).

These digital natives are building the future of fandom and entertainment. Esports heroes like Faker have become national icons, while Netflix's K-pop Demon Hunters captured Gen Z's imagination with its blend of digital idols and Korean folklore. The film has sparked a wave of tiger-themed events across the country, including a sky-painted drone tiger over the Han River.

Craving awe and escapism, Gen Z seek more immersive experiences. But global brands must ensure cultural authenticity. Le Café Louis Vuitton, opened in Seoul in September 2025, blends French techniques with local ingredients curated by Korean chef Yoon Tae-kyun – a perfect example of Culture-coded Retail done right.

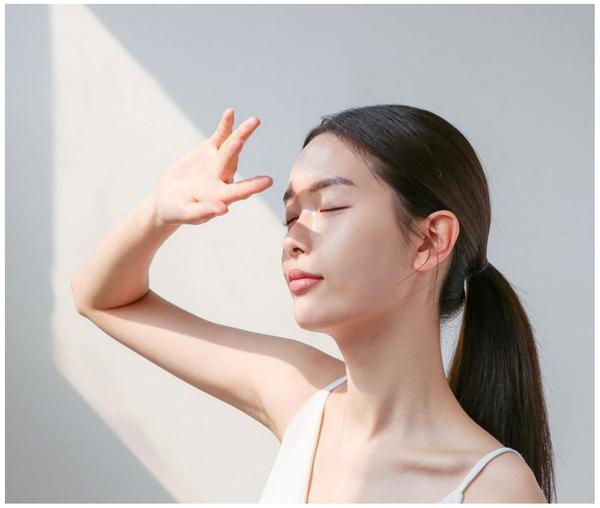
Strategic Opportunities



Jang by Elorea, South Korea

Embrace emotional value as the new ROI

As Korean Gen Z are shifting from price-based consumption to long-term emotional value, consider auditing your product, service, or brand experience for emotional resonance. Ask: Does this bring comfort, joy, status or self-expression?



NOAV cosmetics, South Korea, East Asia

Design for the mini mindset

Sampling culture is driving K-beauty's growth through mini-sized, photogenic formats. From beauty to food and drink, can you introduce trial-size versions of your offerings (physical or digital) to appeal to frugal yet curious consumers?



KitBetter, South Korea

Use fandom as a commercial engine

Explore co-creation or long-term ambassador partnerships with local celebrities or micro-influencers who have fandom power. Design campaigns that allow fans to show devotion through purchases, content or challenges

Kenya

A Generation Demanding Accountability

From Silicon Savannah to the streets of Nairobi, Kenya's Gen Z are rewriting the rules of power, protest and purpose for governments and brands.

Waithood

The delay in achieving key life milestonesdue to limited prospects and rising costs.

Drivers:

what's happening

In Echoes of War, a play written by Kenyan politician Cleophas Malala in 2025 for a drama festival, a young woman called Anifa, who lives in the fictional Royal Velvet Emirates, is symbolically 'pregnant with change' before becoming the face of youth resistance. The play includes scenes of unrest, organised resistance on social media and the consequences of a regime that does not listen to the youth until it is too late.

As well as embodying the Kenyan government's authoritarian tactics and igniting national debates on censorship, Echoes of War represents perfectly why 23% of Kenyans considered Gen Zs as the country's most celebrated heroes of 2024 (source: Infrotrak).

Marked by a willingness to demand political and social change, an independent and entrepreneurial spirit, and tech-savviness, Kenya's youth are making a name for themselves and are hailed as the most influential cohort in the region.

'The lazy Gen Z stereotype doesn't hold up in Kenya,' Nkanai Cynthia, one of the founders of This Is Me, a Gen Z collective focused on social impact and community building among Kenyan youth, tells The Future Laboratory. 'If anything, Gen Zs have proven to be one of the most vocal and action-driven generations.'



Photography by Breston Kenya Kenya



Photography by Manuel Michael, Global

Signals and shifts

what's new

From Gen Z to Gen Zote

Kenya's Gen Zers have emerged as a political force, catalysed by the #RejectFinanceBill2024 protests, known locally as the Maandamano. Sparked by a proposed tax hike on essentials such as bread and sanitary pads, the movement drew thousands of young Kenyans into the streets and online, coordinating through memes, short-form video explainers and AI-powered chatbots.

Described by the Financial Times' Africa editor as 'leaderless and hydra-headed', the protests broke from Kenya's elite-led, ethnically aligned political tradition and forced the government to shelve £2bn ($2.7bn, €2.4bn) in tax hikes.

Young protesters proudly adopted the label Gen Zote (a play on Gen Z and *zote*, Swahili for 'all'), signalling that all generations were welcome in this new mindset, which is focused on transcending tribe in favour of a united Kenyan front for progress. Activists including lawyer Morara Kebaso and viral figure Bradley Marongo (a 'Gen Z Goliath') gained national recognition in the process.

The rise of digital entrepreneurship

One of Kenya's biggest challenges is youth unemployment, with more than 66% of Gen Z currently out of work. This delay in achieving key life milestones due to limited prospects and rising costs is known as waithood. Yet 83% of Kenyan Gen Z describe themselves as ambitious, and more than 13% have launched small businesses (GeoPoll).

In 2024, 1.2m Kenyans – around 5% of the population – were active in the gig economy, a 3,000% increase since 2021 (source: Joint Sustainable Development Goals Fund). 'With the government failing to create sufficient job opportunities, many young people have turned to online platforms to earn a living,' Dr Job Mwaura, research associate at the Wits Centre for Journalism, tells The Future Laboratory.

Start-ups like HustleSasa and Wowzi support this shift, while platforms such as Upwork, Fiverr and Toptal connect Kenyan freelancers to global clients in fields from design and digital marketing to software development.

Authenticity is the algorithm

Gen Z creators are leading with substance as much as style to rewrite the rules of Kenyan online influence. The number of social media users has increased substantially: in 2014, the country counted more than 3.6m users; by 2024, this reached 13m (source: Statista).

'Gen Zs are attracted to public figures who are authentic, relatable and humorous,' explains Cynthia. 'Crazy Kennar and Chebet Ronoh have sustained their popularity due to their 'it' factor. Lydia KM and Murugi Munyi's authenticity is widely recognised and admired, especially on Instagram.'

User-generated content around beauty and alcohol is thriving, while brands such as Jumia – the largest online shopping website in Nigeria – lean heavily on influencer partnerships. YouTube vloggers like Zarilyn Zonroe gain traction with raw, unfiltered content, while comedian Elsa Majimbo built a global fanbase on TikTok during the pandemic by blending local slang and Nairobi humour with meme culture.

Analysis:
what this means

Kenya's Gen Z are driving the country's emergence as a tech and innovation hub, blending digital fluency with civic activism. Ajira Digital, for example, is equipping young people with skills for the global gig economy, aligning with Kenya's vision to be Africa's Silicon Savannah.

A landmark US-Kenya partnership highlights this shift. Agreed in 2024, it aims to make Kenya the first country in Africa to manufacture semiconductors, a move that will position it within a £472bn ($627bn, €554bn) global industry and open doors for youth employment and skills in advanced tech sectors (source: Semiconductor Chip Association).

But this generation's influence goes beyond tech. In 2024, Gen Z-led protests spotlighted femicide and gender-based violence, drawing attention to social issues long ignored by the authorities. With more than 63% of Kenyan Gen Z saying they're 'very involved' in politics or public affairs, their social consciousness has an influence on civic behaviour (source: GeoPoll).

When it comes to their roles as consumers, unethical practices by brands risks rapid backlash on social media. Initiatives that support education, digital access or anti-corruption efforts are likely to resonate. This generation is evaluating integrity and wants brands to engage with them as citizens, not just as consumers.

CASE STUDY

Wowzi

Born in 2020 in Nairobi, Wowzi is a platform designed to link brands with the African continent's rising social media creators. More than 200 companies, from Coca-Cola to Netflix and East Africa's Safaricom, are using Wowzi's AI-driven platform to sift through its 200,000 influencers and rich datasets to find the micro and mid-level creators who fit their profile. TikTok even signed a strategic partnership with the company in 2025.

Photography by KRM Graphics, Kenya

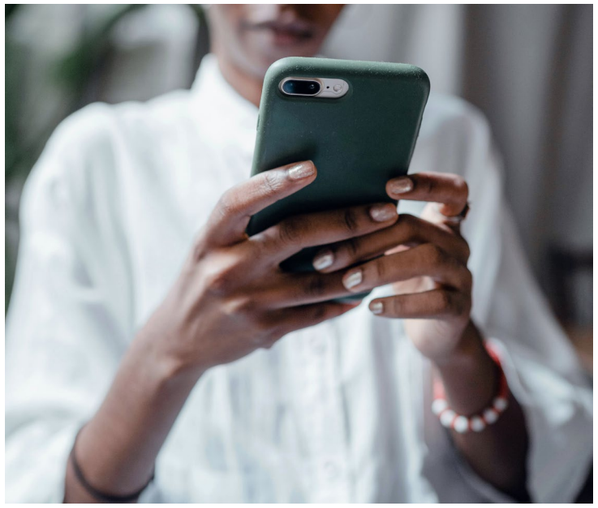
Strategic Opportunities



Tukisonga, Kenya

Localise financial services for waithood

The innovation opportunity revolves around delayed adulthood needs. For example, consider products and services around rent-to-own housing, micro-savings, flexible health cover, or credit solutions tailored to gig workers navigating financial uncertainty



Photography by Ketut Subiyanto on Pexels, Global

The rise of African IP

Back Gen Z creatives building local IP – plays, comics, games or web series – that reflect the lived realities and aspirations of African youth. Help export these stories through funding, distribution or co-productions



Photography by KRM Graphics, Kenya

Move from performative to participatory CSR

Shift corporate social responsibility from donation-based models to participatory civic engagement. Consider supporting youth-led anti-corruption or gender justice campaigns. This generation wants brands to stand up, not just show up

Viewpoint

Augmented Futures for Next-gen Teens

Biomedical scientist Dr Knatokie Ford sits down with The Future Laboratory to discuss how Augmented Futures – a fusion of science, storytelling and futurism – can empower underrepresented teens to shape their own success.

Dr Knatokie Ford has built a career on redefining what is possible. A biomedical scientist, educator, and former senior policy advisor in the Obama Administration, she is now using storytelling and imagination to inspire young people to see beyond the limitations placed on them.

Speaking on The Future Laboratory's Back to the F**kture podcast, Ford admitted that imposter syndrome has shadowed much of her journey. 'My imposter feelings began when I was a graduate student,' she recalled. 'I was transitioning from a historically Black university to Harvard… If you're not intentional about keeping those feelings at bay, they can grow and fester into severe self-doubt.'

Rather than allowing these doubts to define her, Ford has transformed them into a framework for others. At the heart of her work is what she calls Augmented Futures: an approach that blends mentorship, imagination and strategic foresight to equip young people with the tools to shape tomorrow. 'Having someone actually speaking life to the potential they see in you is really powerful,' she said.

For Ford, mentors and teachers are vital enablers, not just preparing young people for what exists, but helping them imagine what could be. As she explained: 'Privilege often comes through exposure. When you're exposed to different experiences and possibilities, your sense of what's achievable expands. But if you've never had that exposure, you don't know what you don't know.'

Her philosophy extends into popular culture. As a science consultant for Netflix's Ada Twist, Scientist and Disney's Eureka!, she champions diverse role models who show children that science is a place for them. One character in Ada Twist was even modelled on her – snazzy glasses, colourful lipsticks and all. 'By being visible… we are creating more diverse representations in the media, and this in itself normalises the presence of Black and Brown scientists in real life,' she noted.

Ford also supports the shift from STEM to STEAM, incorporating the arts into science education. She argues that creativity and critical thinking are as crucial as technical skills. 'Unfortunately, in recent years, we've seen a decline in liberal arts education,' she said. 'But the arts are equally vital for fostering creativity, critical thinking and well-rounded development.'

Looking ahead, Ford hopes Augmented Futures will become a structured part of education by 2034, inspiring learning experiences that translate into real opportunities. 'It's not enough to simply tell [teens], 'You can be anything you want to be' – we need to provide them with tangible ways to explore and understand their possibilities.'

Her ultimate goal can be summed up in one word: thrive. Citing Maya Angelou, she says thriving means not just surviving, but doing so 'with some passion, some compassion, some humour and some style.'



My First AI by Modem and Wang & Söderström, The Netherlands

Viewpoint

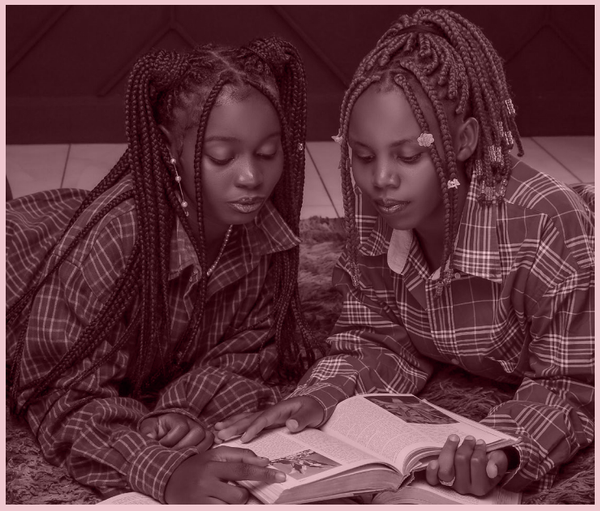
Strategic Opportunities



Photography by jamies.x. co, Kenya

Mentorship as a core benefit

Formalise mentoring programmes where senior staff actively ‘speak life’ into younger employees’ potential, creating a culture of affirmation and growth



Photography by KRM Graphics, Kenya

Experiment with youth co-creation

Invite Gen Z and Gen Alpha voices into innovation workshops, advisory boards or product testing, ensuring their imaginative thinking shapes future strategies



Tukisonga, Kenya

Use fandom as a commercial engine

As on-screen diversity directly influences young people’s perception of what’s possible for them, consider moving beyond token representation to meaningful narratives that challenge stereotypes. Ensure marketing, branding and corporate storytelling reflect diverse talent, stories and perspectives

Indonesia

Faith in the Age of Social Media

With millions of young, tech-savvy and entrepreneurial Indonesians reshaping culture, business and faith, Gen Z is a force no brand can afford to ignore.

Digital Faith

Half of Gen Z use social media as their primary source for learning about religion.

Drivers:

what's happening

Representing 28% of the total population, or 74.93m people, Gen Z are the largest generational group in Indonesia (source: IDN Research Institute). Born into the digital age, this generation has often been labelled as 'weak' by older generations due to their reliance on technology and modern conveniences such as online shopping apps.

However, Sri Widowati, a lecturer in mental health nursing and therapeutic communication at the University of Muhammadiyah Malang, told Times Indonesia that this perception is inaccurate. She argues that Gen Z demonstrate remarkable adaptability and resilience in an era of constant change.

As explored in our Gen Z Now and Next: From Vision to Contradiction macrotrend report, this demographic values transparency, authenticity and responsiveness to social issues.

'Gen Zs can spot inauthenticity instantly,' Defri Dwipaputra, executive creative director at Dentsu Creative Indonesia, tells The Future Laboratory. 'Alignment with inclusivity, sustainability and mental wellbeing must be built into a brand's core – not just its marketing. Instead of surface-level messaging, brands must show real impact. This means sustainable sourcing, ethical production and tangible support for communities. Brands that live their values, rather than just selling them, will win Gen Z's loyalty.'



Moin by Gita Savitri Devi, Indonesia

Signals and shifts

what's new



From left to right: Adidas, Indonesia ;Samsung Galaxy Z Flip5, Indonesia

The rise of local entrepreneurship

Many entrepreneurial success stories embody Gen Z's preference for flexibility, creativity and financial independence over the traditional 9 to 5. A 2019 World Economic Forum survey found that entrepreneurship is the most popular career choice among Indonesia's youth, who leverage social media to showcase creativity and build businesses.

After graduating amid the pandemic-stricken job market, Marie Augustin Alvidian Pangestuti Ais Harjono and her friends decided to open Awan Brew, a community-driven cafe in Pasuruan, East Java.

Despite her parents' initial scepticism, Kimberly Tandra pursued fashion design, launching her label Suedeson to honour traditional Indonesian embroidery. Suedeson debuted at New York Fashion Week in 2018 and Kimberly made the Forbes Asia 30 under 30 list in 2024.

In beauty, barber Ammar Mandili Lubis turned the success of his Indohaircut Instagram account (196,000 followers as of March 2025) into personal care brands – Thug for men and Pink & Play for women.

Relatability as social media currency

Indonesia is home to the world's second-largest TikTok audience, with more than 107m users (source: Statista). Angga Prawadika Aji, lecturer in communication studies at Airlangga University, tells The Future Laboratory that social media has created a wave of local content creators generating billions of rupiah in income. 'What's remarkable is that many of them are self-taught, with no formal background in media or branding,' he says.

'Gen Z prefer to hear from relatable individuals – people they see like themselves,' Angga adds. 'Unlike previous generations who have followed trends set by big brands, Gen Zs follow people: micro-influencers, creators and communities they trust,' adds Dwipaputra.

Among the leading figures in Indonesia's Gen Z creator scene is Jerome Polin, who gained popularity for his vlogs as an exchange student. Meanwhile, Jharna Bhagwani built a massive following (13.5m followers on TikTok and 3m on Instagram) through her viral short-form videos showing off her makeup skills.

A new era of inclusive faith

Some 87% of Indonesian Gen Z identify as Muslim, followed by Christian, Hindu, Buddhist and Confucian (source: Pew Research Center). Notably, 49% of Gen Z use social media as their primary source for learning about religion (source: IDN Research Institute).

While many still follow traditional practices, they are also redefining their faith, integrating modern values such as inclusivity and tolerance. A key example of this is the YouTube programme Log In, hosted by Husein Ja'far Al Hadar, who is also known as Jeda Nulis. The show fosters interfaith dialogue, tolerance and contemporary faith, promoting religion as a way of life that prioritises kindness and peace.

'In Islam, we are always reminded that religion should primarily be a way of life that regulates our relationships – not only with God but also with other human beings, even if we believe in different things,' he told IDN Research Institute.

CASE STUDY

Spotify x Kreaby Artism Exhibition

How to forge an emotional connection with Gen Z was shown in the Spotify x Kreaby Artism Exhibition 2023 campaign. 'Working with Spotify, we transformed its Canvas feature into a storytelling space where neurodivergent artists co-created visuals for songs that Gen Z already loved,' Dwipaputra tells The Future Laboratory. 'More than an awareness campaign, it was embedded in their daily music experience. Artism gave Gen Z a role beyond mere spectatorship. It made them co-creators in an inclusive future.'



Analysis: *what this means*

Indonesian e-commerce company Tokopedia successfully tapped into Gen Z's mindset by leveraging fandom and national pride to stay culturally relevant. Its 2021 collaboration with K-pop phenomenon BTS significantly boosted its user base, attracting more than 100m new users each month.

According to researchers from the University of Singaperbangsa Karawang, the partnership elevated Indonesian products onto the global stage, supporting local SMEs and promoting traditional culture. For instance, the first Tokopedia X BTS talk show introduced Indonesian banana milk and traditional dishes such as chicken satay and fried rice to a global audience of K-pop fans. The campaign's success was not just about visibility – it created a cultural moment that transformed online shopping into a shared fan experience.

Beyond advertising, Dwipaputra believes the greatest opportunity for brands targeting this demographic lies in co-creation: 'Gen Z do not just want to buy from brands – they want to be part of them. Brands that invite collaboration, whether through user-generated content, product design or exclusive communities, will build lasting loyalty and relevance.'

Gen Z will also expect brands to authentically support local creativity and economic empowerment. Products with cultural roots, crafted by local creators and amplified through social commerce can foster deep connections, he suggests.

Alfaz Syam from skatesuckers upcycling collection by Meidiana Tahir, Indonesia

Strategic Opportunities



Moin by Gita Savitri Devi, Indonesia

Embrace co-creation and community-led brands

Gen Z in Indonesia want to participate in brand narratives, not just consume them. Develop collaborative product launches, user-generated content campaigns and interactive platforms where the public shape brand offerings



Adidas, Indonesia

Inclusive faith-driven products and services

Faith remains central to the identity of local Gen Z. Consider innovating by offering inclusive, values-aligned experiences (e.g. modest fashion that is stylish and diverse, fintech for halal investing, or wellness spaces that integrate faith and modern lifestyles)



Alfaz Syam from skatesuckers upcycling collection by Meidiana Tahir, Indonesia

Tap into social commerce and the TikTok Shop

With more than 107m TikTok users, Indonesia is a social commerce powerhouse. Consider how to develop a TikTok-first retail strategy, combining short-form video with seamless in-app shopping, live-stream selling and interactive promotions

Canada

The Power of Multiculturalism

Amid financial struggles and climate anxiety, Canadian Gen Zers are turning to activism to amplify their multicultural identity and are showing a strong sense of national pride.

Non-American

Young Canadians feel unique and resist being grouped with their American Gen Z peers.

Drivers:

what's happening

Canada's diversity shapes the identities and priorities of its youth. The 2021 Census shows that 31.5% of children under 15 had at least one foreign-born parent, up from 22.5% in 2001, and Toronto is the world's second most diverse city (source: World Population Review). This means that representation and inclusivity in media, politics and business are crucial for Gen Z Canadians.

Social activism defines this generation. From Indigenous rights and climate action to LGBTQ+ advocacy, Gen Z Canadians are engaged in social movements and are using digital platforms to push for systemic change. Generation Z voters are shifting away from traditional party loyalty, instead prioritising specific issues such as climate change, affordability and social justice when casting their ballots.

According to Karl Moore, an associate professor of strategy and organisation at McGill University, Canada defines itself as 'non-American', meaning US-style political hostility has not taken root: 'Canadian politicians are more gentle – you can have dinner with liberals and conservatives together, something unthinkable in the US… Young Canadians, including conservative youth, are still quite liberal. They are rejecting traditional politics.'

Moore feels that Canada's welcoming identity endures, saying: 'We've come to terms with the fact that anyone can be Québécois – DNA does not matter.'

N7 Collection by Nike , US and Canada

Signals and shifts

what's new

Indigenous and multicultural creativity

Amid inflation and limited disposable income, Korean Gen Zers have adopted a try-before-you-buy mindset, fuelling a boom in mini-sized packaging – known locally as the mini bobusang trend. Pocket-sized serums, perfumes and skincare treatments allow them to sample widely without long-term commitment. This behaviour reflects a wider barbell pattern: switching between high-end indulgence and ultra-cheap experimentation.

Retailers have quickly adapted. At discount chain Daiso, Aekyung's 10ml spot treatment sold out quickly, while VT Cosmetics' popular Cica serum is now available in 2ml sachets, favoured by students. Convenience store GS25 saw sales jump 124% after launching Mediheal's tea tree pad samples (source: Korea Product Post). Vegan brand Muzigae Mansion also sells 6ml liquid lip tints in exquisite packaging.

This culture of trialling keeps Gen Z in constant discovery mode – rewarding brands that release frequent, limited or photogenic products. Indeed, cute, collectable minis also thrive on Instagram and TikTok, aligning with Gen Z's aesthetic sensibilities.





From left to right: Mémiyelhtel Congregation, Canada. Calvin Plos, Montreal pop-up t-shirt series, Canada

Canadian money mindset

As explored in our Gen Z Now and Next: From Vision to Contradiction macrotrend report, young Canadians are delaying adulthood milestones due to student debt, unemployment and low entry-level salaries. As of January 2025, Canada's youth unemployment rate stood at 13.5%, which is significantly higher than the overall unemployment rate of 6.4% (source: The Economic Times).

Financial anxiety shapes the way Canadian Gen Z approach spending, making them pragmatic consumers. Gen Zs are a frugal and very anxious generation,' Ernan Haruvy, a professor of marketing at McGill University, tells The Future Laboratory. 'They worry about quality and costs, care about endurance and will pay for quality – but not for brand names.'

While they avoid loans for non-essential expenses, local youth prioritise education, travel and eco-friendlier purchases. For instance, 44% of Gen Z Canadians are willing to pay more for sustainable clothing (source: Vividata).

Exporting Canada's creativity across the globe

Canada's cultural footprint is also shaping global entertainment, literature and gaming. Netflix's Never Have I Ever, starred Tamil-Canadian actress Maitreyi Ramakrishnan, ran for four seasons, with the final season gaining an impressive 341.3m viewers and 168.3m hours between January and June 2023 (sources: The Washington Post, Netflix Engagement Report). Other Canadian productions featured on Netflix include North of North, depicting Siaja, a young Inuk mother, and The Porter, set in Montreal in the 1920s.

In literature, acclaimed novelist Esi Edugyan (Half-Blood Blues, Washington Black) and New York Times bestseller poet Rupi Kaur bring Canadian perspectives to international readers, addressing themes of migration, resilience and identity.

The gaming industry is playing a role in this expanding influence. Major studios like Ubisoft Toronto are prioritising inclusive storytelling, as seen in Assassin's Creed: Valhalla, which consulted Indigenous historians to inform the portrayal of Viking interactions with North American tribes accurately.

Walk Gently by Arc'teryx and Cole Sparrow-Crawford, Canada

CASE STUDY

Arc'teryx's Walk Gently

Arc'teryx's Walk Gently design platform spotlighted Indigenous craftsmanship by collaborating with Musqueam artist Cole Sparrow-Crawford on a seven-piece collection blending ancestral techniques with technical apparel. Each garment draws on Musqueam stories, from canoe-inspired shorts to a wool blanket reflecting Coast Salish weaving. The initiative embeds Indigenous designers within Arc'teryx's team, ensuring authentic storytelling and cultural preservation. The campaign was co-led by Sparrow-Crawford's sister and celebrates local traditions and the skills of Indigenous communities for engineering technical garments.



Unfollow Me series by Calvin Plos, Montreal, Canada

Analysis: *what this means*

Unlike previous generations, today's young Canadians are demanding more – more accountability from corporations, more diverse representation in the media and more transparency from political leaders. 'Canadian Gen Z are not spoiled,' says Haruvy. 'They are very young, but they have been punched a lot. They come up pretty rugged and expect to work hard for what they have.'

While their activism is strong, their faith in traditional politics is waning. Many now look to brands, influencers and grassroots movements as agents of change. 'Executives need to listen to this generation,' says Moore. 'More humility, more learning – being agile and adapting quickly is essential. Gen Zs must be heard.'

Interestingly, this young cohort values its distinct identity and wants to be recognised as a separate category rather than being grouped with its American Gen Z peers. 'In Canada, a US brand must start afresh and adapt its brand equity – Canada does not see itself as an extension of the US,' stresses Haruvy.

Brands that fail to align with their values risk becoming irrelevant, while those that embrace authenticity, social responsibility and sustainability will earn their loyalty. Although young Canadians are open-minded and value inclusivity, they will not engage with brands out of politeness. Adapt now, or risk being left behind.

Strategic Opportunities



Arc'teryx's Walk Gently with Musqueam artist Cole Sparrow-Crawford

Authentic Indigenous and multicultural partnerships

Gen Z will expect authentic brands to collaborate with Indigenous and diverse creators in a meaningful way rather than tokenising their culture. Keep in mind Gen Z Canadians want brands to treat Canada as distinct from the US



Levi's Workshop with Hypebeast

Cater to value-driven spending habits

Canadian Gen Z are frugal yet values-driven, prioritising quality, sustainability and ethical production. Consider offering repair, resale and rental services alongside sustainable products to appeal to their cost-conscious and eco-conscious mindset



Teo Cesori, 'the world is mine', Montreal, Canada

Build advocacy engagement platforms

With Gen Z shifting away from traditional party loyalty, there's an opportunity for brands to act as platforms for civic engagement. For instance, can you launch educational resources or digital tools to help Gen Z understand political issues and take action?

India

The Rise of India-viduality

India’s Gen Z are redefining tradition. Blending cultural heritage with global influences, their evolving values of sustainability, inclusivity and individuality are reshaping the consumer landscape.

Made In Heaven

An Amazon Prime series weaving taboo realities into its glossy wedding drama.

Drivers:

what's happening

India's youth population is set to reach 420m in 2024, making up 29% of the country's total population (source: The Economic Times). Among them are 116m Gen Zers, according to Live Mint – individuals born between 1997 and 2012 – who are navigating early adulthood with a distinctly different social, economic and cultural outlook from that of their parents.

Gen Z in India, exposed to technology, travel and diverse media, connect with like-minded communities across geographical boundaries. Guided by values of sustainability, authenticity and inclusivity, they are drawn to both global and local trends, remaining well informed on topics ranging from pop culture and fashion to politics and climate change.

Digitisation and the rise of social media, particularly during the post-Covid era of social isolation, have heightened the online presence of Indian Gen Z.

As WARC's India editor Biprorshee Das notes: 'The average 20-year-old in India is exposed to global affairs at a rapid pace. They are learning about recession, government policies, wars and pandemics as they unfold.' As we highlighted in Gen Z Now and Next: From Vision to Contradiction, being constantly online presents both opportunities and challenges, often contributing to distress for a cohort increasingly vocal about mental health struggles.



Seeing Red, photographed by Asad Sheikh for Verve, India



CASE STUDY

Made in Heaven

Amazon Prime Video's Made in Heaven breaks convention by weaving taboo realities into its glossy wedding drama. Set amid Delhi's elite circles, the series confronts deeply entrenched issues – homophobia, sexual assault, dowry, honour killings and even a lesbian commitment ceremony – within the façade of 'big, fat Indian weddings'. By daringly spotlighting marginalised identities and forbidden love, it disrupts Bollywood norms and propels Indian storytelling into bold new territory.

BEAUTY&YOU by Estée Lauder Companies' New Incubation Ventures and Nykaa, India

Signals and shifts

what's new

Changing societal values

With their extensive exposure to social and global media, Indian Gen Z find themselves balancing traditional family values with an emerging desire for individuality. Over-the-top (OTT) streaming platforms like Netflix, Amazon Prime Video, Disney+ Hotstar and Zee5 are becoming commonplace for Indian Gen Z beyond tier 1 cities. The availability of subtitles and dubbed versions has helped break down language barriers.

Gen Z's increasing acceptance of LGBTQ+ communities also reflects this shift. A report by The Hunch indicates that more than 66.8% of Gen Z in India are aware of Pride Month, with 52% supporting the growing acceptance of the queer community.

In dating, one in two Gen Zers suggests they would prefer to live with their partner before marriage (source: Times of India). Shows like Amazon Prime Video's Made In Heaven brought taboo topics such as a lesbian traditional Indian wedding to the screen, contributing to this break from the status quo.

Evolving fashion choices

Independent fashion brands are thriving by focusing on made-to-order and small-batch production, emphasising cultural pride, sustainability and upcycling.

Menswear label Kartik Research blends traditional techniques like hand-dyeing and handloom weaving with a growing demand for sustainability. The brand launched an exclusive collection at British luxury department store group Selfridges in July 2024. Other stockists include Ssense, Mr Porter and Bloomingdale's.

Indie brands are carving a niche by aligning with Gen Z's preference for blending tradition with self-expression.

Tamaarah Sarah Balachander, who runs the fashion brand Darzi tells The Future Laboratory: 'People are taking festive wear, previously reserved for special occasions, and restyling it; for instance, pairing a ghagra choli with shirts, blazers or jackets for a completely fresh look.'

According to Balachander, the rise of these brands is 'driven by niche targeting and customisation online, enabling them to bypass traditional retail channels and directly cater for specific consumer needs'.

Reshaping India's independent music scene

India's music scene has expanded to include large-scale festivals that attract international pop stars and DJs. Online music broadcaster Boiler Room, for example, regularly hosts India Tours, with its most recent event taking place in Delhi NCR and Pune in June 2024.

Chennai-based contemporary musician and composer Samyukth tells The Future Laboratory that breaking into India's music scene is now easier due to social media and shifting audience mindsets: 'People are much more open to diverse genres and styles, embracing exploration and experimentation in musical tastes.'

Samyukth, who also runs House of Unknown Talents, an open mic community supporting emerging talent, explains: 'Driven by post-pandemic changes, music festivals are a result of audiences becoming more receptive to diverse musical experiences.' This shift is reflected in large festivals like Magnetic Fields, Ziro and NH7 Weekender, alongside smaller events like open mics and gigs in restaurants and bars.

Analysis:

what this means

Indian Gen Z's rapid exposure to international music, fashion and media trends is merging with traditional Indian values, creating unique cross-cultural products and experiences. This convergence is particularly evident in fashion, where brands blend traditional Indian craftsmanship with global fashion aesthetics.

This fusion is likely to deepen, with foreign trends such as K-pop influencing not only music but also beauty, signalling a shift in young Indian consumer preferences for a hybrid identity.

While older Indian generations adhered to more rigid traditions, Gen Z are re-inventing these customs to reflect their individuality. The growing acceptance of pre-marital cohabitation and LGBTQ+ inclusion also shows Gen Z's individualistic approach is about adapting, not rejecting, their heritage.

'Popular media, such as Bombay Talkies, Margarita with a Straw, and Maja Ma treat queerness as an everyday reality rather than something extraordinary,' Niharika Ravi, a 23-year-old social worker and educator at The Gender Lab tells The Future Laboratory. 'They introduce essential conversations about inclusion without framing queerness as an issue or a problem.'

This balancing act between tradition and modernity is likely to continue, encouraging brands to embrace inclusivity and personalisation in their offerings. Brands that can seamlessly integrate novelty while preserving India's cultural authenticity will resonate most with this demographic.



Documenting Delhi girls in their homes, with Valliyan. Photographed by Asad Sheikh India

Strategic Opportunities



Phone Wala Shagun campaign by Cashify, India

Tech-driven consumption

Given over half of Indian Gen Z's spending happens digitally, consider implementing seamless, mobile-first e-commerce experiences that resonate with this tech-savvy generation



Somya Lochan from Quarter HQ and Rina Singh of Ekaco for Verve, India

Non-negotiable sustainability

With a growing demand for eco-conscious consumption, businesses have no option but to embrace and emphasise their sustainability with upcycling and made-to-order offerings to attract younger generations



Delhi girls in their homes, with Valliyan. Photographed by Asad Sheikh, India

Cultural code switching

Gen Z's value of self-expression is blending with traditional family and societal values. Embrace this code-switching mindset in your marketing and communications in order to fluently converse with Gen Z's ever-evolving values



Break Archive, summer campaign, United Kingdom

Viewpoint

Gen Z's New Value System

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

During the May 1968 revolt in France, youth took to the streets declaring: 'It is forbidden to forbid' and 'Be realistic, demand the impossible'. For Andi Davids, chief growth officer at global brand agency Bulletproof, Gen Z in 2025 are echoing similar frustrations online.

'Younger generations have always leaned towards idealism,' she says. 'Looking back at the 1960s or the 1999 WTO protests, there was dissatisfaction with the world and a reassessment of what truly constitutes value.'

Like their predecessors, today's Gen Z are disillusioned, often concluding: if we can't change the world, we can change ourselves. This fascination with the self, rooted in the 'human potential movement', gave rise to lifestyle marketing. Now, it fuels TikTok glow-ups and 'main character energy' with 26% of American Gen Z saying their top priority is personal growth (source: Forbes).

In the US in 2022, Davids noticed 'hyper-individualism and neoliberal ideology at their peak', visible in the commodification of influencers. 'Every aspect of life is now an opportunity to make money.'

But cracks are forming. In 2024, 43% of British Gen Z said civil disobedience is necessary to express moral convictions (source: National Centre for Social Research). Their playful defiance is evident in Jellycat thefts, illegal streaming and dupe culture. A Jellycat thief told Dazed: 'People deserve to have nice things. And in a world where corporations exploit us daily, what's so wrong with people getting their lick back?'

As an antidote to the cost of living crisis, Ikea's 'Do try this at home' campaign and Domino's critique of shrinkflation with its 'Moreflation' offer showcased inventive ways to tell consumers: you don't need to suppress your desires in favour of more practical choices. In this scenario, they were the brands allowing consumers to dream – or rather, desire – big.

Davids calls Gen Z 'pragmatic idealists' – able to hold contradictions, advocating climate action while buying from Shein, yet also driving resale culture through Depop. 'This reflects their ability to remain realistic about what's possible while still holding hope for meaningful change.'

She warns that as Boomers lose authority, Gen Z will step into leadership, already visible with 6,000 Gen Z CEOs in the US (source: The Economist). But their values are tied to desires. 'The most successful brands will be the ones that can effectively communicate value, aligning consumer desires with the deeper beliefs that matter most to them right now.'

For brands, the opportunity lies in leaning into these tensions: official dupe lines, playful discount hacks, or experiences that let consumers feel like they're outsmarting capitalism. As Davids concludes: 'This tension between desires and values will be particularly interesting to watch.'

> 'Statistically, Baby Boomers will transition out of power over the next decade. A movement could emerge – one we haven't yet foreseen – driven by Gen Z, provided they hold onto their core values as they step into leadership roles in business and politics'
>
> *Andi Davids, chief growth officer, Bulletproof*

Viewpoint

Strategic Opportunities



NTS x Cash Frances limited collection, United Kingdom

Turn consumption into a rebellion

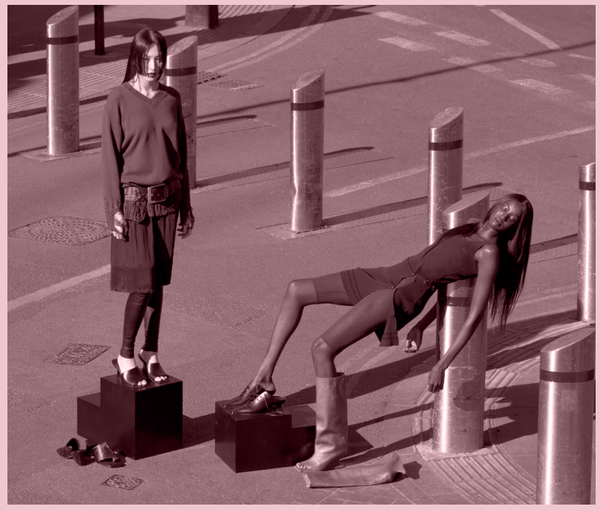
Gen Z want to feel like they’re hacking the system. Can you introduce limited drops, community-first rewards and insider-only experiences that let consumers feel like they’re winning against traditional capitalism?



Grocery Bags, Toronto

Tap into dupe culture with ethical alternatives

Gen Z love dupes but hate exploitation. Instead of fighting imitation, consider creating official dupe lines, eco-friendly remakes or brand-approved resale markets to reclaim value from knock-off culture



Miista, I Carry My Own Podium, United Kingdom

Leverage mischief mercy in marketing

Gen Z’s playful defiance is an untapped branding space. Can you play into rule-breaking with limited-time loopholes, playful discount hacks, or ‘get it before we change our minds’ pricing?

Singapore

A Gen Z City State of Mind

Singaporean Gen Z are facing burnout, driven by economic pressures and climate change anxiety, but be aware of their sense of national pride and willingness to challenge traditional paths.

Strawberry Generation

Singaporean elders describe Gen Z as easily bruised and pampered.

Drivers:

what's happening

Despite being smaller than New York, Singapore is the richest nation in Asia and the fourth wealthiest nation in the world (source: The Straits Times). Income inequality has declined to its lowest level in over two decades and Gen Z spending power is on the rise, with median graduate monthly salaries increasing by 2.69% between 2022 and 2023 (source: Autonomous Universities Graduate Employment Survey).

As a low-lying island in tropical Southeast Asia, Singapore is especially vulnerable to climate change and rising sea levels. Temperatures have increased by 0.25% every decade since the 1940s and an estimated 30% of land is at risk of being submerged by the end of the century (source: The Singapore National Climate Change Study).

Almost two-thirds (63%) of Gen Z Singaporeans report feeling anxious about climate change and 24% have changed jobs or industries due to environmental concerns (source: Deloitte). In September 2023, the first SG Climate Rally since the pandemic drew a predominantly young 1,400-strong crowd (source: Eco-Business). This is emblematic of Gen Z's global-facing political outlook, which has prompted an interest in activism and campaigning, with more young people joining the ruling and opposition parties.



Strange Weather. Photography by Juan Qi An, Singapore

Signals and shifts

what's new

Singlish and national pride

Singaporean youth culture reflects a unique blend of Eastern and Western influences, with the rise of J-pop, K-pop and K-dramas in the 2000s shaping tastes and identity. In nightlife, pride in local culture is evident, as collectives like Strange Weather book local and Southeast Asian acts.

While Gen Z expresses national pride similar to older generations, they're less likely to see Singapore as central to their identity. Instead, they embrace Singlish – a hybrid, multicultural language – as a marker of belonging.

This openness to blending global and local elements is seen in food trends, where hawkers modernise traditional Singaporean dishes, such as serving carrot cake in bowls for a café-style touch. Gen Z also shape retail trends: they shop online and support local brands.

Concerns about the climate have also driven a trend for second-hand, thrift and vintage shopping, leading to the creation of textile upcycling labels such as Commenhers and Superwasted.





From left to right: Strange Weather. Photography by Juan Qi An, Singapore.

The strawberry generation

Singaporean youth are at a crossroads. Some ascribe this to the 'ingrained [local] culture' of 'completing your A-Levels, going to a local university, getting a job, getting a partner so you can get married and you can apply for a [public housing] flat', Larissa Santhana Nair, a Gen Z columnist for local newspaper Today, tells The Future Laboratory. But an increasing number are 'learning there's more to life than this typical route and there is a life outside of Singapore'.

Many express a sense of *sian* – ennui or weariness – with their quality of life. Older generations have reacted to this by describing Gen Z as the 'strawberry generation', believing them to be easily bruised and pampered.

Gen Z Singaporeans are responding by quiet quitting, with one in two admitting they do the bare minimum in their jobs, and by experimenting with side gigs and passion projects (source: Singapore Business Review).

TikTok tastemakers

‘There has been a huge shift for companies, even our public sector and [government] ministries, to cater for the Gen Z audience through TikTok,’ says Nair. Leading Gen Z figures are overwhelmingly those who are popular on TikTok, and can be broadly separated into two categories: everyday figures who post relatable local content, such as @ianjeevan and @daizamazze, and more aspirational influencers and creatives who champion self-expression, such as @cayydences and @smxne.

The influence of K-beauty, skincare and western streetwear make beauty and fashion increasingly crucial to young consumers. While most Singaporeans still dress casually to suit the tropical climate, a growing number of Gen Z have adopted a more playful and experimental approach to fashion that mixes high-street brands with home-grown Asian labels and second-hand clothing.

The local streetwear and jewellery design industry is particularly popular, with Gen Z consumers flocking to brands such as Myrrh, Visual Jargon and Mane Shot.



Ekybho by Evangel Teo. Photography by Shandy, Singapore

CASE STUDY

TikTok creator Ian Jeevan

AIan Jeevan, a 28-year-old financial consultant from Singapore, launched his TikTok journey in 2020. He creates bilingual content in English and Tamil – ranging from travel vlogs and skits to dance trends and live streams – with his grandmother, Naomi Krishnan. Now boasting nearly 220,000 followers, Ian earns around £2,950 ($3,897, €3,335) per sponsored video, enabling his grandmother to cover her own medical bills, according to CNA.





Left: Pink Dot SG, photographed by Jing Yism, Singapore; Above: Pink Dot SG, photographed by Nat/ Enqueered, Singapore.

Analysis: *what this means*

Many Singaporean Gen Zers push back against the country's rigid work culture and traditional notions of success, valuing balance and self-expression. Unlike older generations, often seen as consumerist and politically neutral, Gen Z use consumption to reflect their values, engaging with global issues such as climate change, LGBTQ+ rights and the Israel-Hamas conflict. Climate in particular is urgent, as Singapore is warming twice as fast as the global average (source: France24).

Large turnouts at events like the annual Pink Dot Pride reflect local Gen Z's strong support for LGBTQ+ rights – 73% believe same-sex couples should be allowed to adopt (source: Ipsos).

Young Singaporeans also spend more on club nights and concerts, including major events like Taylor Swift's tour. While open to solo travel, they remain financially pragmatic. 'They see taking loans for these experiences as less justifiable compared to taking loans for education, housing purchases and large furniture,' Dr Teo Kay Key, an IPS social lab research fellow at the Institute of Policy Studies in Singapore, tells The Future Laboratory.

They're also highly aware of Singapore's ageing population and low birth rate – issues emphasised in schools. Yet, with many seniors staying healthy and employed longer, this may be less burdensome for future generations than expected (source: CNA).

Strategic Opportunities



Strange Weather. Photography by Juan Qi An, Singapore

Embrace ennui

Navigate the general mood of apathy among Singaporean youth by celebrating play and individuality, and acknowledging the sian lah mentality (meaning ‘I’m weary and bored – I’ve had it’)



Unthinkables by BBH Singapore, Singapore

Climate-conscious state of mind

Create products and campaigns that address young Singaporeans’ climate concerns, helping them to lead more planet-conscious lives and protect their country’s future



Visual Jargon

Hyper-localised storytelling

Celebrate Singlish and local traditions reimagined for modern life. Brands that remix heritage with innovation (like hawker stalls modernising cake presentation) can resonate deeply with youth identit

Australia

Endorsing First Nations Recognition

Amid fractious global politics, national housing shortages and economic strain, Australia's youth are connecting via grassroots activism and new sources of national pride.

Blak Excellence

Blak is an identity term celebrating Indigenous Australian pride and empowerment

Drivers:

what's happening

Canada's diversity shapes the identities and Australian Gen Z face intersecting pressures shaping their values, behaviour and expectations. The cohort grew up through some of the world's longest COVID-19 lockdowns, which left lasting impacts on mental health. Loneliness among 15–24-year-olds is at record highs and social anxiety is widespread (source: Hilda). Youth offender rates have also risen, often driven by social media clout rather than financial need (source: The Age).

According to Mission Australia's Youth Survey, young people are most deeply concerned about the environment (44%) – yet fast fashion remains a tension, with high consumption rates but growing demand for second-hand and recycled fashion. Broader priorities include equity and discrimination (31%), the economy (31%) and mental health (30%), reflecting frustration with limited governmental action.

Financially, rising living costs – especially housing – are forcing many to stay with parents or move far from cities, limiting independence. Politically, Gen Z value identity and activism, but polarisation is evident: young women lean left, while young men are more conservative, leaving many in 'politically unmatched' relationships (source: The Conversation). Recognition of First Nations heritage is another key driver, with 73% of under-30s supporting the Indigenous Voice referendum, despite its defeat nationally (source: Australia Institute).



Nike AU Collection, Australia



Future Baller, Australia

Signals and shifts

what's new

First Nations heroes

There is renewed pride in identity for First Nations peoples, with programmes focusing on creating new role models and reclaiming dates marking the British invasion in Australia as days for celebrating First Nations achievement.

In January 2024, We Are Warriors, an Indigenous social enterprise dedicated to celebrating Blak excellence and empowering Indigenous youth founded by the rapper Nooky, alongside creatives from R/GA Australia, reclaimed the controversial Australia Day holiday – also known as Invasion Day and long associated with the nation's colonial history. We Are Warriors re-invented it as Blak Powerhouse and hosted the event at Sydney's Powerhouse Museum.

Similarly, spaces like Murran Hub in Geelong, near Melbourne, provide a space for young Black entrepreneurs to meet, learn, sell their products and services, and to celebrate their cultures. Murran hosts Ngarrimili's Youth Talent Pipeline, which partners with businesses committed to creating culturally safe spaces for First Nations young people to help them develop professional skills.

Sport for all

Football (soccer) is booming, with the Australian women's team, the Matildas, inspiring a new generation of fans and players via their achievements in the 2023 FIFA World Cup – especially young women – to support national heroes and get into the game.

In early June 2024, the Matildas played their 14th consecutive sell-out game to a home crowd – 80,000 watching a friendly game against China – with a huge number of young supporters. 'Three years ago, 20–21% of football participants were women and girls; today that number is 26–27%,' said James Johnson, Football Australia CEO (source: Forbes).

Future Baller tackles girls' access to the sport as football becomes increasingly monetised, with a community soccer academy led by accomplished international players Chloe Berryhill and Emily Gielnik. Similarly, One Ball is a positive football programme for children and young people aged 5–17 aimed at building confidence and resilience, founded by Ethiopian migrant and ex-professional footballer Kamal Ibrahim.

Tackling misogyny

Research has revealed that one in four Australian teenage boys admire or follow online personalities promoting misogynistic views (source: Ministers for the Department of Social Services). With platforms such as YouTube and TikTok acting as major gateways for this content, there is growing concern about how harmful narratives are shaping young men's attitudes. In response, the government launched its Stop it at the Start anti-violence initiative in June 2024.

A key element of the campaign is The Algorithm of Disrespect, a series of adverts and an interactive website that exposed how everyday conversations, jokes and digital media can normalise misogyny. The initiative seeks to shift cultural norms and encourage healthier models of masculinity.

'A lot of what is being pushed is unfortunately negative and the way in which you counter that is by really flooding the market with something better,' attorney general of Australia Michelle Rowland told Guardian Australia's Australian Politics podcast (source: The Guardian).

Analysis: *what this means*

Young people in Australia largely believe in a future that includes otherwise ignored identities and histories – but they are also battling increased housing instability, financial pressures, environmental pessimism and gender-specific challenges, especially for men.

More young adults continue to live with their parents, especially in capital cities, or are choosing to live 30–40km outside of city centres so that they can still afford lifestyle and leisure purchases. As professor Brock Bastian told Pursuit: 'While we still don't fully understand the causes and remedies around loneliness for this younger age group, social media and how people communicate have to be a contributing factor.'

A new sense of national identity that acknowledges First Nations and celebrates contemporary cultures and achievements is shaping youth identity. Equality and acceptance are at the heart of this.

Environmental awareness and a willingness to change behaviour to be more sustainable and equitable is a given. It's not enough for brands to pay lip service to hot topics; underlying systems and real-world impact must benefit too.

Optimism and connection are two areas where brands can help young Australians. Creating occasions that provide opportunity for authentic expression and connection, highlighting positive role models, tackling challenges with realism, and empowering young people through knowledge and collaboration are key.

CASE STUDY

Crip Rave Theory

Designed for those who are usually ignored in entertainment and events, Crip Rave Theory sets the bar high when it comes to inclusivity. Recently invited to Melbourne's Rising arts festival, the event has intersectional pricing structures, wheelchair access, Auslan (signed) interpreting, no strobes or haze to help prevent sensory overload, air purifiers and masks to reduce illness for vulnerable people, haptic vests for sound-impaired guests, social and non-social chill-out spaces, all-gender toilets and a First Nations Welcome to Country.

Crip Rave Theory at the Rising Arts Festival, Melbourne, Australia

Strategic Opportunities



Empowering Indigenous Youth, We Are Warriors and R/GA, Australia

Demystify and empower

Informing young consumers in a language they understand wins their trust. Partnering with local citizen broadcasters on TikTok and Instagram, especially those who create city-specific content, to demystify topics is welcome



Crip Rave Theory, Australia

Authentic collaboration

Collaborating with First Nations and CALD (culturally and linguistically diverse) communities to create intersectional events, products and services that transform negatives into positives will win young Australian customers. Remember: nothing about us without us



NTS x Adidas with Flo Dill

Be a good sport

Australia is a sporting nation and equity in sport offers brand opportunity. Designing sports products for all genders and abilities, increasing female representation, championing equal pay and providing access programmes are some ways to contribute

Maghreb

Endorsing First Nations Recognition

After years of political instability and social unrest, the youth of the Maghreb – Algeria, Morocco and Tunisia – are still standing up for their beliefs and making themselves heard through creativity.

Decolonising Language

The Maghreb youth are increasingly speaking English, despite originating from former French colonies.

Drivers:

what's happening

The world had its eyes on the Maghreb in 2010 when years of social unrest and economic difficulties sparked an uprising in the streets of Tunisia. This later spread through North Africa and the whole Arab world.

Almost 15 years later, political instability is still widespread, and unemployment continues to plague young people. As seen with the Hirak movement in Algeria, Gen Z in this region are incredibly resilient. Starting in February 2019, this largely peaceful mass protest movement initially opposed then-President Abdelaziz Bouteflika and later evolved to demand political reforms and greater freedoms. According to Amnesty International, this initiative, also known as the Revolution of Smiles, remains ongoing despite the government's continued repression.

Political uprisings are not an isolated phenomenon; 81% of young Algerians have reported a very low level of trust in their government, yet 84% have stated that they are interested in politics (source: The Danish Institute for Human Rights). Maghrebi youth do not see values such as freedom, equality and human rights reflected by their governments, as exemplified by Tunisia's continued repression of freedom (source: DW).

Yet this generation is not defined solely by hardship. They are also at the forefront of a cultural renaissance, reclaiming identity through music, fashion and creativity. Recent shifts among North African youth show that they have begun to make their voices heard in the rest of the world.



Handmade Upcycled MABRA jackets by ANOURI Original, Morocco



ITSMEDDCOM repurposes Adidas to create a leather babouche, Morocco

Signals and shifts

what's new

Success redefined

Some 48% of North African youth express a desire to emigrate, primarily driven by the need to find employment opportunities abroad (source: Arab Youth Survey). Studying and seeking employment elsewhere, particularly in consulting, has become a common aspiration among North African youth.

The exodus is also caused by widespread economic dissatisfaction, with 62% of Gen Z expressing concern that their national economies are headed in the wrong direction (source: Arab Youth Survey). Youth unemployment rates are also intolerably high in North African countries like Tunisia (more than 40%), Egypt (34%) and Algeria (almost 30%) (source: Matsh).

Success has also been redefined for women, whose goal is to have the ability to 'express themselves freely', according to Amuna Wagner, North Africa correspondent at OkayAfrica. She tells The Future Laboratory: 'Especially for women, [the goal is] not to live in patriarchal and conservative societies, not to live under military dictatorships, nomwt to live with looming collapsing economies.

New voices of defiance

Compared to their elders, Gen Z in the Maghreb are decolonising their activism. 'The youth there are increasingly speaking English, despite originating from former French colonies. It's particularly noticeable in Morocco and is starting to occur in Algeria as well. This shift in language preference is significant; they understand French but choose to speak English spontaneously,' Yasmin, an Algerian Millennial who works in the culture sector between Paris and Algiers, tells The Future Laboratory.

This discontent is visible in protests such as those against Tunisia President Kais Saied's hate speech towards sub-Saharan Africans, which sparked violence but also prompted demonstrations (source: France24). Tunisian youth also marched in support of Palestinians (source: Al Jazeera).

Despite anti-LGBTQ+ sentiments persisting in North Africa – the Barbie movie was banned for allegedly promoting homosexuality and conservative forces persecute the queer scene in Tunisia (source: OkayAfrica) – the LGBTQ+ community exists underground, as documented by photographer Laurence Ellis for Document Journal.

Promoting authentic rhythms and style

North Africa's music scene, shaped by the diaspora, is booming, with hip-hop, rap and indie dominating Gen Z playlists. Moroccan stars ElGrandeToto and Dizzy Dros, and Tunisian rapper Samara, command millions of streams (source: TRT Afrika). 'North Africa is incredibly diverse sonically and language-wise; musicians are creating an identity that blends tradition with global influences,' says Wagner. Regional festivals like Algeria's Raï d'Oran spotlight social issues through traditional sounds.

Music and fashion are converging in Tunisia, where rappers double as style icons, notes journalist Eya Rziga (source: MaftMag). Independent designers draw on heritage to challenge stereotypes: Atelier Rouge celebrates Moroccan traditions, while Mina Binebine empowers women with sustainable fashion. Many sell online, underscoring North Africa's e-commerce boom (source: ISN News).

Youth are also reclaiming public space through art. 'Parkour is a way of taking ownership of a city, a little like street artists who tag,' says sociologist Khadidja Boussaid (source: Al Jazeera).

Analysis: *what this means*

The Maghreb youth are full of resources, talent, aspirations and entrepreneurial spirit; all they need is the right environment to flourish. Norfafrica, an open-source and self-funded collective connecting musicians and promoting artistic developments from Morocco to Sudan, is an example of how music industries in North Africa are not like their counterparts in the West. 'The game is different here because there's no financial incentive,' founder Norf told OkayAfrica. 'Labels haven't tightened their grip yet and haven't saturated the advertising space. We're doing this independently. There's no label head dictating what you can sing about in your songs. You're hearing people's unfiltered lyrics.'

As government interference could continue to negatively affect the creative industry by limiting freedom of expression – the Tunisian government, for instance, cancelled a show by drag queen Khookha McQueer in February 2024 – Gen Z in the region will crave more creative outlets that allow expression without restraint.

Sustainable fashion is also gaining traction. Independent designers, mostly women, are making political and traditional statements through their creations, like the Belgian-Algerian brand Kasbah Kosmic or the Moroccan Bakchic label. Demand for products that have a positive environmental impact is on the rise – as shown by the Youth for Climate event held in Tunisia in September 2023.

CASE STUDY

Atelier Rouge

Atelier Rouge is a Moroccan streetwear label rooted in Agadir, founded by designer Farouk El Filahi. It reshapes Moroccan and African fashion by translating hidden local stories – like those of riads – into expressive garments such as t-shirts, hoodies, embroidered jeans, bomber jackets and totes. The brand embraces ethical and sustainable practices through artisan collaborations, infusing cultural heritage into modern urban wear.

Sophia Elbahja story for MOB Journal

Strategic Opportunities



Couple photographed by Sophia Elbahja, Morocco

Multilingual opportunities

Develop English-first but bilingual – regional Arabic/French/English – platforms, reflecting Gen Z's pivot towards English as a decolonising stance while still accommodating local linguistic realities



ITSMEDDCOM repurposes Adidas to create a leather babouche, Morocco

Incubators for youth entrepreneurship

Establish accelerators tailored to North African contexts, offering funding, mentorship and global connections to young founders in creative industries, technology and sustainability



Handmade Upcycled MABRA jackets by ANOURI Original, Morocco

Tap into the North African diaspora economy

Develop targeted products, experiences, or platforms for the diaspora – especially in France and other EU countries – who want to reconnect with their cultural roots, give back or engage with their heritage conservationists

Market Insight

Cultural Capital

As Gen Z reshape the financial world with irreverence and creativity, fintech is transforming into a playground of memes, gamified investments and community-driven innovation.

As financial literacy and participation become more democratised thanks to finfluencers, fintech is evolving into a more accessible and culturally integrated space.

In 2024, financial content on TikTok surged by 373%, with 70% of users deeming financial topics important and over 80% in Canada taking action based on that content (source: TikTok). Viral TikTok trends, blockchain and Web3 technologies are breaking down barriers to once-exclusive markets, empowering everyday investors to participate alongside professionals.

Social media trends like 'girl math', 'cash stuffing' and 'loud budgeting' reflect Gen Z's playful but proactive approach to managing money. The popularity of #FinTok, with over 4.7bn views, underscores the shift toward digestible financial education (source: CNBC).

'While the majority of HNWIs are optimistic about stock market growth, Millennials and Gen Z investors are looking beyond traditional stocks and bonds'

Jeff Busconi, head of wealth management strategy, Bank of America Private Bank (source: Fortune)

Although Gen X buyers spend the most on crypto on average, 94% of crypto buyers are Gen Z and Millennials (source: Stilt). Meme coins – such as Dogecoin and Shiba Inu – once seen as internet jokes, are now valued at over £81.3bn ($100bn, €96.2bn). These coins, often backed by online communities, have gained legitimacy through corporate adoption.

Tesla and AMC Theatres are among the companies accepting Dogecoin as payment, adding legitimacy (source: Cointelegraph).

Gen Z investors, drawn to high-risk and high-reward opportunities, are also engaging in prediction markets like Kalshi, Robinhood and Polymarket. These platforms blend entertainment with financial speculation, reflecting Gen Z's appetite for gamification.

Underlying this shift is a broader dissatisfaction with traditional financial systems and a desire for financial freedom. Decentralisation, blockchain and Web3 are enabling greater access to wealth-building tools. The global rise of central bank digital currencies (CBDCs), with 134 countries exploring their implementation, reflects a top-down response to these grassroots movements.

Financial behaviour among Gen Z is also heavily influenced by incentives such as loyalty programmes and cashback. This has given rise to the 'reward generation', where gamified experiences and instant gratification dominate financial behaviour. With traditional goals like homeownership feeling increasingly out of reach, many are turning to alternative paths to wealth. As Gen Zers' purchasing power is projected to reach £7.3 trillion ($9 trillion, €8.6 trillion) globally by 2034, their influence on financial markets will only grow (source: NielsenIQ).

Women are reshaping the once male-dominated finance space, led by creators such as Kia Commodore, Seema Sheth, This Girl Talks Money and self-proclaimed Zillennial finance expert Mrs Dow Jones. With 55% of women preferring financial advice from other women, inclusive investing is gaining traction (source: Money Management).

However, this cultural shift is not without risks. The spread of misinformation, lack of regulation and practices like wash trading in prediction markets pose serious challenges. Regulatory bodies like the FCA and EU are beginning to respond, aiming to safeguard users without stifling innovation.



Break Archive, summer campaign, United Kingdom

Market Insight

Strategic Opportunities



Kia Commodore, author of How To Handle Money, United Kingdom

Female-focused financial market

Create financial education tailored to women. Offer personalised apps, workshops, mentorship schemes and content that address their unique financial needs, empowering them to make informed decisions



Fluz. Identity by Koto, US

Pay and play

Consider creating gamified financial experiences. Avoid fostering risky behaviour and instead design experiences such as loyalty rewards, limited-time offers and interactive investment tools to engage Gen Z. How can you leverage dopamine-driven rewards and exclusive experiences to boost user engagement?



Vodka by Saintwoods founded in Montereal, Canada

Leverage social media trends

As Gen Z inherit wealth, consider how to position yourself as a trusted advisor. Partner with relatable finfluencers and create edu-taining content referencing memes and trends to grow engagement and relatability

Saudi Arabia

The New Luxury Tastemakers

In Saudi Arabia, digitally savvy Gen Z, fuelled by a profound cultural pride and a thirst for global experiences, are redefining retail, luxury, hospitality and culture.

Local Luxury

Young Saudis still associate luxury with European brands, yet they also seek elevated local craftsmanship.

Drivers:

what's happening

The Kingdom of Saudi Arabia (KSA) stands out as an especially youthful market overall, boasting one of the youngest populations in the world. As of 2023, 63% of people are aged under 30, according to census data. The paramount position this vibrant youth culture holds for brands will breathe new life into luxury and power KSA's emerging creative economies.

'They're very innovative. When it comes to being entrepreneurs, I have seen a lot of new initiatives by young Saudi men and women who created their own businesses, whether in Saudi Arabia or abroad,' says Prince Bandar bin Saud bin Khalid Al Saud, touching on their contribution to economic transformation. Talent-scouting programmes and out-of-school workshops for students are among a host of initiatives aimed at boosting the creative and cultural sector under a new flagship strategy.

For more than a decade, the government has also been investing heavily in educating its youth, sending many students overseas on full scholarships to study at leading academic institutions around the world. As they return home to be part of Vision 2030, that investment is starting to pay off. 'In the next few years, you will see a lot of international companies that are Saudi-based, Saudi-created and run by young Saudi men and women,' says Prince Bandar.

H&M limited-edition spring/summer 2024 Ramadan collection

Signals and shifts

what's new

Saudi flavours

As part of this, young Saudis are embracing new trends in the food, beverage and hospitality scene, headed by a wave of chefs playing with local cuisines and popularising them for a global palate. One example is MO, a bakehouse and espresso bar in Khobar, which takes cues from developments in experiential fashion retail, pushing forward with an experience-led dining agenda.

More than 90% of the capital Riyadh's 7.8m population eat out at least once a week, according to research by real estate consultant JLL. This growing trend reflects a desire for distinct places beyond homes and workplaces. 'The number of young people who are out and about, who are looking to dine out or go to a coffee shop, is amazing,' says Abdullah Alazzaz, creative director of Azaz Architects. He explains that going for coffee or food is not functional, it is a deeply social experience.

Local luxury

Young Saudis still largely associate luxury with European brands, but they retain a clear and meaningful sense of cultural identity, according to The Future Laboratory and Together Group's FuturePoll™ results. More than three quarters (77%) believe luxury brands should offer localised collections or special seasonal offerings for occasions like Ramadan. Furthermore, 95% of 18–34-year-olds think it is important to support and engage with Saudi-first enterprises and celebrate local craft and design.

'They want to respect their culture and live their culture, but they want to be global,' says Skye Fisher, chief experience officer of Mohammed Bin Salman Nonprofit City. 'They want to assimilate with the rest of the world.' Understanding this unique blend of international sophistication and national nuance is key.

For instance, luxury fashion label Abadia fuses traditional Saudi Arabian crafts, such as Sadu weaving and Naqda embroidery, with contemporary luxury womenswear, using ethical production and collaborating with local female artisans.

Digital world builders

The country also aspires to be a prominent player in the global video games industry. HyperSpace designs, builds and operates 'future-forward' theme parks in shopping centres that mix physical and digital entertainment, including gaming.

Neom's digital twin metaverse platform, XVRS, marks a move from 'megacities' to 'meta cities'. By combining digital and physical architectures with hyper-connected technologies and AI features, XVRS will enable seamless integration of the virtual and real worlds.

This dynamic mixed-reality urban living model, which will unlock the potential of next-generation cognitive cities, features immersive entertainment and social experiences, and a built-in digital marketplace.

Across the GCC, awareness of non-fungible tokens (NFTs), the metaverse and crypto is heightened, according to Chalhoub Group. By 2030, it predicts luxury metaverse retail will hit £39.7bn ($50bn, €46.2bn). For instance, at the third Riyadh Season, attendees could use NFT access cards for entry to the festival's key entertainment zones.

Kaf by Kaf at Riyadh Fashion Week, Saudi Arabia

Analysis:
what this means

Young Saudi consumers are part of a digital-savvy and social generation with a curiosity for elevated fashion, beauty, wellness and hospitality offers. Our FuturePoll™ findings reveal that 66% say they are currently members of one or more luxury membership clubs, compared with 43% of respondents aged 35–44 and 31% of those aged 45 and over. Their emphasis on luxury experiences is unmistakable, with 72% prioritising luxury travel and accommodation, and 59% prioritising fine dining and gourmet experiences.

To them, digital is top of mind, even when it comes to luxury shopping. According to our survey, 46% of 18–34-year-olds use predominantly digital methods for purchasing luxury goods. Their taste for tech also extends to gaming and even crypto investments. To win the loyalty of Saudi's young luxurians, brands need to craft unique offerings that emphasise ease, quality and continuous innovation.

Investment into 'made in Saudi' brands that resonate globally will lead the next generation of luxury. The Kingdom's future wave of national talent will amplify this across fashion, beauty, jewellery, design, hospitality and F&B. Acting as new taste-makers, they will make tacit preferences and desires explicit. 'It's about a new era of cultural influence that is really exciting and well overdue,' says Georgia Fendley, founder of luxury design agency Construct.

L'Occitane Ramadan Virtual Experience, Global

CASE STUDY

L'Occitane Ramadan Virtual Experience

Beauty brand L'Occitane and retail metaverse consultancy Emperia opened a virtual store in early 2024 in celebration of Ramadan. The virtual store is a digital twin of a Middle Eastern-inspired house and emphasises gifting, togetherness and self-reflection. It includes a Ramadan beauty calendar, exclusive gift sets and a skin care questionnaire that recommends products to help shoppers address skin dehydration issues commonly found in customers fasting during the period.

Strategic Opportunities



L'Occitane Ramadan Virtual Experience, Global

The Ramadan opportunity

Ramadan is the cultural and emotional anchor for young Saudis, so it's far more than a seasonal sales spike. Consider how to develop beauty calendars that align with fasting, dining experiences that feel elevated yet communal, digital-first gifting journeys, or personalised services that make iftar hosting effortless



Noble & Fresh at Riyadh Fashion Week, Saudi Arabia

Elevate Saudi craft into global luxury supply chains

Ramadan is the cultural and emotional anchor for young Saudis. Consider how to develop beauty calendars that align with fasting, dining experiences that feel elevated yet communal, digital-first gifting journeys, or personalised services that make iftar hosting effortless



To Breathe by The Royal Commission for AlUla and Kimsooja Studio. Saudi Arabia

Cultivate luxury membership eco-systems

Since more than half of young Saudis already belong to luxury clubs, consider developing curated membership models offering tiered benefits: private dining clubs, travel experiences, NFT-based access passes, or phygital luxury perks

Nigeria

Japa, Sapa and Afrobeats

Scarred by years of social unrest and a cost of living crisis, Nigerian Gen Z are split between hopes of creativity in local music and film and a generational exodus.

Sapa

Nigerian slang for young people struggling with poverty and economic hardship.

Drivers:

what's happening

The violent #EndSARS protests of 2020 may be long over, but for Nigerian Gen Z, they marked the beginning of a deeper cultural and political awakening. Originally a movement against police brutality and the disbandment of Nigeria's Special Anti-Robbery Squad (SARS), #EndSARS became a symbol of hope for a fairer future. Over 50 people were killed during the protests according to Amnesty International.

'I feel like the way #EndSARS is for most of us, it's that it will never fully fade away,' Desmond Vincent, a Nigerian journalist and arts writer based in Lagos, tells The Future Laboratory. 'At the end of [the protests], most of us [in support of the movement] remained connected… the topic was still a big motif for a lot of the artists and designers.'

The government dissolved SARS in October 2020, but systemic corruption and inequality remain. However, the movement energised youth participation. The most recent official data comes from the 2023 elections, when over 37m 18–34-year-olds were registered to vote in Nigeria, according to the Independent National Electoral Commission.

'It's important to remember that young Nigerians made their voices heard in [the 2023] election,' Lagos-based journalist and columnist at Teen Vogue, Nelson CJ, tells The Future Laboratory. Yet challenges persist, with youth unemployment rising and inflation pushing many into urban centres in search of opportunity.



Photography by Adaeze Okaro, Nigeria, West Africa



The Ebinum Brothers are artistic communicators, models and actors born in Lagos, Nigeria

Signals and shifts

what's new

The Japa syndrome

'Japa is probably the biggest thing – moving out of Nigeria. Every ad you see on the roads, both on small screens and big screens, is about studying abroad… Caribbean passports… [or] Global Talent visa for the UK,' says Vincent.

In Yoruba, 'japa' means 'run away' or 'escape'. Now, it commonly refers to relocating abroad. The term has entered popular culture, inspiring everything from slang to debate shows. Following #EndSARS and the 2023 elections, the desire to leave Nigeria has only grown.

In October 2023, The Native, a youth publication, wrote: 'Anecdotally, most of us know at least one young person who's permanently relocated out of Nigeria in the last three [years], to the point where people have shared stories on social media of losing entire friendship groups.'

Vincent adds, 'So many of the jobs that young Nigerians are doing have every intention to cover a foreign visa.'

Generation Sapa

'There's a lot of pressure to make money in Nigeria. Even the songs that we make popular will have lyrics like: 'If you no get money, hide your face,' says Vincent, referring to Davido's hit FIA, which has over 113m views on YouTube. A 2021 UNICEF survey found one in six Nigerians aged 15–24 feel depressed, anxious or disinterested.

With 86m people living in extreme poverty in the country (source: World Bank), 85% of Nigerian youth feel more pressure to succeed than previous generations – the highest figure across 21 countries (source: UNICEF). Popular slang like 'sapa' (economic hardship) reflects this. 'It often manifests online… people calling the foods that they eat 'sapa meals' because they don't have money,' says Vincent.

Online communities now pool resources to buy food in bulk. Climate anxiety is also rising, with 60% of Gen Z feeling personally affected (source: Kantar). '[Gen Z] expect brands to express positions on issues… and contribute visibly to building a fairer world,' writes Ndeye Diagne of Kantar.

A nation of creatives

Nigeria's arts scene is thriving, with a new wave of visual artists exploring masculinity, gender roles and social issues. Podcasts are also booming. Spotify reports a 222% rise in Nigerian podcast listenership from 2021 to 2022, with Gen Z (18–24) making up 50% of streams between July and September 2023.

'The most popular ones are the unstructured talking podcasts. Talk shows about relationships, dating, sex, gender roles and people are the biggest ones,' says Vincent. Top local podcasts include The HonestBunch Podcast, I Said What I Said, Menisms, So Nigerian and Tea with Tay

Young Nigerians also draw inspiration from local influencers, musicians and sports figures. This has shifted parental attitudes toward creative careers. 'A lot of Nigerian parents have now seen what the arts and culture can do for their kids,' adds Vincent. 'The attitude is very much: Let's try our best at everything and see what we can get.'

Analysis: *what this means*

Despite grappling with inflation and pressure to emigrate for better opportunities, many young Nigerians find solace and purpose in the country's thriving entertainment scene. Nigeria's music industry, which generated over £1.4bn (£2bn, €1.4bn) in 2021 (source: Premium Times), is among the world's largest. Afrobeats, led by artists like Burna Boy and Wizkid, has seen a 550% surge in Spotify streams between 2017 and 2022.

'Beyond being food for the soul, music has created a lot of employment for young Nigerians. It has also helped reduce crime in this country,' Kehinde Williams, also known as music star Kayblinkz, told Punch. 'This is why the government and stakeholders must continue to support the industry.'

Nollywood, employing over a million people, is another major driver of youth employment (sources: Jobberman, National Bureau of Statistics). PwC predicts 16.5% annual growth in Nigeria's entertainment and media industry from 2022–2027.

Gen Z are also fuelling the rise of Web3 and crypto, with 68% wanting more Web3 education in schools (source: Boss Beauties). Meanwhile, online sports betting continues to grow according to Ventures Africa.

In parallel, women-led communities are emerging. 'The idea is to give women room to speak… and bond,' Odun Eweniyi, co-founder of Wine & Whine, told Service95. 'I saw that other women needed community and room to vent.'



Free The Youth Block Party. Photography by Edward Konu, Ghana, Nigeria

CASE STUDY

The HonestBunch Podcast

Known for its frank, conversation-style format addressing real Millennial and Gen Z issues, The HonestBunch Podcast secured a spot among Spotify's top five most-streamed podcasts in Nigeria for 2024. Rotating hosts and guests tackle everything from love and cheating to hustle culture and what's happening in the streets. Its success demonstrates that Nigerian audiences crave candid, relatable dialogue that tackles contemporary topics like pop culture and spirituality with authenticity and no holds barred.

Strategic Opportunities



Fairphone 5, Global

Community commerce

Leverage WhatsApp, Telegram and Facebook communities to enable group purchasing of food and essentials directly from producers. This tackles affordability issues while building brand loyalty through community trust



Topicals Detty December influencer activation, Nigeria

Affordable wellness

With high youth anxiety and financial stress, there's an opportunity for low-cost digital therapy, mental wellness apps, peer support groups, or partnerships with telcos to subsidise access to services



Free The Youth Block Party. Photography by Edward Konu, Ghana, Nigeria

Connect with the global diaspora

Given the predominance of the Japa syndrome, develop platforms that connect Nigerian Gen Z abroad with their cultural roots – from Afrobeat-driven entertainment to Nollywood streaming, diaspora-focused e-commerce, or remittance-linked financial products

Glossary

→ BookTok
TikTok community where users share book reviews, recommendations, lore and trends

→ Conscious unbossing
Gen Z workers in South Korea do not want to be promoted to executive positions, opting for 'conscious unbossing' to avoid burnout.

→ Finfluencers
Influencers who share personal finance advice and investment tips online.

→ FinTok
Finance-focused TikTok community, mixing money tips, memes and market commentary.

→ First Nations, Inuit and Métis
Indigenous peoples of Canada, each with distinct histories, cultures and rights.

→ Gasimbi
Korean term describing the enjoyment of spending based on emotional value.

→ Gaseongbi
Korean concept of pragmatic spending based on price first.

→ Generation Sapa
Nigerian slang for young people struggling with poverty and economic hardship.

→ Gen Zote
Kenyan youth protesters proudly adopted the label Gen Zote – a play on Gen Z and zote, Swahili for 'all' – signalling that they care about everyone.

→ Hell Joseon
A reference to a historic period during which South Korea pursued an isolationist policy, it represents the heavy expectations of society, parents and elders.

→ Idol effect
Influence of K-pop celebrities or idols on consumer choices and behaviour.

→ It Favela
Coined by twin rappers and DJs Tasha & Tracie, It Favela defines Brazil's peripheral communities who set global fashion trends long before they reach catwalks.

→ Japa syndrome
In Yoruba, 'japa' means 'run away' or 'escape'. Now, it commonly refers to Nigerians relocating abroad.

→ Labubu
This mischievous, sharp-toothed forest creature from Kasing Lung's The Monsters universe has become a popular collectible sold in blind boxes by Pop Mart

→ Mini bobusang
South Korean Gen Z are obsessing over miniature beauty products, from skincare to fragrances and colour makeup.

→ Nollywood
Nigerian film industry, one of the largest in global cinema.

→ Overparenting
Excessive involvement in children's lives, limiting independence and problem-solving skills.

→ Pink Dot Pride
Annual LGBTQ+ rally in Singapore promoting inclusivity and equal rights.

→ Sian
Singlish expression of ennui, boredom, tiredness or annoyance.

→ Silicon Savannah
Nickname for Kenya's growing tech and innovation eco-system.

→ Singlish
Singaporean English creole mixing English with Malay, Tamil and Chinese dialects.

→ Stray dog syndrome
A lingering sense among Brazilians of national inferiority or marginalisation in comparison to the US and Europe.

→ Strawberry generation
Singaporean elders describe Gen Z as the 'strawberry generation', believing them to be easily bruised and pampered.

→ Waithood
In Kenya, the delay in achieving key life milestones due to limited prospects and rising costs is known as waithood.

→ Wonyoung-style mindset
Named after K-pop superstar Jang Wonyoung of the girl group Ive, this mindset embodies emotional resilience, optimism and the ability to face challenges with grace and self-belief.

Contributors

Abdullah Alazzaz, creative director of Azaz Architects; **Alexandra Milhat**, culture journalist; **Amanda Kusuma Wardhani**, independent journalist; **Amuna Wagner**, North Africa correspondent at OkayAfrica; **Andi Davids**, chief growth officer at global brand agency Bulletproof; **Angga Prawadika Aji**, lecturer in communication studies at Airlangga University; **Carlota Lopez**, art director; **Clare Acheson**, creative strategist; **Defri Dwipaputra**, executive creative director at Dentsu Creative Indonesia; **Desmond Vincent**, independent journalist and arts writer; **Diyora Shadijanova**, journalist, writer, editor and strategic communicator; **Dr Job Mwaura**, research associate at the Wits Centre for Journalism; **Dr Knatokie Ford**, biomedical scientist and founder and CEO of Fly Sci Enterprise; **Dr Teo Kay Key**, IPS Social Lab research fellow at Singapore's Institute of Policy Studies; **Ernan Haruvy**, professor of marketing at McGill University; **Eunmi Byun**, independent researcher; **Gabriela Helito**, founder and creative director of fashion brand Le Shay; **Georgia Fendley**, founder of luxury design agency Construct; **HRH Prince Bandar bin Saud bin Khalid Al Saud**; **Karl Moore**, associate professor of strategy and organisation at McGill University; **Larissa Santhana Nair**, Gen Z columnist for the Singaporean local newspaper Today; **Malvika Padin**, independent journalist; **Manèle El Zoghlami**, cultural analyst and strategist; **Margaux Bang**, strategist; **Marie Augustin Alvidian Pangestuti Ais Harjono**, co-founder of Awan Brew; **Miriam Rayman**, journalist and futures strategist; **Nelson CJ**, Lagos-based journalist and columnist at Teen Vogue; **Niharika Ravi**, social worker and educator at The Gender Lab; **Nkanai Cynthia**, co-founder of This Is Me; **Rafaella Dhelomme**, insights and innovation consultant; **Samyukth**, Chennai-based contemporary musician and composer; **Sheila Liu**, foresight intern; **Simar Deol**, independent journalist; **Skye Fisher**, chief experience officer at Mohammed Bin Salman Nonprofit City; **Tamaarah Sarah Balachander**, co-founder of Darzi; **Victória de Ranieri**, culture journalist and fashion and lifestyle brand consultant; and **Zing Tsjeng**, journalist and author.

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If you want to find out more, say

hello@thefuturelaboratory.com

Co-founder and chief creative officer : Chris Sanderson
Co-founder and editor-in-chief : Martin Raymond

Director of foresight : Fiona Harkin
Deputy foresight editor : Dan Hastings-Narayanin
Insights and engagement director : Olivia Houghton
Senior foresight analyst : Alice Crossley
Senior foresight analyst : Rose Coffey
Foresight analyst : Seyi Oduwole
Creative lead : Emily Rhodes
Junior creative visualiser : Ella Murray

Director of strategic foresight : Alex Hawkins
Deputy strategic foresight editor : Darian Nugent
Presentations editor : Rhiannon Hudson

Design director : Samuel Davies
Creative director : Savannah Scott
Creative artworker : Harry Parker
Senior sub-editor : Ian Gill
Production & resource lead : Maddie Watts

Director of marketing : Rodrigo Tobal
Marketing manager : Sophia Wood-Jenkins
Marketing assistant : Ayesha Evans

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The Future Laboratory
6 Orsman Road, London N1 5RA, UK

Follow us
LinkedIn
TFL Instagram
LS:N Instagram

Get in touch
+44 20 7791 2020
office@thefuturelaboratory.com
hello@lsnglobal.com

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