THE : FUTURE : LABORATORY

Luxury & Hospitality Futures 2022



Cover: **Raf Studio** explores the possibilities of mixed reality for **Glass magazine**, China

Introduction

Since the start of the 2020s, the luxury industry has proved just how resilient it is in the face of macro-economic challenges

During two years of facing down a global health crisis, accelerating living costs and war in Ukraine, luxury groups and hospitality brands have dug deep, taking on **Elastic Brand** attitudes to transform and develop their products and services to cater for the shifting needs, expectations and values of an evolving, ever-more global customer base.

Promisingly, **Bain & Co** reports that the global luxury sector could recover to an estimated market value of £277bn ($338bn, €330bn) by the end of 2022 – growth of 10–15% over 2021. Looking further ahead, this could jump to £319bn ($389bn, €380bn) by 2025.

'Even if the industry is emerging relatively unscathed from the pandemic and its immediate aftermath, it has certainly not surfaced unchanged,' says Lavinia Fasano, foresight analyst at The Future Laboratory. Signifying such change is the groundswell of new trends and industry directions, explored in the Trends Rising section of this year's report. Among them are digital-first luxurians busy investing in non-fungible tokens (NFTs), fractional artworks and next-generation luxury goods. Generation Z also continue to be a focus for luxury firms; together with Millennials, these consumers are expected to represent over 60% of the luxury market by 2025 (source: **Boston Consulting Group**).

High-net-worth individuals (HNWIs) are hungrier than ever for exceptional experiences and extravagant products, fulfilling a need for sensorial enrichment that was denied during the pandemic. 'Whoever thought we were going to live in tracksuits for ever got it wrong,' Sujata Assomull, the founding editor-in-chief of **Harper's Bazaar India**, tells The Future Laboratory.

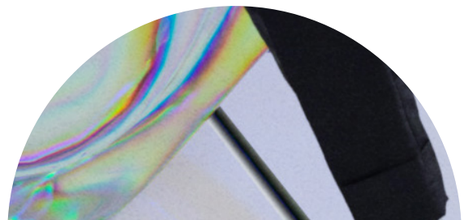
Where **Uneasy Affluence** attitudes shaped the luxury industry in recent years, driving companies to explore more socially conscious and accessible corporate strategies, now the sector can ready itself for a shift towards investment, not only in goods but also personal fulfilment. 'At moments of economic crisis or flux, people migrate back to the things that they know and trust, and consider to be worth the investment,' states Jo Ellison, editor of **How To Spend It** at the **Financial Times**.

Outlining what lies ahead for luxury is **Guilded Luxury**, our new macrotrend for 2022, which examines the drivers and potential trends emerging in the sector as organisations shift priorities from a focus on aspirational shoppers to high-income clients who are less likely to forego luxury purchases during periods of financial instability.

This will foster symbiotic relationships that benefit both brands and their audiences, fostering new types of interactions, experiences and amplified loyalty. As Tamison O'Connor, a reporter for **The Business of Fashion**, says: 'Brands that have strong appeal among high-income clients and can activate the top end of their business will likely fare the best during the recession, while those who rely most on aspirational consumers to drive growth will be hit the hardest.'

We also share key strategic implications that will help your company to transform these insights into practical initiatives. At a time of great flux, this year's Luxury & Hospitality Futures report shines a light on the global innovators, key statistics and audacious ideas that will future-proof the business of luxury as we move further into the decade.





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Generation Z Archivists

Young luxury consumers are using their status as digital natives to rigorously trawl the internet to uncover luxury artefacts or unique items. Over half of Generation Z consumers in the UK, the US and Australia buy second-hand 'to find one-of-a-kind pieces' (source: **Bain & Co**).

Indeed, for a generation that values research, expertise and sustainability, archival items are swiftly becoming Generation Z's ultimate fashion flex. In a piece for **Kaleidoscope** magazine, writer Taylore Scarabelli describes how teens are cross-pollinating their social media platforms with archival luxury content: 'If you look up #archivalfashion on **TikTok**, you'll find endless videos featuring vintage Vivienne Westwood and Galliano-era **Dior**. Not only do savvy teenage collectors use the app to promote their **Depop** pages and show off their algorithmically acquired taste, but they also share trade secrets.'

For luxury brands and retailers, this is opening doors to marketing campaigns and customer service centred on past collections or designs. According to resale platform **The RealReal**, purchases of 1990s fashion by Gen Z increased by 61% in 2021. Embodying this are sellers such as **Olivia Haroutounian**, who is building educational e-commerce experiences, discussing luxury designers past and present on social media, before pointing fans to her resale shop, **Real Life as Liv**.

Turning this into a luxury retail opportunity, nascent app **Sourcewhere** connects shoppers with verified stylists, personal shoppers and luxury collectors to hunt down hard-to-find pieces.

• *Read more on LS:N Global*



Zalando's Luxury on Your Own Terms campaign applies Gen Z's digital-first aesthetic and shopping tools to the luxury fashion sector, Germany

Neo-wealth Wears

Since we examined the dawn of **Crypto-affluence** back in 2017, a category of mostly younger tech- and metaverse-literate luxurians has grown. Now brands are exploring ways to engage this newly moneyed class through accessories that allow people to flaunt their crypto riches in the offline world.

One example is watchmaker **Tag Heuer**. The latest iteration of its Connected Calibre E4 smartwatch allows the wearer not only to connect their crypto wallets but also to showcase their NFT collection via the watch face. ‘We think the wrist is a great place to display your NFT – to have it close to you but also as a way of authentication between members of the community, like a badge of honour, in a subdued way,’ says Frédéric Arnault, the brand’s CEO.

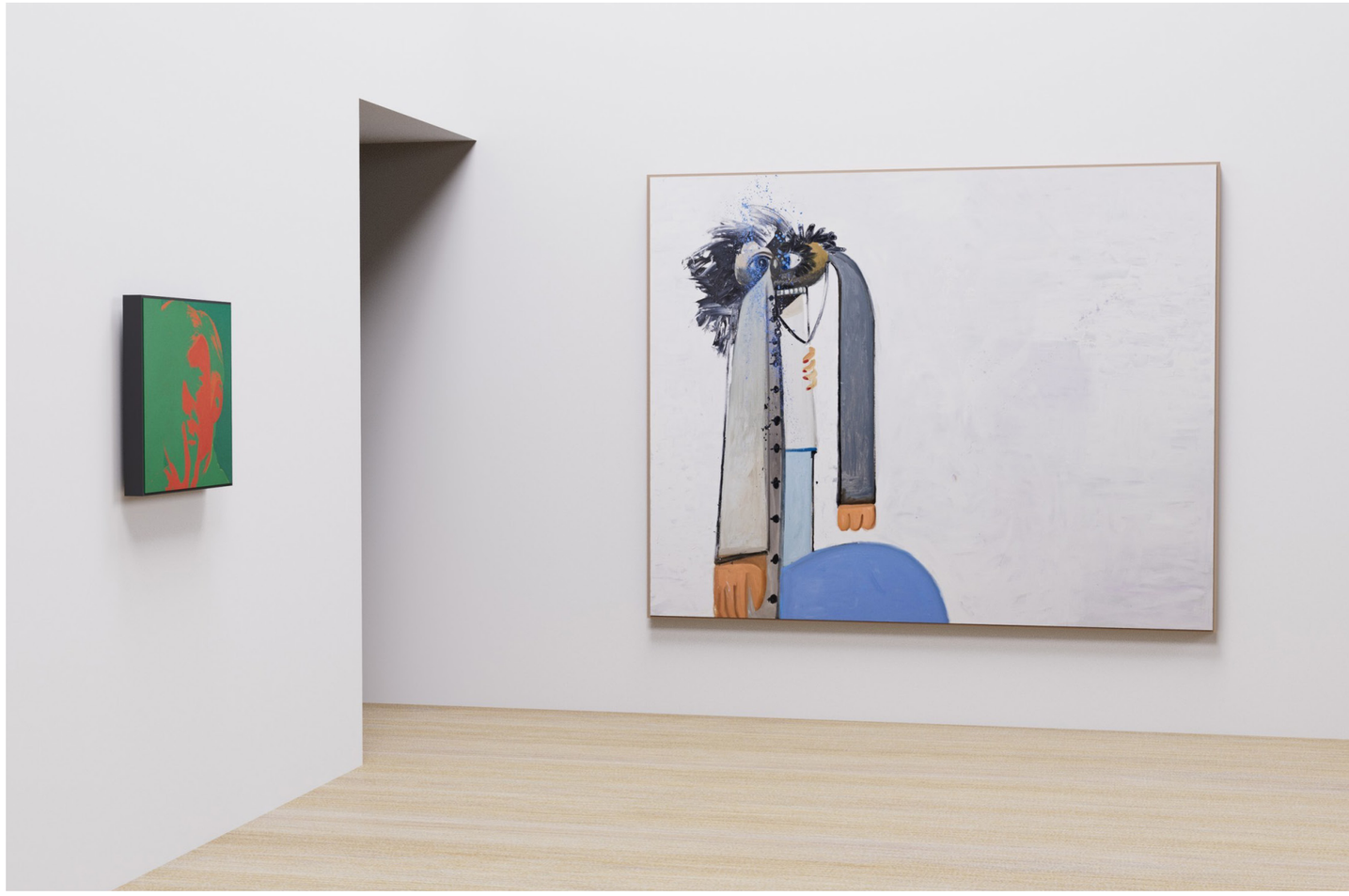
Bulgari’s Octo Finissimo Ultra, the world’s thinnest mechanical watch, is limited to just 10 pieces and is delivered with a unique NFT artwork inspired by the timepiece, which doubles as a blockchain-based proof of authenticity. An embedded QR code on the dial also unlocks a video detailing the manufacturing process behind the timepiece.

Crypto assets are also being realised as fine jewellery. **Tiffany & Co** is now making necklaces for owners of CryptoPunk NFTs, crafted in gold and gemstones, and based on the design of their individual Punk NFTs. Each will cost the equivalent of 30 ETH – about £39,000 ($47,634, €46,545) in fiat currency – with Tiffany & Co’s artisans producing only 250 necklaces on a first-come, first-served basis.

• *Read more on LS:N Global*



Rares positions fashion accessories as tradeable assets, allowing people to buy and sell shares in sneakers, US



Mintus, UK

Fractional Art Ownership

Aiming to democratise access to art ownership, fractional art platforms are empowering everyday investors to purchase important paintings without the hefty price tag.

Often using blockchain technology, these companies divide artworks into shares, which are subsequently sold to speculative investors. And while fractional owners may never physically experience the works, the model is transforming the often-exclusionary art market.

During the pandemic, **Masterworks** has grown rapidly, purchasing artworks by significant artists including Jean Michel-Basquiat, Andy Warhol and Yayoi Kusama, before dividing them into shares to sell to its users. In 2021 it became the biggest spender on artworks in the world with purchases worth nearly £328m ($400m, €390m) (source: **Axios**).

Particle uses blockchain technology to divide artworks into thousands of NFTs that make art accessible to people who wouldn’t normally be represented in the art market. Each artwork is split into 10,000 ‘particles’, each of which corresponds to a certain section of the painting, allowing investors to choose which square they want to buy. ‘When I was a kid and I was looking at auctions and catalogues, I always felt it was impossible to participate financially and that I was by definition excluded,’ states Loïc Gouzer, co-founder of Particle.

Seeking to support emerging talent, **Mintus** aims to attract customers who might want to wager on up-and-coming artists. By the end of 2022, Mintus investors will have access to painting and artworks worth more than £164m ($200m, €194m).

• *Read more on LS:N Global*

‘Investors are increasingly seeking alternative investment strategies to generate risk-adjusted returns’

Nicky Clark, managing director of fine art, Mintus



Crypto-art

As Web3 communities get more involved in the art market, SuperRare is responding with the opening of a phygital gallery in New York, US



Sleep therapy at Saxon hotel, South Africa

Rest-inations

As more luxurians seek out wellbeing-centric travel, mattresses powered by artificial intelligence (AI), in-house sleep specialists and convenient catnaps are underpinning the placing of next-generation restorative facilities at the heart of high-end hotels' offerings.

At the **Saxon** hotel in Johannesburg, time-pressed guests can enjoy a 30-minute Sleep Therapy treatment using a water-filled flotation bed, said to offer respite equivalent to four hours of uninterrupted sleep.

In Switzerland, the **Mandarin Oriental, Geneva,** has teamed up with private medical sleeping clinic **CENAS** for its Check-up with CENAS Sleep Clinic package. The three-day programme includes an overnight polysomnographic test to diagnose sleep disorders. After the test is conducted, the results are carefully analysed by the clinic's experts, who then provide remedies and routines to help customers attain a deeper slumber outside of the hotel's programme.

Hotel beds are also augmenting to improve guests' rest. The Restorative Sleep Suite at the **Park Hyatt New York** hotel is furnished with an AI-powered **Bryte** bed that adjusts the climate according to guests' body temperature. The bed's 100 computer-controlled air cushions ease pressure points by constantly recalibrating the body's support, facilitating a more restful repose. 'As the pandemic has affected the sleep health of so many people, we're proud to provide a relaxing space that not only helps guests better their sleep but also works to improve their overall health,' explains Peter Roth, general manager at Park Hyatt New York.

• *Read more on LS:N Global*

'We provide a relaxing space that helps guests better their sleep and improve their overall health'

Peter Roth, general manager, Park Hyatt New York



Over half **(55%)** of Millennials go on holiday to relax from ordinary life

Source: Condor Ferries



Hotel hypnosis

Amber Pinkerton has created realistic portraits of guests sleeping that allude to the deep rest CitizenM hotels promise, UK



Kayak Miami Beach hotel, US



Data-driven Escapes

The tourism sector is being transformed by media and technology brands that are harnessing their consumer insights and data to create tailored travel advice and experiences.

Expanding beyond its roots as a digital content platform, **Culture Trip** is translating its editorial expertise in travel into small group adventures with its new concept, **TRIPS by Culture Trip**. The range of travel itineraries feature hand-picked, hyper-local experiences led by expert local insiders who can reveal hidden gems and share in-depth knowledge in the same way Culture Trip does online.

In China, Alibaba-owned **Fliggy** is using popular search terms and trending

Among people who sometimes or rarely used a travel adviser pre-pandemic, 44% are now more likely to enlist the help of one

Source: Travel Agent Central



hashtags to inform the creation of new cultural events that cater for hyper-local interests. One example, the Desert Hertz Music Festival, has been built to reflect a growing interest among **Chinese Generation Z** to explore their cultural identity, serving rare local foods, ancient Chinese crafts and traditional clothing experiences.

Taking things further, online travel agent **Kayak** is using consumer insights around preferred technologies, brands and booking systems to inform the creation of a digitally enhanced hotel and design lab in Miami Beach, Florida, with the help of lifestyle-centric hotel brand, **Life House**. Kayak plans to use this Miami site as a design lab to test and refine its hospitality technology for future iterations, drawing on its insights and using consumer and pricing data from the billions of travel queries it receives each year.

- *Read more on LS:N Global*

Luxury Landmarks

Luxury brands are shifting their attention to our urban surroundings, with a growing number of company strategies focused on redeveloping public spaces or refurbishing storied monuments.

Central to this is the preservation of spaces or buildings that pertain to a brand's legacy. In France, **LVMH** fragrance brand **Maison Francis Kurkdjian** has partnered with the Château de Versailles to fund the development of the Perfumer's Garden, a public-facing plot that will open in 2023 brimming with plants and flowers historically used in perfumery. In particular, it pays homage to the 17th century when Louis XIV commissioned work on the Trianon gardens as a space to grow heady, fragrant flowers.

With its restoration of the Temple of Venus and Rome, luxury fashion house **Fendi** is cementing its status as the ultimate Roman brand. It first became a patron of the Parco Archeologico del Colosseo in 2019, funding the restoration of the temple, the construction of which began under the rule of the emperor Hadrian in 121 AD, with work on the largest temple recently finished.

In London, landmark building **Admiralty Arch** is undergoing renovation into a luxury hotel and residences by **Waldorf Astoria**, transforming a historically private yet imposing government building into a lavish destination. The resulting hotel will have three restaurants, several suites and 96 bedrooms as well as a spa, rooftop bar and events space.

• *Read more on LS:N Global*



Fendi's restoration of the Temple of Venus and Rome, photography by Stefano Castellani, Italy

MACROTREND

Guided Luxury



Farfetch spring/summer 2022 campaign, UK

As the world enters a new chapter of global uncertainty, luxury brands are seizing upon safeguarding strategies that build long-lasting and enriching relationships with their most discerning clientele

In recent years, luxury brands have worked hard to prove their point of difference, supplementing their traditional product offerings with a broadening suite of ultra-bespoke services and immersive experiences.

Yet the onset of uncertain economic conditions combined with technological advancements is driving companies to explore new forms of brand-building in order to forge more intimate – and fruitful – connections with their most valued customers.

Indeed, the power play between brands and their clients is in flux. Where luxury brands have long been the gatekeepers of style – dictating what we wear, how we eat and where we travel – they are now learning how to foster more reciprocal and attentive relationships with their consumers.

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

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

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

Guilded Luxury is also about rewarding loyalty and boosting engagement. For brands, the benefit is garnering insights and feedback from close client liaisons. 'Community is at its most powerful when there is a feedback loop: when members are able to provide feedback and we get authentic and honest insights,' explains Bettina Fetzer, vice-president of communications and marketing at **Mercedes-Benz**.

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

In the years ahead, luxurians will seize the opportunity to travel without limits, and a flurry of new luxury hotels, bars and restaurants will fulfil their desire for sensorial experiences, hedonism and alternative cultural exchanges.

Invitation-only events and who-you-know hospitality will only heighten the hunger to be part of tomorrow's insider crowd. 'When I ask an ultra-HNWI to describe a truly exclusive experience, the most common response I get is an invite-only event hosted by a brand,' Oliver Williams, luxury adviser and journalist at **Forbes**, tells The Future Laboratory.

For 2022 and beyond, luxury companies must think beyond product development to become community-builders and social coordinators offering the rarest or most immersive moments. Guilded Luxury offers a framework for luxury businesses to establish and cement more meaningful relationships with clients, harnessing emerging technologies, membership models and a touch of old-world glamour to remain front-of-mind and top of customers' spending.

Pillars of the trend:

Opulent
A new age of extravagance and indulgence

Exceptional
Ultra-bespoke products and services

Intimate
Facilitating authentic encounters between people

Loyal
Fostering a sense of belonging and community

Off-White 4.0 Homeware Collection, Milan Design Week 2022 installation, Italy

Drivers

Having weathered the global pandemic by adopting alternative modes of customer engagement and experiences, the luxury sector is translating what it has learned to navigate a series of new market challenges

Rarity Reset

In recent years, aspirational shoppers have helped luxury brands remain culturally relevant and commercially successful. As a result, companies have embraced entry-level categories such as small leather goods, cosmetics and eyewear. Luxury resale has further reduced the barriers to entry by giving a wider group of consumers access to luxury items. **Bain & Co** estimates that the resale market grew five times faster than the new luxury market between 2017 and 2021.

Yet with a global recession and rising costs looming, companies are refocusing their attention on high-net-worth clients who are less likely to sacrifice luxury indulgences during periods of economic downturn. Some brands are even eschewing discounting in favour of price increases for hero products.

According to **Bloomberg**, luxury house **Chanel** has raised the price of its small classic flap bag by 60% since 2019. Likewise, on premium e-commerce platform **Farfetch**, discounts are dwindling. According to data analysis company **Dataweave**, nearly 92% of **Louis Vuitton** accessories were discounted on Farfetch before the pandemic. By 2021, this percentage had dropped to zero.

Global Driver: Evolving Demographics

Changes in global demographics, including class, ethnicity, gender, sexuality and age, are bringing about significant social and organisational changes



Zyva Studio and **Charlotte Taylor** unveil a re-interpretation of Mercedes-Benz's signature vehicle, the G-wagon, France

What are drivers?

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



Damask investigation by **Remi Veldhoven, Sjaak Hullekes** and **The Fabricant** for the Zeeuws Museum, The Netherlands

Heritage Recoded

While the luxury industry was once defined by its opposition to popular culture, today the sector plays a huge role in driving it forward. According to luxury analyst Erwan Rambourg, **LVMH** chairman and CEO Bernard Arnault has 'made an important case that **Louis Vuitton** was not selling handbags and fashion, but selling culture'.

Today, being at the forefront of the cultural conversation is a key barometer of success for luxury companies. With the rise of technologies such as virtual reality (VR), augmented reality (AR) and NFTs, luxury companies are finding fresh ways to translate their heritage into new realms, remaining top-of-mind for a new generation of digitally native consumers.

According to **Ipsos**, affluent consumers spend more than 46 hours a week engaging with media brands, while fashion and media company **Highsnobiety** has found that 86% of luxury shoppers participate in an online community. These findings indicate that there are ample opportunities for luxury brands to strengthen their role as community organisers, bringing people together, building hype and connecting with consumers in the digital world.

Global Driver:
Accelerating Technologies

People are spending more time socialising and shopping in digital platforms, and brands are increasingly entering this space, creating lucrative digital consumer goods and services

Some **86%** of luxury shoppers participate in an online community

Source: Highsnobiety



Molteni & C furniture curated in an aeroplane setting. Installation by **Ron Gilad** for Milan Design Week 2022, Italy

Maximalism Mindset

The number of ultra-high-net-worth individuals (UHNWIs) increased by 9.3% globally between 2020 and 2021, according to **Knight Frank**'s most recent Wealth Report. While the ultra-rich may have benefitted from the pandemic economy, a lack of personal freedom and travel restrictions have fuelled pent-up demand for sensory experiences.

As a result, big-ticket sales are soaring. According to **Bloomberg**, some 887 superyachts were sold in 2021, up by 77% on the previous year and more than double the sales in 2019. Luca Solca, an analyst for **Bernstein**, sums up the situation: 'For now, getting out of the Covid-19 pandemic is working like a massive feelgood boost: a global YOLO attitude is creating an outsized luxury demand wave.'

Following a spate of revenge spending, we can now expect global luxurians to be more selective, placing higher value on fulfilling experiences and personal growth. 'In 2019, travel had reached an age of fast fashion… we feel that we are now going into more haute couture,' says Elise Bronzo, vice-president of sales at **Indagare**, a membership-based travel and media company.

Global Driver: Urban Mindset

The pandemic has revolutionised the way we live and work, placing a greater emphasis on liveability, security and wellbeing

Private jets now account for some **25%** of all air traffic in the US, double the amount pre-pandemic

Source: Financial Times

The return of luxury

Neiman Marcus launched its Re-introduce Yourself campaign to illustrate how the brand had evolved in the previous year in response to global changes, US

‘If the industry enters a period of terrible global recession, it will knock out a lot of smaller luxury businesses’

Jo Ellison, editor, How To Spend It, Financial Times



Iconic brands USM and Rimowa have collaborated to develop an ultra-luxury storage unit that combines quality and functionality, Switzerland

Wealth Wipe-out

Despite notable financial gains over the past two years, even those with deep pockets will not be immune from the economic downturn. The war in Ukraine and trade sanctions have increased fuel and commodity prices. In June 2022 the **World Bank** revealed that global growth is expected to decline from 5.7% in 2021 to 2.9% in 2022.

A plunging stock market could also profoundly affect the world’s wealthiest. In an article for **The Atlantic**, economic journalist Annie Lowrey writes: ‘We are in a bear market, a punishing one for the roughly half of Americans who own stock and a particularly punishing one for the wealthiest 10% of Americans, who own about 90% of all equities.’

In the first half of 2022, the 500 richest people in the world have already lost a combined £1.2 trillion ($1.4 trillion, €1.4 trillion) including £172bn ($206bn, €203bn) on a single day in June, according to **Bloomberg.** For luxury brands large and small, this financial tumult requires preparedness for a client base that could seek new types of products and experiences that deliver greater value and meaning.

Global Driver: Dislocated World

Extreme wealth is becoming more concentrated as the wealthy benefit from the shock of Covid-19

Insight

After years of democratisation, the luxury sector is re-embracing a closed-door mentality to provide its most elite clients with scarce and transformational experiences

VIC Boutiques

To counter the effects of the global economic downturn, luxury brands are shifting their attention to Very Important Clients (VICs), courting them through the opening of private boutiques designed to boost loyalty, improve client sentiment and encourage continued spending. These appointment-only stores give top-spending consumers a chance to browse products in a more relaxed setting and often boast a wide range of inventive amenities.

In St Tropez, luxury menswear brand **Thom Browne** has opened a boutique that is only accessible to members of the **EPI** private club, a wellbeing resort and spa with an emphasis on tennis. In addition to the designer's ready-to-wear clothing, tailoring and accessories, the appointment-only store stocks a limited-edition capsule collection that changes each season, only accessible to EPI members.

In a similar vein, Swiss watch brand **Audemars Piguet** has opened its invitation-only AP House in New York. Equal parts library, museum and social club, it's a venue where watch enthusiasts can learn more about the brand in a leisurely way, complete with a rotating display of rare watches, a lounge with a fireplace, and a 2,800-square-feet terrace brimming with greenery.

Also in New York, designer rental company **Vivrelle**'s 14,000-square-feet showroom and social club is only accessible to members, with the added benefit of doubling as a workspace. Adding a dash of amusement to the opulent setting, members can try their hand at winning rare handbags using a branded claw machine. In future, Vivrelle plans to use the space to launch brand collaborations and VIP events.



AP House by Audemars Piguet, US

What is an insight?

Insights explore the nascent consumer behaviours, attitudes and trend responses emerging today that will evolve or gain traction in the near future through to 2027. Insights help brands and businesses to understand and identify the opportunities presented by this trend

Digital Dining Clubs

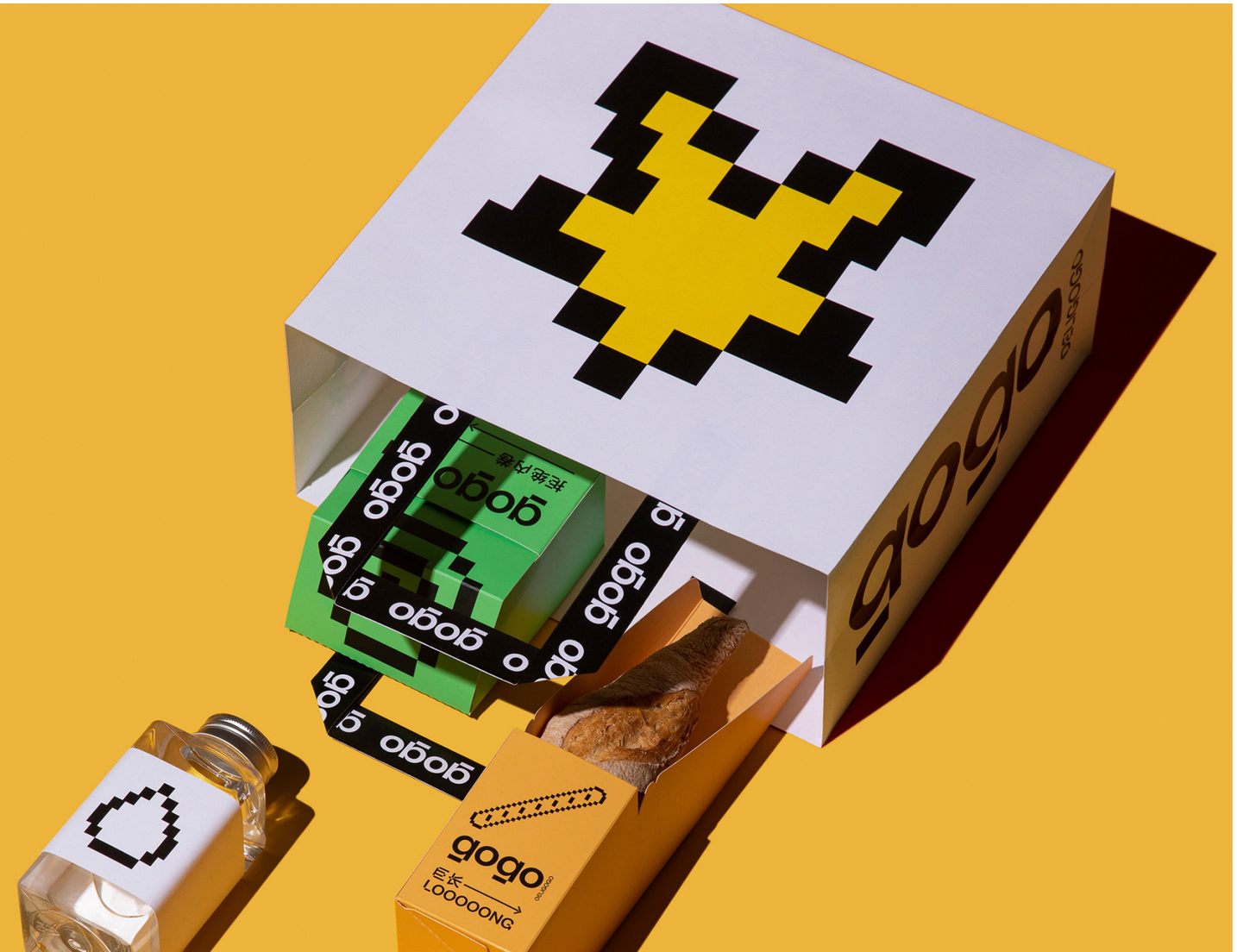
In the hospitality sector, elite dining spaces are being transformed by blockchain authentication and NFTs, augmenting access and providing rarefied experiences for digital-first luxurians.

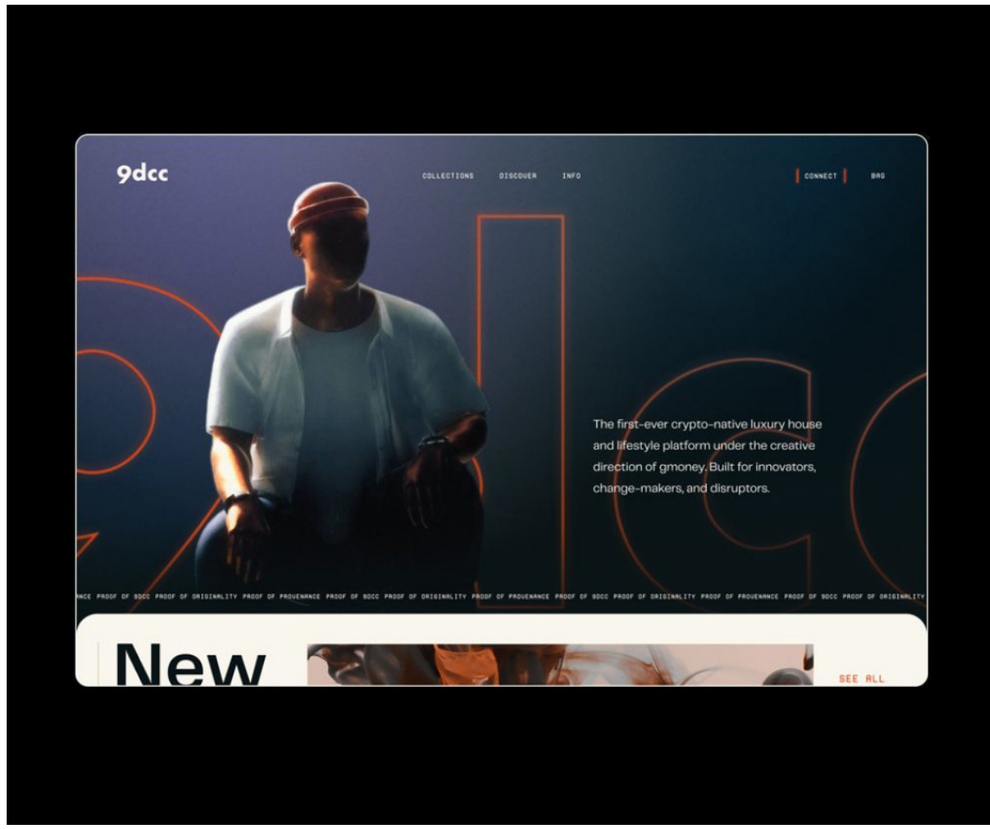
In New York, technology start-up **Front of House** is partnering with restaurants to offer subscriptions to the city's most sought-after dining spots. Its most recent collaboration is with seafood restaurant **Dame**. The two companies launched the **Affable Hospitality Club**, which lets VICs book one dinner each week through an NFT subscription that costs £823 ($1,000, €980).

In San Francisco, hospitality platform **SHŌ Group** has unveiled an NFT-gated Japanese restaurant. There are 3,265 memberships in total, with the most expensive costing £250,955 ($300,000, €296,395). Beyond a members-only menu and access to a private lounge at the restaurant, top-tier members can also embark on a once-in-a-lifetime curated trip to Japan. 'We've always looked at, in terms of the pricing, making sure that we're creating exponential value for our members,' says Josh Sigel, CEO of SHŌ Group.

Opening in New York in 2023, **Flyfish** describes itself as the first members-only dining club governed by the blockchain. To visit the restaurant, customers must own a Flyfish NFT, which will grant them access to a cocktail lounge and the dining room. Through a leasing mechanism, members can also rent their tokens to non-token holders on a monthly basis, granting them the ability to generate passive income.

Convenience store Gogo's recent rebranding by **Meat Studio** is inspired by the digital world and internet aesthetics, China





9dcc by **Gmoney**

Insider Apparel

Luxury fashion labels are giving important clients insider access to their brands, and with this an opportunity to shape the future direction of clothing and accessories. Through membership programmes, these companies are generating buzz, strengthening their communities and streamlining their production processes.

When it was launched earlier in 2022, premium technical outerwear company **Early Majority** gave its customers a chance to buy a lifetime membership for £294 ($358, €351) – non-members pay 60% more for its products. By using a membership model, the company not only garners valuable information and insights from its members but can also reduce overproduction and waste from knowing orders in advance.

Aforementioned NFT models are also emerging, allowing for experimentation and audience engagement. Accessible luxury brand **Lacoste** has created the now sold-out **Undw3 project**, forging a decentralised autonomous organisation (DAO) that will allow members to be part of its creative process, and vote on future products and collaborations.

As we look to the future, we can expect new luxury labels to emerge from such membership models. With collaborations with **Prada** and **Adidas** already under his belt, popular Web3 influencer **Gmoney** recently launched **9dcc**, a luxury brand with NFTs serving as the foundation of its business model. To purchase the brand's clothing, customers must own an Admit One NFT, a token Gmoney launched in May that gives 1,000 holders access to the brand he's building.



37% of consumers consider themselves to be loyal to a brand only after making five purchases

Source: Yotpo

Membership retail

At its launch, premium technical outerwear company **Early Majority** gave its customers a chance to buy a lifetime membership for £294 ($358, €351) – non-members, in turn, pay 60% more for its products, UK





Hedonism Hospitality

Emerging from the sterility of the pandemic, luxurians are in search of excessive, extravagant and edgier hospitality experiences. In response, bars and hotels are reframing historical vices and taboos.

At **Bedroom 6**, an invitation-only speakeasy founded by 24-year-old Rhys Osborne, young partygoers are reviving antiquated absinthe rituals. What began as a private gathering in Osborne's dormitory at the University of Southern California has since grown to include pop-up spaces in New York, Austin, Portland, and even a partnership with **Soho House**.

‘We want people to feel like they’re living it up but also taking part in something that carries historical legacy’

Lisa Harper, proprietor, Rancho Pescadero

Hôtel Amour is positioned as a conceptual playground in which each artist-led bedroom has a different design approach and character. Photography by **Gil Anselmi** for Highsnobiety, France



Another extravagance experiencing a revival is caviar. In New York, several restaurants have started offering ‘caviar bumps’, a nod to a method of snorting cocaine. At **Temple Bar**, blinis and crackers are shunned in favour of spreading the roe directly on customers’ hands, encouraging them to sensually lick it off for a salty hit.

At the **Rancho Pescadero** wellness retreat in Mexico, guests are encouraged to enjoy raucous evenings of drinking and dancing with other guests, before turning to ancient customs to recover. The Ranch’s Hangover Experience is a cornerstone of its wellness programme, offering a gentle wake-up call at a considerate time, a reinvigorating tincture, and a restorative meal of cochinita pibil – a dish that the ancient Mayans used to heal their hearts and minds.

Illuminating Escapes

Post-pandemic travel experiences are also evolving for luxurians, who are seeking out hyper-personal holidays that bring to the fore educational experiences as well as moments of personal growth.

According to Ashley Isaacs Ganz, founder and CEO of **Artisans of Leisure**: 'Luxury travel is back and they are ready to splurge. They want the very best of everything right now. They want everything private. They're privatising access to museums [or] sites.'

The **Six Senses** resort in Ibiza recently introduced its Guest Experience Maker programme. Here, residents enjoy a dedicated consultation to maximise their stay, choosing from a menu of personalised activities ranging from private yoga sessions and outdoor movie screenings to in-villa dining and poolside barbecues.

Where dining is concerned, guests at the **Plaza Athénée** in Paris can sit down with the hotel's celebrity chef-in-residence, Jean Imbert. As part of the experience, Imbert develops a bespoke menu tailored to his guests' tastes and preferences, ensuring an intimate evening with one of the most prominent figures in the culinary world.

Other experiences are tuning into the rise of the hobby economy. Luxury travel agency **The Luminaire** targets 'deeply curious' travellers with bespoke experiences that immerse people in local cultures. One way is through a partnership with **Magnum Photos**, allowing enthusiasts and amateurs a chance to learn from celebrated photographers such as Cristina Garcia Rodero, Jonas Bendiksen or Alex Webb on trips to Mexico, Norway or Cape Cod.



Alicja Kwade's installation for Desert X AlUla 2022 uses mirrors to challenge visitors' understanding and perception of the ancient desert region. Photography by **Lance Gerber**, Saudi Arabia

‘We know the next generation has… a wide and eclectic range of interests’

Adam Sebba, co-founder and CEO, The Luminaire

Palate pavillion

The Vertical Panorama Pavilion by Olafur Eliasson at The Donum Estate aims to amplify visitors’ personal wine-tasting experience by using experiential artwork to elevate its contextual surroundings, US

‘For those who don’t go on these trips, they want it. They always ask me: ‘How can I get on the list?”

Oliver Williams, luxury adviser and journalist, Forbes





Saint Laurent explored the concept of ‘destination runways’ with its spring/summer 2023 menswear show set in the Agafay desert. Designed by **Es Devlin**, Morocco

Guestlist Getaways

Representing the pinnacle of Guilded Luxury, luxury brands are becoming curators of money-can’t-buy moments, treating VICs to lavish and sometimes far-flung private events.

As we previously saw in **Whisper Networks,** invitations to these physical events are both scarce and highly coveted, representing a future of luxury brands as assemblers of people and cultural moments. ‘People who go on these trips fall in love with the brand and for those who don’t go on those trips, they want it,’ explains Oliver Williams, luxury adviser and journalist at Forbes. ‘They always ask me: ‘How can I get on the list?”

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

Some events last several days. **Cartier** recently organised a once-in-a-lifetime experience for VICs that included winery tours in Toledo, Spain, and a private runway show of its latest Beautés du Monde collection. The getaway ended with a private concert by the Black Eyed Peas.

Elsewhere, jewellery company **Piaget** recently sponsored a series of exclusive events in the AlUla region of Saudi Arabia. There was even a chance to rub shoulders with the Piaget’s C-suite. At an open-air concert in the desert, VICs were joined by the company’s chairman Yves Piaget and former CEO Chabi Nouri.

Foresight

By the 2030s, the luxury industry will be elevating client relationships in ever-more personal ways, from heightened healthcare to cyber-security

Medi-luxe

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

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

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

Health wearables will also become covetable accessories. **Gucci** is already exploring this field through a collaboration with health technology company **Oura**. Together, they've created a limited-edition version of the Oura Generation 3 ring, a wearable that analyses sleep patterns, heart rates, and can track periods. In the future, luxury brands could even curate and tailor experiences – from diets to holidays – based on wearers' health data and needs.



Oura Generation 3 ring by Oura and Gucci, Finland

What is a foresight?

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



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

Virtual Craftsmanship

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

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

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

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

‘It’s so important for us to embrace the near future and become a bridge for physical and virtual luxury’

Silvia Venturini Fendi, creative director of accessories, Fendi



Ledger Nano X by Fendi and Ledger, Italy

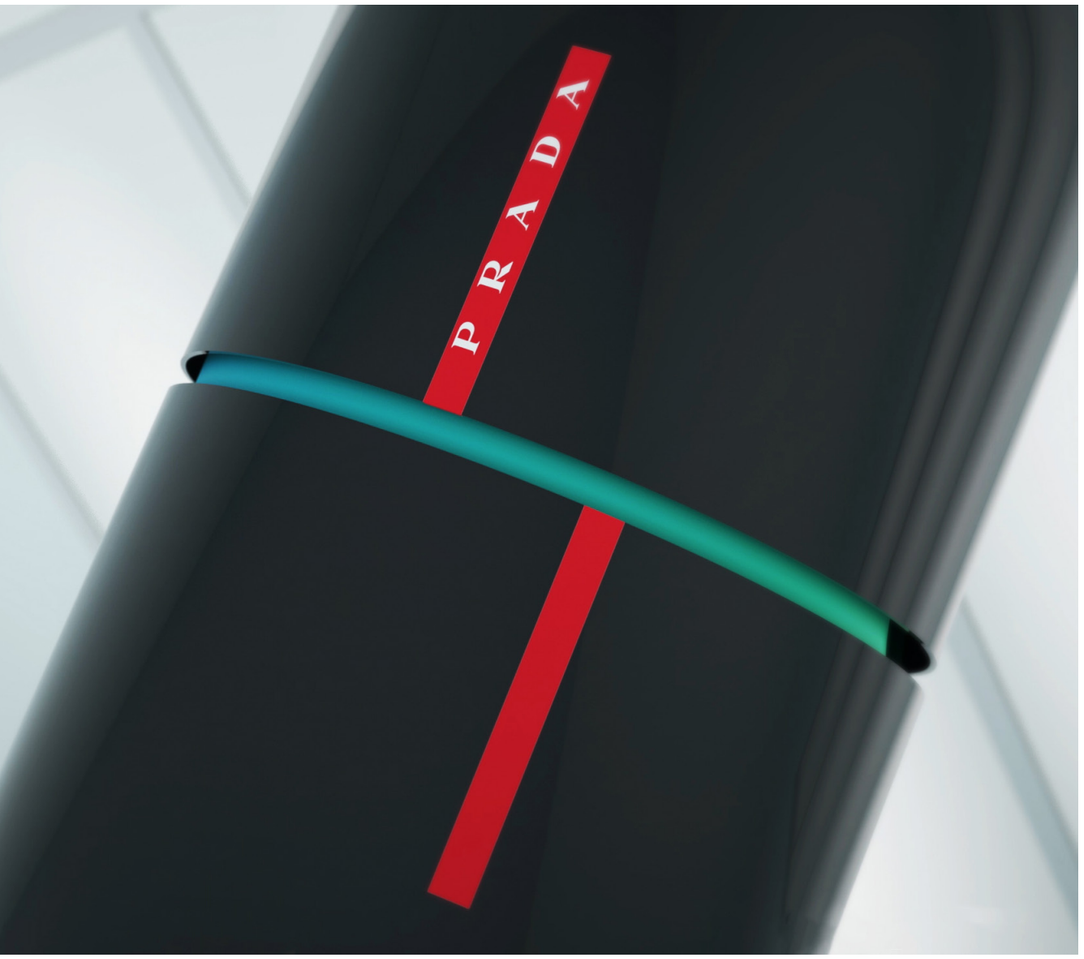
In-style Security

With nearly a quarter of HNWIs in Britain already considering cybercrime the biggest risk to their wealth, by 2030 luxurians’ portfolio of virtual memberships, crypto investments and involvement in DAOs will demand superior digital security (source: **Saltus Wealth Index**).

But this won’t be cloistered and covert – as security becomes the ultimate luxury, a wave of bold accessories will emerge to stylishly counter cyber-attacks and security breaches.

Already, luxury house **Fendi** has partnered with digital security company **Ledger** to create the Ledger Nano X, a hardware wallet that ensures that crypto holders won’t lose access to their funds even if their digital identity is compromised. ‘For us, creation is just as much about the invisible as the visible – which is why it’s so important for us to embrace the near future and become a bridge for physical and virtual luxury,’ says Silvia Venturini Fendi, Fendi’s creative director of accessories.

And with digital-first luxurians set to lead more nomadic lifestyles, smartphones and personal devices that provide military-grade security and high-level cyber protection will be essential. The Vertu Constellation X Ulm phone – a collaboration between smartphone company **Vertu** and crypto exchange platform **Binance** – includes high-grade encryption services and cutting-edge CommuniTake technology. Priced at £12,235 ($14,890, €14,603), it signals how the crypto elite will protect themselves without having to sacrifice their lifestyles.





Post-copyright Collaboration

In future, pioneering luxury brands will recognise the benefit of inviting creative collaboration from their audiences as a way to understand what motivates and inspires them, as well as to inform new products and services.

To do this, luxury brands will engage with the communal, democratic values of Web3, embracing the notion of Creative Commons Licenses. Here, we can expect luxury brands to release virtual products – especially NFTs – that are designed to be playfully reworked or redesigned by clients to meet their own needs or desires.

We've previously seen this with **Toadz**, an NFT project that sparked a flurry of derivatives using Toadz imagery by people who might not have been able to acquire one of the original, limited-edition NFTs. Instead of diluting the value of the real Toadz series, however, these derivatives re-affirmed the idea of the original by building a thriving community around the authentic work.

> 'InfiniteWorld will soon provide customers with exclusive digital experiences to elevate their membership in the McLaren universe'
>
> *Gareth Dunsmore, chief marketing officer, McLaren Automotive*

Prada is introducing NFTs to its Timecapsule product drop collection that occurs on the first Thursday of every month, US



Imagine, then, a fine jewellery house such as **Tiffany & Co** or a luxury car-maker like **McLaren** giving audiences free rein to augment products and have them brought to life. McLaren is already exploring this through a project with **InfiniteWorld** metaverse, where brand fans create and mint original NFTs and digital artwork that represent McLaren's luxury supercars and hypercars.

Such client collaboration will not only provide a route to personalised products and services but, being digital-first, will also serve up virtual twins to prove authenticity and design ownership, and add a further layer of security.

Strategic Implications

Here we look at the key steps that luxury and hospitality brands need to consider and implement when taking a more proactive approach to becoming a Guilded Luxury and Hospitality player



One Hundred Shoreditch, UK

Strategic Actions

As we enter a period of economic downturn, companies can seize the chance to interact with, inspire and provide moments of relief to consumers across the world

Convert consumers into community members

Incentivise consumers to play an active role in your brand community by rewarding them with tiered benefits and perks. Depending on their loyalty and level of engagement, provide clients with insider access to online channels and physical spaces that serve as places of exchange for people with shared interests. This will help foster community, enhance loyalty and strengthen the relationship between client and brand.



Zalando and Adidas, Germany

Restrict entry points to the brand

With a new category of digital assets lowering the barrier to entry to luxury brands, protect the top end of your consumer segment by creating rarefied experiences that appeal directly to VICs. Gated retail experiences, private dining and outstanding events show top-spending consumers how valued they are. The key to creating these exceptional encounters will be having an intimate understanding of what clients want.



G-construction by **Zyva Studio** and **Charlotte Taylor**, France

Adopt democratic operations

Technologies such as NFTs and DAOs will offer the chance to restructure business operations by providing a constant channel of communication with customers. Establish more reciprocal relationships with clients to streamline production models, improve product development and advance sustainability goals while bolstering a sense of belonging in the wider brand eco-system.



Ankorstore in collaboration with Pentagram, UK

Thought-starters

What are the most pressing concerns for your business as we enter a new decade of uncertainty? Prepare for the future by answering these key questions:

Consumer: Expand the remit of retail

Broaden the scope of the boutique. What kind of services – such as childcare, medical advice or travel guidance – will luxurians come to expect from future luxury retail spaces?



Superself by Selfridges, UK

Business: Re-organise relationships

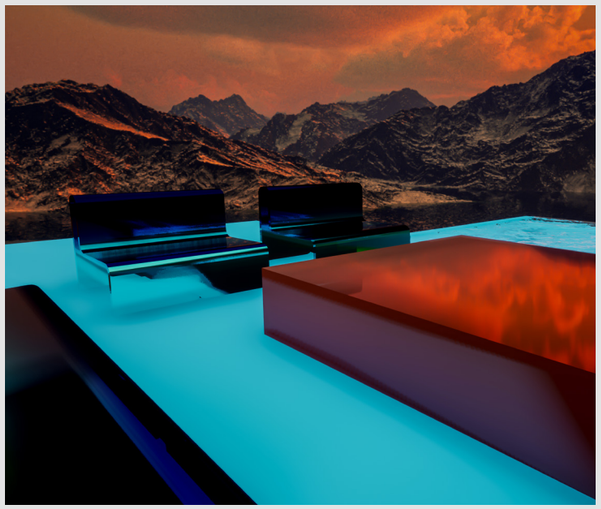
Emerging technologies are eliminating traditional hierarchies. How can the luxury industry reframe the relationship between consumer and brand so it becomes more collaborative and reciprocal?



Emerge, US

Culture: Exclusivity for all

Exclusivity does not have to be alienating. How can your company use technology to ensure that each consumer – from aspirational to VIC – has access to an exceptional experience that caters for them?



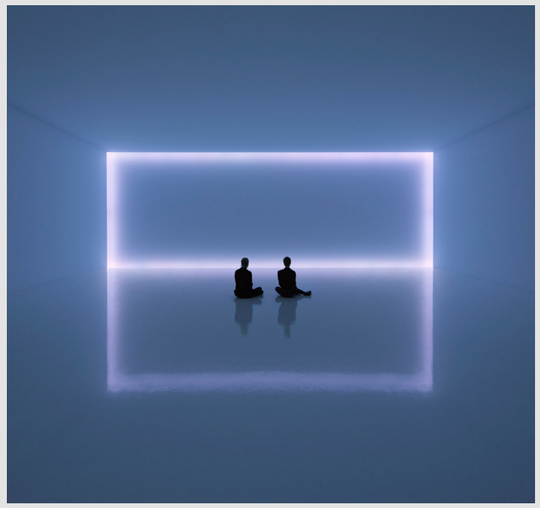
Mars House by Krista Kim, Canada

Related Macrotrends

2020

Enlightened States

The experience economy is moving towards personal transformation as the public imagination looks inwards, favouring self-discovery over shared spectacle.

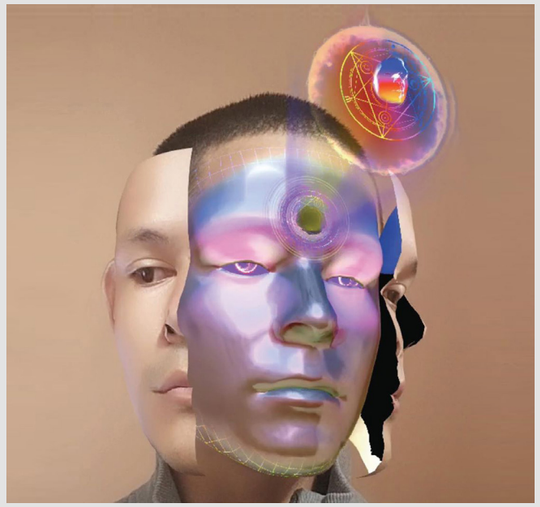


Doug Wheeler installation at David Zwirner, US

2020

Feedback Frontiers

As communications with consumers become more circular and conversational, brands are treating every micro-interaction as a valuable opportunity to lean in, learn and improve their model.



Creators AR by Leaders Group, Israel

2020

Omnilux Lifestyles

The luxury experience of the future will no longer rely on human-to-human moments, but anytime attainment, anywhere in the world. In this digitally bolstered second existence, luxury is an omnipresent service.



Memory flagship store by Gentle Monster, China

2021

Alternet Economies

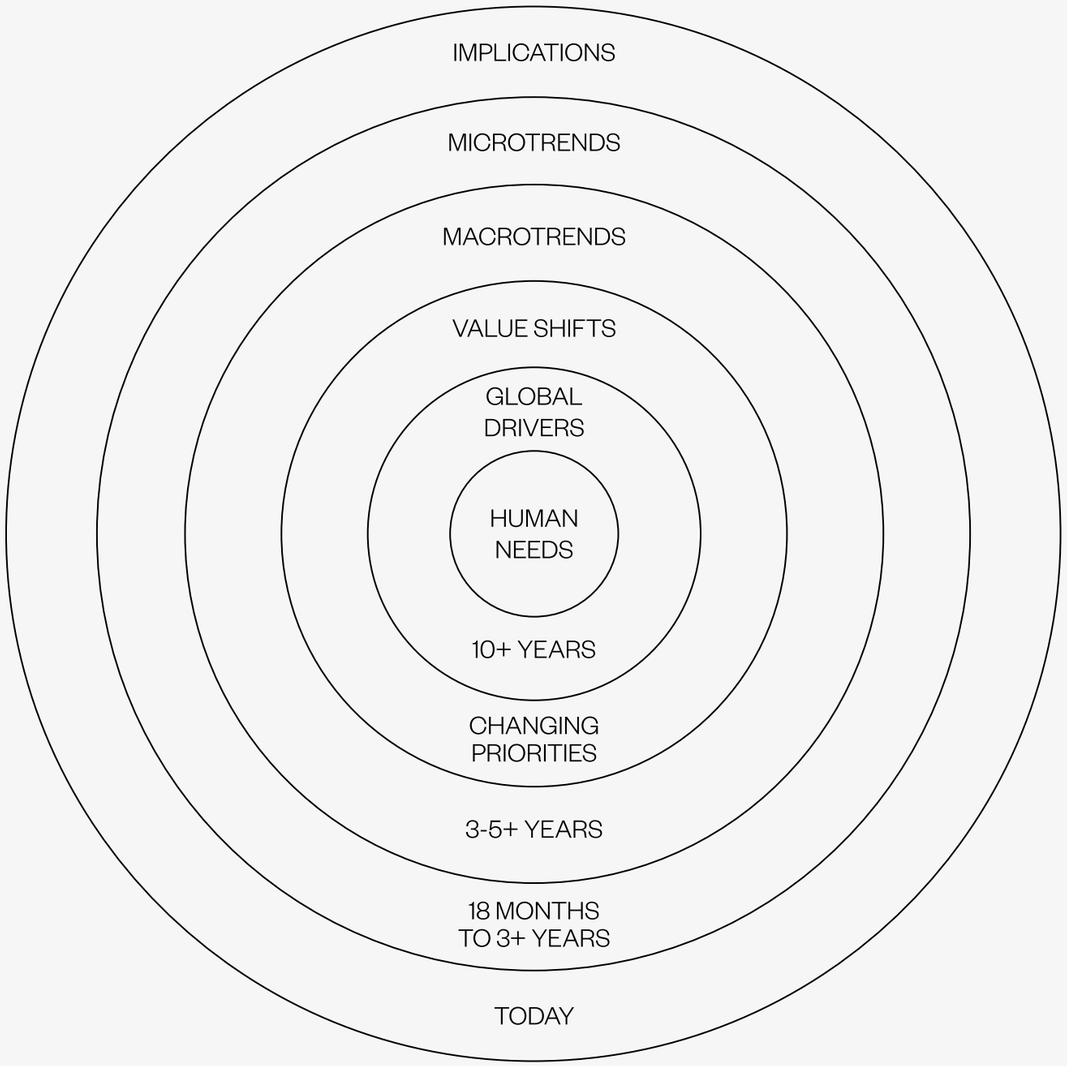
A technological counter-culture is decentralising capitalism, reforming the internet and powering new value frontiers for creators, consumers and brands.



Dell XPS Youniverse by MPC & VMLY&R, US

Methodology

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



The Future Laboratory's proprietary foresight methodology

Introduction

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

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

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

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

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

Futures Taxonomy

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

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



01 Human Needs

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

02 Global Drivers

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

03 Value Shifts

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

04 Macrotrends

The cultural manifestations of new and emerging attitudes worldwide

05 Microtrends

Influential short-term signals indicated by innovation

06 Implications

Future implications for brand and business growth



The Seven Human Needs

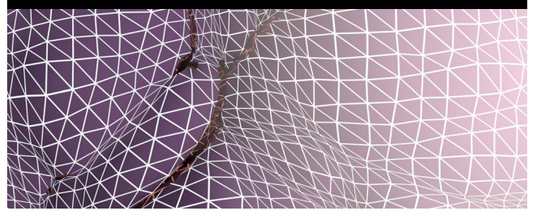
The seven human needs are timeless and universal. Based on a value system that supports human nature's physical and emotional programming, each human need is of importance to us as individuals and together they form the foundation of society as well as that of our methodology:

Why they matter:

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

The Seven Human Needs

Security

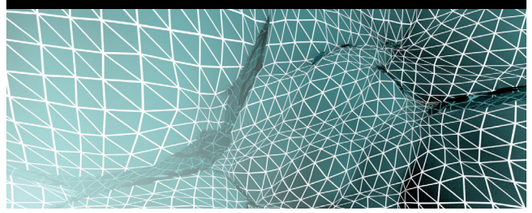


At the core of humanity is a fundamental need for structure, control, certainty and stability. It is a basic human survival instinct to protect ourselves and our loved ones from perceived physical, emotional and economic threats

KEY ELEMENTS

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

Fulfilment

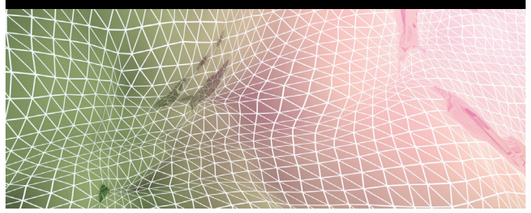


There is a human desire to direct our own lives, to create forms of freedom, and to find deeper meaning and balance in life. It is the psychological need to fully realise our personal potential with the resulting feeling of satisfaction

KEY ELEMENTS

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

Belonging

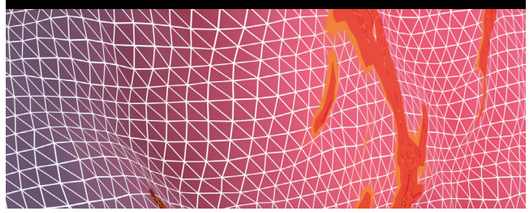


It is a social need to be physically connected to a group of like-minded people. We have an emotional urge, on an individual level, to create support systems and relationships that provide us with acceptance and approval

KEY ELEMENTS

Nationalism, Tribalism, Roots, Conviviality, History, Culture

Curiosity

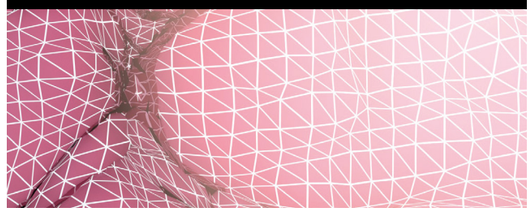


To both create and co-create makes us push the boundaries of what is ultimately humanly possible. Our in-built intuition makes us inquisitive beings with a shared inclination to discover or challenge the norm

KEY ELEMENTS

Exploration, Education, Connoisseurship, Discernment

Identity

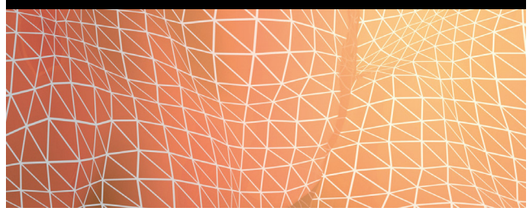


We have a need to distinguish our character or personality from others and to feel unique and respected for who we are. We build our sense of who we are through a personal exploration of gender, sexual orientation, ethnicity and age

KEY ELEMENTS

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

Attainment

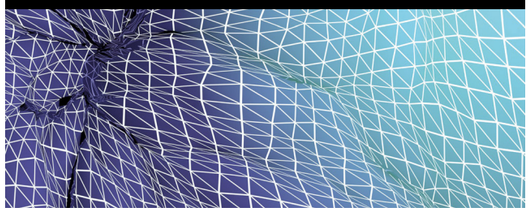


All human beings need to feel respected and recognised among their peers, which drives the desire to constantly express our significance and success, our knowledge and tastes, with our achievements often reinforced through the acquisition of symbolic goods

KEY ELEMENTS

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

Purpose



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

KEY ELEMENTS

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

The Six Global Drivers

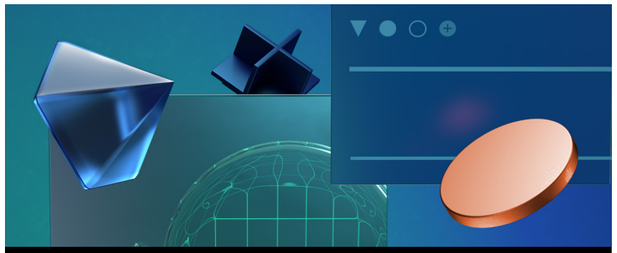
Global drivers represent the cultural, social, economic, political, technological and environmental eventualities reshaping the world we live in. They are factual, objective and long-term structural forces that are pervasive, powerful and transformative.

Why they matter: What's next

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



The Six Global Drivers



Accelerating Technologies

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



Climate Change and Resource Scarcity

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



Dislocated World

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



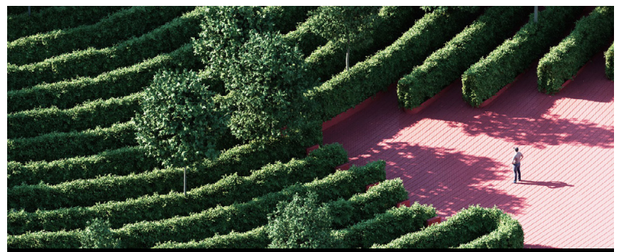
Global Versus Local

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



Evolving Demographics

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



Urban Mindset

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

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



The Value Shifts

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

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

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

Why they matter: What to plan for

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

Macrotrends

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

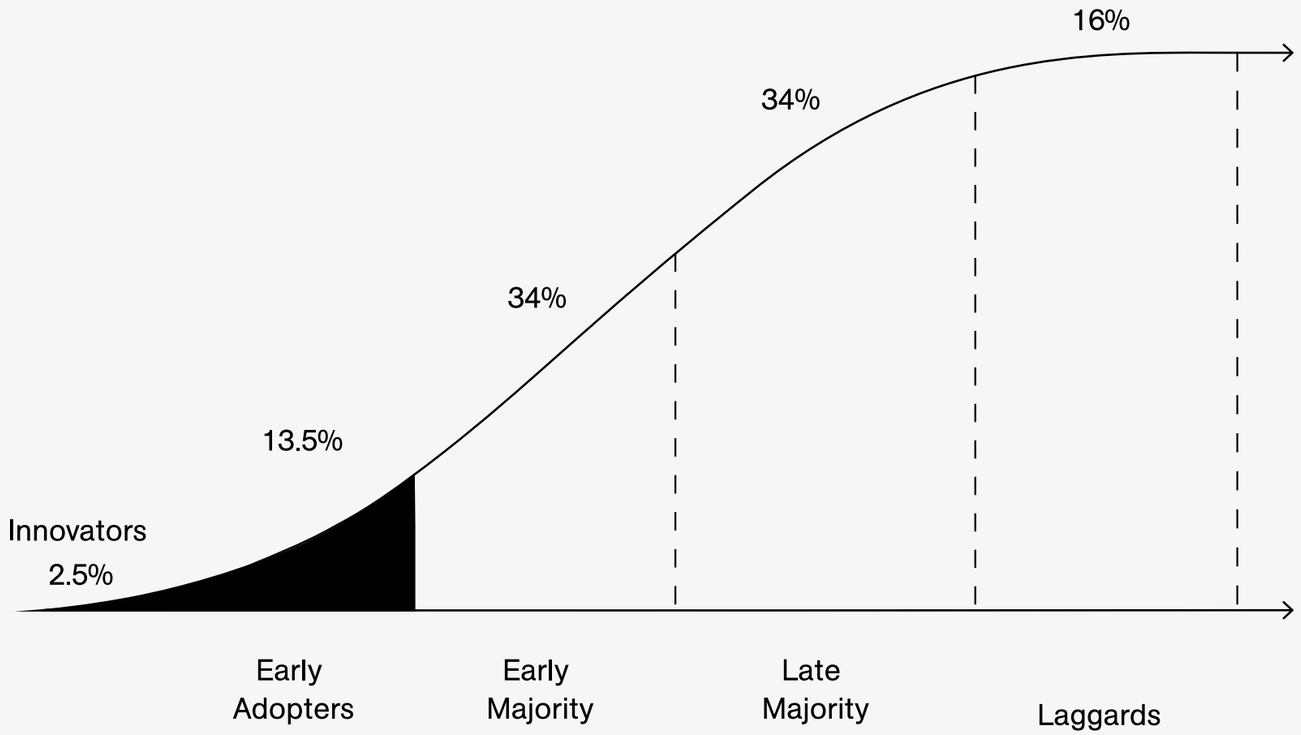
Why they matter: Where to play

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

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

The Diffusion of Innovation curve

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



DISCOVER MACROTRENDS



Microtrends

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

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

Why they matter: How to win

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

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

Strategic Implications

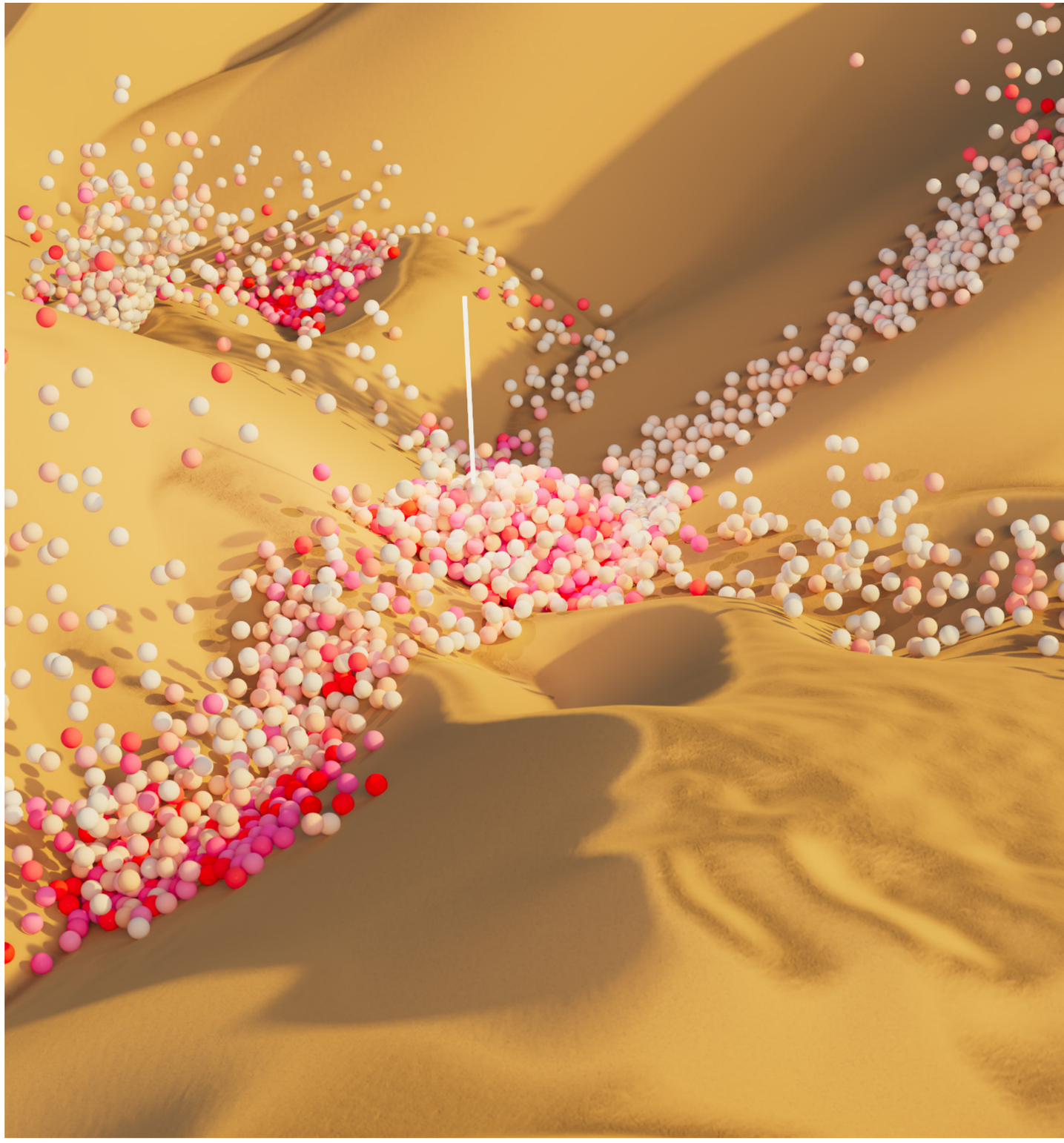
As you can see, we don't predict the future. But through Strategic Foresight we can track global shifts to understand the key drivers of change and mine the evidence of today's world to preview what the future could look like.

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

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

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

BOOK A STRATEGIC CONSULTATION



Make a better future happen

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

Did you know that members get free access to all of our trend reports?

We can also deliver our research to your business in a number of ways, from **virtual presentations** to **strategic workshops** and **bespoke reports**.

If you want to find out more, say **hello@thefuturelaboratory.com**

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