THE : FUTURE : LABORATORY

The Great Acceleration

Trend Briefing 2021 Report Collection

Introduction

The Covid-19 pandemic hasn't just changed the world, it has accelerated the ways in which we engage with it and the technologies we use to do so.

Workplaces have been irreversibly transformed, consumers have adopted entirely new ways of living and learning, wellbeing and social inequality have been thrust into mainstream consciousness, and brands have reset antiquated missions to focus on solutions. As Ashley Fetters puts it in The Atlantic: 'The coronavirus era feels like it has pushed us into a technologically sophisticated, hyper-connected future that otherwise may have been years, decades, or generations away.'

Post-Trump, the pendulum is also swinging away from 'fake' and 'fabricated', and back towards hard data, hard facts, and a belief in experts and scientists to provide a pathway to collective freedom. We are not accelerating towards a new normal, but towards a new *extra-ordinary*.

The inter-Covid world that emerges will look and feel drastically different. As Xprize founder Peter Diamandis and science author Steven Kotler point out in The Future Is Faster Than You Think, convergence in energy, transport, health, education and living standards will enable a blending of tech, innovation, science and disruptive sustainability on an unprecedented scale.

Against this backdrop we are witnessing the rise of radical digital value systems, decentralised metropolitan and suburban infrastructures, and agile kinetic corporations. The Future Laboratory's 2021 Trend Briefing report is your guide to the three macrotrends epitomising these shifts.

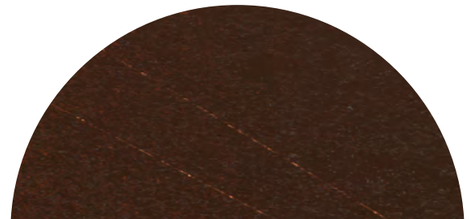
In **Alternet Economies**, we look at the next chapter of stakeholder capitalism. Instead of simply being used to share information, the internet is now being used to share and coordinate value. Within this more equitable version of cyberspace, competitive platforms, currencies and modes of commerce are creating a fluctuating landscape for brands and media.

As city inhabitants question the ability of metro areas to flex and support them during times of crisis, **Equilibrium Cities** examines how our built environments will become healthier, inclusive and more responsive. As we move through The Transformative Twenties, data-first digital systems will enable people to shape and experience their cities remotely, possibly even in alternative realms.

And finally, as the power dynamic shifts between brands and consumers, all eyes are on the inner workings of businesses, and how seamlessly they can respond and recalibrate. In order to survive, **Elastic Brands** must move beyond reaction and instead take a kinetic approach to their business models, from everyday operations to their supply chains and workforce.

If the past year has taught us anything, it's that we have to move with speed and at scale to rethink and rebuild everything we once knew and took for granted. It's not just possible, it's essential. Are you ready to accelerate?





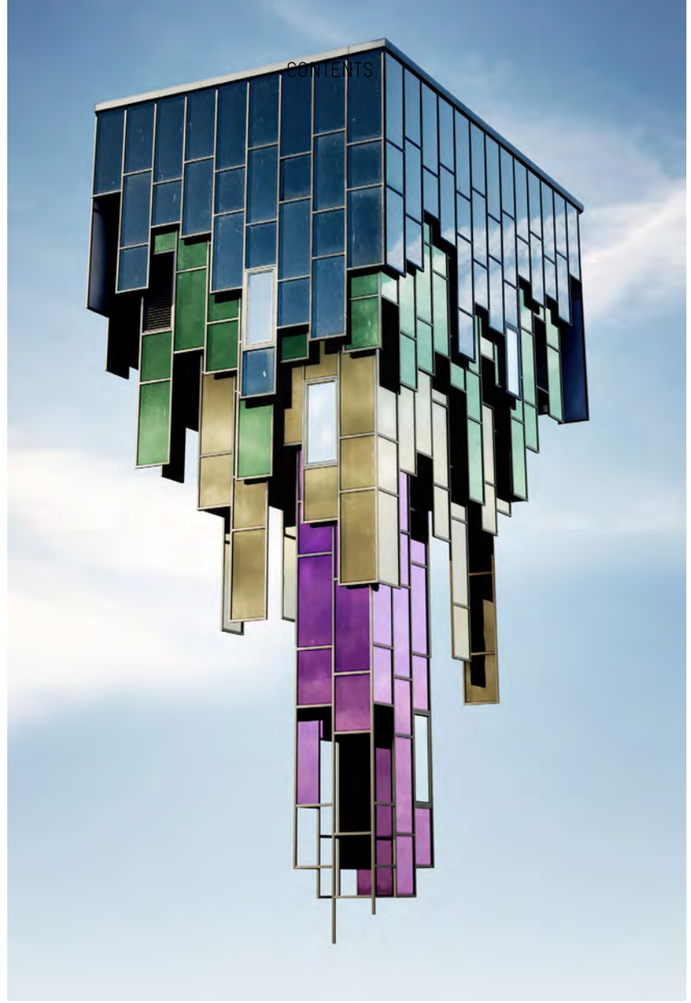
Cover: Respawning Li Ning Into God Mode by TRAUM INC

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Facing their biggest shake-up in recent history, cities are evolving to allow future generations to live in balance with nature and urban progress.



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Caught between unpredictable consumer and corporate demands, organisations are taking a kinetic approach to their business models.

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A technological counter-culture is subverting digital capitalism and powering new value frontiers for creators, consumers and brands.



Drivers

There is no denying that we are living at a time of rapid and dynamic change. From the complex impacts of climate change, depleting resources and ageing populations, to a global pandemic and geopolitical instability, the Transformative Twenties will be a decade of challenge and continuous disruption.

Yet amid the turmoil we also recognise that some things will stay the same. People still have the same basic human needs: fulfilment, belonging, curiosity, attainment, purpose, identity, and security.

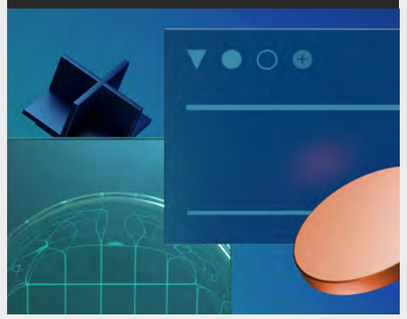
But new forces sitting above these needs are changing our value expectations and transforming our aspirations and priorities. They are beginning to reveal the role, the purpose and the direction that brands and businesses can take as they move towards 2030.

We call these global drivers.

What are global drivers?

A global driver, sometimes referred to as a mega-trend or a global force of change, is a fundamental shift and external force that has 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.

Accelerating Technologies



The digital and offline worlds are converging. For millions of people around the world, living a day without technology is almost unthinkable

Climate Change and Resource Scarcity



Climate change is cited as the biggest global risk, according to the World Economic Forum, with far-reaching impacts for our planet

Dislocated World



The coronavirus crisis has unearthed pervasive social, political and environmental inequalities and divisions on a global scale

Global versus Local



Today's interconnected world in which goods, services, information and culture are rapidly spread is creating new tensions between global and local living

Evolving Demographics



Forces will begin to evolve the global population, contributing to major social and cultural shifts that will affect the demographics of tomorrow

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

MACROTREND

Alternet Economies

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



Dell XPS Youniverse by MPC and VMLY&R

Some 30 years after the first website went live, a revolution is upon us. At the intersection of technology and societal change, the power structures and established hierarchies of the internet are about to be subverted by novel economic systems. This is especially true as we witness the dawn of the metaverse – an alternative universe of fledgling virtual spaces.

‘The world wide web itself is entering its Saturn return, a period traditionally viewed as a difficult but pivotal coming of age passage,’ says Emily Segal, co-founder of think tank Nemesis.

Once a nexus of innovation and techno-optimism, there are signs that the gilded age of Silicon Valley may be waning. Anti-monopoly and anti-trust lawsuits are on the rise, from China to India, as countries crack down on internet giants and join a global shift in attitude. As a result, the ethical quandaries we mapped in Morality Recoded are reaching fever pitch.

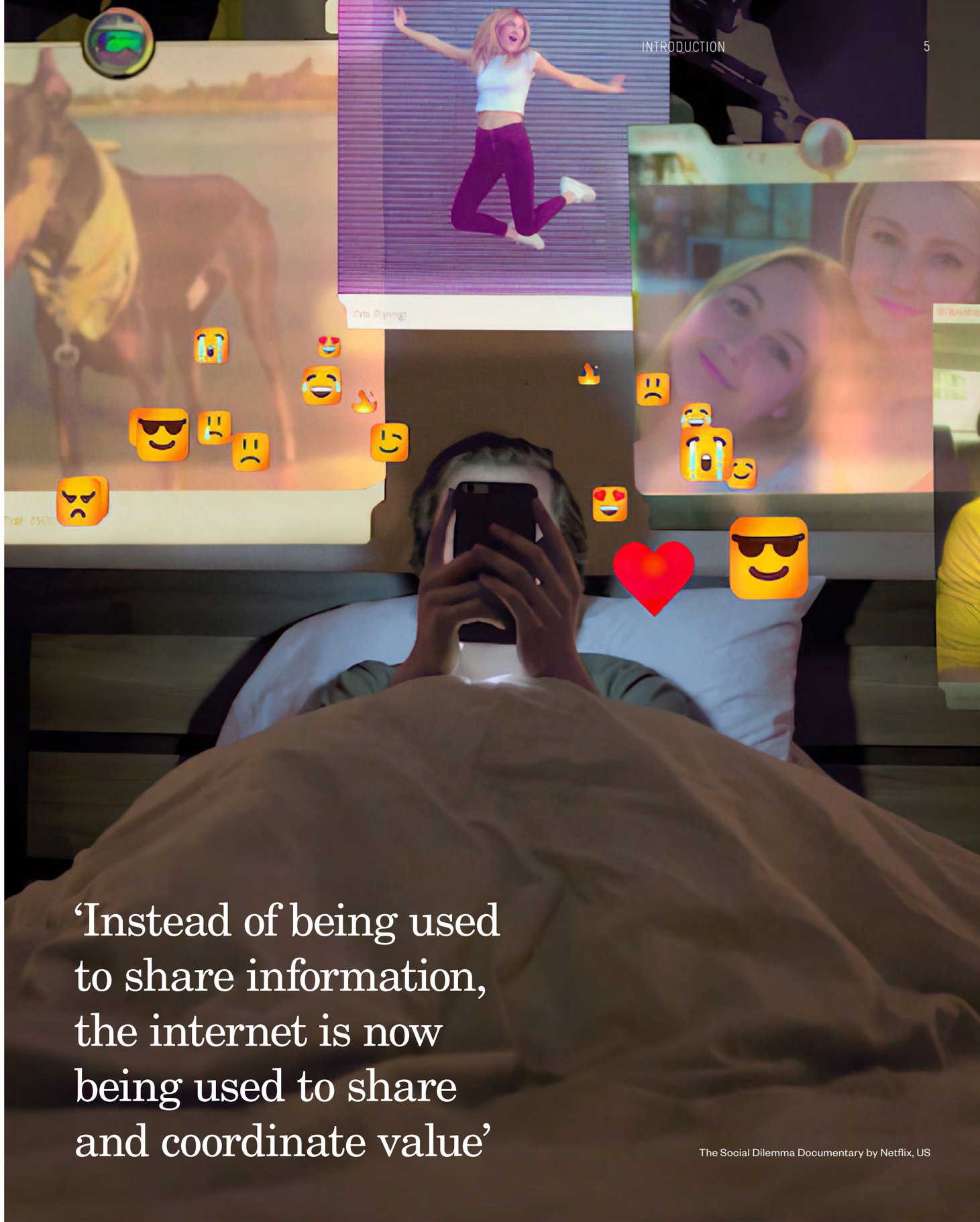
In the US, 85% of consumers believe big tech has too much power and nearly six in 10 think social media has a negative impact on society (source: Accountable Tech). The answer, for many, lies in Web3 – a next-generation internet built on decentralised technologies that promises better user control, and more competition between internet brands and businesses.

‘As we enter the 2020s, centralised power and decentralised communities are on the verge of outright conflict for the control of the digital public space,’ says Cade Diehm, founder of The New Design Congress. ‘The fight for what comes next ultimately won’t play out in centralised tech spaces.’

The New Value Economy is now diversifying as digitisation not only disrupts creative ownership, but also enables us to quantify cultural value in new financial terms. Tokenisation, for example, can convert culture into a tangible economic force. Meanwhile, cryptonetworks are enabling consumers to become stakeholders. Instead of being used to share information, the internet is now being used to share and coordinate value.

As established systems of exchange are upended, it will bring benefits to new audiences. By 2025, mobile connectivity could be enjoyed by an additional 4.3bn people worldwide (source: Plural Sight). And for the 65% of Generation Z and Millennials who plan to be, or already are, their own boss, an entrepreneurial spirit will grow (source: Spotify).

To survive in this fluctuating landscape, brands and media must become open-source providers – offering the tools, assets and services needed to empower a new generation to prosper within a more equitable version of cyberspace. Rather than products, the Alternet Economies will trade on participation as competitive platforms, currencies and modes of commerce drive a total paradigm shift.



Drivers

Virtual Immersion

Covid-19 has accelerated new technological behaviours, many of which will outlast the pandemic. In the early stages of the outbreak, McKinsey & Co noted that digital adoption among consumers and businesses had vaulted five years forward in as little as eight weeks. As we move online for both work and recreation, the virtual world has become a series of third spaces.

Demonstrating this, gaming video content reached 1.2bn viewers in 2020, according to Superdata. Meanwhile, global online content consumption is soaring, with average daily time spent consuming content now totalling six hours and 59 minutes (source: Double Verify).

Now, the metaverse is about to become a key social hub, ushering in an era of immersive virtual exploration. 'The metaverse is arguably as big a shift in online communication as the telephone or the internet,' says David Baszucki, founder and CEO of gaming platform **Roblox**. 'Within the next few decades its applications will exceed our wildest imaginations.'

Global Driver:
Accelerating Technologies

Deeper Online Immersion: People are spending more time socialising and shopping in digital platforms



Club Matryoshka at CTM 2021, Berlin

The pillars of Alternet Economies:

Participatory
Trades on inclusion and community, not product

Entrepreneurial
Incentivises through financial empowerment

Decentralised
Redefines models of governance and ownership

User-generated
Transforms consumers into creators

'The metaverse is arguably as big a shift in online communication as the telephone or the internet'

David Baszucki, founder and CEO, Roblox

Entering Cyberspace

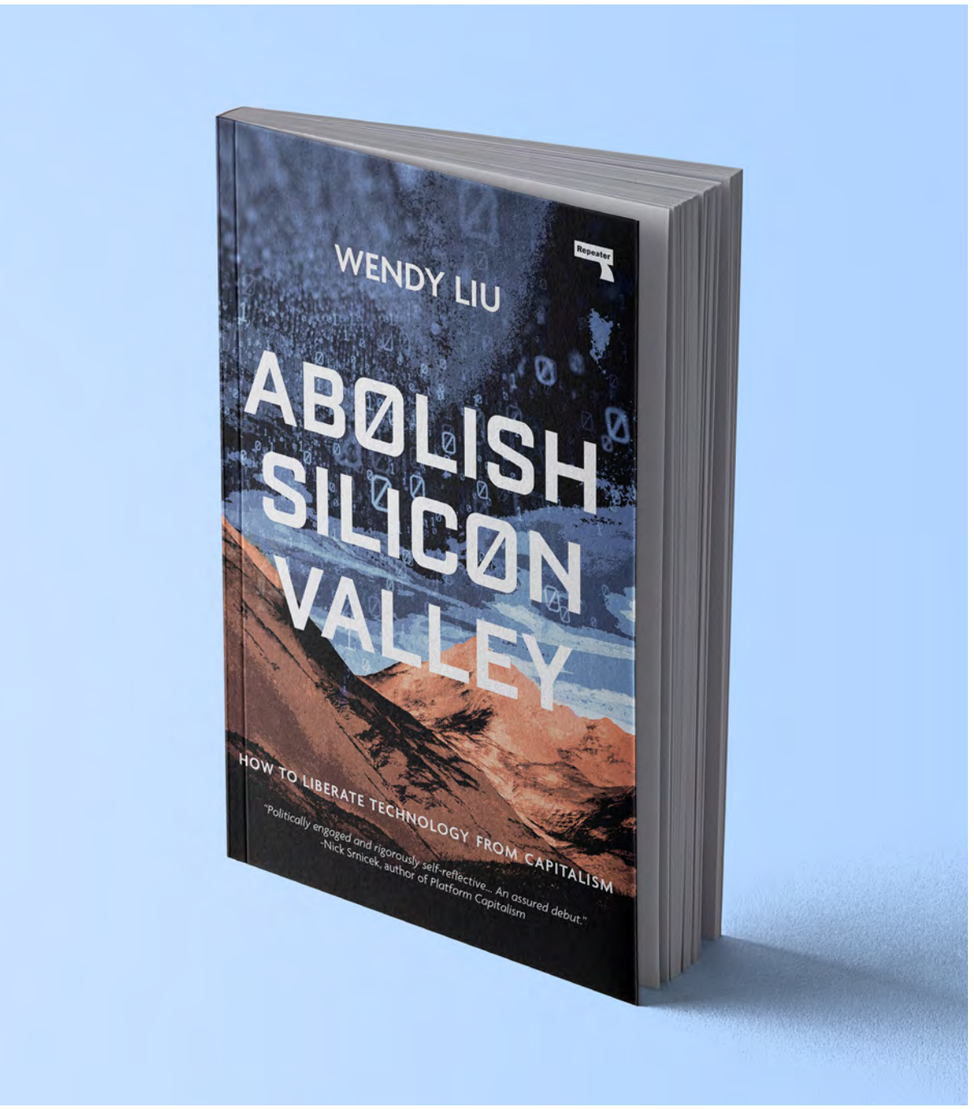
Finesse has created an AI fashion brain that uses machine learning to search the web for what's trending and bring it directly to its customers

‘The world wide web itself is entering its Saturn return, a period traditionally viewed as a difficult but pivotal coming of age passage’

Emily Segal, co-founder of think tank Nemesis

72% of US adults say social media companies have too much power in politics

Source: Pew Research Center



Wendy Liu's book questions the structural and economic factors that gave rise to Silicon Valley



Virtual Protest

Julieta Gil's digital archive depicts the Angel of Independence monument after a protest in Mexico City against systemic violence towards women. The digital artwork exists outside government censorship

Anti-monopolists

People are challenging the power of today's tech giants and waking up to the impacts of surveillance capitalism. Public concern has been sparked over the extent to which a handful of companies have colonised the internet.

In the US, 72% of adults say social media companies have too much power and influence in politics today (source: Pew Research Center). **Facebook** is now facing anti-trust lawsuits over its acquisitions of **Instagram** and **WhatsApp**, coinciding with arguments that **Amazon**, **Google** and **Apple** should also be reined in.

To curb the power of tech companies such as **Alibaba** and **Tencent**, China has drawn up its first anti-trust rules. In India, Amazon founder Jeff Bezos – who is now stepping down as the company's CEO – faced mass protests from local retailers across 300 cities during his most recent visit to the country. Privacy concerns are also pushing people towards alternative networks. For example, a backlash against WhatsApp's latest privacy policy update drove millions of users towards competitors like **Signal** and **Telegram**.

Global Driver:
Dislocated World

Techlash: The scale, wealth and influence of tech is leading to growing scrutiny from society and regulators

Subculture Rising

Consumers are turning away from an accepted mainstream as the internet strengthens subcultures. This has been intensified as identity becomes something we collect, assemble and arrange in an age of New Bricolage Living.

Indeed, culture as we know it is increasingly caught between the poles of individualism and collectivism. 'Hyper-individualism and mass trends sit side by side within the very same person,' reads Dazed Media's report, The Era of Monomass. 'We are fragmented and united all at the same time.'

Digital campfires have fanned the flames of online subcultures – from **TikTok** cults and niche meme groups to Aesthetics Wiki. In a European study, 86% of Gen Z said that connected technology enables them to connect with online communities through shared passions (source: Deutsche Telekom).

Society is now confronting the homogeneous nature of the internet and the monoculture it has created. The space between the clearnet and what technology writer Caroline Busta calls 'the dark forest' region of the web is becoming increasingly important. 'To be truly counter-cultural at a time of tech hegemony, one has to, above all, betray the platform,' she says.

Global Drivers:
Evolving Demographics

Fluid Identities: Identity is evolving to reflect a more fluid mindset, widening existing demographic divides

Dislocated World

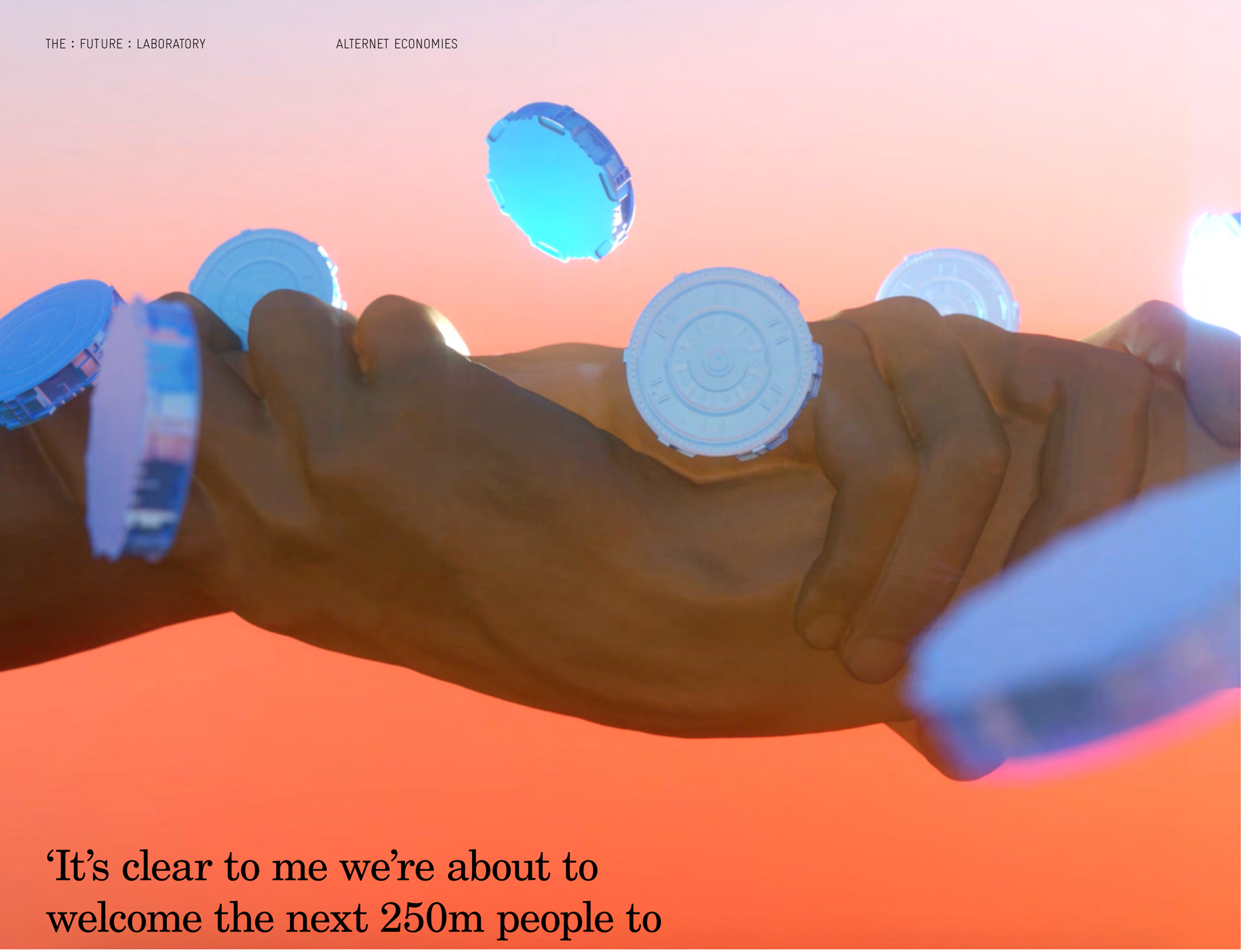
Polarisation: Heightened partisanship is being compounded by social media and shifting demographic patterns





Left: #AySauce by ASOS, UK; Right: Not Fair campaign by Thought Over Design, Mumbai

> 'To be truly counter-cultural at a time of tech hegemony, one has to, above all, betray the platform'
>
> *Caroline Busta, technology writer*



‘It’s clear to me we’re about to welcome the next 250m people to the crypto-space, including large institutions and wealthy individuals’

Ian Rogers, chief experience officer, Ledger

Leeza Pritychenko for The Future Laboratory

Cryptonomics

Financial empowerment is rising up the consumer agenda as economic instability gives way to a new sense of entrepreneurialism. As identified in Community Commerce, consumers are seeking alternative ways to access and exchange products and services online.

Central to the next phase in these shifts is the arrival of the Fourth Industrial Revolution, which is expected to create up to £2.7 trillion ($3.7 trillion, €3 trillion) in value by 2025, according to McKinsey & Co.

Third-generation web technology is set to transform the way we consume within cyberspace. Offering pathways to more equitable economies, cryptocurrencies and blockchain technology are poised to reach critical mass. This brings even greater promise to emerging markets, where access to financial services is more limited.

‘Analysts say there are only 50–100m people in the crypto-space today – it’s clear to me we’re about to welcome the next 250m people to the space, including large institutions and wealthy individuals,’ writes Ian Rogers, explaining his move from chief digital officer at luxury conglomerate **LVMH** to a senior role at cryptocurrency organisation **Ledger**.

Global Driver:
Accelerating Technologies

Industry 4.0: As people spend more time online, digital systems and infrastructure are transforming the way we consume and trade

Related Macrotrends

2014

The New Value Economy

Back in 2014, we charted the shift towards a more abstract notion of value beginning in the digital space, with concepts such as reputation, time and privacy being re-invented as new forms of currency.



Chanel show, Paris

2015

New Bricolage Living

Against the backdrop of third-stage globalisation, in 2015 we considered how technology was being used to create borderless and decentralised citizens.



Kenzo spring/summer 2015 campaign by Toiletpaper

2018

Morality Recoded

By 2018, the realisation that digital platforms can have an impact on real life prompted brands and consumers to re-evaluate the power of innovation and established the need for a moral code fit for a digital era.



ANIMA II by Nick Verstand

2019

Community Commerce

As Gen Z emerged as the most populous generation, these younger consumers began powering peer-to-peer networks, micro-commerce and decentralised retail online.



Community Commerce visuals by Pitch Studios for The Future Laboratory

Insight

From direct-to-creator culture to platform cooperatives, the internet economy's established value exchange is evolving and multiplying to become more equitable and diverse.

Post-social Creators

Amid the rise of post-social media, the direct-to-creator movement is establishing new structures for content creation and new commodities based on personal access. Reclaiming creativity and social capital, closed-community platforms where users can engage with their followers in an authentic way are growing rapidly.

This is evident in the success of **OnlyFans**, which reported a 75% increase in new users in March and April 2020 (source: The New York Times). By 2022, the influencer economy is expected to be a £10.8bn ($15bn, €12.3bn) industry globally (source: Business Insider). With influencers increasingly exploring direct selling and subscriptions, the pressure is on brands to keep up.

'In an economic and cultural environment that encourages an ethos of individualism and entrepreneurialism, selling intimacy makes sense,' says Kavita Ilona Nayar, a doctoral student whose research explores the intersection of intimacy, commerce and technology.

FanHouse lets creators monetise their following with exclusive content – without the negative brand association of OnlyFans. Column, on the other hand is an invitation-only network that lets users subscribe to different closed forums headed by leading figures in technology, business and academia.

Also highlighting a commerce model built on authentic self-expression, Basic.Space operates as a membership-based online marketplace. The platform's digital storefronts allow users to shop for items featured in photos and live-streams of creatives. Encouraging a direct dialogue between sellers, brands and customers, its private **Instagram** account is accessible only to members.



Lego Vidiyo by The Lego Group and Universal Music Group

What is Insight?

Insights explore the nascent consumer behaviours, attitudes and trend responses emerging today that will evolve or gain traction in the near future through to 2025. Insights help brands and businesses to understand and identify the opportunities presented by this trend.

By 2022, the influencer economy is expected to be a **£10.8bn ($15bn, €12.3bn)** industry globally

Source: Business Insider

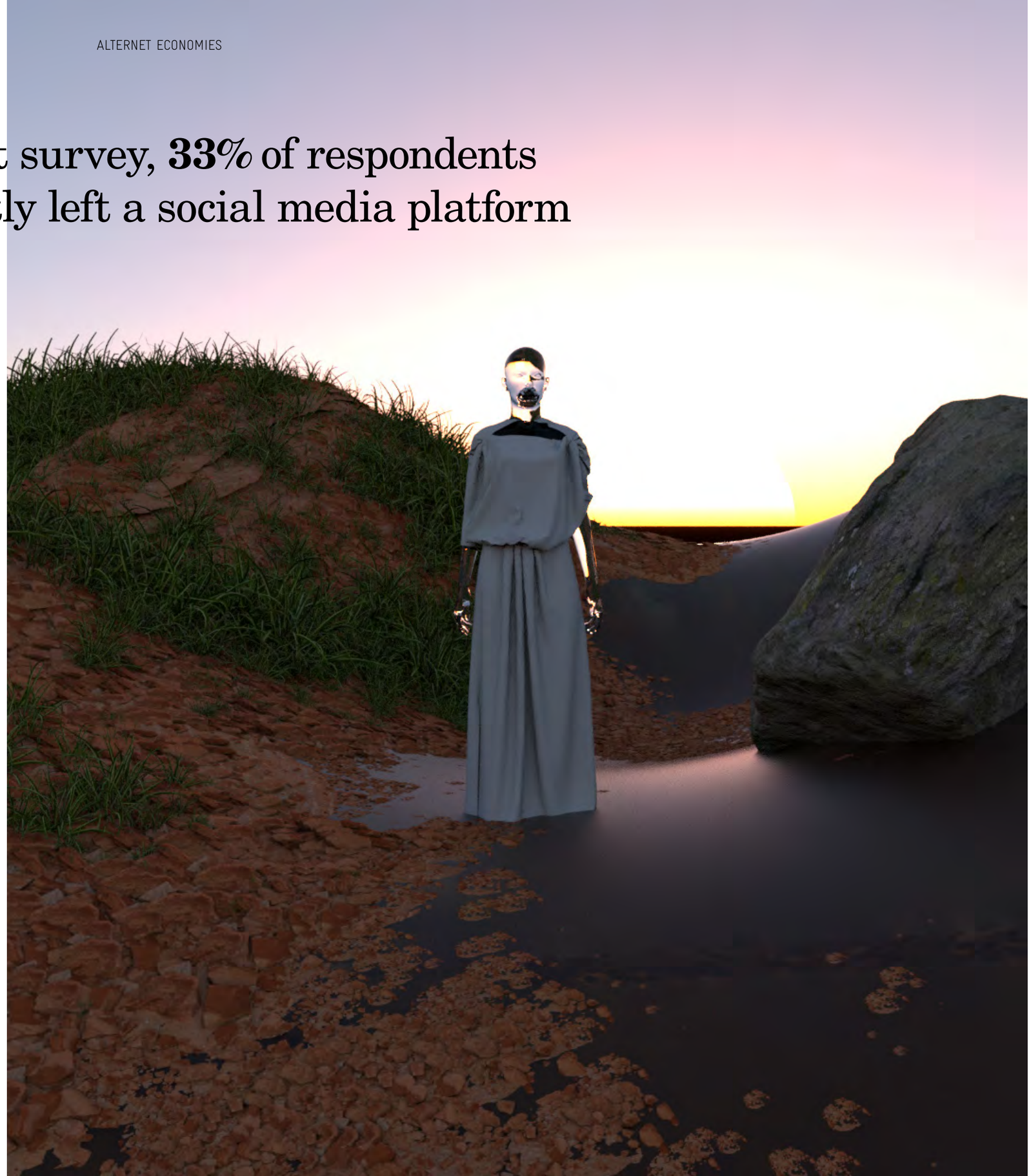
High-signal Community

Column is a new social network dedicated to fixing information incentives online



In a recent survey, **33%** of respondents had recently left a social media platform

Source: Co-matter



Data Body

Forest Walker by Jamie Seechurn, London. Seechurn's work provides a vision of a digital blockchain-connected world in virtual space

Cooperative Media

In a recent report, Co-matter found that 33% of respondents recently left a social media platform. As people increasingly shun mainstream platforms, more democratic social networks are empowering users and paying them for their data, content and engagement. These differentiate themselves based on their governance models.

'Community ownership and governance of technology platforms is a big part of the movement towards a more humane future,' says Tristan Harris, co-founder of the Center for Humane Technology.

With an eco-system powered by tokens, Voice is a blockchain-based platform that rewards users for posting quality content. Based on their participation, verified users obtain Voice tokens that they can eventually convert into fiat money. The service, which essentially functions as a decentralised version of **Facebook** or **Medium**, was launched to the public in July 2020.

Similarly, Twetch is an ad-free social network where users not only own their data and content, but also earn money as they garner likes and followers. The platform also uses bitcoin technology for peer-to-peer messaging and to build next-generation information systems.

For businesses looking to participate in this changing landscape, Exit to Community (E2C) is a collaborative working project that explores ways to help start-ups make the transition from investor-ownership to user-ownership.

Direct-to-avatar

Direct-to-avatar represents the next step for direct-to-consumer as gaming, entertainment and social media converge within the burgeoning metaverse. As demand for avatars, skins and collectible content grows, so too will opportunities for commerce. The video game industry alone is expected to exceed £144bn ($200bn, €164bn) by 2023, with in-game micro-transactions driving this growth (source: Juniper Research).

‘Many new consumer brands emerged over the past decade,’ says Matthew Ball, a start-up adviser who has written about the metaverse. ‘If you want to stand out or build a new brand today, virtual spaces seem like the new frontier.’

Rockstar Games’ Grand Theft Auto title recently featured its first fashion brand, Polish label Misbhv. Within the game, players are able to purchase Misbhv pieces at five clothing stores in the fictional city of Los Santos. Berlin-based skate label **Civilist** also appears as part of a new update.

Similarly, **Niantic’s** augmented reality-based mobile game Pokémon GO launched items from the **Gucci** and **The North Face** collaboration as limited-edition digital designs for players’ avatars in January 2021.

As direct-to-avatar establishes a new paradigm, brands are building their own interactive gaming environments. Launched in late 2020, ComplexLand was a free, open-world fashion and music festival that was designed as a game. The immersive five-day virtual event allowed users to create an avatar and shop for items from different brands, order food, connect with others via a chat feature and watch music performances.



‘If you want to stand out or build a new brand today, virtual spaces seem like the new frontier’

Matthew Ball, start-up adviser





Clockwise from top left: Poéemon GO campaign by The North Face and Gucci; ComplexLand by Complex; MISBHV X GTA

Fyooz

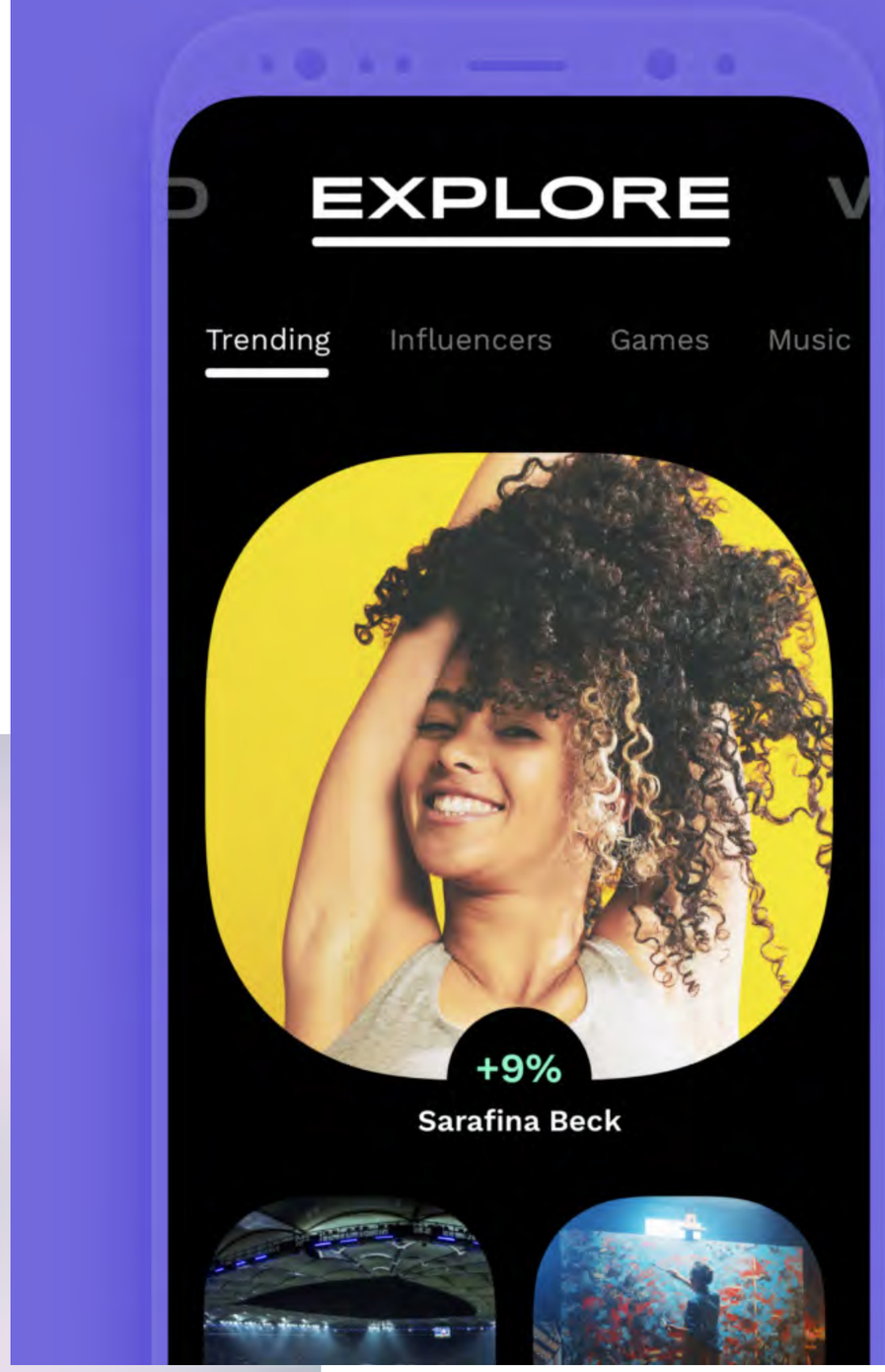
Fyooz brings culture and crypto together to innovate the live digital entertainment industry.

Spotify is reported to pay only **52%** of its revenue in royalties

Source: Opus



$RAC by Zora, US



Tokenised Tunes

Tokenisation is transforming the music industry, allowing both artists and fans to recapture their value. Turning fandom into its own form of currency, these shifts are breaking down the monopoly of streaming platforms such as **Spotify**, which is reported to pay only 52% of its revenue in royalties (source: Opus).

Audius, an artist-owned streaming platform, is leading this sea change. The company's mission is 'to create a fully decentralised community of artists, developers and listeners'. In October 2020, the platform launched its native $AUDIO token, which works to align artists and listeners by allowing them to unlock varying levels of access and share in the governance of the platform.

'Artists have historically been deprived of capturing their value by a sea of intermediaries like corporations and platforms that have a monopoly on creative ownership,' says musician and record producer André Anjos – better known by his stage name RAC – who also recently launched his own community token $RAC to reward his most loyal fans.

Similarly inviting audiences to participate in the success of the artists they love, Fyooz is a fully compliant, Swiss-regulated platform where anyone can issue their own cryptocurrency via the process of tokenisation on the blockchain.

Key Sectors:
Media & Technology

The Alternet Economies will create a fluctuating landscape for media. Not only is creative ownership being transformed, but platforms and virtual worlds are being built on alternative models of financial exchange.

Internet-owned Brands

An emerging class of community-run brands are turning consumers into creators – and inviting some to share in the profits. These disruptors adapt the existing concept of a decentralised autonomous organisation (DAO) and apply it to the retail and fashion categories.

Digital-first fashion house Finesse uses data, AI and community feedback to predict trends and produce virtually prototyped designs that users vote on. The company, which recently raised £3.2m ($4.5m, €3.7m) in funding, approaches its customers as peers.

Taking this one step further, Saint Fame describes itself as 'the world's first internet-owned fashion house'. In 2020, its creators came out of stealth with the launch of Zora, an online marketplace where all brands and creators can mimic Saint Fame's viral strategy.

Another example is MetaFactory, a marketplace for digi-physical apparel that takes a crowdsourced approach to creating new brand economies, where designers and their communities share incentives and collective brand management. The MetaFactory community can suggest and vote on product designs using the platform's own currency.

'Traditionally, a brand creates products, then markets them to consumers who buy the products, and the value flow is very linear,' explains co-founder Hammad Jutt. 'Ethereum and blockchain allow us to flip that on its head.'

'Beyond just the passive buyer or the active designer, there's a community of people who are deciding what products make it to the marketplace'

Drew Harding, co-founder, MetaFactory



Key Sectors:
Retail & Fashion

As online consumption accelerates, the rise of decentralised brands and the direct-to-avatar economy means product types must be created to be accessed, consumed and exchanged digitally.

Finesse and ASTRSK



Retail Metaverse
Virtual World by Cryptovoxels is a user-owned virtual world powered by the Ethereum blockchain

Day-to-day DeFi

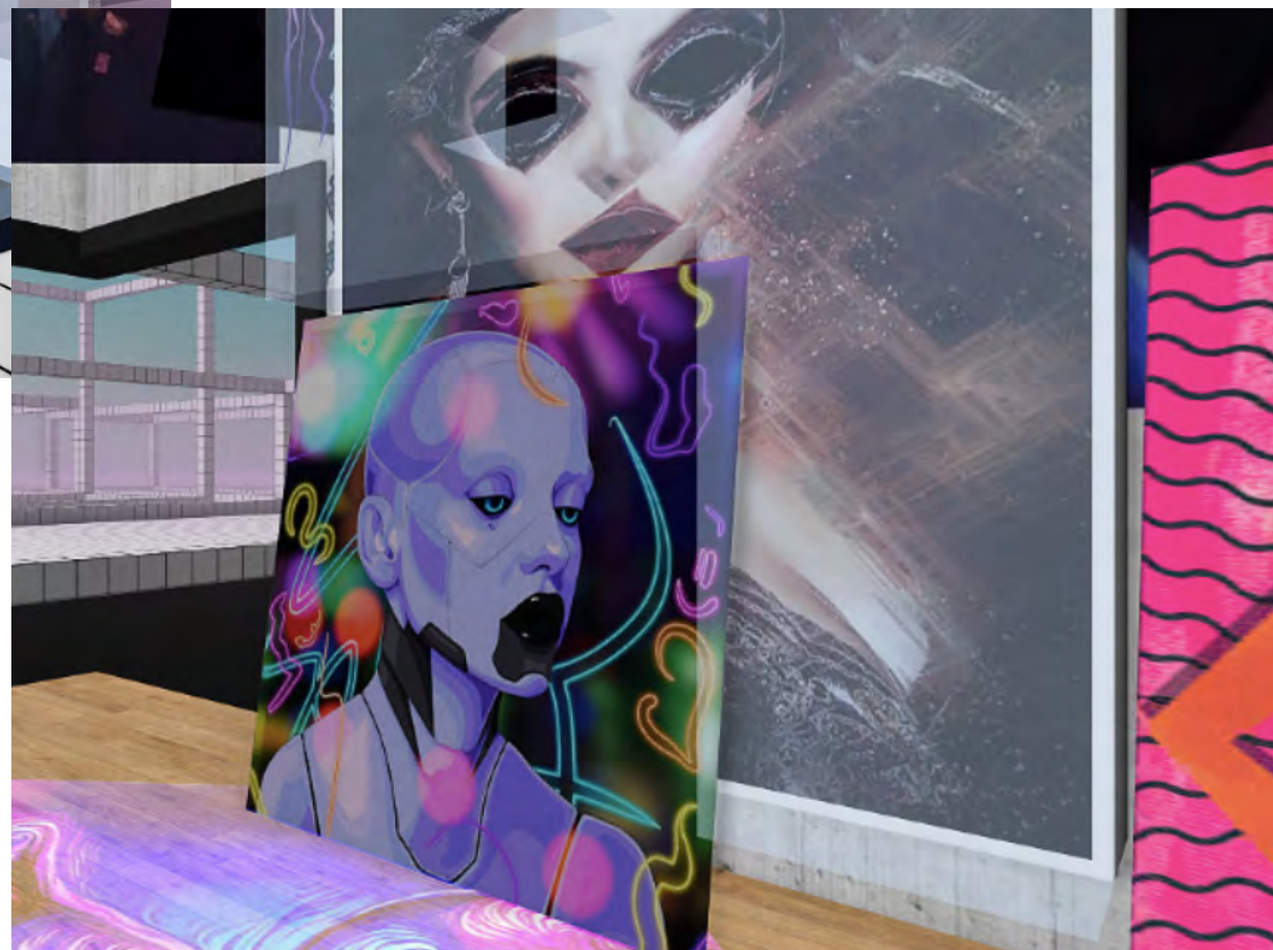
Cryptocurrencies are going mainstream and laying the groundwork for a mass move towards decentralised finance (DeFi). As the £725.4bn ($1 trillion, €828.4bn) global cryptocurrency market cements a new economic foundation, financial services are legitimising digital assets.

'The goal of DeFi is to reconstruct the banking system for the whole world in this open, permission-less way,' Alex Pack, founding partner at Dragonfly Capital, a £72m ($100m, €82m) cryptofund, tells Forbes.

'The shift to digital forms of currencies is inevitable, bringing with it clear advantages in terms of financial inclusion and access,' says Dan Schulman, CEO of PayPal. In October, the payments provider announced that its customers are now able to buy and sell bitcoin and other virtual currencies using their **PayPal** accounts.

Elsewhere, Anchorage Digital Bank made history in early 2021 when it became the first federally chartered digital asset bank. Its national bank charter gives the crypto-institution the same regulatory footing as other national banks in the US.

Marking an important step towards mass adoption, the world's largest crypto-exchange, **Binance**, has also joined the fray with a debit card that makes cryptocurrencies more usable in everyday life. The Binance Card, which converts cryptoholdings into fiat currency at the time of transaction, can be used at over 60m merchants worldwide.



'The goal of DeFi is to reconstruct the banking system for the whole world in this open, permission-less way'

Alex Pack, founding partner, Dragonfly Capital

Foresight

In a future less defined by incumbent platforms, technologically empowered consumers will trade new assets, currencies and collectibles as they move between virtual worlds.

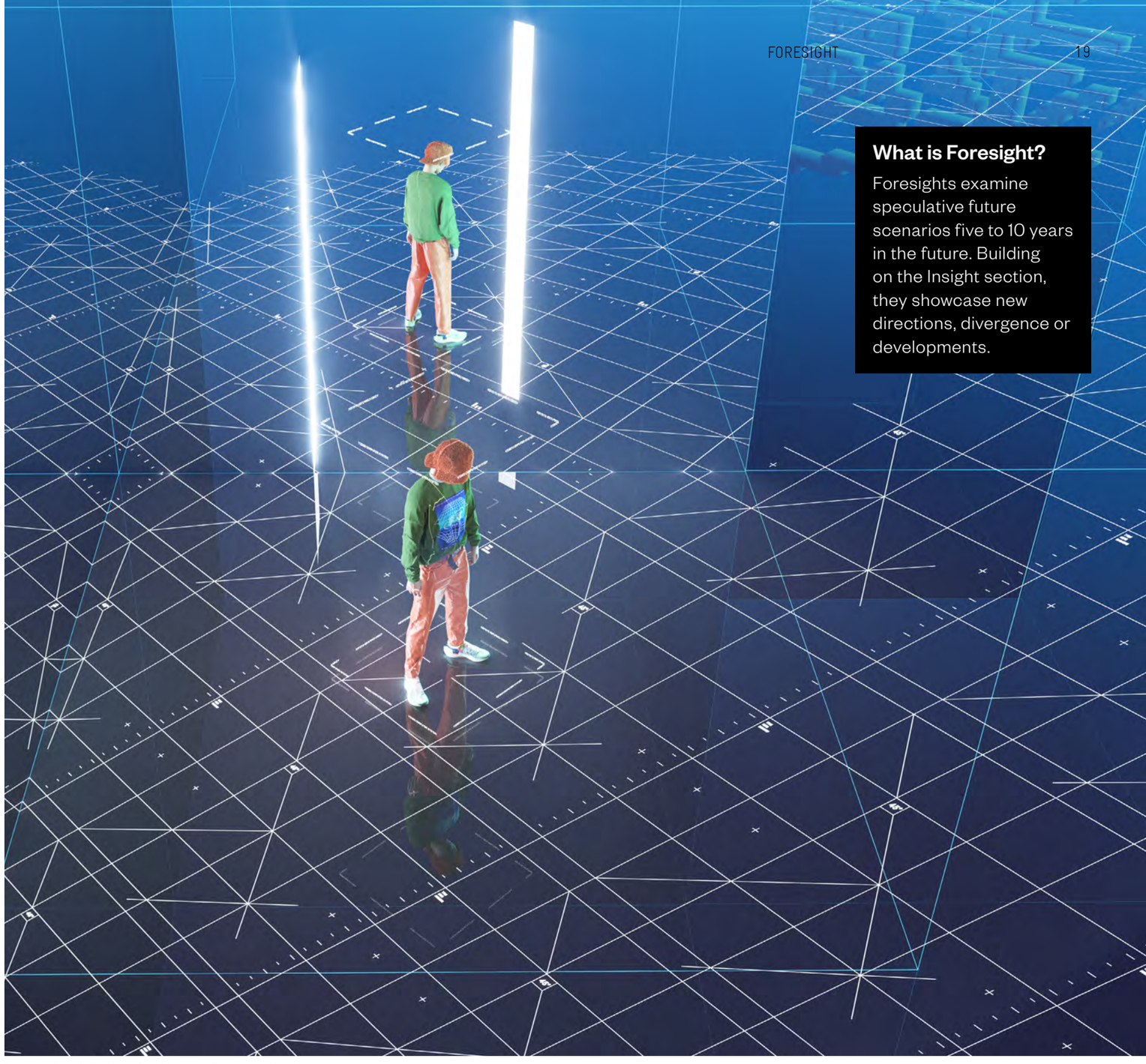
Personal IPOs

In the years ahead, the rise of user-generated capital will bridge the gap between the creator economy and decentralised finance.

As the use of social and community tokens grows, consumers will increasingly utilise blockchains to create their own currencies and other stores of value. Those who are successful may even launch personal brand IPOs. Paving the way for this, bitcoin alone is expected to achieve user adoption of 20–50% by 2030 (source: Forbes).

'Personal tokens, or 'social finance', are paving a new path for how creators establish and incentivise groups of like-minded individuals,' says Cooper Turley, founder of the **Social Token Agency**. The agency, which combines artist management and decentralised finance, is the first for personal token creators.

This future will be further democratised by nascent social token incubators such as Seed/Club, which helps 'design, launch and grow social tokens so anyone on the internet can realise their full potential'. As a result, brands will have to consider how they participate in a future of consumption increasingly defined by forms of social finance, which could be used as a form of payment.



What is Foresight?

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

Respawning Li Ning Into God Mode by Traum Inc, London

By 2030, bitcoin is expected to achieve user adoption of **20–50%**

Source: Forbes



Ethel's Club by Somewhere Good

Community Coders

Beyond 2025, young tech enthusiasts will take a more community-centred and altruistic approach to the digital products and platforms they create. As the next generation of Digital Architects, these technologically fluent consumers will construct their own virtual spaces and personal storefronts that will compete with legacy players.

'I'm hopeful for the new generation who have grown up with the tech industry as a sort of villain,' says Wendy Liu, author of Abolish Silicon Valley. 'Young people now understand that radical action is needed to change institutions.'

There are already hints of this among Generation Z in Europe, with 83% of them believing that connected technology is key to building a better future (source: Deutsche Telekom). Describing itself as a 'community of young builders', Gen Z Mafia, for example, creates tech-positive products that challenge the Silicon Valley establishment.

Highlighting the nascent opportunity for these future consumer-created hubs, Somewhere Good is a social media platform and one-stop-shop for people of colour that blends community and commerce.

Looking further ahead, Generation Alpha will be instrumental in driving a disruptive virtual economy built around micro-communities. Two thirds of these young consumers already say that they like creating new worlds digitally, and more than a third enjoy computer coding (source: Beano Studios).

'With the right developments, the digital fashion market might become bigger than the real fashion market'

Marjorie Hernandez de Vogelsteller, co-founder, The Dematerialised



Digital shoes by Buffalo and The Fabricant

Key Sectors:
Youth

The future of Alternet Economies will be driven by today's youth – for whom the online realm is a pivotal space to socialise and construct their identities, as well as work towards financial independence.

Non-fungible Fabrication

By 2030, a successful economy based on digital assets will flourish. As digitisation drives the decline of material goods, consumers will embrace a post-material lifestyle that favours digital experiences and peer-to-peer sharing.

Blurring the line between physical and virtual, non-fungible tokens (NFTs) will continue to move into mainstream commerce and redefine the market for virtual collectibles. Already, **Nike** has patented NFT-based footwear. The patent describes a system for minting, exchanging and intermingling cryptographic digital assets in the form of digital shoes, which can each be linked to a real-world physical shoe or cross-bred with other digital shoes.

We can expect to see many physical products accompanied by cryptographically secured digital assets – and in some cases replaced altogether. The Dematerialised, a marketplace for digital garments, is banking on this.

'One of the most important elements of a new economy or asset class is how the product is purchased or consumed – and where the demand is increasing,' says co-founder Marjorie Hernandez de Vogelsteller. 'With the right developments, the digital fashion market might become bigger than the real fashion market.'



User Customisation

For Li Ning's Fall/Winter 2020 collection, TRAUM Inc. created avatars, game environments, user interfaces, customisation screens and UIs

Data Commerce 3.0

As we move into the open metaverse, a new data commerce market will follow. The metaverse's complex network of browsers, indexes and virtual destinations will create new data collection types – especially in the fields of marketing, communications and advertising. As a result, consumers will increasingly rely on tools to control, broker and profit from their personal data.

'In a new world where we extend reality and defy reality, a world where data fuels the progress we make in the metaverse, we have to hold big tech accountable for transparency and ethical use of data being collected,' says Kavya Pearlman, founder and CEO of XR Safety Initiative, which promotes privacy, security and ethics in immersive environments.

With the number of gamers worldwide expected to exceed 3bn by 2023, in the years that follow, technologies that allow people to manage their digital identities and assets across different gaming eco-systems will grow (source: Newzoo).

Laying the groundwork for this future, Crucible envisages a world where the player becomes the platform. Its ultimate aim is to 'ensure user sovereignty in the new digital worlds and economies ahead'. Acting as a passport to the metaverse, the company is developing a single, universal interface that connects to Web3 technologies like self-sovereign identity, blockchain and cryptocurrencies.

'In a new world where data fuels the progress we make in the metaverse, we have to hold big tech accountable for the ethical use of data being collected'

Kavya Pearlman, founder, XR Safety Initiative

Leeza Pritychenko for The Future Laboratory

Strategic Implications

Alternet Economies represents a cultural and economic paradigm shift towards a people-centred internet, powered and owned by communities and creators.



Ultimate Night In collection by Domino's Pizza

Strategic Actions

In the next decade, these seemingly fringe ideas could play a critical role in driving a more empowering, evolving and equitable future with the tools to thrive.

Tap into digi-physical culture

Brand experiences are becoming more participatory, empowering discovery and socialisation. Gaming has already gained legitimacy as a cultural community, so consider how the next generation of storefronts built by community coders will redefine the market for virtual goods.



Dell XPS Youniverse by MPC and VMLY&R

Open-source your brand through cooperation

The rise of the creator economy means people no longer want to engage in passive consumption. Think about how to open-source to give your community the tools to express their own creativity and help them turn their passions into an economic force.



Bathing in the Cloud by Lucas de Ruiter

Build belonging through deep ownership

A new financial operating system for the creator economy is powering user-generated capital and social money. Consider the deep sense of connection that can be expressed by holding the social money of a digital community and how it will empower new kinds of loyalty.



Misbhv and Grand Theft Auto, Poland

Thought-starters

Live-streaming, tokenisation and neo-patronage are changing how we think about and interact with the creators we love, offering new ways to convert cultural value into capital gain.

Be in symbiosis with your fans

The new behaviours and expectations that these creators are shaping via their fans will soon have huge ramifications as audiences start to ask: Why can't I get this from you?



MetaFactory, Australia

Rethink ownership and governance

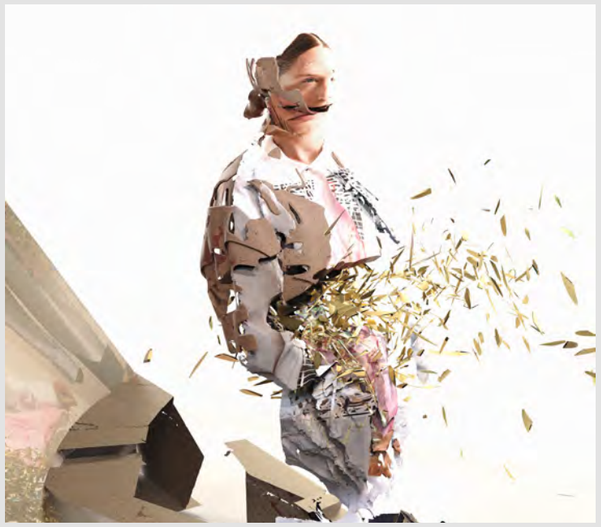
As people become aware of the financial and ethical implications of their digital behaviours, platforms with anti-monopoly practices could be totally wiped out. Which platforms do you want to align with?



Saint Fame

Have an open-source mindset

As creators build their own brands from the ground up, legacy business could become a mere spectator. As a brand, are you investing in a future-fit community strategy to prevent this?



FAT magazine commissioned by Norbert Schoerner and Hussein Chalayan with 3D by Sam Rolfes

MACROTREND

Equilibrium Cities

With the pandemic exposing urban inequalities, citizens' priorities are changing – they are demanding a more receptive built environment that ensures equitable urban living and will allow future generations, nature and businesses to thrive.



Planet City by Liam Young

Covid-19 has sapped the energy of urban life. Revealing stark inequalities between the lived experience of global citizens, the pandemic is exposing issues of urban safety, public services, access to green spaces and the need for immediate change.

The ability of our metropolitan areas to support us during times of crisis is being questioned as global urban centres are hollowed out – dubbed the 'Polo-mint effect' by the Royal Institution of Chartered Surveyors (RICS) – with many people remaining reticent about re-entering central districts following the pandemic.

With 68% of the planet's citizens predicted to live in cities by 2050, this demands new approaches to how our streets and spaces are used, alongside a reframing of who and what the priorities are for our future cities (source: UN).

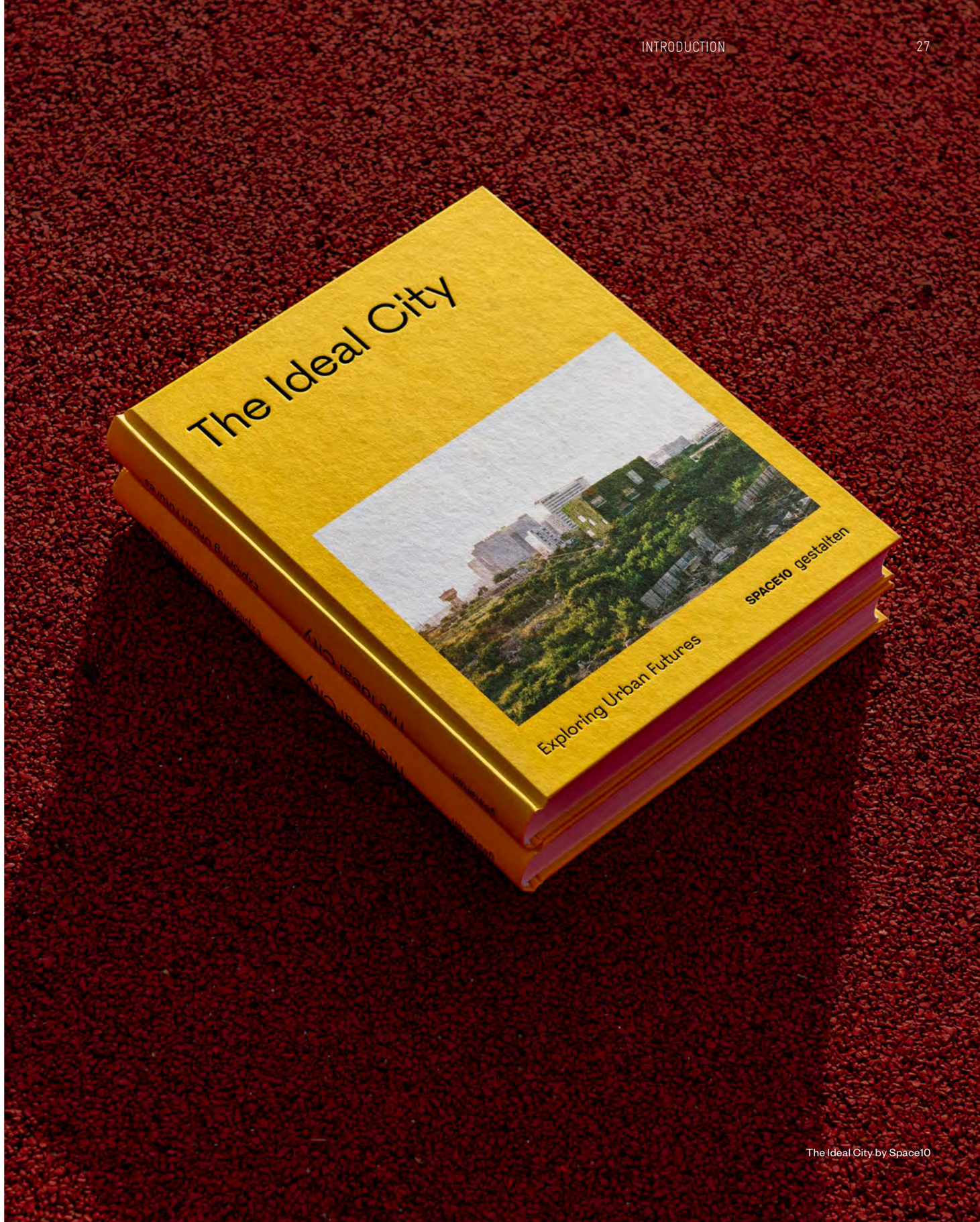
Drawing on the community-first visions of city life championed by Millennials and Generation X over the past decade, a better-balanced urban existence is fast becoming a reality. This shift is already being felt across cityscapes as varied as London, Singapore, Chongqing and Barcelona, propelled by the rise of hyper-local food-growing, the prioritisation of pedestrians and cyclists, and neighbourhoods that advocate community and independent businesses.

As we move through the 2020s, the priorities of the city will change further. We can expect more blended developments that turn office blocks and industrial spaces into destinations of culture, creativity and community, while citizens' mental and physical wellbeing will dictate the design of new building projects. As urban planner and geographer Dr Angelos Varvarousis says: 'The pandemic has made it clear how much we need social relations, how much we need other ways of feeling good beyond consumerism and consumption.'

In turn, the flow of the city will evolve as infrastructure, logistics and energy supplies tune in to local needs, challenging global firms to downscale, decentralise and align themselves with varying communities' values.

What does this mean for the future? By 2030, the world's Equilibrium Cities will be built on a foundation of nature, but they will evolve through intersectional architecture, new economic models and responsive healthcare – some will even establish new populations in the virtual realm.

'Our future cities will be proactively steered by citizens who will proudly seek to uphold wellbeing, access and inclusivity – metrics they will no longer be willing to compromise. And why should they?' says Martin Raymond, co-founder of The Future Laboratory.



The Ideal City by Space10

Drivers

The Big Remote

A combination of the fourth industrial revolution and global pandemic has powered the big remote, with global citizens embracing online learning and working, healthcare and retail.

In turn, daily routines, commutes and use of city infrastructure have dwindled in some regions. In the UK's first lockdown, national rail services carried just 4% of their usual passenger numbers, while in April 2020, New York's MTA reported a 90% decrease in subway and bus ridership (sources: Department for Transport, Citizens Budget Commission).

With curtailed footfall in once-bustling city centres, stores, theatres and music venues have shut, and some global cities are enduring a slow recovery. A survey by Menino of US mayors found that 90% expect remote working to continue in the future, which they say 'could make downtowns less appealing and vibrant'.

Even Japan's long-ingrained culture of overwork and presenteeism is shifting. News agency Jiji Press reports that, inter-Covid, 68% of Japanese citizens have no stress from commuting and more than 50% say they can now live and work from areas with lower housing costs.

Global Drivers:
Accelerating Technologies

Deeper Online Immersion: People are spending more time socialising and shopping in digital platforms

5G Connectivity: Opening up new possibilities in healthcare, remote working, design and communications



In Japan, **50%** of citizens say they can now live and work from areas with lower housing costs

Source: Jiji Press

Circo Aéreo by KOGAA explores the underused potential of empty urban spaces with a public installation

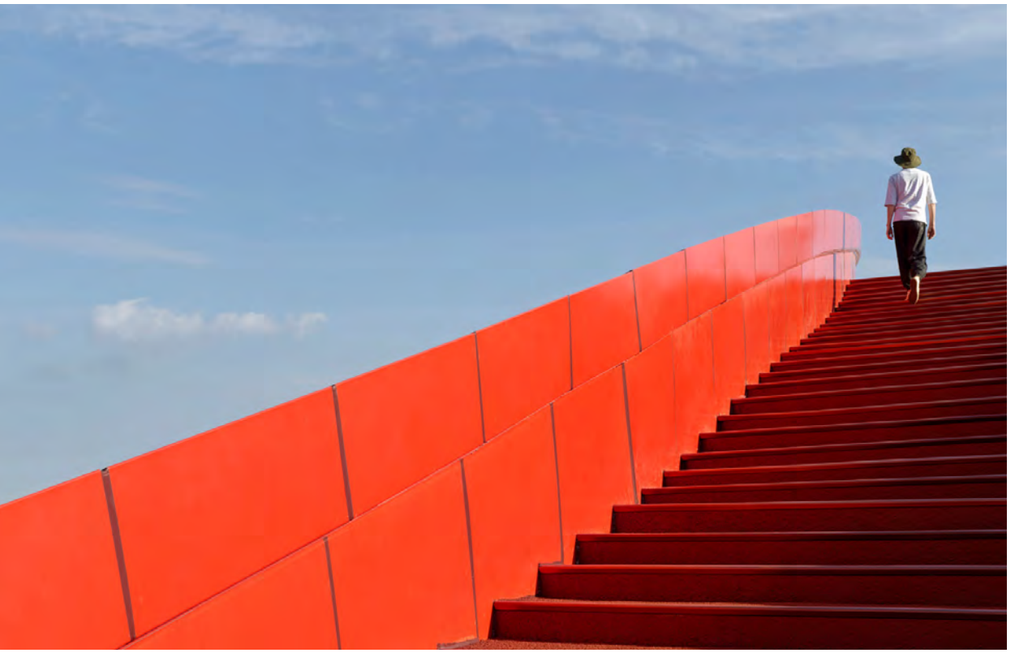
The pillars of an Equilibrium City:

Nature-centric
Built with utmost respect for nature

Life-preserving
Safer, healthier, and sanitary for all

Intersectional
Developed with all citizens' needs in mind

Virtually accessible
Benefits residents even in the digital realm





Degrowth Rising

While inter-Covid sales have soared for convenience-focused firms like **Amazon** and **Alibaba**, a degrowth mindset is emerging among some people as a rejection of lifestyles centred on the relentless consumption of goods and resources, and its impacts on society, the environment and wellbeing.

This is playing out through changes to lifestyles and purchasing. Said to reflect a 'profound discomfort about the state of the economy', about 40% of US consumers have reduced spending throughout the pandemic, and many expect to continue to cut back on non-essentials (source: McKinsey & Co). Elsewhere, a study by Utopia found that 60% of German Generation Z would limit their consumption to do something about climate change.

Such attitudes are even scaling to city level. British economist Kate Raworth's model of doughnut economics was recently adapted for Dutch capital Amsterdam to help citizens emerge more resilient – and equitable – during the inter-Covid period.

'We need to address the far-greater impacts that climate change – and future disruptive events – will have on our cities, and on all of us'

Brooks Rainwater, senior executive and director, Center for City Solutions



Thoughtful Terrains

The Loop of Wisdom by Powerhouse Company is a rooftop trail that elevates public walking and jogging routes to promote health and wellness, while reflecting the natural undulation of the local Chengdu landscape

Global Drivers:
Dislocated World

Eco-anxiety: The climate crisis is adding a layer of anxiety to how people feel about the future

Degrowth: Governments want to 'build back better,' restarting capitalism in a more environmentally positive way

‘[The pandemic] is enabling us to shift away from the idea of growth to ‘thriving’, which means our wellbeing lies in the balance’

Kate Raworth, British economist





Left: The Future’s Not Cancelled by BBC News explores how the pandemic has affected young people’s futures across the UK’s urban and suburban area; Above: Youth in Power by Ryan McGinley depicts the rise of youth activism in America against injustices such as gun control

Abounding Anxieties

The coronavirus crisis has unearthed pervasive social, political and environmental inequalities and divisions on a global scale.

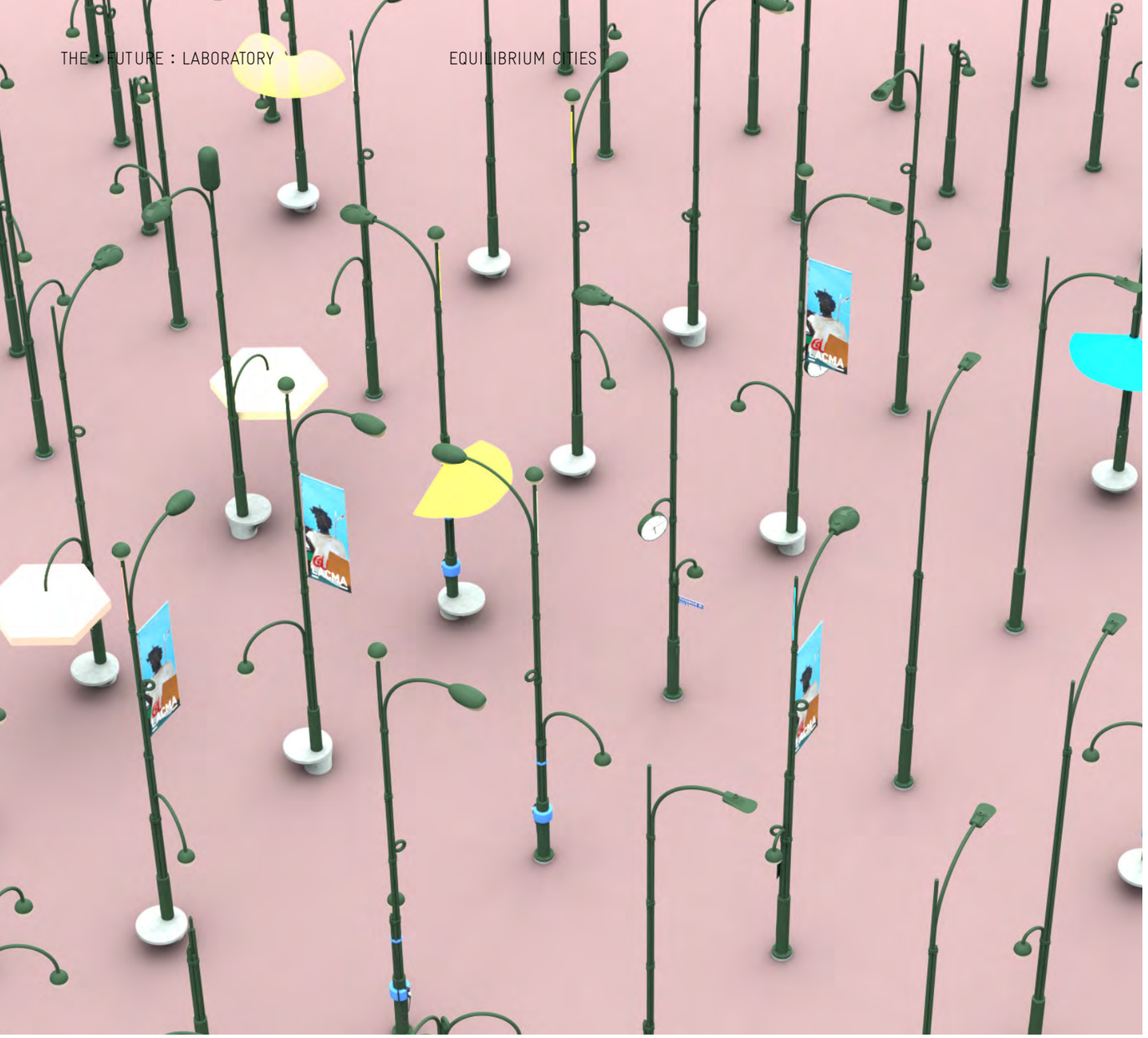
As a result, anxieties are being felt across regions and generations. About 34% of Americans were prescribed anti-anxiety medicines between February and March 2020, while 41% of Britons aged 18–25 believe their future goals now seem ‘impossible to achieve’, rising to 50% from poorer backgrounds (source: Prince’s Trust). Low- and middle-income workers, in particular, have suffered; on average, informal workers worldwide lost up to 60% of their earnings in the early months of the pandemic. In Africa and Latin America this figure was nearly 80% (source: UN).

In our towns and cities, those with the funds or the ability to do so have sought safety from the pandemic by fleeing to rural regions. Others who are obligated or want to remain in cities are facing what the UN describes as ‘deep-rooted inequalities’ [which] can lead to the pandemic having a disproportional impact on groups that were already in a situation of greater vulnerability.

Global Drivers:
Climate Change and Resource Scarcity

Long-term Anxieties: Stress, anxiety and depression levels have rocketed under Covid-19 restrictions

Demographic Polarisation: The pandemic has widened existing demographic and racial divisions



Local Allure

Neighbourhood stores and services have gained power and prominence as people divert their spending from homogeneous city centres and malls into the areas where they are spending more time.

Even as platforms like **Amazon** and **Tmall** grow, people are using independent local stores and services to connect with their community and see the positive impact of their spending locally. Some 79% of consumers plan to continue shopping in neighbourhood stores and 84% want to buy more locally sourced products in the longer term (source: Accenture).

This behaviour emphasises the stoicism of local supply chains amid global shipping delays and food shortages caused by the pandemic, and in Europe, Brexit.

As Fraser McKevitt, head of retail and consumer insight at Kantar, notes: 'Independent retailers [have] had a resurgence because they are fulfilling what we need. They're there, they're part of the community and they're easily accessible.'

Global Drivers:
Global versus Local

Domestic Pride: With tourism on hold, many countries are turning inwards to stimulate growth

Self-reliance: Regional and national isolationism is growing as cities and states look to prioritise self-reliance



Adaptive Design

Superbloom by Project Room is a multi-functional lighting system that conceptualises how smart localised design can improve people's experience of their neighbourhoods, while also adapting to future Los Angeles residents' needs

79% of consumers plan to continue shopping in neighbourhood stores

Source: Accenture

Key Sectors:
Retail & Hospitality

Degrowth mindsets and more considered spending are giving brands space to do more in cities, from hubs that allow locals to exchange items, share food and learn to districts dedicated to indie brands or local tradespeople

Hyper-local Logistics

The Klarna Future Shopping Lab in Sweden explores how to improve the e-commerce experience with the conceptual Modular Mailbox, a community-facing locker that allows users to collect online orders, rent items or even 3D-print products, all in their neighbourhood

Related Macrotrends

2010

Rurban Revolution

Back in 2010, we charted the city dwellers rejecting globalisation and corporations to live hyper-locally, growing their own food and embracing small-scale brands to make their urban lives feel as rural as possible.



Rooftop honey in Melbourne

2015

Whole-system Thinking

In 2015, we were thinking holistically about nature in terms that go beyond traditional environmentalism, instead moving towards a world in which human innovation and nature will be integrated and hybridised.

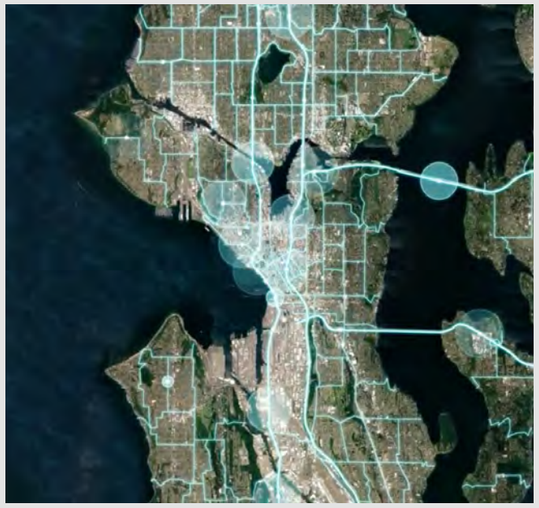


The New York Times T magazine

2017

Civic Brands

This sense of dislocation ushered us into the era of the Civic Brand, in which businesses stepped up where governments were failing. Amid the shift from top-down corporate hegemony to post-ownership, brands raced to provide tools for a decentralised economy.

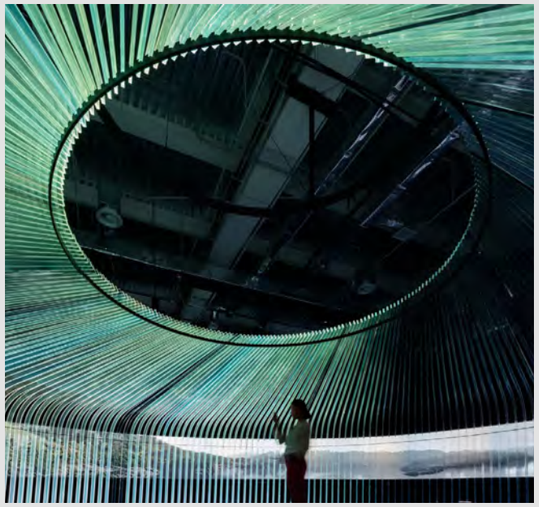


Uber Movement

2018

Post-purpose Brands

As our obsession with economic growth proves to be unsustainable, brands, institutions and consumers are seeking new metrics of progress, from societies' collective happiness to anti-fossil fuel architecture.



We Are Energy by Asif Khan, Astana

Insight

Driven by shifting citizen behaviour, in the decade ahead city living will become greener, more inclusive and responsive, shaping a future of equitable and progressive urban living.

Salubrious Streets

In the 2020s, streetscapes and infrastructure will be refashioned throughout cities to put walking and cycling before cars, providing greener, cleaner urban living.

In the UK, on average, 80% of all trips under one mile are made on foot, while cycling is soaring: some places in the UK have reported a 70% rise in people using bikes during the pandemic (sources: Department for Transport, Gov.uk). Post-Covid, Foster + Partners envisages turning some residential streets into public gardens, replacing on-street parking with food-growing, seats and shared pedestrian and cycle routes to connect communities and boost wellbeing, while maintaining vehicle access for those with accessibility needs.

In Barcelona, 500 superblocks covering 21 streets are set to transform its urban core, drastically reducing the number of vehicles – and air pollution – to create 3.9 hectares of green, safe spaces for children and older citizens. IS Global estimates that these superblocks could prevent nearly 700 premature deaths every year in the city.

Compact cities are also being designed to give residents everything they need on their doorstep. Housing a million residents, Saudi Arabia's The Line envisages a 100-mile belt of car-free, nature-imbued city modules whose residents can access essential stores and services within a five-minute walk from home.



The Better Days Are Coming, I Promise project by Yinka Ilori features billboards that deliver messages of hope to residents across London in response to Covid-19 and in support of the Chelsea and Westminster Hospital NHS Foundation Trust

‘Places will evolve naturally as people inhabit them, but it must be done with an authentic understanding and alignment with citizens and customers’

Tom Larsson, design director, Stanhope

For every dollar spent on nature restoration, at least **£6.40 ($9, €7.30)** of economic benefits can be expected

Source: Nature4Climate



Blended Cultural Realms

Giving citizens a reason to go back into cities, urban centres will transform into lively blended cultural realms (BCRs), uniting workspaces, industry, residential homes and cultural activities, converting uninspiring mono-cultural districts into 24/7 hives of activity.

'Reduced demand for office work in the central city [is] going to create a real opportunity for driving down rents and converting commercial areas to residential,' says urban theorist Richard Florida. 'Our cities will need artists and creatives to help rebuild.'

Indeed, this creativity will see BCRs remedy the hollowing out of our cities by placing community, socialising and recreation front and centre. In Chongqing, The Oval combines residential homes, public art, a skatepark and bowling alley, alongside independent stores.

Previously priced-out retail and hospitality brands will seize upon falling property rents and 'white-box' opportunities will revive tired districts, with reduced rates given to local industry and trades to promote a diversity of activities.

Looking to the future of BCRs, architects **dRMM** propose multi-purpose neighbourhoods where local industry is stacked upon one another, be it bakers, urban farms or start-ups, to free ground space for parks, climbing walls and leisure activities – attractive selling points for developers and citizens alike.

Lego, meanwhile, shows how future city planners can engage Generation Alpha, inviting children to design their vision of a future world using its bricks – injecting colour, humour and play into streetscapes.

Playful Infrastructure

The Lego Group's Rebuild the World campaign presents an optimistic future for cities such as London by re-imagining what urban environments might look like from the perspective of Generation Alpha

Natural Foundations

With the pandemic highlighting the value of green spaces, nature will be formalised as a public benefit in cities to bolster mental health, mitigate social inequalities and maintain equilibrium.

At a time when one in eight households in Britain has no access to a garden, the UK **National Health Service**'s green social prescribing programme links people with local, nature-based activities, such as walking and community gardening (source: Office for National Statistics (ONS)).

Streetscapes will also evolve to improve biodiversity and access to nature. Promoting tactical urbanism, **Jose Maria Mateo Torres'** Natural and Urban Devices (NUDes) can be retrofitted to suburban businesses and housing blocks, enhancing roofs, balconies and façades with miniature forests and communal vertical farms. In Paris, new city landmark the Green Line garden bridge will democratise access to nature and healthier living with public food-growing and education, adapting 'to the needs of new generations and to new constantly evolving uses'.

Nature will also undergo a rebranding, becoming more accessible and diversified to inspire all communities to reap the benefits of a natural cityscape. Initiatives like Flock Together, a birdwatching collective for people of colour, are helping young residents in London, Accra and Tokyo reclaim nature in their cities. 'We wanted to break away from that traditional image of middle-aged white people wearing khaki – we want to make it more accessible,' says co-founder Ollie Olanipekun.





Left: The North Face in collaboration with Gucci and Flock Together, a birdwatching collective for people of colour that aims to teach that nature is a universal resource; Above: Sunne by Marjan van Aubel, The Netherlands

Energising Architecture

As urban densities evolve, architecture will be reworked to produce green energy, food and community facilities for neighbourhoods, allowing them to function autonomously within their own boundaries.

With building and construction responsible for 39% of global carbon emissions, such architecture can help mitigate these and future operating emissions (source: World Green Building Council).

Taking a circular approach, London's Bunhill 2 Energy Centre is the world's first scheme to use waste heat from the city's underground network to provide lower-cost, green energy for 550 local homes, businesses, schools and leisure centres. Taking this further, **Morris + Company**'s Energy Hub in the city's Elephant & Castle district is a mixed-use building comprising a heat and power facility, nursery, community café and small park, turning energising architecture into a building with greater social purpose.

Entire neighbourhoods will decentralise energy production, turning homes from inanimate buildings into community utilities. **Guallart Architects'** Xiong'an ecological city takes a compact, mixed-use model to create self-sufficient areas that don't rely on nearby Beijing. 'With 5G technology integration, the home and the neighbourhood will become a service. The greenhouses on the roof produce food and energy, and there's a 3D printing lab where you can print items you might need, instead of ordering them online,' says Vicente Guallart.

Building and construction are responsible for **39%** of global carbon emissions

Source: World Green Building Council

Energising Architecture

The Self-sufficient City by Guallart Architects in Xiong'an is a mixed-use ecological city designed to rethink urban environments through circular practices, providing the community with all the services they need within a localised space

Intersectional Developments

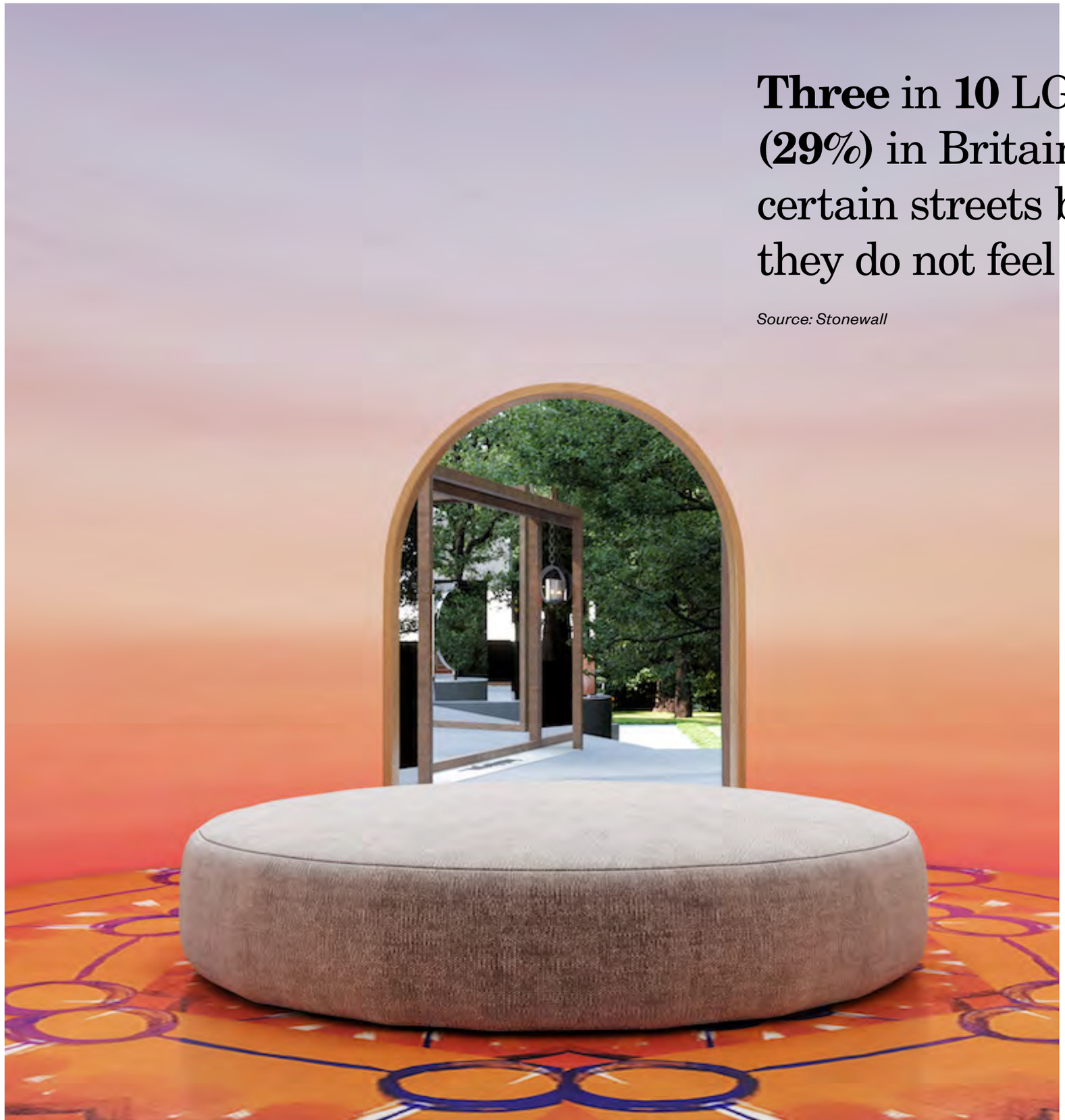
Alongside the six generations that will live in our cities, they are also home to constantly evolving urban diaspora – New York is home to more than 200 nationalities, Berlin has over 180, while in the UK, London has the largest proportion of non-UK born (35%) and non-British (21%) residents (sources: World Population Review, OECD, ONS).

Consequently, the voices and expectations of people of the global majority (PGM), as well as children and ageing residents, LGBT+ communities and people with disabilities, will define a safer, more supportive future built environment.

Pushing back against heteronormative architecture, more inclusive spaces will flourish for the LGBT+ community. Designer Reily Joel Calderón Rivera's conceptual public bathrooms for the University of Puerto Rico are a response to the institution's controversial history among marginalised groups, featuring nooks for exploring gender performativity and terraces for transgender people to sunbathe.

Focusing on culture, traditions and heritage, US-based non-profit organisation BlackSpace's toolkits for neighbourhood strategies help architects protect and celebrate hidden gems in predominantly Black neighbourhoods. 'We want to get together across disciplines to centre Blackness in public spaces… It's part of a different ethical model to operate under,' explains Emma Osore, co-founder of BlackSpace.

Demonstrating this is New York's Bronx Point. Built on local community feedback, this affordable housing scheme will feature recreation spaces, a farmers' market, riverside walks and the Universal Hip Hop Museum.



Three in **10** LGBT+ people **(29%)** in Britain avoid certain streets because they do not feel safe there

Source: Stonewall

Diversifying Domestic Settings

Obsidian By Black Artists + Designers Guild is a virtual interior design concept that presents a future vision of domestic settings for Black communities in 2025

‘Everyone will be able to opt in and create a digital [health] twin for themselves, whether a visitor or a Neomian’

Dr Maliha Hashmi, executive director of health and wellbeing, Neom





Key Sectors:
Health & Wellbeing

In the Equilibrium City of the future, citizens’ health and wellness will be a key metric of success. For brands, consider how you can advise developers on healthier urban surroundings or support local communities with products and know-how

Left: Xuhui Runway Park by Sasaki, Shanghai; Above: Parc de la Distance by Precht

Well-frastructure

Equitable cities will also prioritise health and wellbeing, weaving it into the infrastructure in sometimes unexpected ways. Retail parks and empty stores could soon provide healthcare services, taking cues from architect firm **NBBJ**’s drive-through clinic concept, in which patients with non-urgent conditions would be treated by medical staff without leaving their vehicles. ‘Drive-in healthcare facilities could be set up anywhere; [for example] under-utilised malls in cities where you have freeway access,’ says Ryan Hollinger, partner at NBBJ.

Nearer to home, mental wellbeing will inform the design of parks and recreation spaces. In Austria, **Precht** studio’s maze-like park guides visitors on a 20-minute solitary walk, allowing them to tune in to nature. Regeneration, too, will put wellbeing first. The Xuhui Runway Park, a former Shanghai airstrip, is now a public park, with gardens and birdwatching groves for reflection and respite from urban living.

Embedded technology, data-sharing and AI point to the future Well-frastructure. **Centric Lab**’s Urban Health Index is empowering communities to track environmental aggressors such as air and noise pollution, using this data to lobby for systemic change while making citizens’ health the foremost ROI for developers.

In Saudi Arabia’s automated region, Neom, future residents will join a wellbeing eco-system that creates a digital twin of their health and genetic profile, with AI offering real-time assessments to encourage proactive health management and prevention.

Foresight

By 2030, global cities' growth will mean urban issues are tackled through hyper-connectivity and networked cooperation, as communities and our experiences of the city continually evolve to ensure equitable living.

Civilian Safety Nets

By 2030, cities – not suburbs or rural towns – will be regarded as the healthiest, safest places in the event of health, climate or political turbulence.

Not only will greener urban infrastructure and fewer polluting vehicles give residents the space to be fitter, healthier and more resilient, a combination of proximity to health services and smart, data-driven architecture will mean communities can respond quickly and effectively when required.

Wall-being, an award-winning project in the recent Pandemic Architecture competition, demonstrates how architecture will play a pivotal role in safety-net cities. These infrared, heat-sensing and germ-tracking walls are designed to be built into everyday buildings and urban infrastructure. People standing near can monitor their body heat, while colour fluctuations alert passers-by to germ concentration or gatherings of people, so they can keep a safe distance.

As Shima Hamidi, assistant professor of American health at Johns Hopkins University, explains: 'People are more cautious about the threat [to health] in dense areas and more likely to have protective behaviours.'



What is Foresight?

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

Champs-Élysées by PCA-Stream will transform one of Paris's busiest tourist landmarks into an urban green space, and has ambitions to entice local residents back into the city centre

'Our design is rethinking living quality through information distribution and raising health awareness for the general public'

Jennifer Yip, co-designer, Wall-being

Radical Rewilding

Planet City by Liam Young speculates how a metropolis the size of an average US state could house the world's expected 10bn citizens in 2050 to allow the earth's surface to rewild naturally

The Klarna Future Shopping Lab, Sweden





City Super-networks

In future, the balance of power between major and regional cities will evolve, as second- and third-tier city super-networks gain power around the world.

Driven by a desire for greater autonomy from traditional centres of governance, they will emerge from the protectionist states of mind that fuelled Brexit and several other nations' ensuing desire for independence from global powers. Tackling local or regional challenges, these networks will independently foster equilibrium living into the 2030s. As Chris Murray, director of Core Cities UK, says: 'This is a global trend towards city agency; networks of cities taking the lead on solving the biggest challenges that we face as a species – climate change, social cohesion and economic inequality – which cannot be solved by nations alone.'

> 'It is cities that must deliver and do the heavy lifting – that have the local connections and convening powers to understand and manage complexity'
>
> *Chris Murray, director, Core Cities UK*



Clockwise from top right: Toyota Woven City by BIG; Currents for Currents by Dada Design imagines what coastal communities might look like in the future as they are transformed into completely self-sufficient networks in response to climate change demands

For businesses and brands, it will be a chance to problem-solve; 86% of the public expect CEOs to speak out about societal challenges such as local community and job automation (source: Edelman Trust Barometer 2021).

Powered by 6G connectivity, City Super-networks will establish platforms for trade, skills and creative collaboration between citizens and businesses, working together to transform local housing, green transport infrastructure and bolster job security in the fourth industrial revolution.

Nat-core Cities

Towns and cities will shift from core operations focused on business, retail and consumption to make nature and citizens' care and responsibility for it central to how they operate and develop.

Singapore is developing the smart sustainable town of Tengah – built on a former brickworks – that will feature 42,000 homes in districts that revolve around nature, from a neighbourhood with urban farms to a car-free city centre. An ecological 'corridor' through Tengah will provide a safe passage for wildlife, while residents can use an app to monitor their usage of natural resources like water.

'Changing our relationship with nature through everyday encounters does help people take environmental action,' says Perrine Hamel, assistant professor at Nanyang Technological University's Asian School of the Environment. 'And urban design is the first way to affect and change behaviour.'

Elsewhere, entire regional layouts and centres of governance will be reformatted so that nature, rather than urban centres, dominates. This will not only improve synergies between urban and rural communities, it will also demonstrate respect for biodiversity and promote sustainable development.

In Switzerland, the **Braillard Architects Foundation** is leading the Greater Geneva project – a 'transnational and polycentric metropolis, in the form of an urban constellation'. This proposal to create a circular 'bio-metropolis' will unite 11 towns, two lakes, and will centre on Mount Salève.



The Dutch Biotope by Marjan van Aubel Studio is a circular climate system dedicated to producing energy, water and food sustainably through modular solar panels and organic materials

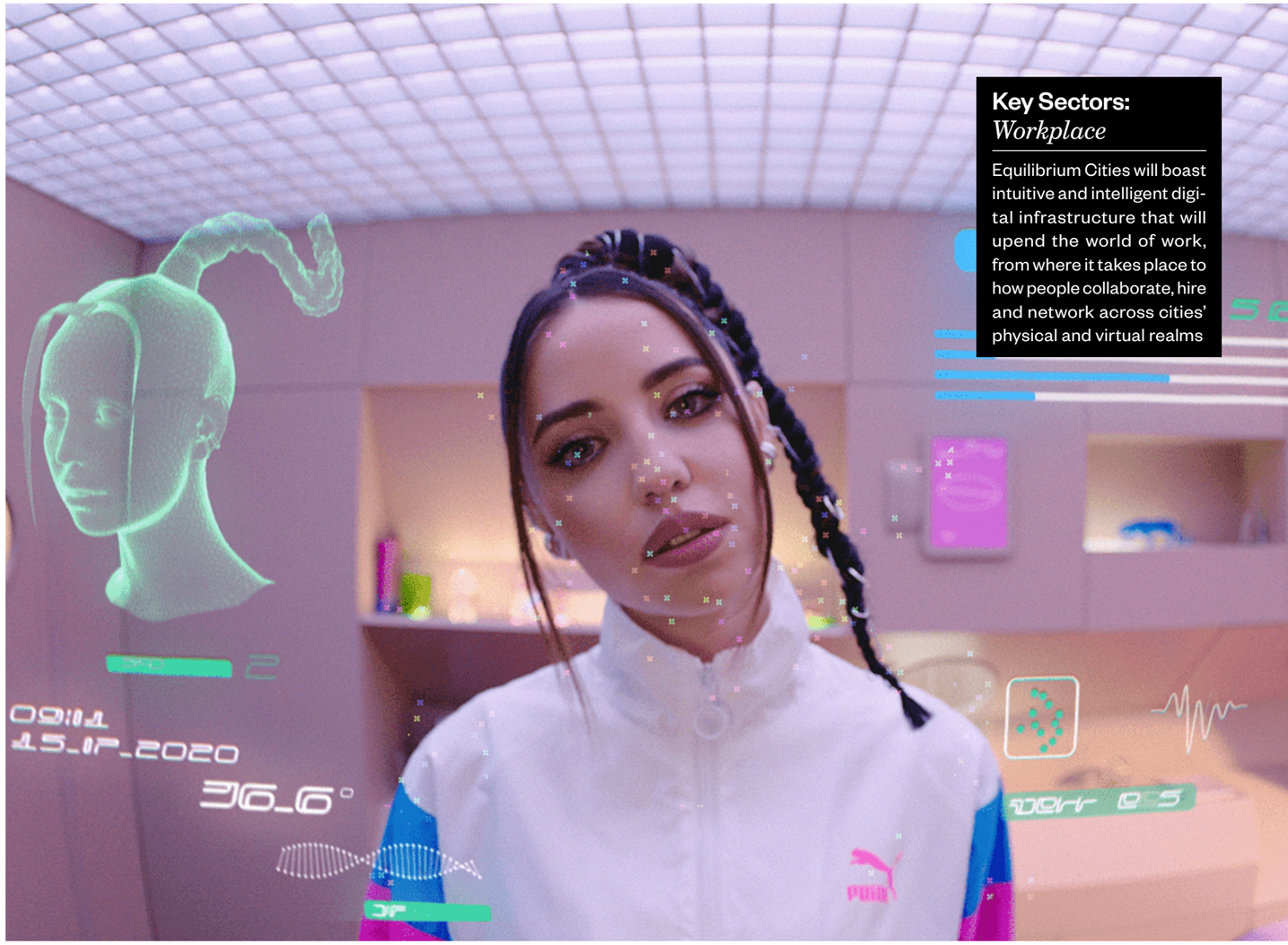
'Everyday encounters help people take environmental action... and urban design is the first way to affect and change behaviour'

Perrine Hamel, assistant professor, Nanyang Technological University's Asian School of the Environment

‘[Digital citizenship] will mean people can fully engage not only socially, but with local and national governments and broader political and societal processes’

Borislav Gorov, CEO, Telelink City Group





Left: The Green Structure of Copenhagen by Agnes Josefin Hekla envisages how Denmark’s capital city might look in future if it is transformed into a sustainable, self-sufficient metropolis; Above: Puma RS-2K campaign by Seek.Studio imagines a world of digital avatars, AR and gaming. Art direction by Eugene Lekh and Eugene Pylinsky

Digital Domains

New data-led cities that empower citizens to have an active role in the design and experience of their surroundings will evolve further in the decade ahead with the creation of digital city residencies for global citizens.

This will allow Generation Alpha, who will be young adults by the 2030s, to expand their social and career reach, while circumnavigating potential health events and unnecessary travel. Instead, they will seek honorary citizenship of the locales that best match their mindsets, ambitions, values or future view of the world; for example, a digital Tallinn residency for tech innovators, enabling them to launch businesses and boost the local economy from afar.

Digital residents will be able to virtually tether to their adopted city at any time. Wormhole Labs, a global crowdsourcing initiative creating a 10D virtual version of the world, hints at this future. Wormholers using the platform will be able to explore cities or neighbourhoods remotely, socialising with locals in real time, even making purchases in local stores. For hospitality, retail or travel brands this opens doors to immersive experiences, such as private tours around cities, personal shopping or business meetings in these digital domains.

Strategic Implications

Equilibrium Cities proposes a radical reframing of our priorities in the future urban environment, and calls for global firms to downscale, decentralise and align themselves with communities' values.



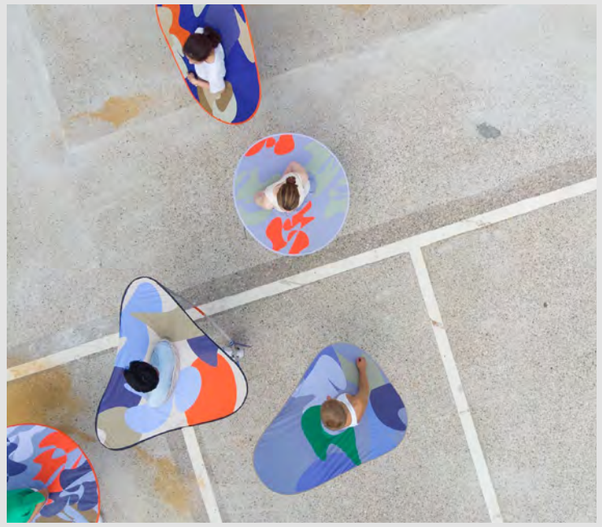
Buycloud by Noa Jansma

Strategic Actions

This era of people-first placemaking signals a shift towards more equitable living, where future generations, nature and businesses will have the tools to thrive.

Empower community autonomy

Generic and centralised solutions no longer resonate with locally minded citizens. Redistribute power and autonomy to both physical and digital communities through the use of data-powered networks in which energy, food systems and resources respond specifically to local needs.



Bounding Spaces by Anna Dienemann

Champion a degrowth mindset

Reject old symbols of urban progress and prioritise thriving in balance with the planet. Consider how the built environment works symbiotically with nature, and develop solutions to optimise its benefits such as enhanced health and eco-regeneration.



Where We Stand by Accept & Proceed

Collaborate rather than dictate

Actively collaborate with citizens to gain an authentic understanding of, and alignment with, their local needs. Adopt a people-first approach that champions an area's intersectional, cultural and emotional requirements, and enables residents to shape their future spaces.



Quatre Couleurs by Riwan Coëffic

Thought-starters

A state of equilibrium living is being established as power is distributed towards smaller tier cities and districts.

Adding contextual value

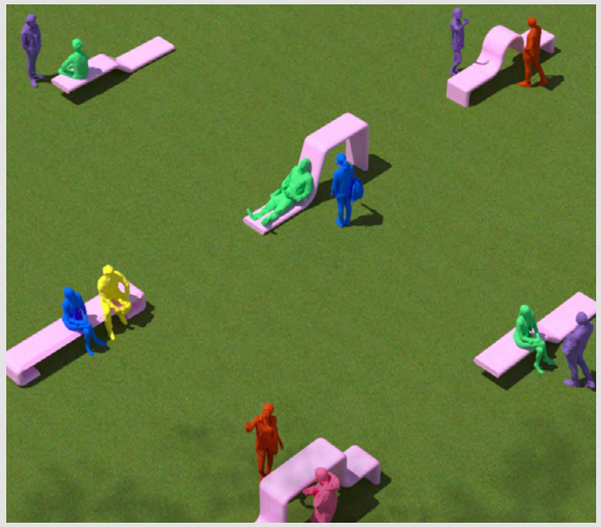
Citizens are aligning themselves with both physical and digital communities that follow the values they ascribe to. As a global brand, how does your offering empower individual collectives with nuanced needs rather than gentrify them?



The Self-sufficient City by Guallart Architects, Xiong'an

Creating nature-first foundations

As nature's invaluable status is elevated, citizens could demand access to it as a key factor of a balanced life. How are you going to positively contribute to a city while putting environmental and wellbeing needs before your own?



Bryant Park by Hush, New York

Wellbeing infrastructure

The built environment will be expected to advance a healthy lifestyle and support those who navigate its infrastructure. Are you able to uphold a culture of wellbeing for all and avoid being an urban aggressor?



Thinx, UK

MACROTREND

Elastic Brands

Forget advertising campaigns and branded content. As the power dynamic shifts between brands and consumers, all eyes are on the inner workings of your business – and how seamlessly it can adapt.



Kiel Fragments by Sven Hauth

Businesses and brands can no longer afford to be stagnant. The past 12 months have been a battle of the fittest, galvanising companies into thinking, reacting and changing at a moment's notice.

Unsurprisingly, not all survived this recalibration. American economists estimate that at least 100,000 small businesses closed in the first two months of the pandemic, while the Office for National Statistics found that 30% of UK businesses have less than three months of cash reserves.

It wasn't only a global pandemic that triggered this point of reckoning. Consumers – once only engaged via a handful of touchpoints – are now turning organisations inside out, blurring the definitions between brand and business. With a Post-purpose mindset tearing down the façade of advertising, customers are entering a more intimate relationship with brands. It is one tied to the transparency of their inner workings, from everyday operations to their supply chains and workforce.

This highly intricate space is now in the public eye, and the fundamental systems that previously made up your business are now your entire brand. 'Brands are a collection of stories united by a belief,' says Joel Fariss, senior associate of futures at Gensler.

'The brand experience internal to the organisation has to align with the brand experience external to the organisation.'

And then there are Generations A and Z, who are unafraid to unravel your business. Dubious of consumerism, they are swapping mainstream corporations for Alternet Economies. With 42% of Gen Z not trusting the average American company, and 66% of Gen Alpha wanting to buy from companies trying to do good in the world, organisations must borrow from alternative eco-systems to win their custom (sources: Forrester, Wunderman Thompson).

Essentially, businesses are caught between consumer and corporate demands, struggling to stay afloat in a fluctuating climate while maintaining they are civic, resilient and moral. Instead, companies must move beyond reaction to take a kinetic approach, foreseeing problems before they exist and adapting their malleable structures accordingly. 'To be ready for the unknown, you need agile architectures, flexible business models, and the ability to flex up and down as your business demands,' says Savio Tovar Dias, senior director at Avaya International.

This is a chance for brands to pilot a transformative future for business. From radical collaboration to smart logistics and departments of new perspectives, businesses that brace for the New Normal and not the New Extra-ordinary will quickly fade into irrelevance.



Auctioning Off A Dead Mall, Jesse Rieser for The New York Times, US, 2020

Drivers

Trust Fatigue

In today's hyper-perceptive society, consumers are no longer seduced by glossy brand messaging and are looking beyond the Civic Brand façade.

According to Kantar, only 14% of people trust advertisers when gathering information about a business, and nearly two-thirds are seeing more 'trust-washing' from brands (source: Edelman). To regain trust, brands are aligning themselves with the values of B-Corps, prioritising people and the planet over profit – a phenomenon we identified in Post-growth Society.

The result is a more humanised approach to conducting business. In China, where foreign conglomerates have only been operating since the 1980s, Key Opinion Consumers act as empathetic brand ambassadors. 'It was confusing for [Chinese] consumers to understand the concept of a brand… So, they trusted people rather than companies,' says James Hebbert, managing director at Chinese digital agency Hylink.

With the brandification of influencers, individuals are also being posited as the brands of the future. 'Influencers have demonstrated an incredible ability to move from platform to platform, taking their following with them,' writes Sam Lessin, partner at Slow Ventures. 'In a transparent world, people trust influencers more than they trust institutions.' As such, brands must be prepared to match individuals' natural versatility.

Global Driver:
Climate Change and Resource Scarcity

Clean Capitalism: Consumers are moving towards B-Corps and social enterprises that align with their sense of purpose

Pillars of an Elastic Brand:

Intentional
Taking pride in the act of pausing and recalibrating

Kinetic
Able to expand and contract as demand fluctuates

Proactive
Going beyond reactivity in order to predict change

Transformative
Fuelled by risk and new perspectives



Burberry worked with IBM's Extreme Blue on a sustainability prototype to trace products using the blockchain

Nearly two-thirds of consumers have seen more 'trust-washing' from brands in the past three years

Source: Edelman



The CIA's rebranding aims to encourage interest from a younger demographic with visual cues from media and music culture

‘[CEOs] have to think about the evolution of their businesses after the crisis – phases we call ‘return’ and ‘re-imagine’ as opposed to just ‘respond’

Kurt Strovink, senior partner, McKinsey & Co

Corporate Unravelling

With **Glassdoor** just a click away, consumers are gaining a glimpse into internal workplace culture like never before. According to Rani Patel Williams, business partner at Livity, people are requiring more structural transparency, demanding: ‘Who is on the board of directors or at C-suite level?’

Numerous DTC brands that placed consumer-centricity at their core – from **Everlane** to **Away** – failed to provide evidence of structural transparency in 2020. CEOs, in particular, became personally accountable for brand mistakes. A recent study by Edelman found that CEO credibility is at an all-time low globally, from India to Brazil and Russia. ‘[CEOs] have to think about the evolution of their businesses after the crisis – phases we call ‘return’ and ‘re-imagine’ as opposed to just ‘respond’,’ says Kurt Strovink, senior partner at McKinsey & Co.

This recasting of corporate roles extends to brand creative directors, who, as Sean Monahan, founder of culture trends newsletter 8Ball, writes, ‘feel as over as the Experience Economy and the Instagram aesthetic’. He continues: ‘Anyone with enough brain cells left to scroll through **TikTok’s** For You page could see… the creative class days of cultural domination were numbered.’

Global Driver:
Urban Mindset

Human Capital: The health and wellness of a workplace is more linked to success than before in the mind of the consumer

Capricious Consumption

Consumption habits are more erratic than ever. While the pandemic accelerated anti-consumerism – 65% of fashion consumers plan to buy more long-lasting, high-quality items – a hedonistic spending mindset runs in parallel. In China, pent-up 'revenge spenders' led the luxury goods market to grow by 48% in 2020 (sources: McKinsey & Co, Bain & Co).

Simultaneously, with the pandemic driving increases in local spending, multinational brands have greater expectations to live up to.
'As people value the convenience and personalisation that so many small businesses offered during this stressful time, they will increasingly expect to feel similar emotions from all the companies they deal with,' writes Andy MacMillan, CEO of customer experience platform UserTesting.

Brands must anticipate sudden changes in customer relationships, especially among the next generation. A study by Ketchum found that 62% of consumers expect their brand preferences to change permanently before the pandemic subsides, and this is likely to increase as Generation Alpha mature: '[Gen Alpha will] have no qualms about switching products and services,' says Grant Thornton strategic growth adviser Robert Hannah. 'One consequence is that the lifecycle of brands and products will become shorter.'

Global Drivers:
Global versus Local

Glocal Expectations: Consumers will increasingly expect the personalised touch of local brands from multinational conglomerates

Multilateralism: The pandemic has reinforced the benefits of collective solutions to global problems



Key Sectors:
Retail

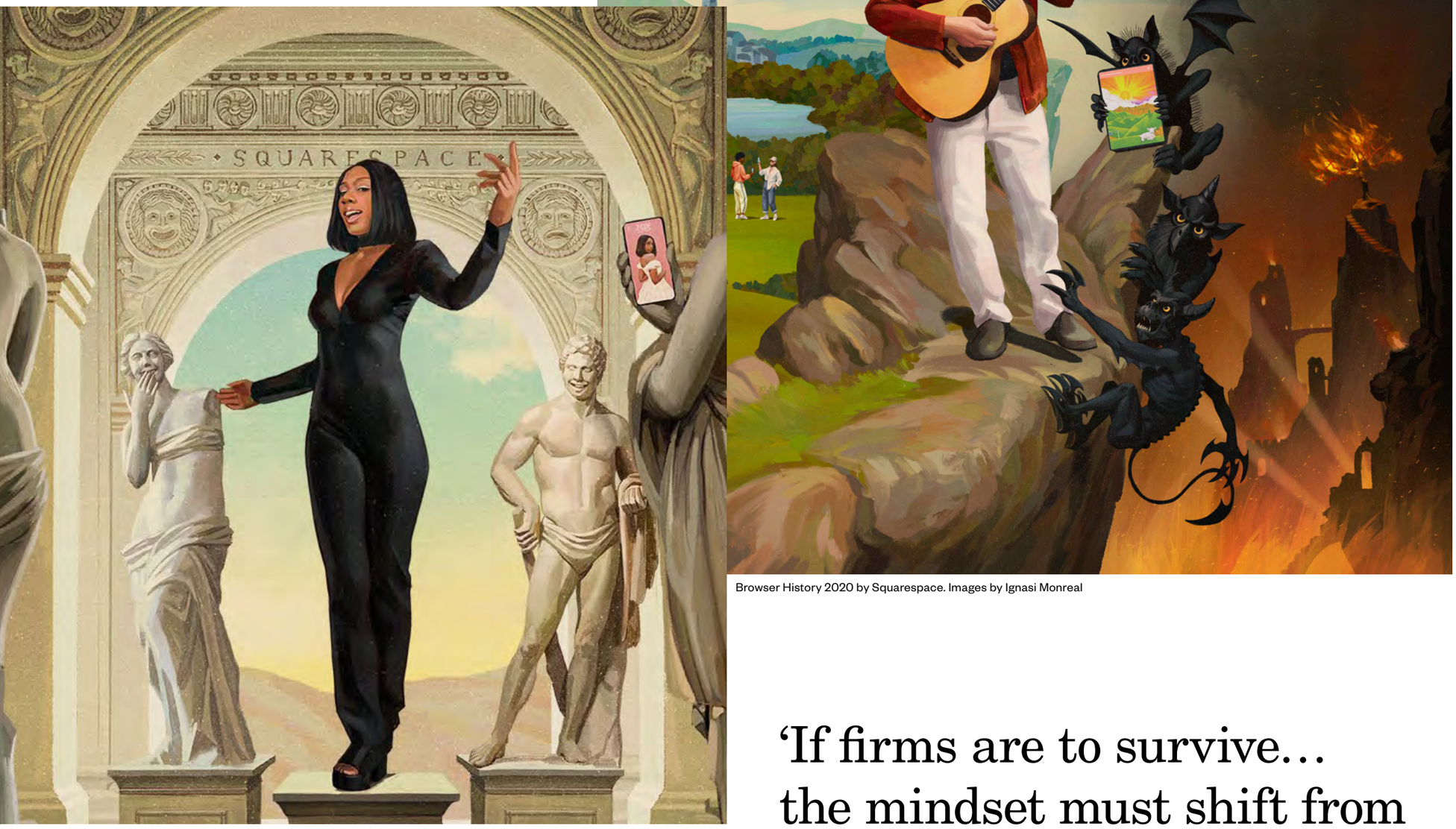
Spontaneity will be vital to retailers navigating an unpredictable economy. Store models will be transformed based on customer shopping habits, and manufacturing processes will become hyper-reactive and hyper-localised



Left: Shaping by Eyla Llarena Aliaño proposes a different lifestyle where environmental care in consumption is a priority. Above: #LVGreenscreen pop-up store, New York

62% of consumers expect their brand preferences to change permanently before the pandemic subsides

Source: Ketchum



Browser History 2020 by Squarespace. Images by Ignasi Monreal

‘If firms are to survive… the mindset must shift from innovation to transformation’

Vijay Vaitheeswaran, US business editor, The Economist

Business Resilience

In 2020, businesses were forced into crisis mode, putting the agility of their operations to the test. A Salesforce report found that 89% of customers say how a company acts during a crisis demonstrates its trustworthiness.

Resilience, as we forecast in 2019, became a buzzword, as companies scrambled to bounce back from a position of irrelevance. But, as Nader Mikhail, CEO of Elementum, explains, using the resilience model in isolation no longer works ‘because it misses the fact that disruptions – pandemics, natural disasters – are not one-off events’.

It’s not just the pandemic that has caused a mass re-appraisal of institutions. In June 2020, the Black Lives Matter (BLM) uprising put businesses under a microscope like never before. Some 66% of American Generation Z said a company’s reaction to BLM permanently affected whether they buy from them in the future (source: Morning Consult).

Consequently, organisations are implementing proactivity over reactivity to navigate unpredictable times. ‘CEOs face a year of reckoning, as they deal with innovation fatigue inside their firms and a complex business environment outside, says US business editor of The Economist, Vijay Vaitheeswaran. ‘If firms are to survive, the mindset must shift from innovation to transformation.’

Global Drivers:
Dislocated World

Ongoing Disruption: Businesses are having to deal with greater change than ever

Brand Boycotting: Consumers are contemplating their relationships with brands more than ever before



Celebrating resilient entrepreneurship

Browser History 2020 is a campaign by Squarespace celebrating the resilience of small business owners and entrepreneurs during the pandemic. Images by Ignasi Monreal

Related Macrotrends

2015

The Immortal Brand

Seven years on from the start of the global financial crisis, we forecast the decline of short-term thinking and the rise of innovative business leaders that plan years, decades – even centuries – ahead.



Contact by Olafur Eliasson for Louis Vuitton Foundation. Photography by Iwan Baan

2016

The Dislocated World

In 2016, a society dominated by distrust, disconnection and disenfranchisement emerged, and opportunities arose for brands eager to take a stand and choose what type of future they wanted to create.

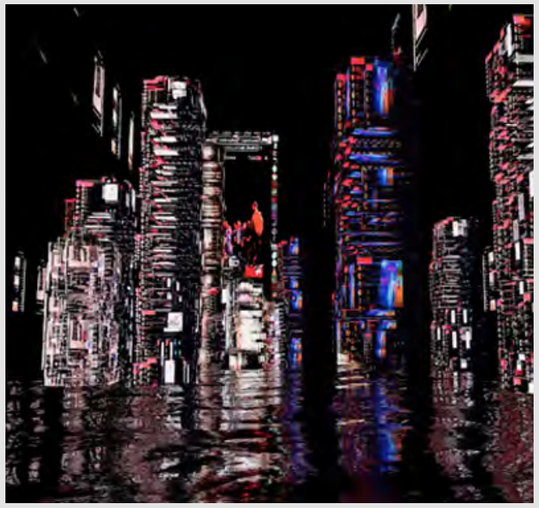


Spatial Bodies by Auijk

2017

Civic Brands

This sense of dislocation ushered us into the era of the Civic Brand, in which businesses stepped up where governments were failing. Amid the shift from top-down corporate hegemony to post-ownership, brands raced to provide tools for a decentralised economy.



Data Church by Vito Boeckx

2020

Post-purpose Brands

By 2020, terms such as brand purpose had become obsolete. As consumers became jaded by empty mission statements, brands began to take a more realistic, honest and iterative approach to betterment.



A Concise Passage by Rashed Al Shashai at Desert X Alula. Photography by Lance Gerber

Insight

Throwing open the doors to their internal processes, brands are abandoning knee-jerk reactions and implementing an approach of more strategic and sustained problem-solving.

Symbiosis Strategies

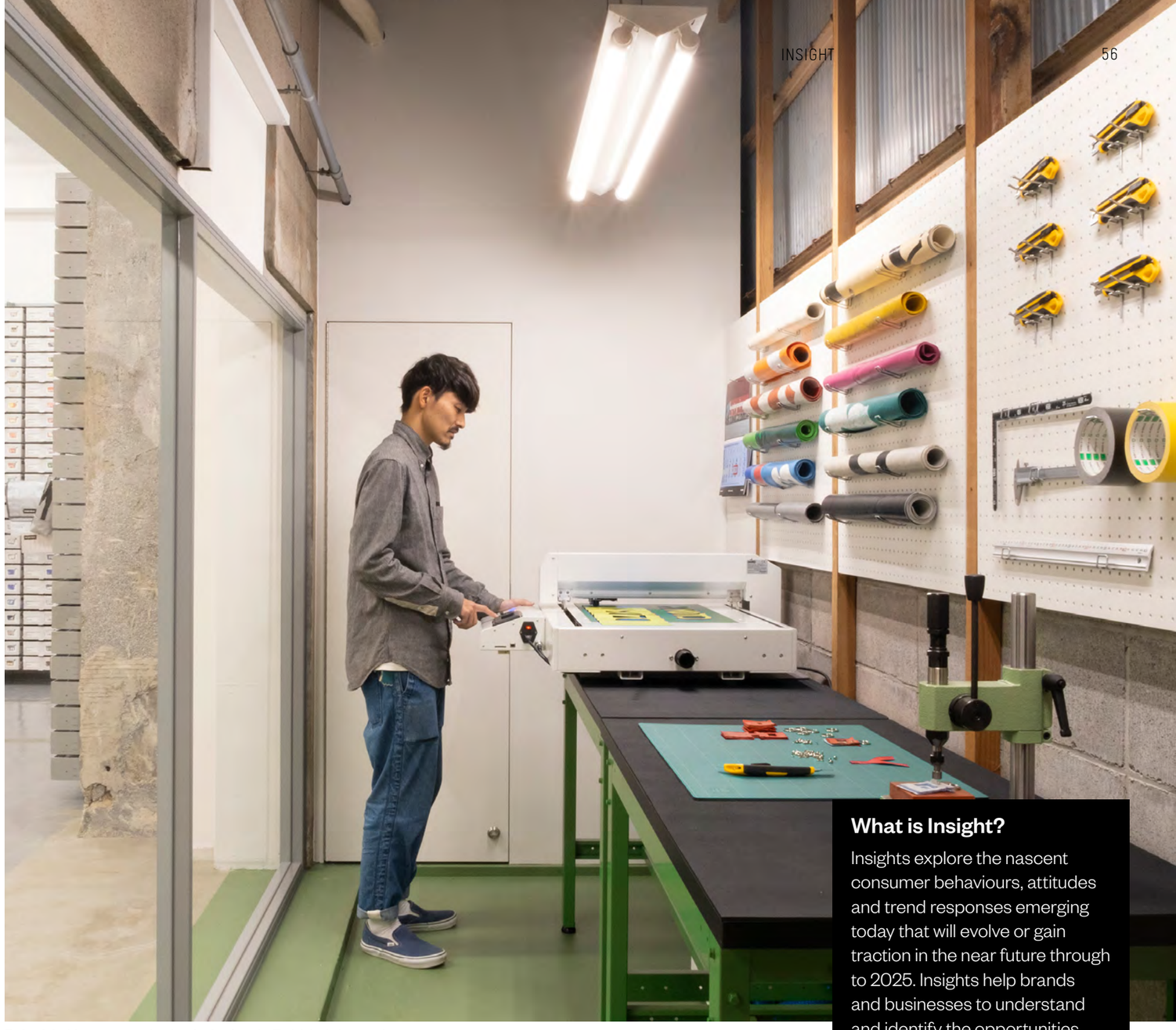
Brands are swapping competition for radical collaboration, exchanging ideas, marketing and supply chains in the name of civic innovation.

Although China's BATX tech firms are largely competitive, **Alibaba** and **Tencent** are using their impressive digital infrastructures to help local businesses such as mom-and-pop and repair stores get online. Similarly, **Pinduoduo** is raising the incomes of rural farmers by sharing its e-commerce know-how.

In December 2020, Burger King offered free marketing space to British and French independent restaurants until they can re-open. The campaign was designed to demonstrate the brand's 'visibility and community with restaurant owners who need it more'.

The chain also encouraged customers to support **McDonald's** and **KFC** in efforts to save hospitality – competitors it has virtually burnt in previous ads.

Forfeiting market leadership for the greater good, rival shoemakers **Allbirds** and Adidas have joined forces to fulfil an ambitious goal – creating a sneaker with the lowest ever carbon footprint. Both brands share common sustainability goals, and recognise that their success depends on sharing their material innovation and supply chains. 'When you think about competition, you just have to change your perspective,' James Carnes, vice-president of brand strategy at Adidas, tells Vogue. 'We're not really competing with each other any more – we're competing with this external force.'



Freitag's inside-out store takes inspiration from its Zurich logistics warehouse

What is Insight?

Insights explore the nascent consumer behaviours, attitudes and trend responses emerging today that will evolve or gain traction in the near future through to 2025. Insights help brands and businesses to understand and identify the opportunities presented by this trend.

'We're not really competing with each other any more – we're competing with this external force'

James Carnes, vice-president of brand strategy, Adidas

‘My role now includes risk analysis… health and safety policy implementation officer… and feasibility clairvoyant’

Diane Jackson, chief production officer, DDB Chicago



Celebrity-driven drinks
Travis Scott’s Cacti brand, in collaboration with Anheuser-Busch, is at the forefront of pop culture innovation

Outside Insiders

With the pandemic exposing the deficiencies of internal hierarchies, businesses are dismantling their rigid structures, rethinking their chains of command to prioritise the value of new perspectives.

Trapped in a **Zoom** rut, creative agencies are breaking out of their comfort zones, decentralising creativity to harvest better ideas. ‘Designers are writing copy, planning and account pitching ideas,’ Wieden + Kennedy Portland creative director Jason Kreher tells AdWeek. ‘This way of working lets people show up in places they hadn’t before.’ As a result, job descriptions will need to be rewritten. According to DDB Chicago’s Diane Jackson, her chief production officer role now includes everything from risk analysis to ‘feasibility clairvoyant’.

Inter-generational teams can inspire businesses to solve problems differently. Australian ad agency **Thinkerbell** has launched Thrive@55, an eight-week paid internship for Baby Boomers that addresses the industry’s distinct age gap, while allowing younger employees to benefit from diverse viewpoints.

For a fresh vantage point, some businesses are enlisting celebrities for their unparalleled knowledge of contemporary media. Cult YouTuber Emma Chamberlain is the creative director of new skincare brand Bad Habit, while Travis Scott has launched a spiked seltzer with Anheuser-Busch. ‘As a culture-shaping artist, Scott is incredibly connected to his fans and what’s new and next in culture,’ says Fabricio Zonzini, president of Anheuser-Busch.

Key Sectors:
Workplace

Elastic Brands will only succeed by rewiring workplace structures. Inherently fluid job roles, departments dedicated to new perspectives and inter-generational collaboration will prosper in this future

Conscious Recalibration

Seizing control of an adverse business climate, brands are intentionally taking time to pause, strategise and recalibrate their business models.

Already, businesses including ASOS and Kingfisher are voluntarily paying back furlough money to the government as they increase revenue, understanding the importance of showing initiative at times when consumers are judging brands by their actions. 'If a company has done well over the last few months, there may be a perception that it's unfair to have used taxpayers' funds,' says Kirsty Churm, senior associate at Kingsley Napley.

Inter-pandemic businesses are considering the benefits of hibernation, planning positive exit strategies that allow them to come back stronger. When 'DTC darling' **Brandless** closed in February 2020, experts weighed in on what went wrong. 'Something courageous Brandless could have done would have been to talk to its consumers about the pricing issues it was facing,' writes Elijah Schneider. 'Changing the model is OK… People are usually OK with it, too.' Subsequently, Brandless re-appeared in June with a leaner, community-first business model.

In future, we can expect businesses to draw inspiration from the organic recovery techniques of nature. According to the field of biomimicry, 'natural systems take advantage of shutting down when conditions are not favourable', says research author Alyssa Stark. Co-author Stephanie Fernhaber adds that if businesses require time to recalibrate their business strategy in order to survive, 'customers will respect that'.





Left: Burberry Pocket Bag Collection by Six N Five; Right: Nike Unite aims to help local communities connect more closely with sport

Reactive Relevance

To maintain relevance, organisations are rolling out decentralised operations that can monitor changes in the market – and act fast.

According to McKinsey & Co, the crisis accelerated the need for more agile supply chains and solid data analytics. **Alibaba** is using its consumer data network to help factories respond quickly to changing behaviours, including car manufacturer **Odis**, which created a car cleaning solution based on demand in three days. Its factory-to-consumer live-streaming service also enables manufacturers to better understand their end consumers.

Decentralised operations allow businesses to reach consumers on a hyper-personal level. 'Micro-enterprises are able to adapt to fluctuations in smaller markets, instead of having one macro-approach,' explains Gensler's Fariss. He highlights Chinese appliance brand **Haier** and its Ecosystems of Micro-Communities (EMCs) model, which comprises micro-enterprises that form temporary alliances to meet the needs of a specific user group. **Unilever**, meanwhile, is developing shipping container nano-factories to speed up – and localise – its supply chains.

Applying this model to the advertising industry, which can work to three-month production timelines, 10 Days London is a new agency that turns campaigns around in just 10 days. 'Brands need fast-moving, flexible campaigns – not to be held back by a slow outdated production model that leaves them out of pocket,' says the agency.

To improve supply chain resilience, **45%** of executives plan to shift production closer to home markets in the coming years

Source: Bain & Co

Multi-functional retail

Off-White's flagship store is a fulfilment centre and a multi-purpose events space designed by Virgil Abloh and AMO Design, Miami







Channel 66 is a new live-stream destination by Vans, US

‘To be ready for the unknown, you need agile architectures, flexible business models, and the ability to flex up and down as your business demands’

Savio Tovar Dias, senior director, Avaya International

Flux Capital

Navigating an unpredictable market in which demand wavers by the day, businesses are turning their workforces and retail spaces into transformable entities.

Instead of resorting to furlough, organisations are repurposing employees during fallow periods, turning them into ambassadors and head office workers. With retail employees’ exposure to customer pain points, ‘they became the best equipped for call centres and customer service online’, says Melissa Gonzalez, founder of The Lion’esque Group.

Workplaces can also benefit from Symbiosis Strategies. In Germany, **McDonald’s** staff were loaned out to overwhelmed **Aldi**. And in Australia, Uber Eats’ latest co-campaign features tour guides from the Cook Islands, who, with no summer tourists to entertain, were enlisted to give a ‘guided tour’ of the Tropical Whopper burger.

Reconceiving the store as a transformable canvas, the Off-White flagship branch in Miami is designed to serve seamlessly as a fulfilment centre and multi-purpose events space. In Amsterdam, automotive brand Lynk & Co has opened its first flagship club, which can adapt to the community with movable components, hosting events such as DJ sets and fashion shows. With all décor for sale, the store can be less reliant on automotive purchases. ‘More people will question if buying a car is the right option today in a world that is uncertain,’ says CEO Alain Visser.

Intangi-brands

In the ultimate act of business dexterity, a new wave of planet-friendly start-ups are becoming known as purveyors of knowledge rather than goods. As Christopher Morency, editorial director at Highsnobiety, writes: 'Beyond physical products, the ultimate goal of the modern-day business is to trade in the intangible.'

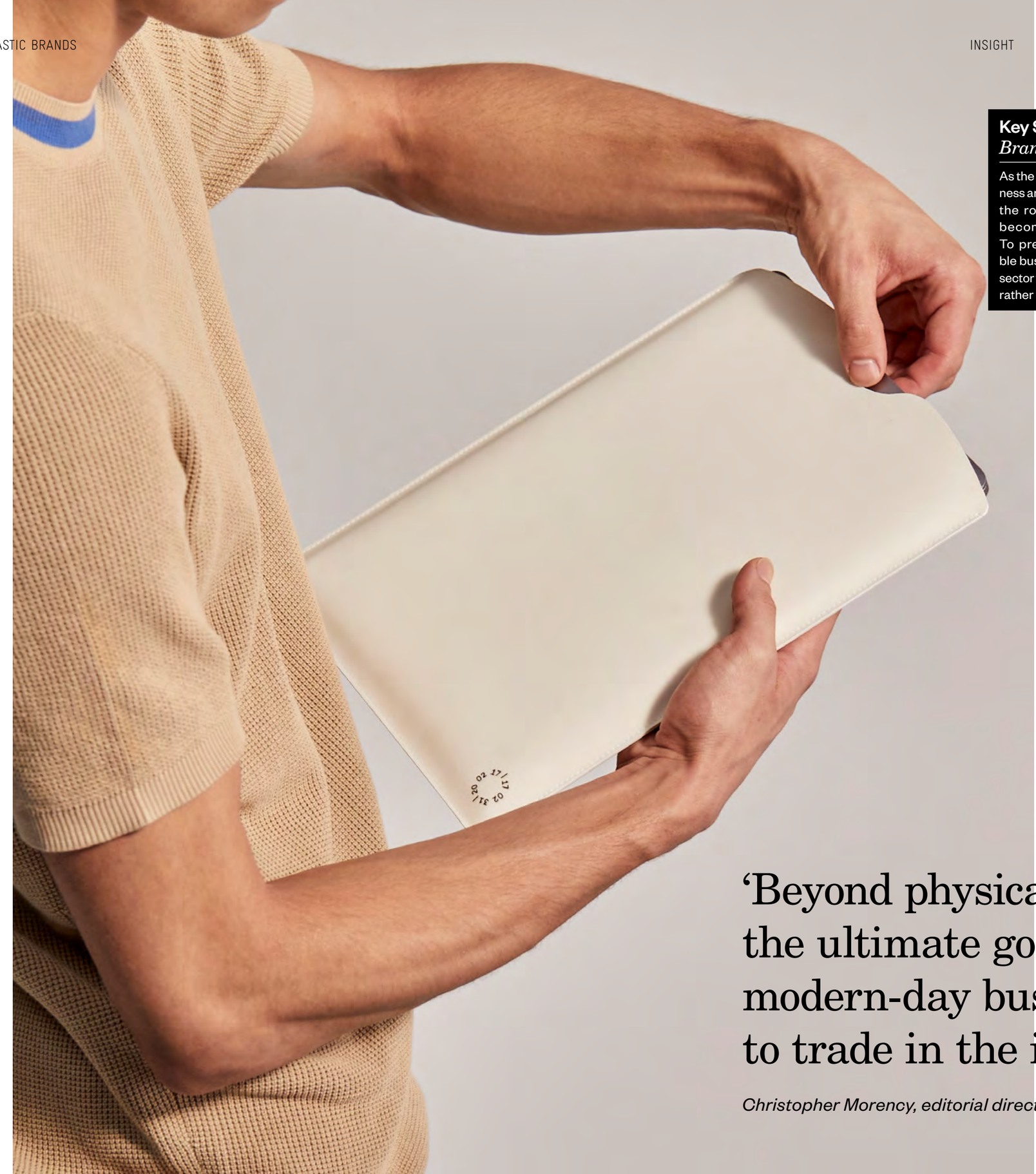
Air Company is challenging the traditional role of a brand by trademarking a technological solution that can be applied across industries, enabling it to consistently deliver responsive goods. Its first product is a carbon-negative vodka – but spirits are just the beginning.

'We will be applying our innovative technology across a multitude of industries, consistently delivering goods that can change the world,' reads Air Company's website. Similarly, fashion brand Covalent has unveiled AirCarbon, a biotechnological manufacturing process that will be used across its modern luxury accessories.

Meanwhile, the Urgent Company is a CPG brand centred around a single innovation in plant-based ingredients – modified proteins. In July, it unveiled its first product: Brave Robot ice cream. 'We are in the business of using science, engineering, technology, social awareness and some common sense to create safe, natural and delicious consumer products which support a more verdant planet,' explains the brand.

Trademarking intelligence

AirCarbon is a biotechnological manufacturing process that will be used across Covalent's modern luxury accessories



Key Sectors: *Branding*

As the definitions of business and brand converge, the role of branding is becoming existential. To prepare for malleable business models, the sector will design for ideas rather than products

'Beyond physical products, the ultimate goal of the modern-day business is to trade in the intangible'

Christopher Morency, editorial director, Highsnobiety

Foresight

The next decade will turn the business world inside out, as revolutionary job titles disrupt the C-suite and brands contemplate their own expiry dates.



Garden of Elysium by Anders Juul Jørgensen looks to spirituality to tackle properties like selfishness, greed and apathy in climate change

What is Foresight?

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

Chief Disaster Officers

As the aftershocks of the virus reverberate beyond 2025, there will be a reshuffle of the C-suite, as CEOs look to new roles to co-pilot growth.

'[Covid-19] will open a window of time in which we actually take catastrophic risks seriously, and are willing to pay the costs required to develop protective measures before the next catastrophe strikes,' explains philosopher Toby Ord.

One of these measures will be to invest in a chief disaster officer to predict crises, building elasticity into the business in case one should transpire. As Doug Stephens, author of Resurrecting Retail, suggests: 'Every business should have a person whose role should be to do nothing but staff the organisational crow's nest, monitoring the horizon for anything and everything that could impact the course of the company.'

When recruiting for this role, companies will turn to those who have not only lived through the Transformative Twenties but were born during them. This will lead to the emergence of Gen Alpha CEOs. With Gen Z predecessors proving that adolescence goes hand in hand with entrepreneurship, and programmes such as The CEO Kid and Regenerative Futures already nurturing future business leaders, it's only a matter of time before inter-generational leadership becomes a dynamic way to weather unpredictability.

> 'Every business should have a person whose role should be… to monitor the horizon for anything and everything that could impact the course of the company'
>
> *Doug Stephens, author, Resurrecting Retail*

Mortal Commerce

As seasonal hibernation thrives, so too will the notion that not all brands have the right to exist.

Although there was a culling of the weakest businesses in 2020, there are more newcomers than ever before. According to Bloomberg, the number of new business registrations in the US rose by nearly 25% last year.

As these novel industries grow, the next generation of business leaders will be equipped to plan for their own endings. Planned obsolescence is losing its associations as a consumerist practice of the technology industry and moving into the operational models of organisations. ‘We [need] to reclaim the language of endings and generate a new vocabulary,’ designer Joana Casaca Lemos tells LS:N Global. ‘When an ending becomes tangible, you can see the possibilities.’

Beyond ceasing operations entirely, Mortal Commerce will result in leaner inventories. Luxury watch brand Patek Philippe recently caused uproar when it discontinued its most popular Nautilus style, which had a decade-long waiting list. According to its president Thierry Stern, the decision allowed the brand to loosen its reliance on one model and instead focus on a prosperous future. ‘A watch should not be a top leader on its own… When you have a fantastic brand, you have to protect the brand and not just one product,’ he says.



Post-pandemic products

Species project by Siwon Kim, Seungwoo Kim, Jisoo Kim, Yejin Kim and Jaepil Jung explores product obsolescence and evolution in the post-pandemic era

‘You get one chance, you get two chances and that’s it… The fastest, most nimble [brand] with a younger clientele will prevail’

Vincent Chin, professor, Fashion Institute of Technology

Arctic Monkeys Artefacts 4020 by Anthony Authié and Supertoys Supertoys

‘Can you turn yourself into a mathematical equation… in order to gain the kind of rapid body intelligence that’s possible?’

Jaron Lainer, computer philosophy writer





Left: Sevenclicks by Alex Gehlen is a brainstorming tool that enables you to discover new connections between your subjects of interest; Above: Bump Galaxy by Bianca Caragues is a virtual world for healthcare prototyped on Minecraft

New Tech-spectives

Seeking ways to break business habits in the long term, the most daring companies in the 2030s will invest in cognitive expansion tools to boost internal productivity.

Technology can assist these radically new perspectives. Businesses will develop their own experimental brainstorming platforms that release random knowledge to provoke creatives’ imagination when stuck on a new ad campaign – in the style of **Sevenclicks**.

Branded metaverse islands will emerge in which employees take part in emotional intelligence exercises or test new ideas. **PepsiCo** has taken the first steps towards this future in its latest training programme, built on **Minecraft** to conquer **Zoom** fatigue.

As businesses become further immersed in the metaverse, digital avatars will provide opportunities to expand our cognitive spectrum. Virtual reality (VR) guru Jaron Lanier speculates whether inhabiting different bodies in VR – perhaps relating to gender or ethnicity or even inanimate objects – could make new forms of human intelligence accessible to the masses. ‘Can you turn yourself into a mathematical equation… in order to gain the kind of rapid body intelligence that’s possible?’ he asks.

Dynamic Democracy

As consumers become ever-more woven into the fabric of corporations, in the second half of this decade brands will sacrifice the autonomy of their shareholders, handing the reins to their stakeholders.

Consumers will increasingly expect to have a seat at the table. According to Edelman, 68% of people agree that consumers have the power to force corporations to change. Therefore, expect to see a power shift from the corner office to the edges of your organisation, and give everyone from loyal customers to your suppliers an equal say in your future.

Daniel Hopper, owner of New Zealand consultancy BYB Marketing, believes it's a matter of time before 'customers and other stakeholders such as suppliers are actively involved in the problem-solving process; participating in suggesting ideas, designs, concepts and solutions for products and services'.

And it doesn't stop at internal decision-making. The democratisation of the design process will pave the way towards a future in which your customers will be your creative directors. India-based beauty brand **MyGlamm** envisages a future where consumers play an integral role in product development, and expects half of its products to be co-created in 2021.



68% of people agree that consumers have the power to force corporations to change

Source: Edelman

Problem-solving Design

Wake Up! by Leila Saad explores why designers should stop rehashing existing products and begin designing true era-appropriate goods

Strategic Implications

The rules for brands are outdated.
In obeying them, past icons have faltered
and fallen. But a new breed is emerging,
as focused on self-preservation as
on performance, and behaving more
like evolving, living organisms.



Puff by Borja Alegre

Strategic Actions

As consumers demand to engage with businesses' inner workings over branded façades, brand and business will merge into one.

Collaborate on common goals

In the fight for survival, smart brands know that working together beats operating in isolation. Put traditional rivalries and hierarchies aside and look for progressive growth opportunities through mutually beneficial partnerships with those who strive towards common goals.



Bolt Threads exchanges eco-leathers for brand expertise. Photography by Ashley Batz

Embrace biomimetic business models

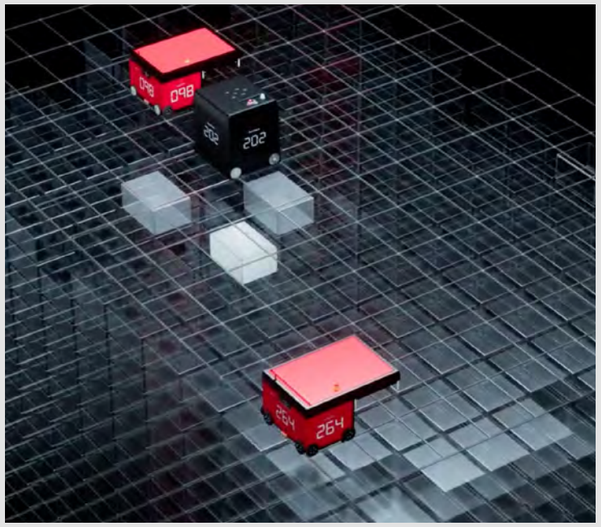
With no blueprints, it's harder than ever to pre-empt and predict. In uncertain times, prioritise reactive and responsive strategies. From hibernation to chameleon shifts, enable quick-response recalibration through decentralised supply-chain models and shrewd shutdowns.



Synthetic Ecologies Lab by Ada Sokol

Re-evaluate and repurpose resources

Be willing to transform the very foundations you are built on. From products to places and people, re-evaluate the roles these assets play in your business future by reviewing them in the context of the challenges ahead, and take steps now to repurpose or recalibrate.



AutoStore, Norway

Thought-starters

A new model for business is emerging that rewards risk-taking and reactivity.

Democratised decision-making

With the spirit of collaboration powering Elastic Brands, how could you create opportunities for cooperation with outside influencers from competitors to customers, and make space for them at the decision-making table?



Mezcal brand Rosaluna aims to build long-term relationships with creatives rather than using cash-for-posts influencers

Embracing the end

In a future where there is less room for market congestion, and where the end does not necessarily indicate failure or a permanent situation, does your business have a productive and positive exit or metamorphosis strategy?



PepsiCo hosts employee training on Minecraft

Job obsolescence

As uncertainty prevails, technology advances and a new generation with new expectations and motivations emerge in the employment market, which traditional job roles could become unfit for purpose, and what might we look to replace them with?



Hinge Designed To Be Deleted campaign acknowledges the end of the product's use

Prepare for The Great Acceleration

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?

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