THE : FUTURE : LABORATORY
: : THE TRANSFORMATIVE TWENTIES



ASMR Earth by Onesal

Introduction

Discover the key trends that will affect the next 10 years of consumer behaviour and experiences, as well as the mindset shifts that brands need to embrace both internally and externally.

Twenty years ago, we described the new millennium as one of FUD: fear, uncertainty and doubt. The Turbulent Teens followed – a decade which we forecast would be defined by the rise of dissent, populism, disruption and climate denial. It opened with the Arab Spring and ended with the birth of a deadly new coronavirus in a Wuhan seafood market.

In the interim, we had the Occupy movement, Black Lives Matter, #MeToo, DIY European terrorism, LGBT+ rights visibility, the rise of the alt-right, the Rohingya massacre, Prime Minister Boris Johnson, President Donald Trump, Greta Thunberg and Extinction Rebellion.

It was also a decade of continuous technological disruption, with rising online commerce at the start, and the dominance of big data and ubiquitous global mega-systems such as **Google**, **Apple**, **Facebook** and **Alibaba** at its close. We used our phones to get connected and then lost online, wearables to monitor our health, the Cloud and 5G to make us more agile, and the gig economy to become more fluid. We also wrestled with advanced robotics, AI, machine learning, data privacy, mixed-reality interfaces and the right to be forgotten.

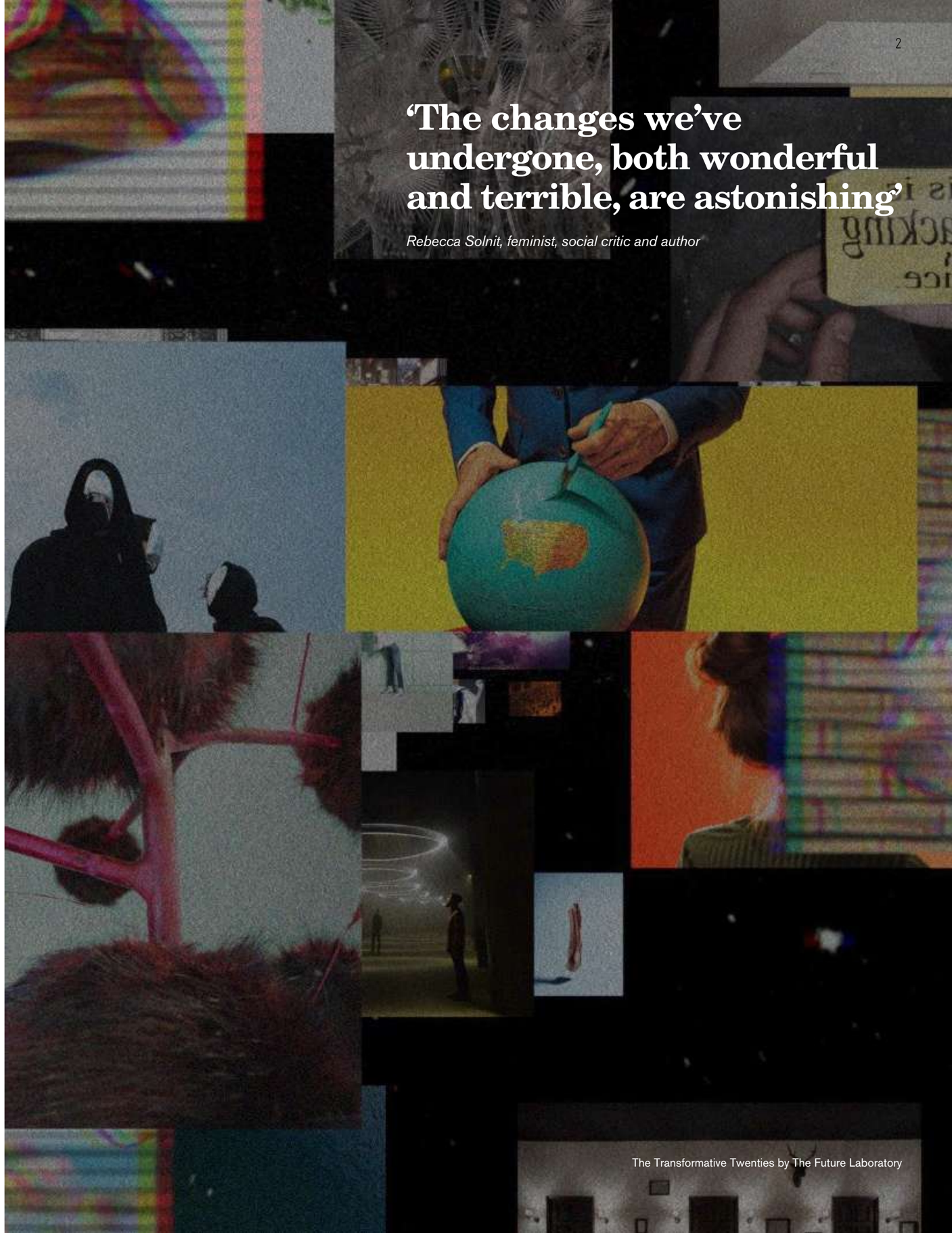
Nature, which we had abandoned in so many ways, struck back in so many other ways. From the wildfires in Australia and California to the melting of the permafrost that encased Norway's Svalbard 'Doomsday' seed vault, and finally to the global panic caused by Covid-19, our way of life has been disrupted beyond recognition.

So, is all lost? Can we turn the turbulence around? What comes next?

Rightly, everybody talks about the negatives of the current pandemic. But the positives will be far more reaching and profound. This is a hard, unsettling reset – but it will result in unprecedented and beneficial changes in how ordinary people behave and interact. If businesses aren't prepared for this, in many ways they deserve to become the casualties of a new paradigm shift in how we broker the way we live, work and play.

After a decade of expansion, we are contracting, regrouping, reconsidering and refocusing. We are judging our brands, our experiences and ourselves in a whole new light. The three macrotrends you are about to discover delve deeply into the death of purpose, the rise of selfishness and our push towards a solitary sensuality that borders on the narcissistic.

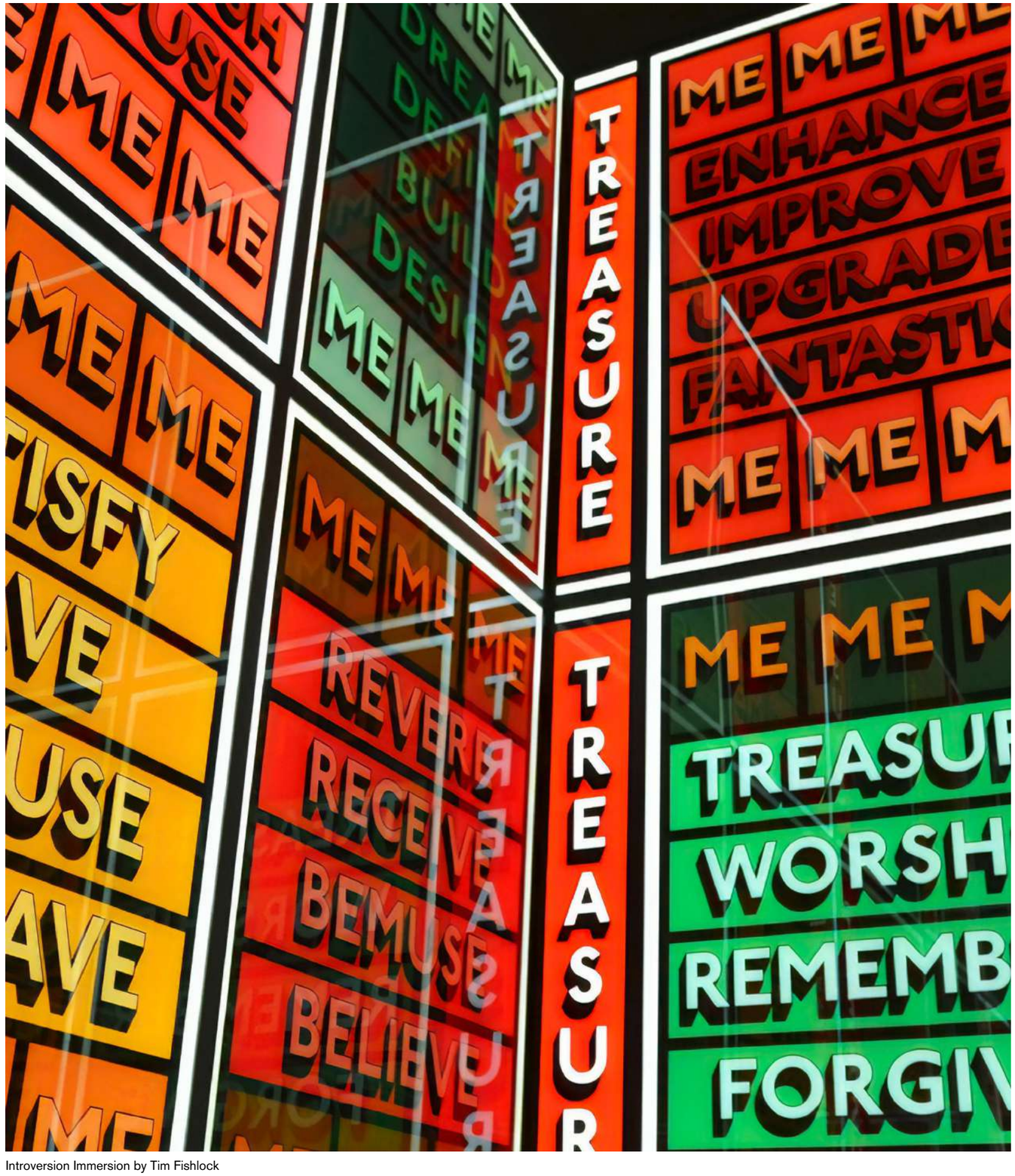
Are you ready to transform at pace and reset everything you know in order to make it to 2030?



Pleasure Revolution

With every second of our free time colonised by the cult of busyness, consumers will turn away from relentless productivity and shift their focus from enhancement to enjoyment.

Off Hours, US



Introversion Immersion by Tim Fishlock

‘In a time when self-improvement practices are big business… enjoyment is a practice of resistance to current forms of unfreedom’

Sandy Grant, philosopher

Consumers are emerging from an austere decade that burnt us out politically, socially and economically, one in which global uncertainty generated a lucrative market for personal betterment.

At the dawn of a new decade, this uncertainty has only accelerated. The catalyst that is Covid-19 has thrust consumers into a novel situation that demands action, resilience and – ultimately – a radical recalibration of society as we know it. We are entering a period of reflection like no other in which intensified notions of success, achievement and productivity are proving futile. Amid this chaos, consumers are re-assessing the ideologies of what makes a good life.

Eight years after we unveiled The New Sublimity, our desire for fulfilment is treading new paths. The high-calibre lifestyles we predicted in The Optimised Self have arrived, but are increasingly at odds with the pursuit of mindfulness. Facing a barrage of expectations, it is rapidly dawning on consumers that the self-actualising activities they have bought into – from the wellness industry to the ritual of workism – are hindering their ability to feel fulfilled.

By 2030, however, enjoyment will become a political act against the mechanisms of capitalism. In the past decade, leisure activities have become entangled with guilt, as the fetishisation of busyness has driven an expectation that our free time should be spent refining ourselves physically and intellectually.

But we have reached such advanced levels of health and knowledge that, on the brink of a new decade – and with isolation and solitude rapidly becoming the new normal – there is finally a chance to pause, reflect and embrace the state of liminality. ‘In a time when self-improvement practices are big business… enjoyment is a practice of resistance to current forms of unfreedom,’ writes philosopher Sandy Grant.

As we take time to recentre ourselves, governments are cautiously adopting new metrics of progress that favour personal wellbeing and happiness over economic growth. We can now expect a more gracious approach to consumerism – one in which pleasure, inactivity and the desire to live ordinarily are equally valid metrics of living.

Brands must become part of this new equilibrium. ‘The old narratives of busyness can be undone,’ says strategy executive and sociologist Ana Andjelic. ‘Brands can flip the script and start to celebrate anti-striving… They can alleviate our guilt about doing nothing through the same marketing mechanisms they used to create it… They can portray unceasing productivity as an unenlightened and passé choice.’

Hindsight

Caught in a whirlwind of perfectionism, side hustles and an endless quest for optimisation, consumers are pressing pause and reconsidering their part in the capitalist system.



Conceptual Portrait by Rony Hernandes



New Office by Anna Zimmermann, 2020

Widespread Workism

Society has become so preoccupied with working that it is no longer just a means to achieve economic stability. The Atlantic writer Derek Thompson calls this workism. He argues that, in our post-faith quest for purpose, work has gained a holy status, but economists have failed to anticipate that 'for the college-educated elite, it would morph into a kind of religion, promising identity, transcendence and community'.

Workism has been accelerated by the rise in freelancing, which sells workers an illusion of freedom and control. With six in 10 Americans believing that freelancing is the modern version of the American Dream, it's estimated that there will be 90.1m freelancers in the US by 2028 (sources: Harris Poll, Upwork and Edelman). In Japan, where *karoshi* culture, or death by overwork, is troublingly prevalent, Deloitte reports that 55% of Millennials are considering taking on short-term contracts or freelance work.

This has led to an intensified notion that time equals money. 'We're fed the myth that the way to happiness is paved by self-starters, championing the self-employed lifestyle as the next step on the ladder to self-actualisation,' says cultural writer Chantal Brocca. However, 'the line that separates work and life becomes blurred until it disappears, and you end up switched on 24/7'.

'We're fed the myth that the way to happiness is paved by self-starters, championing the self-employed lifestyle as the next step on the ladder to self-actualisation'

Chantal Brocca, cultural writer

The Over-optimised Self

Our quest for optimisation could be nearing its climax. As technological advancements proliferate, there is a backlash against persistent betterment as consumers realise that a goal of having it all is leading to a deteriorating sense of wellbeing.

Since we identified the Self-quants in 2011, the BBC has reported a rise in self-trackers who use various strategies – such as recording their activities every 15 minutes – to analyse their life experiences in the ultimate act of betterment. This has only exacerbated our anxieties about choice. Patrick McGinnis, venture capitalist and coiner of the term FOMO, is writing a book about the paralysis of FOBO (fear of better options), which has transformed us into a generation of commitment-phobes. 'In order to choose something, you must let go of another thing… it's the fear of having to mourn the road untaken,' he says.

But with 92% of us feeling pressure from society to always be progressing, experts are reframing rest as a revolt against the backbone of capitalism – doing (source: Ace & Tate). Claudia Hammond explores this concept in her book The Art of Rest, which examines how brands have ploughed millions into sleep, but missed opportunities to help us unwind. However, this near future is being fast-tracked as the advance of Covid-19 allows consumers to reclaim restful behaviours.

92% of global consumers feel pressure from society to always be progressing

Source: Ace & Tate



Embr Wave



At the Beginning of Everything by Deloitte

Clean Capitalism

In a profit-driven society, consumers are embracing new metrics of progress that value personal wellbeing, emotional fulfilment and social good over economic growth.

More consumers than ever are partaking in do-good behaviour without financial incentives, such as volunteering. Almost four in 10 (38%) Britons volunteered in 2018, according to a survey by YouGov for the National Council for Voluntary Organisations, with 77% finding that volunteering improved their mental health.

Many young people are contributing to the descent of liberalism, reacting to extreme right-wing politics with a more positive view of socialism that supports their quest for equality, sustainability and classlessness. A US Harris Poll and Axios study found that 61% of Generation Z in the US have a more positive reaction to the word ‘socialism’ than ‘capitalism’ at 58%. Catering for this generation, the world’s first post-capitalist streaming platform, **Means TV**, will be launched in 2020 with a mission to create a media infrastructure that empowers the masses.

New Zealand has even taken steps to becoming a Post-growth Society. In 2019, it became the first Western country to create its entire budget based on policies to improve wellbeing. ‘Growth alone does not lead to a great country,’ wrote Prime Minister Jacinda Ardern. ‘Nor does it take into account who benefits and who is left out or left behind.’

Generation I

With Generation Z already the world's largest demographic, future consumers will bring new ideologies and a refreshing sense of individualism to the fore.

In East Asia, young people are already showing signs of heightened self-love by turning against traditional milestones of success. As explored in LS:N Global's The Uncoupled tribe, being a *honjok* – someone who actively seeks singledom and solitude – continues to be a desirable lifestyle choice in South Korea. 'We live in a generation where simply working hard for a bright future doesn't guarantee happiness, so why not invest in 'me' time?' asks Korean photographer Nina Ahn.

Faced with bleak financial prospects, young South Koreans are also rewarding themselves with short-term indulgences such as food deliveries and spontaneous holidays. The practice has been dubbed *shibal biyong* and is referred to as 'symbolic endeavours responding to social problems via individual consumption', says Alex Taek-Gwang Lee, a professor at Kyung Hee University. 'As saving cannot guarantee the future… the idea of investing in the present rather than the future gains strength.'

In China, affluent singletons – dubbed 'single aristocrats' – are booming. According to state-run media organisation Xinhua, 20% of the post-1990s generation have never dated, by choice, and are instead prioritising family, friendships and themselves.



Yangachi campaign, 2020

'We live in a generation where simply working hard for a bright future doesn't guarantee happiness, so why not invest in 'me' time?'

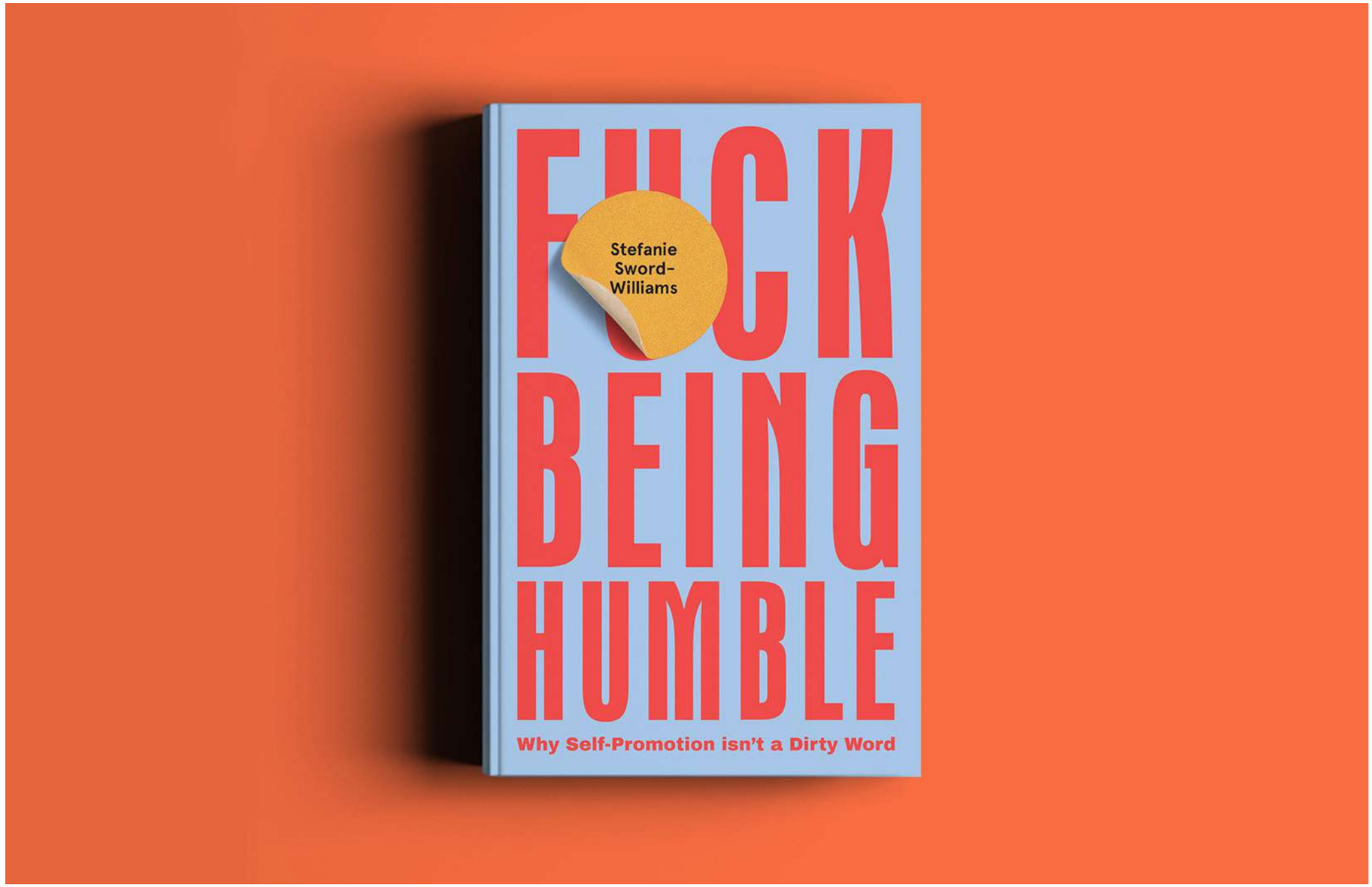
Nina Ahn, photographer

Insight

No longer simply chasing achievement, consumers will embrace moments of downtime, pleasure and serendipity to gain a new perspective on life.



Make Yourself a Gift to the World by Droga5 for Equinox. Directed by Floria Sigismondi



F*ck Being Humble by Stefanie Sword-Williams

‘The opportunity for you to change direction, for you to take control of what makes you happy, is so much more available than it ever has been’

*Stefanie Sword-Williams, founder, F*ck Being Humble*

Vanity Redefined

In a media landscape that increasingly values inclusivity, brands are rebranding self-pride as a force for good.

Although an inflated sense of self would traditionally be considered a potential veneer for feelings of vulnerability, new research led by Queen’s University Belfast suggests that having just a hint of narcissism in your personality is a strength not a weakness. The director of the study, Kostas Papageorgiou, correlates narcissism with ‘very positive components of mental toughness… protecting against symptoms of depression and perceived stress’.

To healthily re-introduce these characteristics among consumers, **F*ck Being Humble** is a mentoring platform that helps individuals overcome the fear of self-promotion. Through workshops and panel events, the platform urges participants to take regular time for themselves to contemplate what makes them special. ‘The opportunity for you to change direction, for you to take control of what makes you happy, is so much more available than it ever has been,’ founder Stefanie Sword-Williams tells LS:N Global.

With 72% of consumers describing themselves as more selfish than selfless, according to Ace & Tate, some brands are reframing wellness pursuits as self-love. In January 2020, **Equinox** unveiled a new campaign, Make Yourself a Gift to the World, celebrating the positive effects of self-devotion on the wider world. ‘Our message this year, delivered in a playful, tongue-in-cheek way, is a statement about the benefits of being your best self for the benefit of others, turning the idea of self-obsession on its head,’ says Seth Solomons, chief marketing officer at Equinox.

Homebody Economy

As opting out of social commitments becomes not just a choice but an act of solidarity, consumers are reframing at-home guilty pleasures as tools to switch off from the chaos of the outside world. In 2019, before a time of social distancing en masse, British consumers favoured JOMO over FOMO, with over a third (33%) often relieved when a friend cancels plans (source: YouGov). It's no coincidence, then, that self-care is now an industry estimated by Harvard Business Review to be worth £8.5bn ($11bn, €10bn) in the US.

But with self-care increasingly critiqued as self-indulgent and privileged, companies such as **Girls' Night In** offer a solution, trading solo self-care for community wellness – a more collaborative experience that encourages consumers to host virtual book clubs, happy hours and games nights. With loneliness now affecting 64% of UK freelancers every day, according to Viking, community wellness initiatives can allow friends to focus on themselves, together – even during self-isolation.

'In the age of Instagram, people want to celebrate the fact that they are taking a break, and taking time to take care of themselves, because time is the ultimate luxury,' says its founder Alisha Ramos. Bath time is also experiencing a renaissance. **Maude** has expanded from sexual wellness products to celebrate the languor and intimacy of bathing with a collection of massage candles, bath salts and coconut milk powder, intended for both solo and couples' use. Beauty retailer **Lush**, meanwhile, is celebrating the diverse bathing rituals around the world with its emotional and reflective We the Bathers campaign.



Maude bath, US



Nice magazine, South Africa

‘Without perspective, people can continue on a hamster wheel of life wondering why burnout, boredom and complacency result’

Sue Hawkes, author, Chasing Perfection

Slacker Culture

In a backlash against workplace burnout, the consumers of the future will show a fresh attitude to work that prioritises personal fulfilment above striving for success.

Generation Z is the most self-taught generation yet, having harnessed digital tools to master anything that affords satisfaction. ‘I have a background in graphics and communication, but today I was reading about data science. I also work as an app developer,’ 23-year-old graduate Lucas Antunes tells LS:N Global.

Simultaneously, youth unemployment is at an all-time high in many nations, from South Korea to Nigeria, Turkey and India. In the UK, the employment rate of 16–17-year-olds has virtually halved over the past two decades, with the death of Saturday jobs blamed in part for this decline (source: Revolution Foundation).

Rather than further alienating these young people, some are reframing how we view unemployment, positioning it as a positive and political state. Home-grown African publication **Nice** magazine’s latest issue focuses on the world’s least employed youth population – South Africa – breaking down the stigma of *abo mahlalela*, or ‘those who stay and do nothing’, and attributing value to those who are accused of ‘not playing their part in the socio-economic wheel’.

Minternships are also becoming more popular, whereby 30something consumers take a step back from current workplace stressors and digress to the level of an intern. ‘Without perspective, people can continue on a hamster wheel of life wondering why burnout, boredom and complacency result,’ says Sue Hawkes, author of Chasing Perfection.

Serendipitous Living

With consumers overly reliant on lazy mechanisms that help us navigate our cities, brands are stepping in to reconnect us with the spontaneity of urban life.

According to the most recent statistics by the UK Department for Transport, of the many millions of journeys people make every day in England, only 27% are on foot. Holding the pervasiveness of Uber and convenience-first navigation apps accountable for this, experts believe these consumers are missing out on the joys of discovery. 'These maps and apps flatten, simplify and neutralise space that is in reality three-dimensional, complex and rhetorical,' says Kathleen Vandenberg, senior lecturer at Boston University.

This is changing, however. According to The Atlantic, many consumers are using **Apple's** Find My Friends app to turn life into a movie and regularly cross paths with friends. Meanwhile, before the Covid-19 pandemic, Copenhagen's Metro system committed to re-introducing colour and texture into our wayfinding experiences with a series of ads celebrating its new line, which will connect 85% of the city's population. The humorous ads are designed to show how public transport can offer 'plenty of togetherness with strangers… and chances for awkward encounters, like running into an ex-lover'.

Brands are also encouraging consumers to upend their routines and rediscover impulsiveness. To inspire Stockholm residents to embrace spontaneous live music experiences, digital advertising company **Clear Channel** recently replaced 300 advertising billboards with guides directing commuters to the nearest gigs. As a gig draws closer, the GPS coordinates of the venue trigger the closest digital screens.



Copenhagen Metro campaign by agency Hjaltelin Stahl

Of the many millions of journeys people make every day in England, only 27% are on foot

Source: UK Department for Transport



The Sinner Hotel, Paris

‘Spaces like Cocktail [d’Amore] are the kind of fertile soils needed for all kinds of creative, progressive and positive ideas to even begin to come into being’

Marcus Knupp, illustrator

Neo-pleasure

In a future that has eradicated the taboos of eroticism, sex will be used as a way to reject the pace of modern life and connect with our carnal desires. Historically, indulging in the pleasure of sex was deemed appropriate as long as it was for the purposes of making babies, writes Brandon Ambrosino for the BBC. However, this is changing. ‘Perhaps it’s time to admit that enjoyment is the main reason most of us have sex.’

Consequently, there has been a global evolution of kink culture. In Berlin, parties such as **Cocktail d’Amore** have been encouraging ‘warm encounters you have with random strangers, a fleeting closeness that society usually denies’ for 10 years, and the culture is now emerging in more conservative nations such as India, where Jaya Sharma, co-founder of the **Kinky Collective** – an Indian BDSM community – is working on a book about kink activism.

This is even filtering into hospitality. Parisian hotel **Sinner** plays on the historically debauched nature of luxury hotels, described as ‘a mediaeval Catholicism-meets-sadomasochistic eroticism: an environment that encourages sophisticated sensual pleasure from the moment you step through the door’. Guests have access to wet rooms large enough for several people, lubricants and accessories such as riding crops.

Taking this a step further, the mindful sex movement is rebranding sex as the next critical wellness pursuit. At New York’s **NSFW**, which stands for New Society for Wellness, members can explore self-pleasure and sexual enlightenment in a judgement-free safe space.

Practical Boredom

Raised in the attention economy, humans have forgotten how to embrace the state of being bored. As Sandi Mann, author of The Upside of Downtime, points out: 'We're trying to swipe and scroll the boredom away.'

While consumers once accepted inactivity as part of being human, we are now suspicious of dead time. However, amid a fearful period that gives consumers permission to press pause, the increasing popularity of Niksen – a Dutch relaxation technique that encourages stillness and sanctioned daydreaming – represents a re-appraisal of how we view idleness. 'Unfilled moments, moments when you don't have entertainment, or moments when you don't have companionship, may actually spawn creativity,' says Susan J Matt, an emotion historian.

Brands must prepare for the renaissance of the hobby, as consumers learn to recognise the value in repetitive and mindless activities. **Temporary Academy for Un/Re/Learning** is a programme based in The Philippines that enables students to learn deeper, human skills such as drawing and making music from a number of 'dropouts, minorities and outcasts'.

Nature can also incur positive boredom. In 2019, **Shackleton Whisky** lured consumers into Britain's connectivity-free rural areas with a series of interactive maps. Meanwhile, the **Feminist Bird Club**, which brings LGBT+ consumers, women and people of colour together for bird-watching activities, has reached more than 2,500 members worldwide. '[Birding] just reset my goals in life,' says Ryan Mandelbaum, who has re-organised his life to centre on birdwatching. 'Rather than pursue success, now I just pursue doing the thing I like.'



'We're trying to swipe and scroll the boredom away'

Sandi Mann, author, The Upside of Downtime

Shackleton Whisky Off The Grid initiative

Foresight

As tomorrow’s consumers adapt to a new equilibrium and pace of life, societies and brands will be reshaped to fit the desires that come with a slower, introspective and more joyful lifestyle.



We See Less Even Though We See More by Erik Östensson for Ignant



Ngaren: The Museum of Humankind by Richard Leakey, designed by Studio Libeskind

Contemplation Spaces

Traditionally, religious spaces would offer communities regular time for reflection. However, the percentage of Americans who describe their religious identity as atheist, agnostic or ‘nothing in particular’ has risen to 26%, up from 17% in 2009 (source: Pew Research Center).

In recent years, mindfulness has been harnessed to fill this gap in society. But now, the practice is increasingly critiqued as commercialised – psychotherapist Miles Neale refers to the secularisation of meditation as ‘McMindfulness’. Therefore, future forms of contemplation will take a more educational and human-centric approach, merging spirituality with hospitality.

Claus Sendlinger, the founder of **Design Hotels**, has dedicated his personal hospitality venture, the SLOW project, to altering consumers’ sense of being. Its new property, Marina Marina, is a space in Berlin inspired by the architecture of religion that aims to encourage contemplation among workplaces and individuals. The property, designed as a space to drive fresh ideas, will feature a range of gathering places, from hidden speakeasy rooms to pop-up auditoriums, all playing with ideas of spirituality and humanity.

Further elevating this sense of introspection, **Studio Libeskind** plans to bring a museum of human evolution to Kenya’s Rift Valley in 2024. Ngaren: The Museum of Humankind will use design and thought-provoking artefacts to draw attention to the pivotal role of Africa in universal issues, from biodiversity to climate change. ‘The museum will be a place for discovery, wonder and contemplation,’ says architect Daniel Libeskind. ‘Through the architecture and exhibitions, Ngaren will anchor all walks of life to Africa: the epicentre of human existence.’

Kink Architecture

As heteronormativity loses its default position, and kink culture, eroticism and sex work lose their stigma worldwide, a sexual revolution could influence the way our cities and spaces are designed.

In media artist Nicholas Pfosi's exploration of queer culture, his photography project Cruising aims to shed light on the way public spaces have been reclaimed by gay men over time, transforming mundane car parks or bathrooms into 'sites of passion'. '[Cruising] was arguably even a political act – a kind of fuck you to mainstream society's villainising of queer love; an act of necessity as much as daring,' he writes.

To integrate this concept into the sex-positive society of tomorrow, architects are hoping to build a new field of urban design that welcomes cruising and sex in semi-public places. Cruising Pavilion, a concept that was recently presented at **ArkDes** museum in Stockholm, explores urban typologies that could be adopted in future cities – particularly ones that create more democratic and accessible spaces for queer and non-binary people. For the curators, serendipitous design is important, and future cities should look to the directionless, labyrinthine qualities of the darkroom as an important architectural device.

'A city that is not able to foster new ways and radical ways of having sex, is a city which is obsolete,' co-curator Charles Teyssou tells Dezeen. 'Cruising is a really accurate thermometer of a city being democratic.'



Cruising Pavilion by Pierre-Alexandre Mateos, Rasmus Myrup, Octave Perrault and Charles Teyssou

'Cruising is a really accurate thermometer of a city being democratic'

Charles Teyssou, co-curator, Cruising Pavilion



Photography by Rob Woodcox

Ethical Enjoyment

By 2030, taking time for oneself will no longer be considered a self-indulgent activity that solely benefits the individual. Just as the solidarity of the global pandemic has shown – it will help society at large.

Women's rights activist Adrienne Maree Brown's new book Pleasure Activism: The Politics of Feeling Good explores how our emotional desires can be interlinked with social justice. Brown believes that changing the world should not be overstated as work, and aims to reframe ethical and activist behaviours as personal liberation. 'One of the ways that we start doing the work of reclaiming our full selves – our whole liberated, free selves – is by reclaiming our access to pleasure,' she explains.

In the future, we could see the democratisation of enjoyment. Philosopher Sandy Grant imagines us living in a pleasure economy, in which exclusivity no longer exists and enjoyment is universal. 'Instead of enjoying the exclusivity of things – cars others cannot afford, holidays others cannot take… What if I decline enjoyments that exploit or hurt others?' writes Grant.

Already, the Uneasy Affluence mindset is gaining momentum, as consumers turn away from traditionally luxurious activities, such as eating meat or buying designer fashion items. New research by Boston College and Harvard Business School has found that owning luxury items can make consumers feel guilty and even trigger feelings of imposter syndrome.

'One of the ways that we start doing the work of reclaiming our full selves – our whole liberated, free selves – is by reclaiming our access to pleasure'

Adrienne Maree Brown, author, Pleasure Activism: The Politics of Feeling Good

Ephemeral Living

Innovators are imagining a future in which people seek a life that is transient, exploratory and – most importantly – free from the reigns of a consumerist society.

Looking at our future existence through a speculative lens, **Stream City** envisages us living in a fictional urban environment defined by fluidity. The Dutch Design Week 2019 project includes a VR free-flying experience and designs for flying suits designed to allow tomorrow's citizens to glide through life freely, without being tied down by places, people and possessions. According to the project's designer Stéphane Louis-Alexis-Borel, 'it aims to provoke an experience: to detach oneself from things and to live temporarily according to anarchistic values'.

Showing how this notion of transience can be integrated into the hospitality industry, **700,000 Heures** is the world's first 'wandering hotel'. Every six months, the hotel relocates to a new destination – it was most recently at an apartment in Paris and will soon move to southern Osaka – encouraging high-spending consumers to follow and take part in local activities such as gardening and calligraphy classes.

Named after the average human lifespan, the hotel makes a perpetual nomadic lifestyle a reality for a new generation of Untethered Luxurians. After all, 75% of global Generation Z believe that the world would be a better place if people were required to periodically spend a few months living in a different culture, according to Ford.



75%

of global Generation Z believe that the world would be a better place if people were required to periodically spend a few months living in a different culture

Source: Ford

700,000 Heures

Lab Notes

Goodbye hustle culture

: Opting out is the new opting in. While today's consumers are defined by their proactivity, influence and connectedness, the next decade will see the dissolution of hustle culture, as inactivity and rest become the status symbols of tomorrow.

Solitude without guilt

: Self-worth must be decoupled afrom aspiration. To champion the anti-striver, brands must reframe motivational marketing to celebrate slacker culture and alleviate our guilt about solitude and leisure time.

Pleasure as activism

: By 2030, society will be built around individual and collective pleasure. As consumers begin to question how their unceasing sense of aspiration contributes to a capitalist system, they are recognising that the ultimate activism is enjoyment itself.



Equilibrium by Uv-Zhu, China

Enlightened States

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

Doug Wheeler installation at David Zwirner gallery, New York



Senses by Louisa Grey for Frama

‘In a sense, by providing us with a steady diet of experiences, the experience economy may inadvertently return us to a state of pure experience’

Benjamin Schneider, writer

Over the past two decades, we have revelled in an overwhelming sense of the world opening up. Thanks to the internet, a booming leisure market and low-cost travel, experiences have slowly superseded objects in consumers’ minds, marking a fundamental shift from materialism to experientialism.

Not only have products of this new culture of doing become status symbols – to be commodified, consumed and shared – but we have also become slaves to the associated spectacle. Amplified by social platforms, a monotonous merry-go-round of photogenic pop-ups and immersive events have followed. These, ironically, are partly driven by a desire to counter the very sense of internet fatigue they have come to perpetuate.

But with a recent survey finding 46% of Generation Z rate new experiences as one of the three most important things in their lives, the experience economy’s superficiality is becoming palpable (source: Boiler Room Brand Labs).

‘In a sense, by providing us with a steady diet of experiences, the experience economy may inadvertently return us to a state of pure experience,’ says writer Benjamin Schneider. ‘The mindless, yet emotionally charged scroll, the sugar rush of an interactive installation, the meal, date or errand streamlined by a third-party platform are quickly becoming the stuff of our everyday lives, devolving into non-experiences.’

Our horizons are now changing. Caught in a state of social, political and economic flux, consumers and brands are recalibrating amid the impact of global events such as Covid-19. By choice or by circumstance, people are slowing down, looking inwards for greater meaning and challenging themselves to find fulfilment in the everyday. Meanwhile, brands are rethinking their roles in the emotional lives of consumers as The E-motional Economy matures.

As we collectively seek to silence the noise around us – to resist the constant and competing demands for our attention – the powers of self and solitude are emerging. We are entering an era in which personal transformation trumps consumption and throwaway interactions are traded for more meaningful, contemplative moments.

Between now and 2030, the concept of experience as medicine will take root. The focus will shift to places, processes and practices that cultivate quiet, intimacy and introspection – all with a view to rebalancing our emotional, physical and spiritual states. As a result, the experiences of tomorrow are poised to play a transformative role in creating tools to ground and re-orientate ourselves in a fast-changing world.

Hindsight

The impulse to seek new experiences is shifting focus, away from their social currency and towards their personal value.



Birch, Cheshunt, England

Anxiety Inflection

We are living in apprehensive times. Endless uncertainty about the future coupled with the ills of the internet have defined a new age of anxiety. In the UK, one in four people experience some form of mental illness in any given year, while concern about the environment reached record levels in 2019 (sources: Mind and YouGov).

This is driving a new eco-anxiety phenomenon, which Psychology Today describes as 'a fairly recent psychological disorder afflicting an increasing number of individuals who worry about the environmental crisis'. In response, major exhibitions such as Broken Nature and Eco-Visionaries have, in the past year, used art and design to explore humankind's impact on the planet while presenting innovative ways to reframe our relationship with nature.

At the same time, as the conversation about mental health evolves, the subject is increasingly being explored through a cultural lens. Last year an article in Elle dubbed Anxiety Pop as the sound of 2019. At the 2020 Grammys 18-year-old Billie Eilish emerged as the genre's breakout voice. Accepting the Grammy for Album of the Year this January, her brother and producer Finneas O'Connell stated: 'We wrote an album about depression, and suicidal thoughts and climate change and being the bad guy, whatever that means.'

In this way, art, media and entertainment are being used to confront today's existential challenges. Looking ahead, the anxiety economy and the experience economy will overlap as people turn to culture as a source of comfort and contemplation.



Consider Falling by Sarah Howe, On Edge: Living in an Age of Anxiety, London



Museum of Ice Cream, US. Photography by Nicole Franzen

‘[Pop-ups] take nature and art and knowledge-seeking, flatten them into sight gags and stick them to every stray surface’

Amanda Hess, writer

Commodity Climax

In 1998, a Harvard Business Review article declared the emergence of the experience economy, describing the transition from selling services to selling experiences. At the heart of this shift is the notion that events are commodities. But while location-based entertainment is set to become a £9.3bn ($12bn, €11bn) industry by 2023 and the £3.4bn ($4.5bn, €4.1bn) immersive entertainment market is booming, the commercial drive towards experientialism has created a homogenised, superficial and unsustainable landscape (sources: Immersive Design Summit, Greenlight Insights, StoryTech).

In her piece The Existential Void of the Pop-Up ‘Experience’, The New York Times writer Amanda Hess says that, while popular, pop-up experiences are changing culture and tourism for the worse. ‘They take nature and art and knowledge-seeking, flatten them into sight gags and stick them to every stray surface,’ she writes. Further highlighting the way social media has transformed travel trends, a recent survey of 18–34-year-olds found that 37% of respondents said their choice of holiday destination was influenced by social media, and 31% said that posting holiday pictures online was as important as the holiday itself (source: WeSwap).

The resulting rush of over-tourism has spawned an epidemic of sameness, while putting serious strain on local cultures and environments. The drawbacks of social media’s acquisitive mindset are perfectly captured by writer and artist Jenny Odell: ‘The consequences of **Instagram**-fuelled desire are a harsh reminder that the world is not an inert shop of wonders for our consumption.’

Time Affluence

Traditional markers of wealth and luxury have shifted in line with the rise of the experience and sharing economies. As value systems have been restructured to prioritise access over ownership, the notion of success has also changed, establishing time – and how we broker and define it – as a new currency.

Although time is at a premium, technological advances combined with increasingly flexible modes of living and working also mean we have more leisure time than previous generations. Beyond work, household chores, education and religious activities, the US Bureau of Labor Statistics' 2018 American Time Use Survey found that men and women in the US spend 5.7 and 4.9 hours, respectively, on leisure activities each day.

With this in mind, many of us are spending our free time in ways that aren't making us happy, says James Wallman, author of Time and How To Spend It. 'Leisure doesn't improve quality of life unless one knows how to use it effectively,' he explains.

Wallman has ordered his philosophy for time well spent into a seven-point checklist that forms the acronym STORIES: Story, Transformation, Outside and Offline, Relationships, Intensity, Experience, and Status and Significance. The common thread among these is that meaningful experiences have personal value by allowing us to unplug, connect or grow.



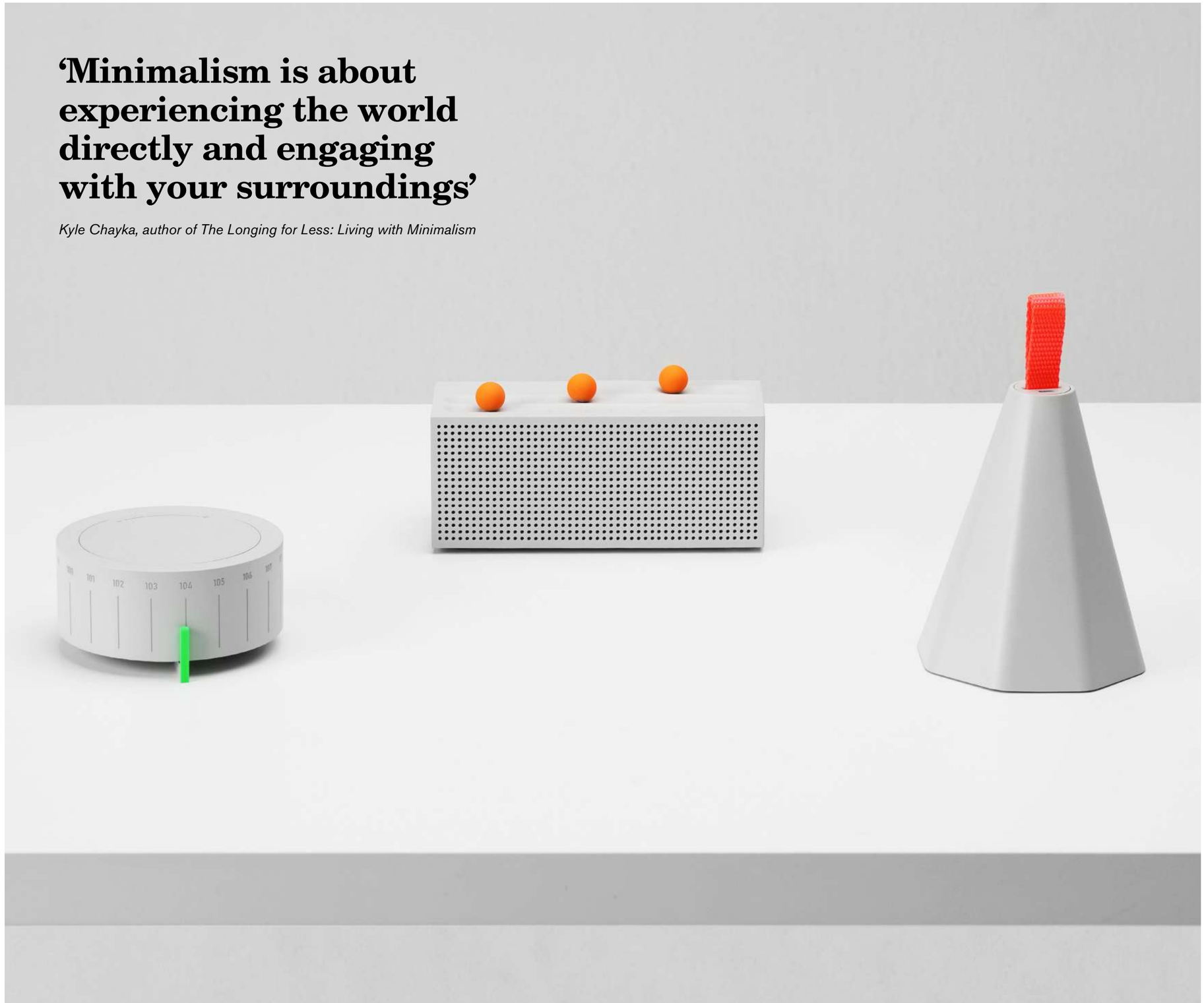
Adidas Gardening Club

Men and women in the US spend 5.7 and 4.9 hours, respectively, on leisure activities each day

Source: US Bureau of Labor Statistics

‘Minimalism is about experiencing the world directly and engaging with your surroundings’

Kyle Chayka, author of The Longing for Less: Living with Minimalism



Tamed Digital Product by Studio SF-SO

Simplified Stimulation

Minimalism has entered the mainstream consciousness in more ways than one. Over-stimulated and overwhelmed, more and more people are looking to simplify their lives visually, physically and mentally not only as a way to rest and reset, but most vitally to reconnect with themselves. This is especially true in light of the recent Covid-19 outbreak, when consumers have sought to positively reclaim self-isolation.

In The Longing for Less: Living with Minimalism, cultural critic Kyle Chayka explores our preoccupation with this movement, which he suggests has been steadily co-opted and commercialised into a superficial trend. But according to Chayka, ‘minimalism is about experiencing the world directly and engaging with your surroundings’.

This idea of re-engaging with the world is forcing us to reconsider our relationship with design and technology. In an era of non-stop digital distraction, awareness of the personal, social and cultural costs of technology is growing. According to **Pinterest**, searches for social media detoxes rose by 314% across the platform in 2019.

At its most extreme, this has paved the way for the new practice of dopamine fasting, which involves halting any kind of stimulation for up to 24 hours at a time. Such sensory deprivation is slowly building momentum as people look to restore sensitivity to life’s small daily pleasures. ‘Your brain and your biology have become adapted to high levels of stimulus so our project is to reset those receptors so you’re satiated again,’ James Sinka, a practitioner of dopamine fasting, tells The New York Times.

Insight

As the experience economy becomes increasingly introspective, it will offer unique opportunities to stimulate and support a range of emotions and states of mind.



Amsterdam Museumnacht by Czar, Scott Kooken and Michael James Phillips

Haptic Intimacy

Beyond sight and sound, the rise of screen-based interactions has estranged us from our other senses and disconnected us from one another, leading to a crisis of touch. But a new wave of tactile tech aims to combat this by harnessing the sense's social and emotional power. As the next frontier for digital experiences, advances in tactile research are poised to transform our relationships and redefine the future of intimacy.

'Only recently has brain science fully grasped that skin and touch are as rich and paradoxical as any other part of our humanity,' writes Adam Gopnik in The New Yorker. 'Touch is the unsung sense – the one that we depend on most and talk about least.'

In a bid to redress the balance and bring a sense of touch to daily digital communication, fingernail-mounted haptic interface **Fulu** allows users to send and receive touch to and from family members or loved ones, or feel textures remotely. While touch interfaces and haptic technology have traditionally been experienced using gloves and virtual reality interfaces, Fulu aims to provide an accessible touch interface that is more suitable for everyday use.

Elsewhere, researchers from Northwestern University in the US and the Hong Kong Polytechnic University have developed a multi-layered, soft 'skin' made from silicone that could also allow us to feel physical sensations from a distance. Such innovations have the potential to humanise our online interactions and bring comfort to consumers during periods of isolation.



'Touch is the unsung sense – the one that we depend on most and talk about least'

Adam Gopnik, writer, The New Yorker

Fulu by Ryo Tada. Image by Deo Suveera



Endel, Berlin

‘We’re entering the era of adaptive, personalised digital supplements that will improve people’s lives by working in the background’

Oleg Stavitsky, co-founder and CEO, Endel

Neuromedia

As we develop tools to track various media’s effects on the mind, content is increasingly being created and curated to support specific moods. This could radically alter our relationship with music and entertainment more broadly, paving the way for a new era of media that could mirror and mould our emotional states. New research by ACM Digital Library shows the potential for machine learning to map our physiological and emotional responses to music.

Signalling the potential, **Endel** is an audio start-up that creates customised sound frequencies to boost mood or productivity. These personalised audio tracks respond to user inputs such as time and location, as well as biometrics including heart rate. In 2019, Endel made headlines when its algorithm became the first to be signed to a record label. ‘We’re entering the era of adaptive, personalised digital supplements that will improve people’s lives by working in the background,’ says Oleg Stavitsky, co-founder and CEO of Endel, who recently made the app’s soundscapes free for a month to help ease anxiety brought on by the spread of Covid-19.

Digital health innovator **AeBeZe Laboratories** aims to make the connection between media and mood even more transparent with its ‘digital nutrition’ concept. Its app, Moodrise, curates packages of photos, videos, graphics, sounds and music based on their proven ability to evoke six core emotions. Backed by science, each content category has been created to trigger specific neurotransmitters in the brain. Michael Phillips Moskowitz, founder and CEO, refers to these multimedia bundles as ‘digital drugs’.

Transformation Trips

A greater focus on personal fulfilment is gaining momentum in the travel industry, with consumers embarking on trips that help them explore their ever-changing selves. In a recent **Lonely Planet** survey, for example, 95% of respondents cited travel as an 'opportunity for positive change' in their life and 59% view travel as an opportunity for personal growth more than they used to. As the trend for decelerated travel evolves, it will increasingly take a slow, thoughtful approach to self-discovery.

Last year, **Airbnb** rolled out The Italian Sabbatical programme, which invited travellers to swap their annual adventure for the chance to live and volunteer in a southern Italian village for three months. During the sabbatical, participants immersed themselves in rural community projects such as beekeeping.

Black Tomato has launched Bring It Back – a collection of purposeful itineraries that can be tailored to travellers' personal goals – with a similar mission. At the heart of the concept is the idea that travel, when properly curated, has the power to transform. The trips are intended to address various questions and anxieties consumers face in life. 'I constantly see people wrestling with frustrations that they need to unpack, and they just don't feel like they have the time,' says founder Tom Marchant, who suggests that travel is 'a brilliant vehicle to find those answers to the fundamental questions that we all have'.

59%

of those surveyed by Lonely Planet view travel as an opportunity for personal growth more than they used to

Source: Lonely Planet



Bring It Back by Black Tomato



Off-White c/o Virgil Abloh and Musée du Louvre, Paris

‘I think seeing art, seeing performance, seeing cultural artefacts and history has a unique way of opening up new views in your mind, alternative realities’

Kay Lindhout, director, Czar

Meditative Museums

As time spent in museums is rebranded as a wellness pursuit, cultural immersion is also being recognised as a way to explore identity. Consumers are turning to spaces dedicated to culture and history not only to encourage slower, more calming states of mind, but also to learn about themselves.

A recent report by Art Fund found that 63% of UK adults have visited a museum or gallery to cope with anxiety or stress. Another benefit that comes from arts engagement is a sense of personal growth. Playing on this idea, **Czar Amsterdam** launched a campaign in 2019 to promote Museumnacht.

The theme, The First Time, references the initial emotions that young people experience when they come face to face with culture. ‘I think seeing art, seeing performance, seeing cultural artefacts and history has a unique way of opening up new views in your mind, alternative realities,’ says Kay Lindhout, director at Czar.

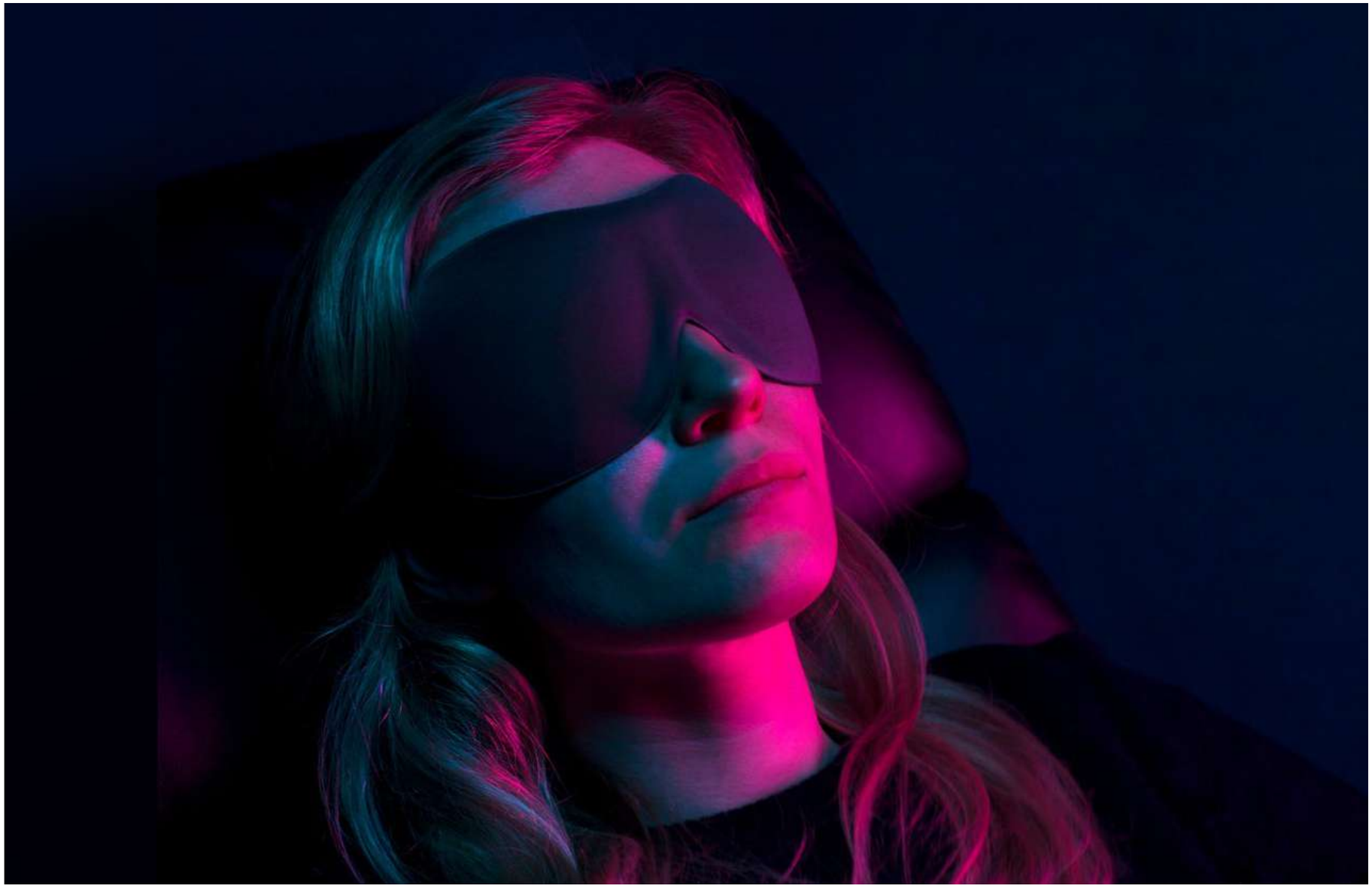
New museum concepts are now bridging the gap between entertainment and enlightenment on an individual scale. **The Museum of Future of Experiences (MoFE)**, which bills itself as a new class of entertainment company, creates mind-bending experiences ‘curated to your individual psyche’. Merging immersive theatre and psychology, MoFE offers guided 60-minute visits that include individual analysis, audio-visual stimulation and dreamlike virtual reality. To personalise the experience, guests are quizzed by guides about their hopes and fears, which shapes the content they see.

Psychonautic Therapy

The rise of secular spirituality and conscious hedonism are streamlining the psychedelic experience as it moves from a rite of passage steeped in subculture to a form of modern therapy. Start-ups are exploring new horizons for psychedelics by eliminating the trip or providing comparable experiences without the drugs. These are aimed at the next generation of psychonauts – those who take psychedelics as a transformational exercise.

Building on the Silicon Valley trend for micro-dosing to sharpen focus and creativity, **MindMed** is developing hallucinogenic and non-hallucinogenic categories of psychedelics. The first of these will offer hallucinogenic therapies as an in-clinic treatment, supervised by a therapist or doctor. The second offering will be a new drug that boasts many of the upsides of psychedelics while cutting out the downsides of tripping.

Wavepaths is pioneering a new approach to psychedelic therapy. Instead of drugs, the start-up is championing the notion of experience as medicine, offering meditative journeys using generative music and light art. The experience is designed to help people come to a greater understanding of themselves, according to founder and neuroscientist Dr Mendel Kaelen. 'It's not merely an experience that is emotional, we are setting up an experience that allows the listener to come to a deeper connection with him or herself,' he says. 'That kind of experience is not just fleeting, it actually has a sustained effect on our sense of wellbeing.'



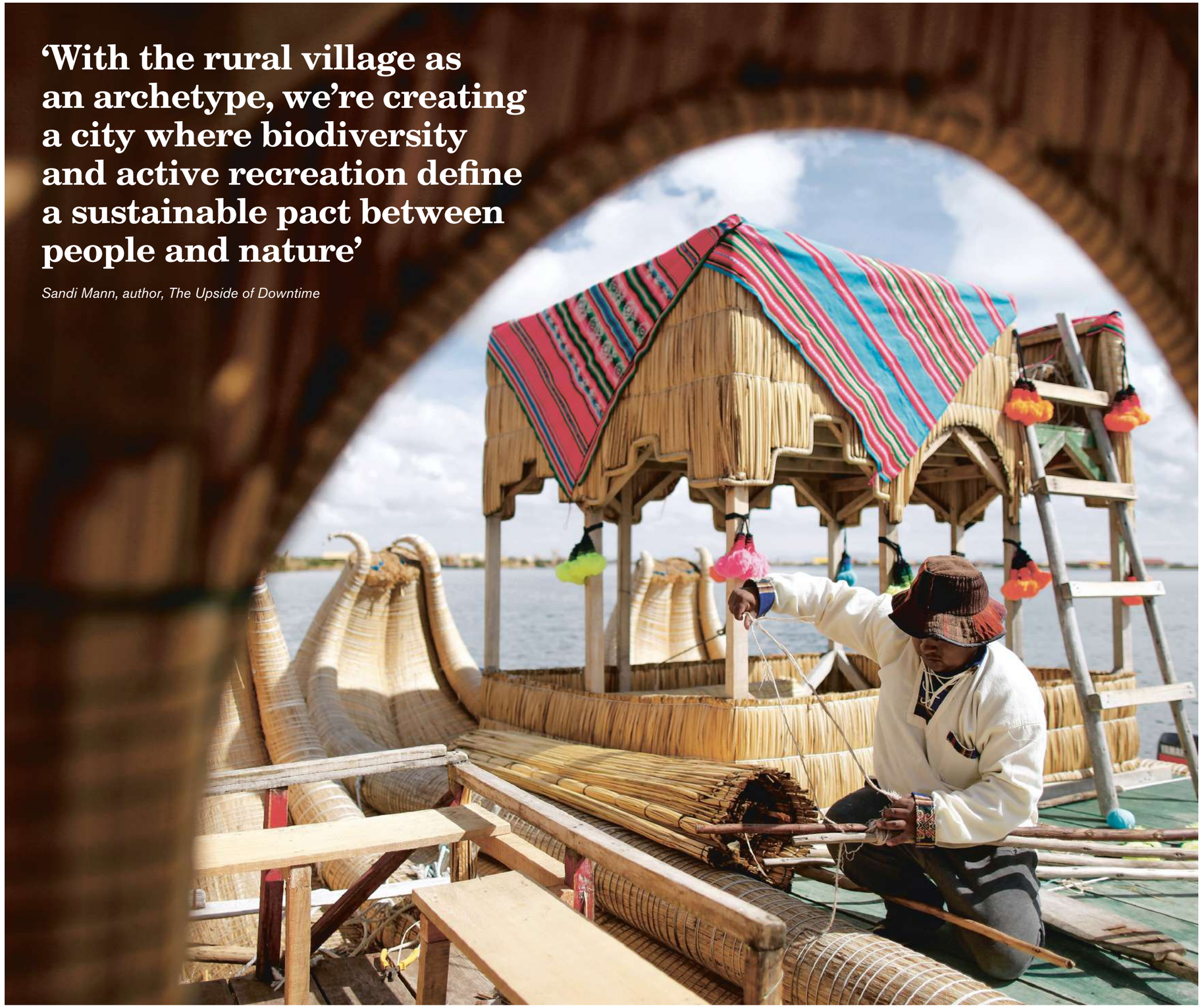
Wavepaths, London. Photography by Mathias de Lattre

'It's not merely an experience that is emotional, we are setting up an experience that allows the listener to come to a deeper connection with him or herself'

Kay Lindhout, director, Czar

‘With the rural village as an archetype, we’re creating a city where biodiversity and active recreation define a sustainable pact between people and nature’

Sandi Mann, author, The Upside of Downtime



Lo-TEK Design by Radical Indigenism by Julia Watson

Urban Rewilding

In response to a growing understanding of nature’s therapeutic effects, architects and designers are radically rethinking the way we live in and build urban spaces. The world of wellness architecture is evolving not only to promote wellbeing through intuitive design and sustainable materials, but also by encouraging greater synergy with the natural world. Future design and placemaking will aim to provide thoughtful opportunities to experience nature by weaving it into the spaces around us.

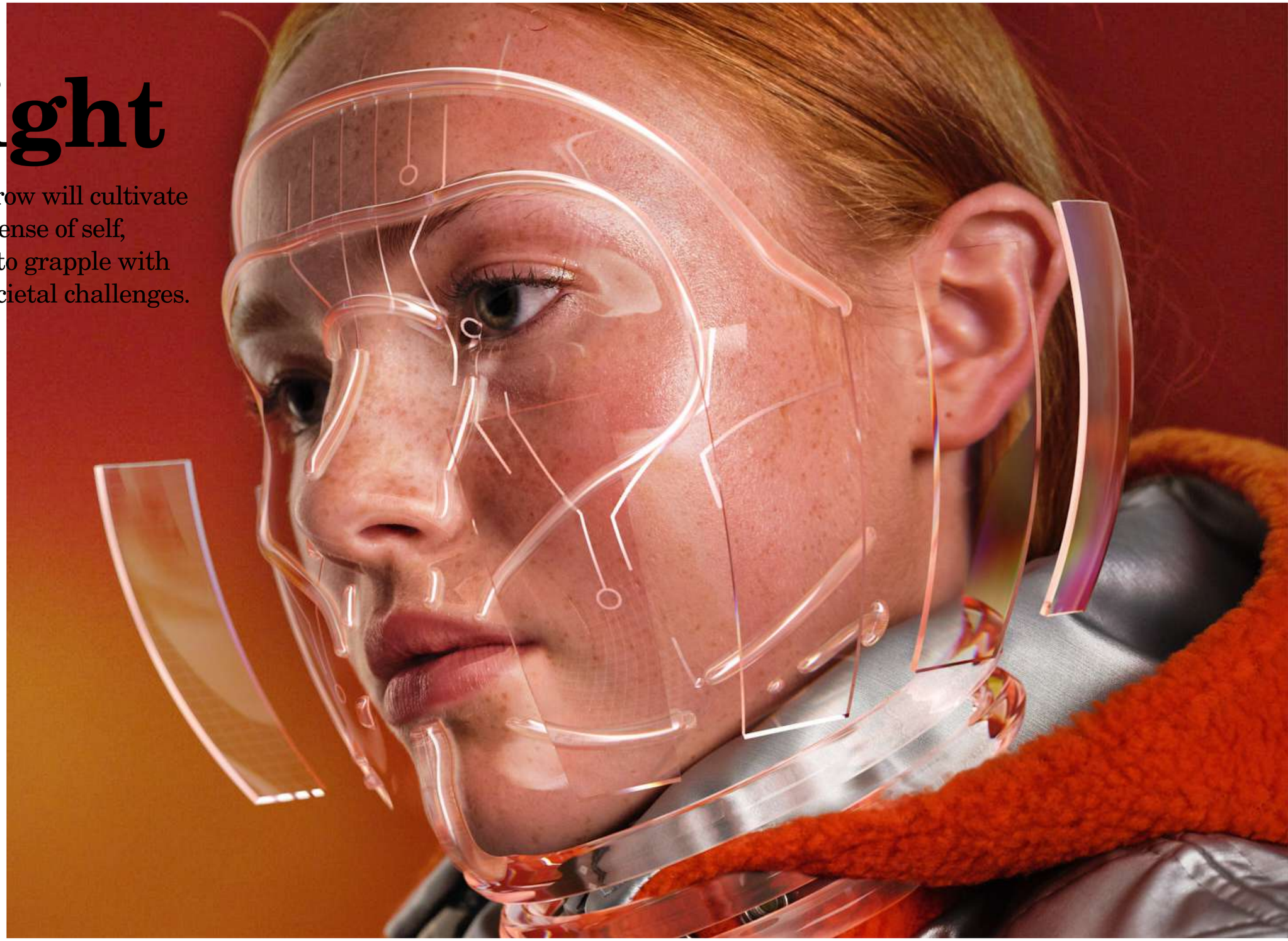
One example is Danish architectural practice **Henning Larsen**, which is designing an all-timber neighbourhood in Copenhagen that will be integrated into the natural landscape. Created in collaboration with biologists and environmental engineers, residents of Fælledby will live alongside nature and actively participate in bettering it. ‘With the rural village as an archetype, we’re creating a city where biodiversity and active recreation define a sustainable pact between people and nature,’ says Signe Kongebro, partner at Henning Larsen.

Some experts are making the case for dumb cities instead of smart ones. ‘Rather than chasing the newest shiny smart city technology, we should redirect some of that energy towards building excellent dumb cities,’ says Shoshanna Saxe of the University of Toronto. Putting these ideas into action, designer and academic Julia Watson approaches design as an exercise in rewilding, offering experiential, urban and spatial design services that bring nature and architecture together. Her new book, Lo–TEK Design by Radical Indigenism, celebrates the nature-based design traditions of indigenous communities.

In ways that are beneficial to people and the planet, future design and placemaking will provide opportunities to experience nature by weaving it into the spaces around us.

Foresight

The experiences of tomorrow will cultivate a greater, more resilient sense of self, providing intuitive ways to grapple with personal, political and societal challenges.



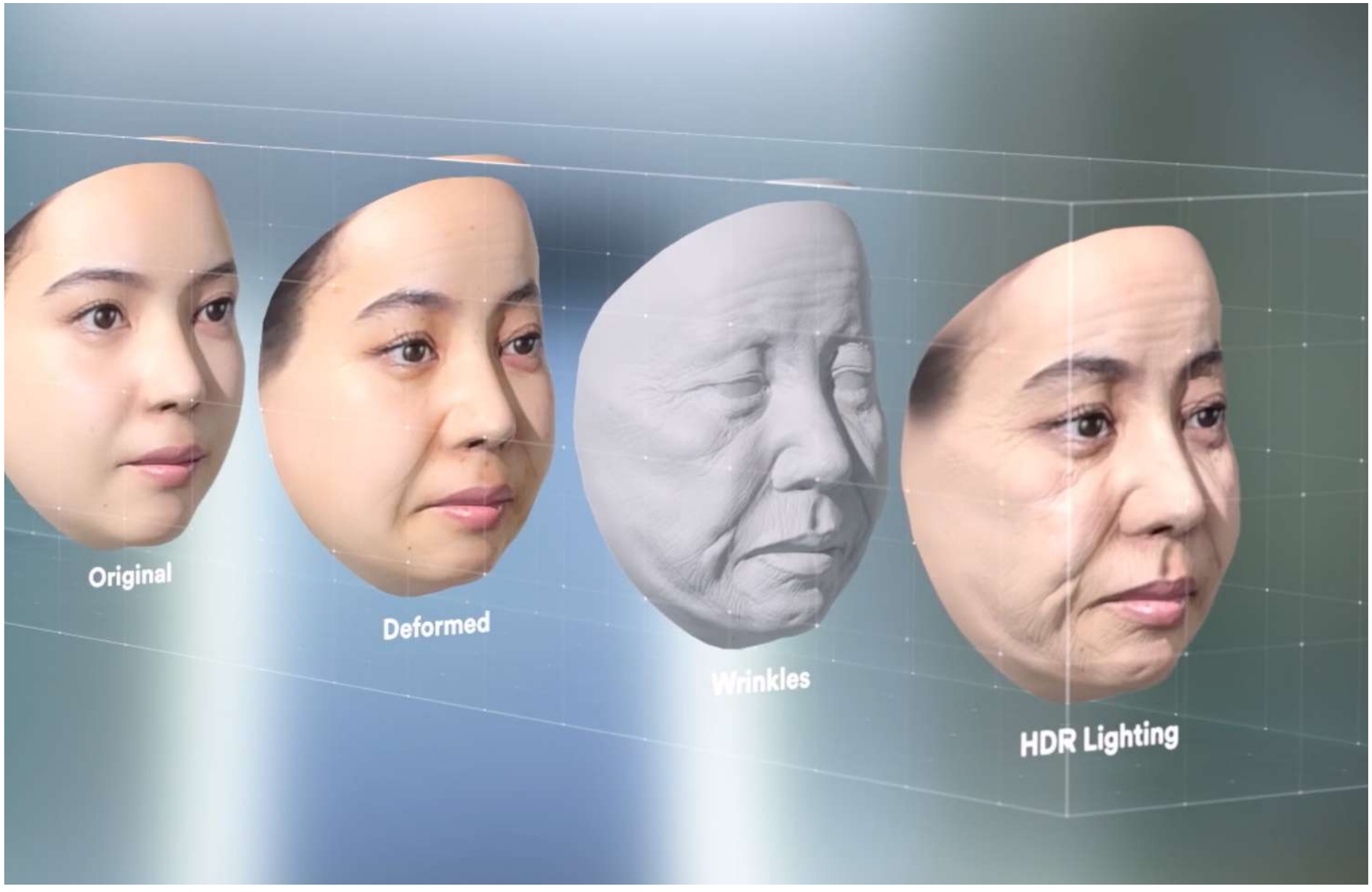
Future Mars Humans by Builders Club

Intuitive Elderhood

In the coming age of artificial intelligence, the true value of culture, wisdom and heritage will re-emerge. By 2050, the number of people aged 80 or over is projected to almost triple, from 143m in 2019 to 426m, according to the UN. With more people living longer, healthier lives, nations and brands will need to offer products, services and experiences that help consumers discover new roles in society and promote collaboration between generations.

'We're talking about a new life stage which is as long as the latter part of your adult life,' says Dr Joseph Coughlin, director of the **MIT AgeLab**, which exists to explore new thinking on ageing populations. Aiming to provide a new playbook for the transition from adulthood to elderhood, **The Modern Elder Academy** is tapping into this. The luxury retreat, which calls itself the world's first mid-life wisdom school, provides workshops that cultivate wisdom, build emotional intelligence and strengthen intergenerational ties, all with a view to educating the next generation of 'modern elders'.

Such thinking is also key for cultural preservation. Indigenous crafts are increasingly disappearing because ageing populations worldwide are not able to pass down their traditions and skills. But thanks to rising interest in hobbies and transformational travel, efforts to teach these crafts are evolving. **Vacation With An Artist** lets travellers book apprenticeships with master craftspeople around the world. Experiences like this that celebrate ancestral learning will be essential to future generations.



Beyond Time by Shiseido and R/GA Tokyo

By 2050, the number of people aged 80 or over is projected to almost triple, from 143m in 2019 to 426m

Source: UN



La Nostalgie du Futur by Marion Lasserre

Re-engineered Intelligence

The intersection between the physical and psychological will drive a future of goods and services that interplay between our emotional and corporeal states. So far, physical intelligence – the ability to detect, change and manage the balance of chemicals in our bodies and brains – is being hailed as the biggest breakthrough in human intelligence since the concept of emotional intelligence (EQ).

A simple, recent iteration is **The School of Life**'s Thinking & Eating, a collection of recipes for emotional wellbeing. 'We want to show how ingredients and dishes can be supporters of certain ideas, emotions and states of mind that best help us confront the challenges of existence,' says The School of Life.

Armed with greater knowledge of our bodies and brains, we will also learn to hack, as well as manage, our emotions in years to come. **La Nostalgie du Futur**, a conceptual brain spa by Central Saint Martins graduate Marion Lasserre, illustrates this future by addressing the rise in mental illnesses and stress as modern malaises amid busy urban living. Collaborating with researchers, perfumers and sound artists, Lasserre's spa concept is designed to boost mood-elevating neurotransmitters in the brain in order to ignite the production of serotonin, pointing to a future when we can individually trigger specific chemicals in our brains to enhance and manipulate experiences.

'We want to show how ingredients and dishes can be supporters of certain ideas, emotions and states of mind that best help us confront the challenges of existence'

The School of Life

Radical Relaxation

The value of solitude is increasingly recognised, with scholars believing that time alone can be good for creativity, self-development, relaxation and spirituality. Already, Britons spend 29% of their leisure time alone (source: Office for National Statistics). As we move towards a future in which we have more free time, opportunities to rest and reconnect with ourselves will not only become more essential, but also more extreme.

Designers are beginning to explore a future for spaces that actively invite introspection. Kirsten Spruit a graduate of Design Academy Eindhoven, taps into some of these ideas with her project A Space for Lingering, a mixed-media installation that encourages spectators to lie down and contemplate the act of doing nothing. 'To counter that sense of always needing to be productive and busy, I decided to focus on the opposite and design something that stimulates idle lingering,' says Spruit. She cites technological acceleration and information overload as making it 'difficult yet crucial to take some time away from it, to reorientate yourself".

Looking forward to 2050, **Philips Design** speculates about the more radical idea of human hibernation. At Dutch Design Week, the designers behind its Hiber Nation project proposed a future in which humans sleep for three months straight to reduce our impact on the environment. In this yearly hibernation, body temperature would be kept low and the metabolism slowed down, causing people to enter what Philips calls 'therapeutic hypothermia'.



A Space for Lingering by Kirsten Spruit

Millennials report feelings of loneliness much more often than their Generation X and Baby Boomer counterparts

Source: YouGov



Compression Carpet, Future Survival Kit by Lucy McRae

Primal Interiors

With Millennials reporting feelings of loneliness much more often than their Generation X and Baby Boomer counterparts, those lacking in companionship may seek alternative means of physical comfort and connection as they get older (source: YouGov). As a result, future living spaces will use thoughtful design to build human intimacy into our environments.

Through her experimental machine, Compression Cradle, sci-fi artist Lucy McRae explores our current touch deficit, which could become more drastic. 'Compression Cradle is an immersive experience that considers whether we can design experiences that change the physiology of the body,' says McRae. 'When you hug someone or have sex you release oxytocin, a mysterious hormone that affects how we bond with each other. With this project, I question whether design can enter that area of the intangible.'

Such ideas could even collide with placemaking, as designers find ways to create similar levels of comfort outside the home. Hinting at this future, Nick Ross's Proto furniture collection for Danish brand **+Halle** aims to bring the concept of dwelling out of residences and onto 'over-stimulated' public streets. The chairs, sofas and benches are designed to create a habitat of safety. 'I wanted to create a feeling of a primal place, for instance, tucking yourself into a corner,' says Ross.

Lab Notes

Appeal to the individual

: Introversion and introspection are losing their stigma. In the next decade the experience economy will follow suit, moving from the social to the individual.

Go beyond the transaction

: Brands must reconsider their role in the life of consumers. Looking beyond their traditionally transactional relationships, they will be required to refresh their experiential offering in order to promote personal purpose and meaning.

Strike a balance

: Balance is redefining consumer culture in all respects. By 2030, experiences will be designed to help consumers achieve unprecedented harmony between their physical and psychological states.

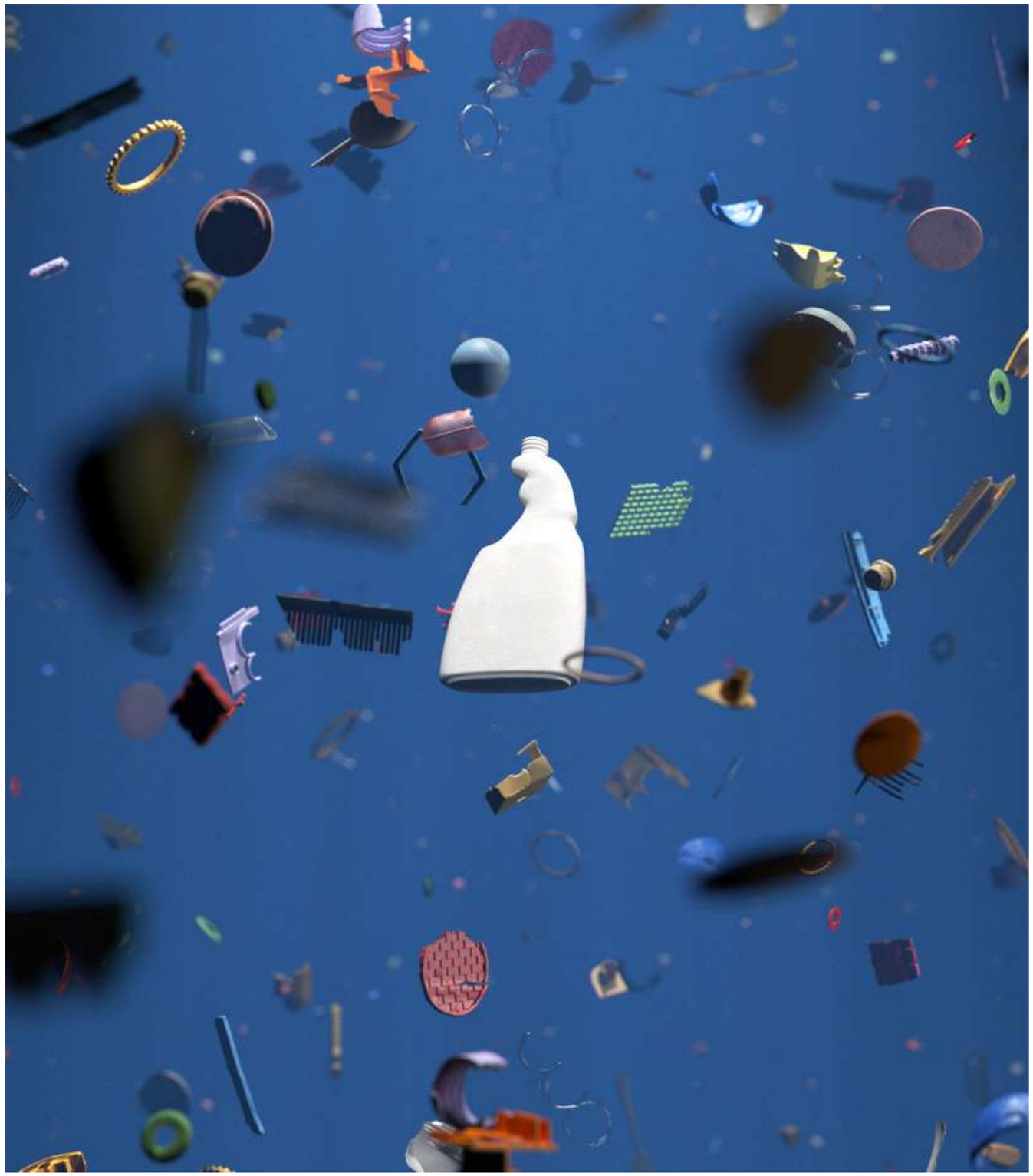


Marina Marina, Berlin

Post-purpose Brands

Pushing back against purpose-washing and bandwagon behaviour, brands of the future will embrace imperfection – as well as intuitive technologies – to focus on products and services that will constantly evolve to meet our needs.

A Concise Passage by Rashed Al Shashai at Desert X Alula 2020, Saudi Arabia. Photography by Lance Gerber



Still from One Potato Head Studios study chair animation by Max Lamb

‘While people care about social issues, it’s not why they’re buying the brand. Most of the time people choose whichever brand best meets their goals’

Simon White, chief strategy officer, FCB West

Mainstream brands still buy into notions of purpose and sustainability and proactive mission statements, but the brands that will thrive this decade, in particular as we move through the challenges brought by Covid-19, will take a more realistic, honest and iterative approach to development.

Recognising that purpose or sustainability are not sole reasons for their existence, brands will fuel their infrastructures with data streams to continually redefine their offering as relevant to consumers and the current global mood, while undertaking their own journey of constant betterment.

‘While people care about social issues, it’s not why they’re buying the brand. Most of the time people choose whichever brand best meets their goals,’ explains Simon White, chief strategy officer at FCB West. ‘These are functional and unconscious emotional goals linked to our deeper human drives.’

Brands will need a foundation that is purposeful rather than being something they aspire to or wish to be defined by. Amid the spread of Covid-19, for example, 56% of respondents to a survey by 4A and Suzy said they were pleased to hear about brands taking actions to help out communities, like making donations of goods and services.

But sustainable practices will also be integral. Global brand **Unilever** is responding by selling brands in its portfolio that are damaging the planet. As CEO Alan Jope says: ‘Principles are only principles if they cost you something.’

As consumers question their consumption habits, exacerbated by Covid-19 isolation driving contemplation around their lifestyles as well as climate crisis concerns, many want to buy less. The brands of 2030 will have to fight to be the chosen ones. ‘Fundamentally, the world doesn’t have time to wait for anyone to become perfect. Brands need to be alert, transparent and consultative in their approach. Apologise when you screw things up, but be heroic in your recovery,’ says Charlotte Goodman, director of people and purpose at **Virgin Group**. ‘People are happy to go on the journey with you. They want to see that you are agile and trying to get better every day.’

To achieve this, brands will use data alongside emotionally intelligent AI and machine learning to become unobtrusively enmeshed in our everyday lives. We’ll expect them not only to offer a product, but to harness shared information to systemically improve and engage with our fundamental human needs.

Hindsight

Using purpose to add value has become morally and socially questionable. A new generation of digital natives will use data and technology to fuel betterment.



The Shortest Distance Between Two Points by Rayyanne Tabet at Desert X Alula 2020, Saudi Arabia. Photography by Lance Gerber



Pack of Lies by Maiiro is a platform that highlights greenwashing in the beauty industry biodiversity projects

Purpose-washing

Purpose was arguably the most overused marketing buzzword of the past decade, and not without reason. According to Edelman, nearly two-thirds of global consumers are 'Belief-driven Buyers [who] will choose, switch, avoid or boycott a brand based on where it stands on the political or social issues they care about'.

However, consumers are tired of purpose-washing as brands market purpose without reflecting it in their organisation. According to Business in the Community's Responsible Business Tracker, while 86% of businesses have a purpose statement, 83% have yet to consider what this means across departments or set clear team targets.

Companies that lack meaning will also be challenged to prove their raison d'être and resilience in times of crisis; they must be honest about why their brand exists and use that existence to progress. 'In a changing business landscape, brand purpose helps you continually re-orientate your core capabilities to remain relevant, even as market and methods change, sometimes drastically,' says Scott Omelianuk, chief strategy officer at branding consultancy **HumanConsult.io**. To put it simply, brand purpose is a means to help you understand why you matter to people.

'If we're serious about brands doing less harm and more good in the world, we need to drop the flawed idea of brand purpose – and retain the good intentions behind it'

Nick Asbury, branding and design writer

Consumerism Curtail

Today's promiscuous consumerism makes building and retaining meaningful customer relationships a challenge. According to Nielsen, only 8% of global consumers are committed to the brands they purchase, compared to 42% who actively search for new brands and products.

As well as being less loyal, people have begun to consume less as they consider the environmental and psychological worth of products. For 38% of Americans, simplifying their life and accumulating less stuff is a 2020 New Year's resolution, according to a study from selling app **Mercari**. In light of Covid-19, 29% of consumers expect to save more, while 27% expect to spend less on discretionary items such as fashion and luxury goods (source: Boston Consulting Group).

In turn, re-commerce platforms, such as **Depop** and **Alibaba**-owned **Idle Fish** are becoming increasingly popular. Online thrift store **ThredUp** estimates that the second-hand apparel market will double by 2023. The move towards fewer possessions and less waste marks an existential crisis for many brands, especially those focused on FMCG and fast fashion. To remain relevant, these brands will need to rethink their strategies and architecture to embrace circularity.

'It's just not going to be acceptable for brands to sell more stuff without also providing options for it to be recycled or resold,' says Rachele Simms, head of strategy at The Future Laboratory. 'While this might seem threatening for brands, it offers a major opportunity to create new revenue and loyalty through after-purchase service and circularity.'



The Climate Issue: The Problem with Putting a Price on the End of the World, The New York Times Magazine, April 2019. Photo illustration by Pablo Delcan



Hot:Second by Karinna Nobbs, London, is the world's first circular store where physical garments are traded for digital experiences

Generation Optimism

We now have the largest youth population in history, according to the UN. With a less-talk, more-action attitude, this generation are questioning the traditional notion of brands and rethinking how they interact with them.

As future consumers – not to mention the founders, shareholders and boardroom members of the 2020s – they are optimistic, entrepreneurial activists growing up in a woke world of revolutionary tech. They also expect to use their digital native status to create notable change. According to a 2019 report from Wunderman Thompson Commerce, 51% of Generation Alpha want a job where they can use technology to make a difference.

As this generation emerge from the pandemic and form their own companies, we can expect a shift to the use of data and AI with active, holistic betterment at their heart. 'Whenever I speak to a young person, they all want to be businesspeople and they have every respect for commercial credibility, but they don't feel it should be at the cost of the planet,' says Nadya Powell, co-founder of brand and systems change-maker, **Utopia**. 'Bigger than sustainability is the expectation that a business will behave really well. It's about belonging.'

51%

of Generation Alpha want a job where they can use technology to make a difference'

Source: Wunderman Thompson Commerce

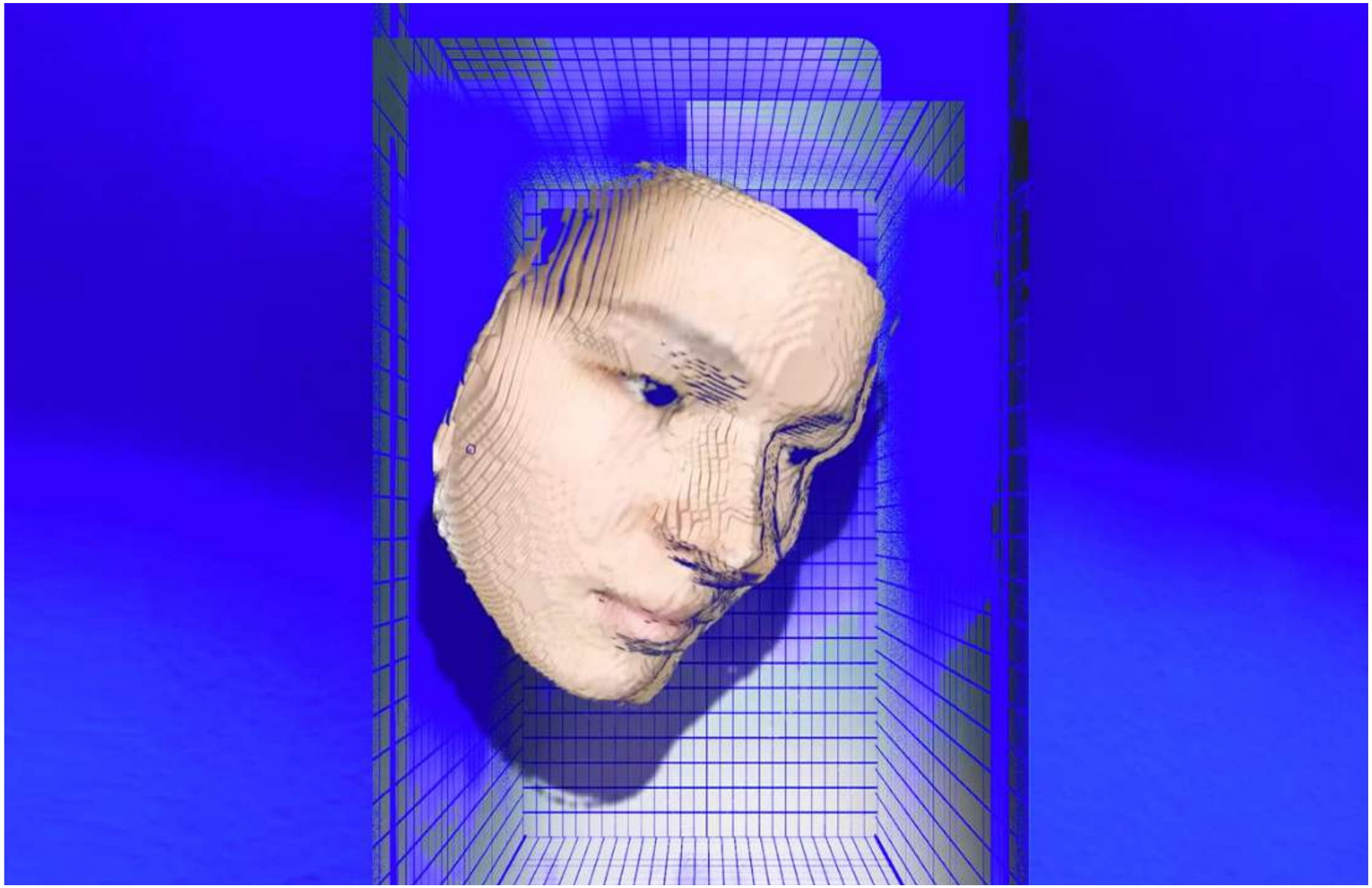
Data Dichotomy

While future consumers will expect brands to continually improve practices, they could also block innovation by refusing to share data. Brands will need to focus on communications around security and value to gain the necessary permissions to feed their betterment systems and, more importantly, meet consumers' fluctuating needs.

Consumer trust is low. Only 31% of consumers in Asia-Pacific trust organisations offering digital services to protect their personal data and just 5% prefer to transact with an organisation that offers a cheaper but less trusted digital platform, according to Microsoft and IDC. But there is a growing awareness of the role that data can play in improving society, especially where recent government announcements are concerned. Just over half of UK consumers believe the exchange of personal information is essential for the smooth running of society, according to the Data and Marketing Association.

With this in mind, a privacy brand boom will emerge in the future as entrepreneurs capitalise on consumers' desire for control of their data, and dictate how, when and where it will be used. Communicating and exhibiting how data can be used for the greater good will change consumer perceptions of this exchange.

'The opportunities of digital innovation rely on people trusting organisations with their data,' says Elizabeth Denham, UK Information Commissioner. 'If not enough patients trust an organisation trialling an innovative approach to healthcare, then the possible benefits to society of that innovation could be lost.'



Face To Face by Ningli Zhu

51% of UK consumers believe the exchange of personal information is essential for the smooth running of society

Source: Data and Marketing Association

Insight

Virtuous consumers expect brands to make sacrifices too. Fuelled by data, they can act as consumer companions on the journey towards betterment.



Still Life by Vera van der Burg, Design Academy Eindhoven



Resort 2020 campaign by Prada, Global

Sacrificial Brands

Globally, 53% of respondents to a 2019 FleishmanHillard study said their perception of a company comes from how it acts, while only 47% said it was a result of products and services. In the current brand landscape, however, most consumers can’t see the wood for the trees as purpose-washing has resulted in marketing that is confused with action.

Now, brands are reframing their success to acknowledge that it’s okay to aim to be profitable and aspirational, as long as they mitigate their impact through self-imposed restrictions.

Prada has signed a £41.5m ($54m, €50m) five-year loan with banking group **Crédit Agricole**. Repayment terms are conditional on meeting key targets around sustainability – including environmental and societal goals – and interest rates will be reduced if these are achieved.

Similarly, footwear brand **Allbirds**’ Carbon Fund is imposing a carbon tax on the business to ensure its future operations incorporate eco-initiatives. ‘If you don’t measure your carbon emissions and pay for it, you’re part of the problem,’ notes Allbirds co-founder Joey Zwillinger.

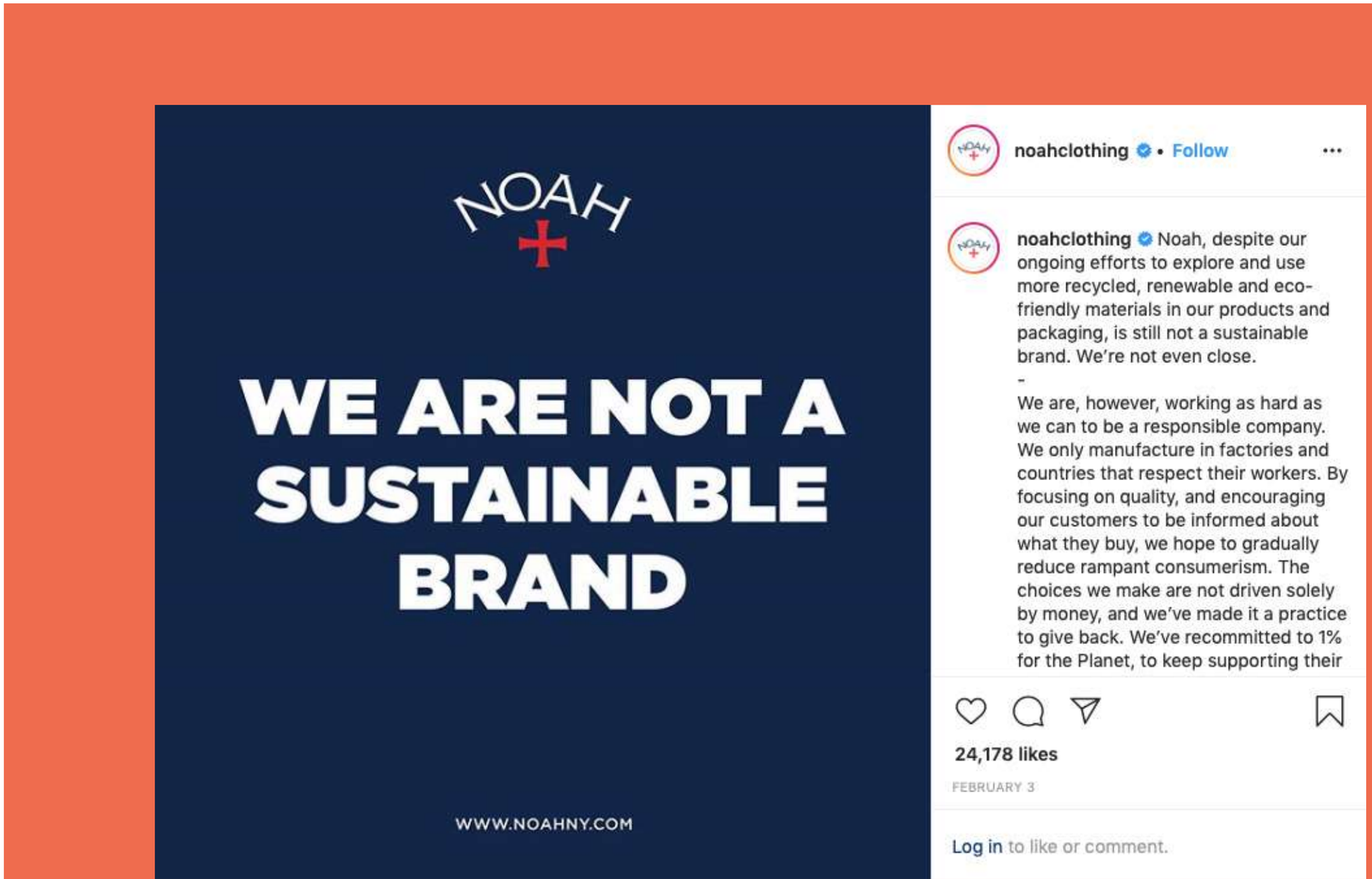
Without this accountability, consumers are reluctant to believe brands have a viable business model. ‘Ultimately, consumers don’t care about a brand’s bottom line. When they look at their own lives and the contribution and sacrifices they’re making, [they need] brands to align with them,’ says Ete Davies, CEO of **Engine Group**.

Future Imperfect

Brands' tone of voice will also change to acknowledge the imperfections of being a business in the changeable 21st-century landscape. Company communications will need to reflect how honesty is in and apathy is out. 'The concept of brand purpose is moronic,' says Mark Ritson, adjunct professor at Melbourne Business School. 'I do not want **Starbucks** telling me about race relations and world peace – I want it to serve me a decent coffee in pleasant locations.'

Streetwear brand **Noah** is clear that any consumerism comes at a cost, but it doesn't want to be defined by it. In October 2019 it launched a jacket made from Econyl recycled nylon on Instagram with the statement: 'We've said it before, and we'll say it again: we're not a sustainable brand. But this jacket is almost entirely recycled and cruelty-free. Sometimes you get lucky.'

If a brand can't be perfect, it must learn where to focus on the road to betterment. Conscious that consumers will challenge discrepancies between brand and actions, **SafeAuto**'s recent We are the Rest of Us advert pokes fun at hollow brands which try to create woke consumer movements. The campaign succeeds as SafeAuto creates real social change by providing affordable coverage to low-income drivers rather than paying lip service to the notion of purpose.



Noah Instagram post

'I do not want Starbucks telling me about race relations and world peace – I want it to serve me a decent coffee in pleasant locations'

Mark Ritson, adjunct professor, Melbourne Business School



Open Spaces

Habit Purveyors

With 52% of consumers choosing brands that align with their personal values while standing for something bigger than just their products and services, the move away from grand gestures of change is also translating into the physical brand offer (source: Accenture).

Some lifestyle brands are changing their focus from pushing stuff to selling meaningful lifestyle changes and positive habits. 'The belief that brands can facilitate habits and lifestyle changes independent of any transaction and through messaging alone is – and feels – important,' explains marketing trends writer Emily Singer.

Launching just before the coronavirus outbreak and nations' long period of anxious self-isolation, **Open Spaces** encourages people to tidy their homes to improve wellbeing. Describing clutter and untidiness as symptoms of burnout from work and daily demands, its online tidying guides are designed for a variety of personality types, supported by direct-to-consumer storage solutions. In this way, it plays a supportive role in consumers' lives, enabling them to access the brand's eco-system and aspire to its behaviours before buying.

Similarly, kitchen brand **Equal Parts** elevates time spent at home through space- and time-saving cookware. 'We wanted to focus on activities in the home that help take back time and attention, and here was one concerning arguably the most important element of one's home – the kitchen,' says the brand. Not to be confused with loyalty, habit-forming brands sell motivation for change and create products that provide delight in consumers' lives on their terms.

Omni-present Branding

Branding is becoming less about a logo, an aesthetic or a product, and more about meaningful interactions across touchpoints, especially digital ones.

Some 43% of under-30s feel large established social platforms like **Facebook** and **Instagram** have 'too many people on them' according to youth agency Zak, so consumers are seeking richer and deeper connections found in more niche communities. Coined Digital Campfires by the Harvard Business Review, such spaces have become rife in periods of self-isolation during the during Covid-19 outbreak. British jeweller **Annoushka Ducas**, for example, is using Hero to maintain close relations with her global customers during the pandemic, calling for more conversational approaches from brands and marketeers built on casual interactions and personalised responses.

First-of-its-kind text boutique **Whym** is taking this further by letting customers ask honest questions about products, get suggestions from an adviser and add items to their basket from the boutique's lookbook with a hashtag – eliminating any branded platform, check-out or hints of e-commerce.

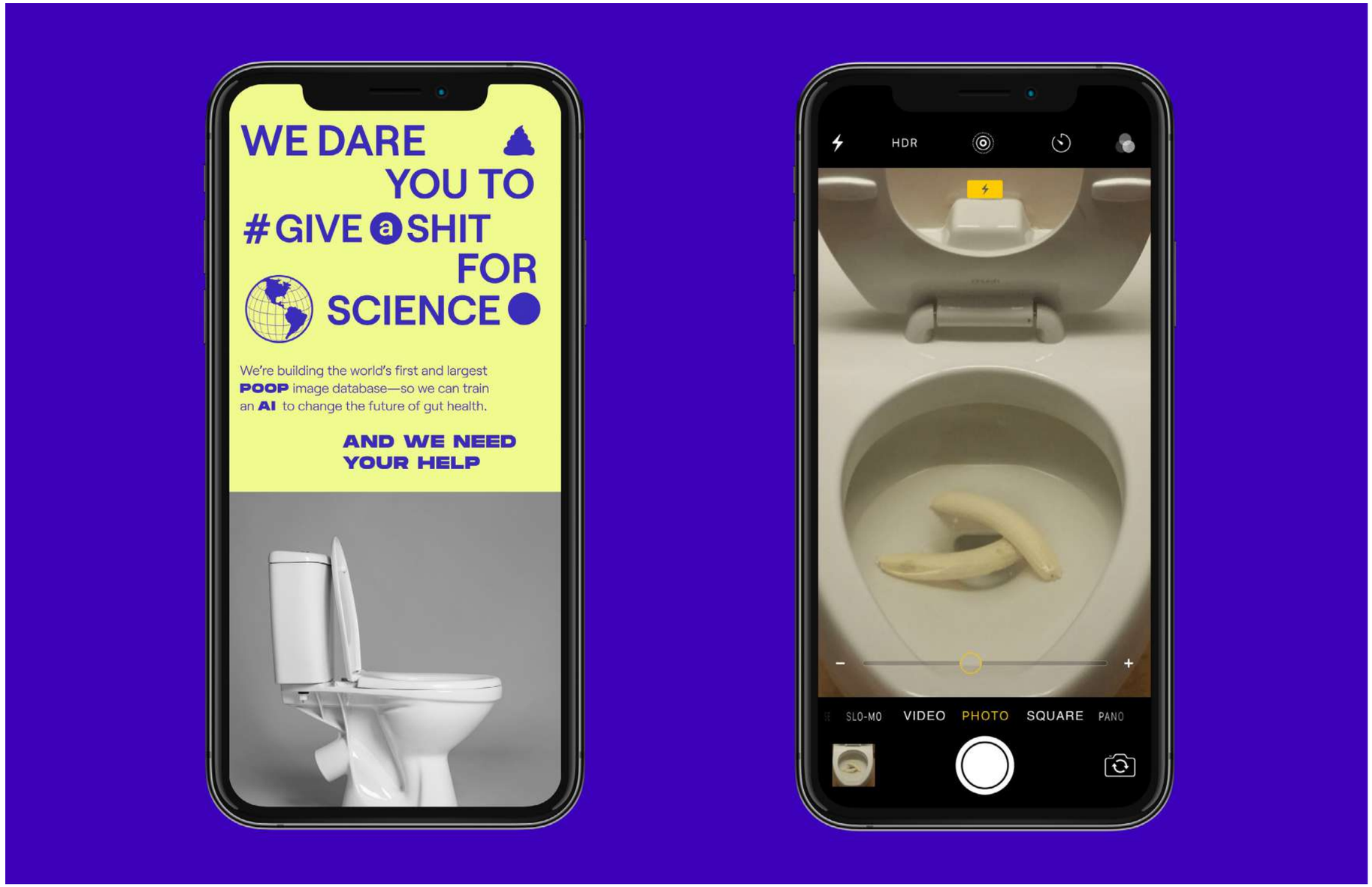
As brands become more entrenched in our social interactions, digital avatar 'friends' that are relatable rather than faceless bots will be crucial in formulating a brand personality. **Samsung**'s AI-powered Neon avatars are designed to be 'friends' with humans. 'In the near future, one will be able to license or subscribe to a Neon as a service representative, financial adviser, healthcare provider or concierge,' says Pranav Mistry, CEO of **Samsung Star Labs**. 'Neons will work as tv anchors, spokespeople or movie actors, or they can simply be companions and friends showing the potential of brands to be the voice of these personal relationships.'



43% of under-30s feel large established social platforms like Facebook and Instagram have 'too many people on them'

Source: Zak

Neon by Samsung, Las Vegas



#giveashit by Seed and Auggi

‘In this way, the immense economic value of data should be returned back to citizens’

Francesca Bria, founder, Decode

Problem-evolving

A major challenge for businesses in the coming age of betterment will be acting quickly to resolve issues and learning from their mistakes. Fuelled by data, this will involve consumers and brands working together to create continuous loops of feedback, improvement and evolution.

Conceived by three entrepreneurs, **Way Running** has created a simple vision of this with a running shoe with a built-in feedback loop. Customers provide feedback on the product via an app – including how often they wear it and for what activities – to create an improvement cycle that informs each version of the shoe. It aims to push the running industry forward by rethinking the technology-driven nature of sustainable footwear.

To ease concerns about giving brands personal data, EU-funded project **Decode** provides tools that enable people to share information for the greater good of their community. The project, piloted in Amsterdam and Barcelona, lets citizens decide what they keep private, share, with whom and on what basis. ‘This is a new deal on data, which does not exploit personal data to pay for critical infrastructure,’ says founder Francesca Bria. ‘In this way, the immense economic value of such data should be returned back to citizens.’

This method has also been applied to healthcare. Give a Shit is a social media campaign by US microbial science company **Seed**. The scientists behind it are building ‘the world’s first and largest poop image database’ by encouraging people to share images, with the aim of training AI to improve gut health in society.

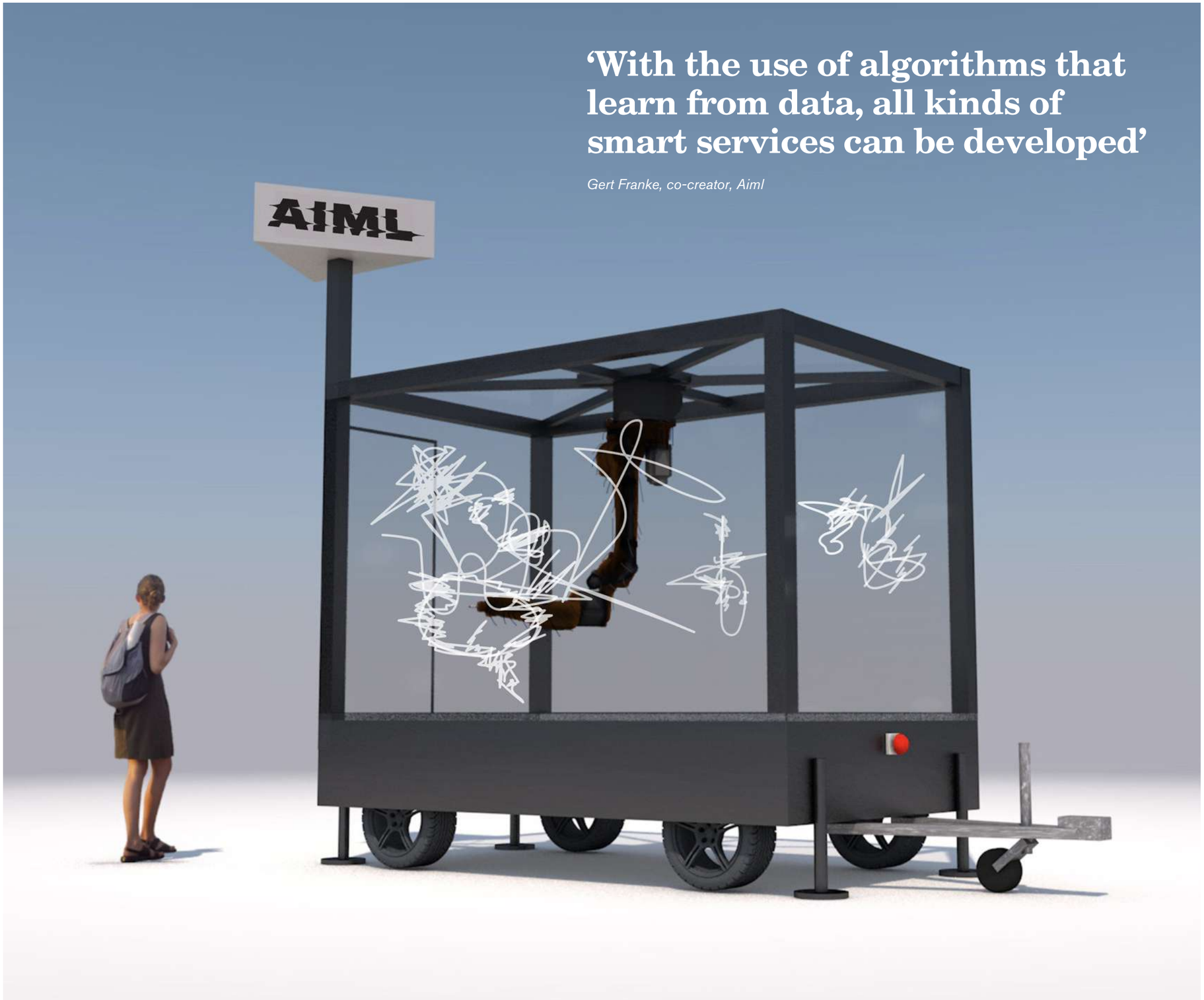
Emo-algorithms

According to Pew Research Center, only 18% of US citizens trust advertisers to use facial recognition responsibly. But as AI-led facial recognition becomes more common, used by brands and retailers to test their marketing campaigns, data collection is not enough.

Brands must understand why people select one product over another, or how their mood evolves when they interact with your brand or services, with emotionally intelligent algorithms coming to the fore to identify nuances in data based on empathy, not subjective bias.

Exploratory schemes such as Vera van der Burg's Still Life project, which trains algorithms to prioritise human emotions over their digital data, are teaching them to understand human emotions like jealousy, love and seduction.

Taking this further is Aiml, a 'datacreature' housed in a clear box. Designed to sit in a neighbourhood – but with potential application in workspaces or research domains – it uses AI and machine learning to monitor data points of people that pass by or linger around it, assessing and translating their moods into creative drawings. Aiml makes data more visible and tangible, providing instant feedback about the public attitude and mood – data that will be crucial during future periods of social upheaval.



'With the use of algorithms that learn from data, all kinds of smart services can be developed'

Gert Franke, co-creator, Aiml

Aiml by Clever°Francke in collaboration with Jelle Reith and Ibo Ibelings, Eindhoven

Foresight

As smart infrastructures become a reality, the role of brands will be as investors in cycles of data-driven innovation.



VR Varjo Technologies

Innovation Infrastructures

Built on a constant flow of data, brands will move away from merely creating individual products to act as facilitators in bettering every aspect of society.

The Woven City is envisaged as **Toyota**'s city-scale laboratory near Mount Fuji. It will test innovations from autonomous vehicles to human-robot cohabitation. This is evidence of the brand future-proofing its role in societies where combustion engines are shunned for more technology-driven living.

'With people, buildings and vehicles all connected and communicating with each other through data and sensors, we will be able to test AI technology in both the virtual and physical realms, maximising its potential,' says Akio Toyoda, president of Toyota Motor Corporation.

More meaningful, eco-conscious innovation will be central to this future. 'I expect to see more robust discussions regarding product responsibility and the role of technology in society – including increased expectations for companies to demonstrate how their products and technologies are meaningfully addressing global challenges,' states Suzanne Fallender, corporate responsibility director at **Intel**.

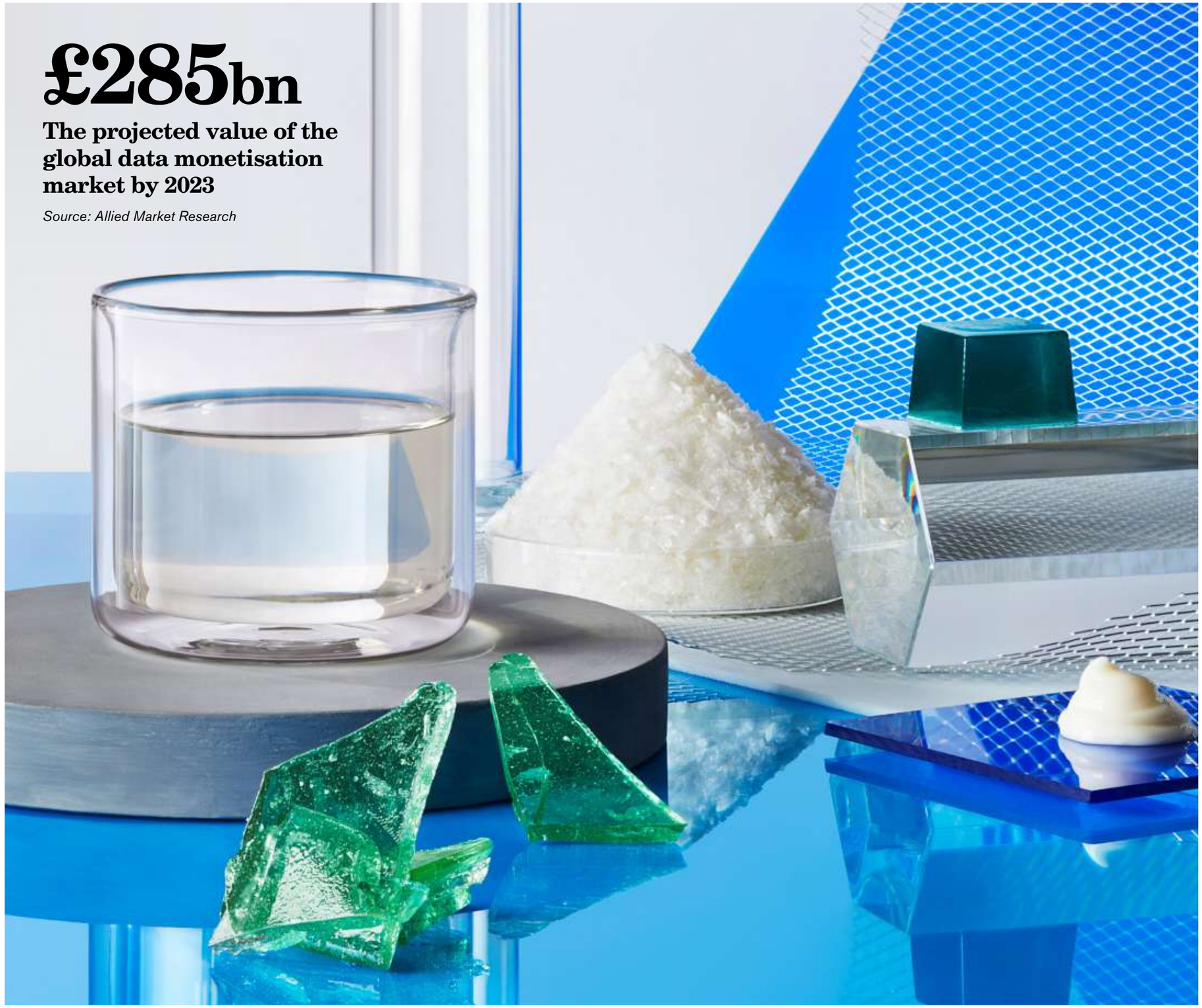
By 2030, then, people will look to brands to innovate through the creation of such testbed eco-systems. Paris research studio **Interstellar Lab** plans to build a village of biomes in the Mojave Desert, California, to explore the viability of habitats on Mars. The EBIOS (Experimental Bio-regenerative Station) concept will include infrastructure for waste management, food production and water treatment, underpinned by carbon-neutrality.



EBIOS by Interstellar Lab, California

'[There will be] increased expectations for companies to demonstrate how their products and technologies are meaningfully addressing global challenges'

Adrienne Maree Brown, author, Pleasure Activism: The Politics of Feeling Good



Geltor uses synthetic biology to produce high-performance, animal-free collagen

Return on Value

With the global data monetisation market projected to reach £285bn ($371bn, €343.4bn) by 2023, in this booming data-driven economy brands will have the resources to fully understand consumers and provide them with an ever-improving personalised offer (source: Allied Market Research).

'Within the next three to five years, every consumer will own all of their information and get compensation for that information,' says Chris Miglino, CEO of digital marketing and consumer data management platform **SRAX**.

But as consumers place greater monetary value on their data, expectations about what they receive in return also increases – and brands will be held accountable for how they interpret and apply this information. 'A brand is the foundational promise that a business makes to its customers,' notes John Williams, the founder and president of **web.com**. If brands fail to meet that promise despite the in-depth data they hold, then consumers are entitled to pay accordingly.

In future, consumers could soon avoid paying a fixed price for a product, instead paying according to the efficiency and applicability to them as an individual. In the health and beauty sectors, where transformational claims are rife, brands will not only have to use data to create targeted products, but also to prove their value. If a moisturiser only improves skin texture by 40%, for example, a consumer might be entitled to pay just that proportion of the price.

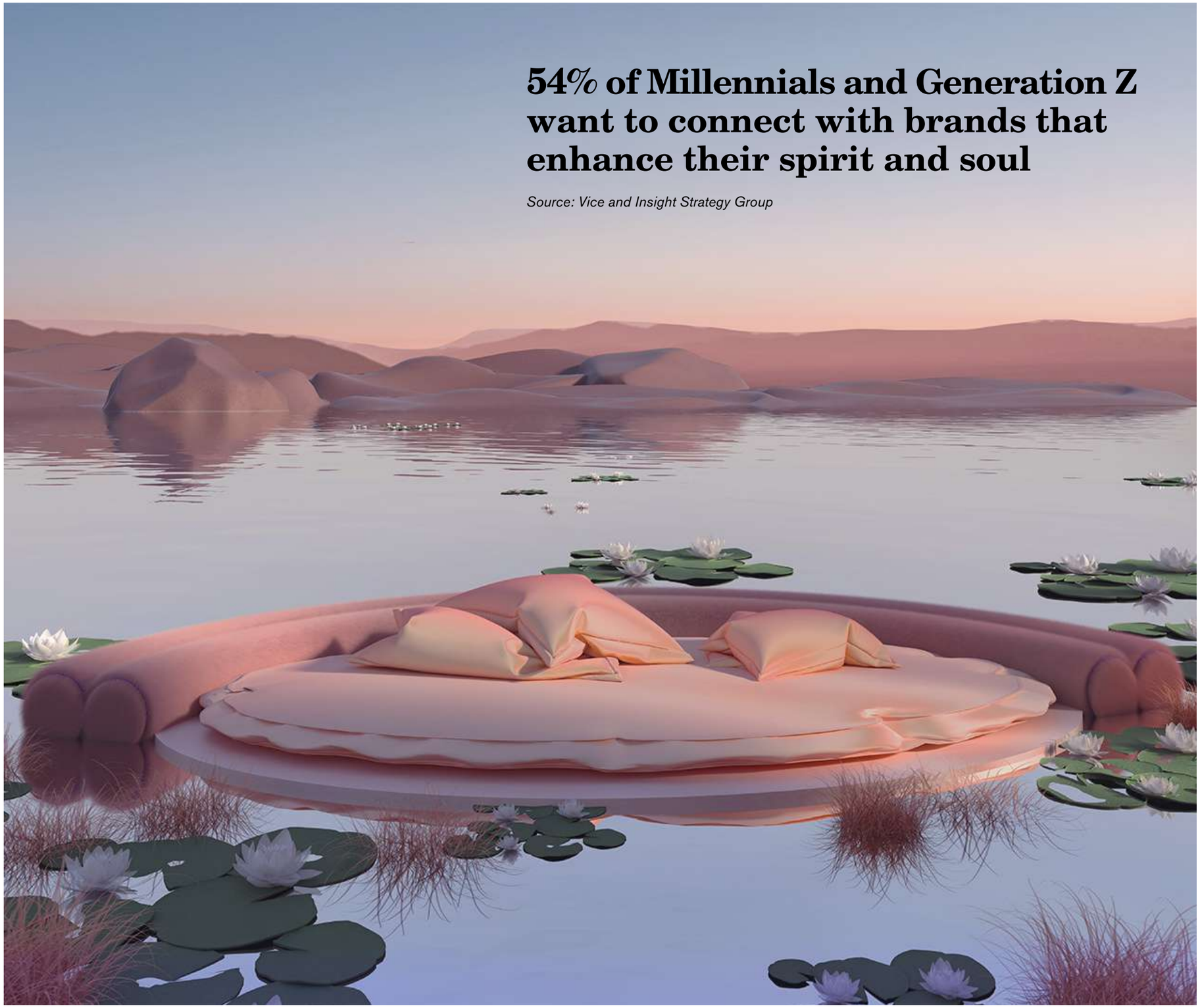
Animism Ascending

The simple reappearance of wildlife in our silent cities during the Covid-19 pandemic was enough to show humanity the detrimental effects of globalisation and tourism on the planet. As we move through the outbreak, people will cherish environments and objects more as beings, imbuing them with deeper spiritual meaning. But this return to animism could be a blessing and a curse, as brands are not only exalted, but also punished more harshly when they disappoint.

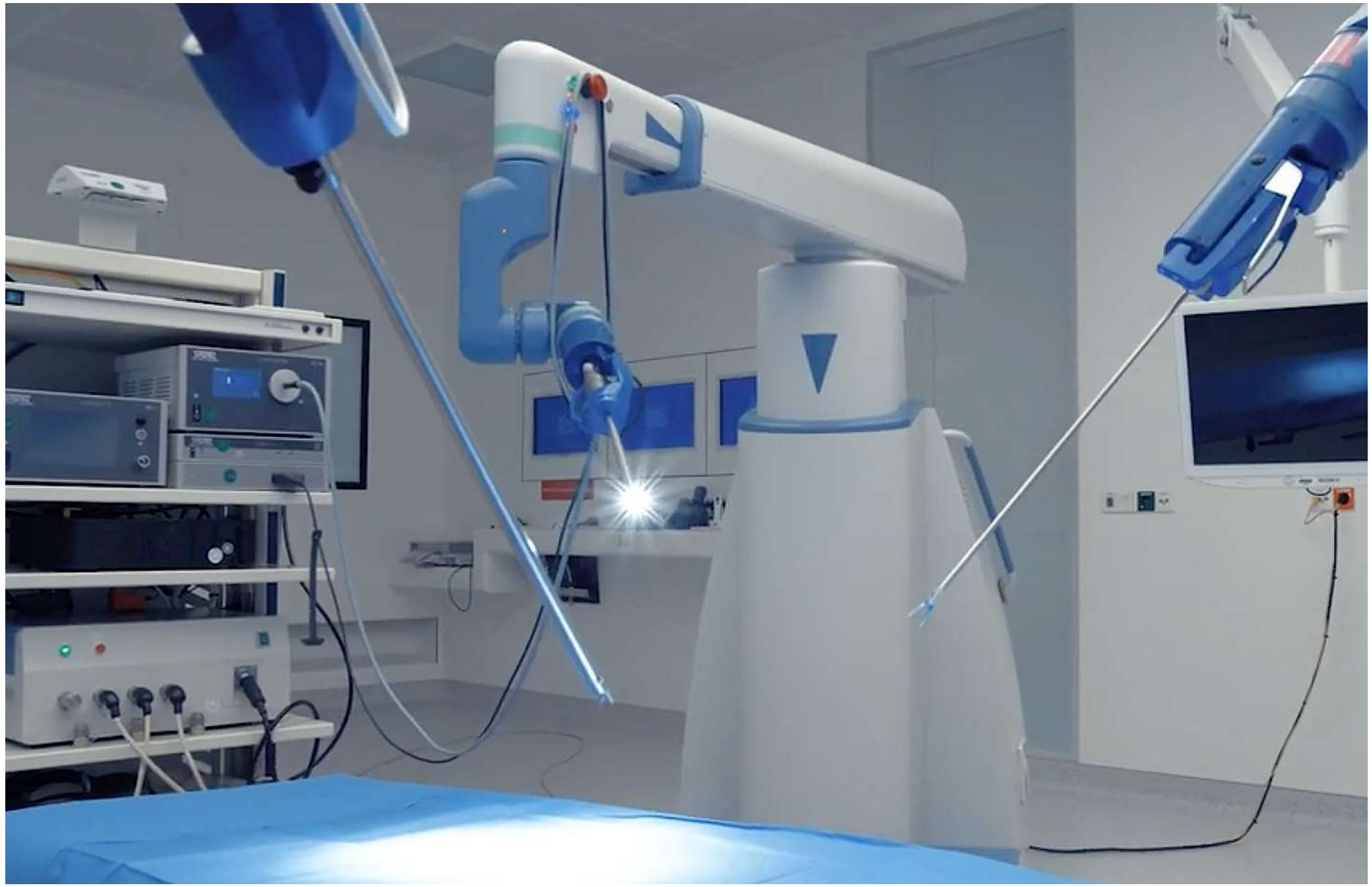
In 2019, 61% of Toledo citizens voted for the Lake Erie Ecosystem Bill of Rights, which made Lake Erie temporarily a 'legal person'. Other natural areas have been given environmental personhood, including the Whanganui River in New Zealand, designated 'an indivisible and living whole' by parliamentary declaration.

As future consumers search for meaning in a digital world, brands will be built purely on animism. In a study by Vice and Insight Strategy Group, 54% of Millennials and Generation Z said they want to connect with brands that enhance their spirit and soul. As brands become increasingly human, this will deepen.

This will be a huge responsibility for brands as they will be chastened in a similar way to human beings. Brands will need to program ethical and meaningful betterment into their entire eco-systems, including empathetic algorithms.



Lilypad: An Immersive Experience by Visual Citizens is an immersive experience designed to question perspectives on the digital and its relation to the natural world



Who's in Charge? by Máxima MC, Thorsten Alofs and Sanne Muiser

‘We’re not [currently] able to transmit touch and muscle movement through the internet, but we will with the low latency capabilities of 5G’

Mischa Dohler, professor of wireless communications at King’s College London

Real-time Teams

In many ways trialled during the Covid-19 crisis, the full range of 5G’s capabilities will usher in new opportunities for brands and workers in the next decade. This low-latency network will enable kinetic movements to be sent to other locations in real time, enabling greater collaboration within companies, faster product development and the potential to establish new economies built on global skill-sharing.

In China, 5G infrastructure has already been widely rolled out, and the technology is forecast to bring in £9.5 trillion ($12.3 trillion, €11.4 trillion) of projected economic benefits worldwide by 2035, according to a study by IHS Markit, Penn Schoen Berland, and Berkeley Research Group for Qualcomm.

‘We’re not [currently] able to transmit touch and muscle movement through the internet, but we will with the low latency capabilities of 5G,’ says Mischa Dohler, a professor of wireless communications at King’s College London. His **Internet of Skills** project predicts using 5G for seamless remote global collaboration – for example, an employee wearing a haptic suit could manipulate a robot to manufacture or inspect a product in real time, continents apart.

As future brands will be required to operate in full transparency, this technology could lead to consumers purchasing the skills to make a specific product, rather than the finished product itself. ‘I believe with [5G] there is a great opportunity to maintain skills and democratise them remotely,’ explains Dohler.

Lab Notes

Share your journey

: Purpose can no longer be used as a selling point nor the sole reason to exist. As brands, openly accept imperfection and share your journey of constant evolution and betterment to define your offering.

Be a partner

: Consumers respond to a brand partner rather than pursuer. In future, brand identity will be shaped around and by seamlessly integrated conversations and intimate digital interactions.

Show your value

: In our data-driven economy in 2030, nearly every touchpoint will be measurable. The value a brand brings to consumers, emotionally and functionally, will be a future measure of success.



Geo-Design: The Transboundary Loophole by Noud Sleumer

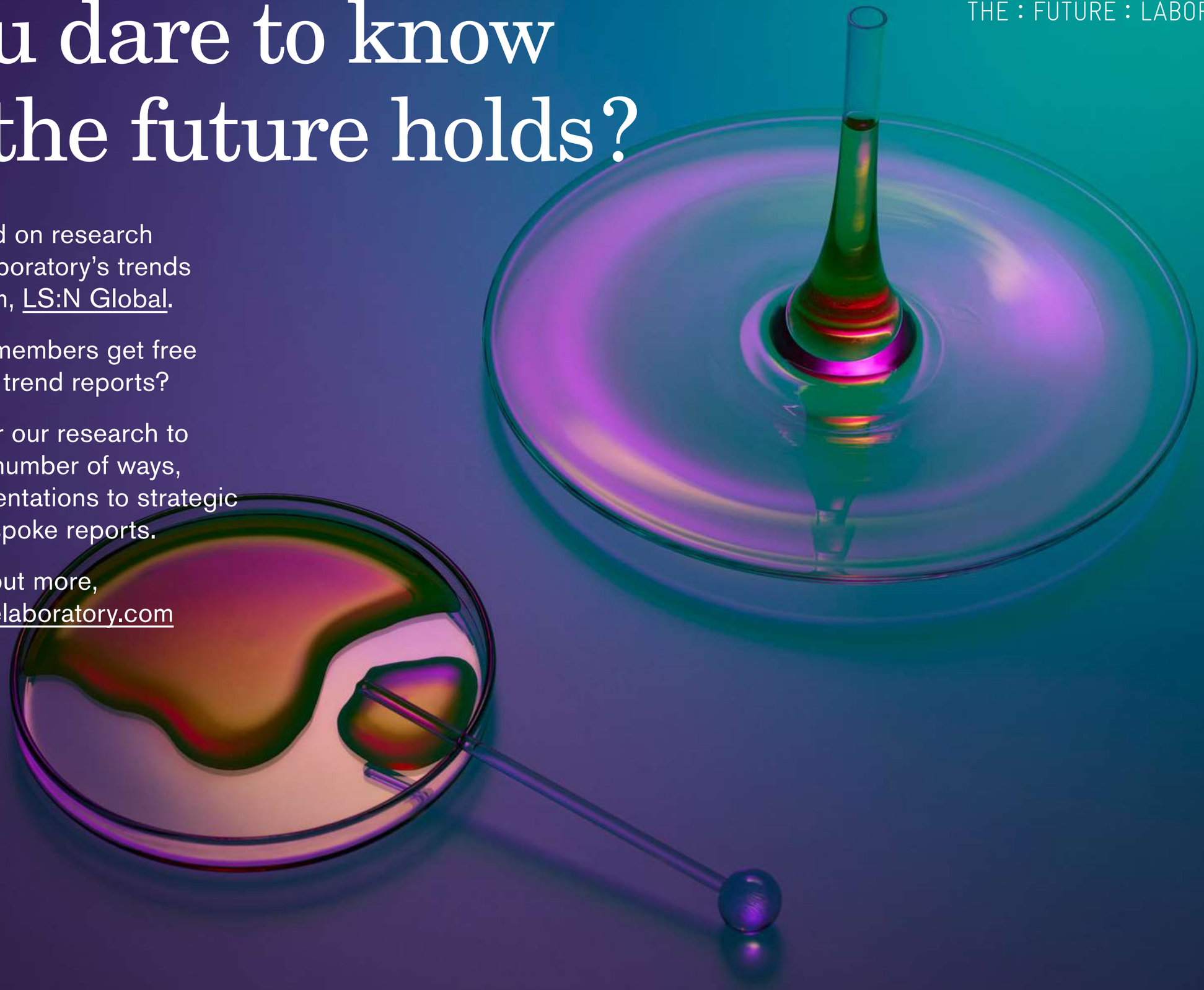
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