THE : FUTURE : LABORATORY

Youth, Media and Technology Futures 2021

Introduction

We have just emerged from the most online period in human history. But this means that media and technology brands must work harder than ever to maintain momentum

The past 12 months have been an exercise in balance, as consumers heal from the digital fatigue caused by tele-everything – learning, working, even socialising and resting. **TikTok** proms, **Animal Crossing** funerals and **Roblox** graduations became oddly normal ways of celebrating life's milestones, experiences we're only now replacing with the real thing.

Some experts believe the tangible world will serve greater purpose after such a binge of technology – albeit temporarily. 'Offline is going to hit like a drug,' journalist Luke Winkie writes on his Substack. Far from being anecdotal, it's a phenomenon backed up by data from the world's largest media brands. After extraordinary growth in 2020, **Netflix** reported its worst first quarter in eight years in 2021, while **Instagram** recorded a 7% drop in content being produced by teens in Australia (source: **The Australian**). At the extreme end of the spectrum, Foster Kamer, chief content officer at **Futurism**, wants to 'stigmatise the internet'.

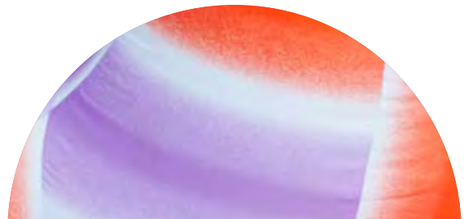
But the benefits of the great remote aren't going anywhere. In fact, the shift to virtual existence made the world more accessible to everyone, particularly those who are disabled or living in non-Western nations. China's internet users finally totalled more than 1bn in June 2021, helping drive predictions that, by 2030, 90% of the projected world population will be online (sources: **CNNIC**, **Cybersecurity Ventures**).

In this report we reveal the trends driving our interconnected future, from the emergence of a Digital Afterlife to the Curator Kids overthrowing the creator economy. And from Vietnam to the US, our Global Youth Snapshot sheds light on the ways in which Generation Z are balancing online and offline communities.

For those already looking ahead, our macrotrend offers a first look at what – or who – comes next: a transitional generation of Zalphas who are at the forefront of this technology paradox. As they learn how to navigate a world that both is and isn't comprised of pixels, they are not seeing the physical and digital worlds as silos, but as equally important realities that can be layered on top of one another. They are already living the way that Barry Chudakov, founder of **Sertain Research**, outlines as essential to humans' relationship with tech: 'We must become present with our tools; we must gain in meta-awareness, retool our understanding of how we think while tech-immersed versus how we think otherwise.'

If this report leaves you eager for more insight about media and technology, and Generations A and Z, make sure you also explore the Youth sector on our trends intelligence platform, *lsnglobal.com*.





Cover: Kaleidoscopic Home by Tin & Ed for Ikea's Everyday Experiments at Space10 in Copenhagen, Denmark. The exhibition brings the digital platform EverydayExperiments.com to life to explore how playful interventions in our home can enrich physical and mental wellbeing

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These practical strategies will guide your brand through the coming era of youth atonement

Trends Rising

From crypto-investors to shopping coteries, these are the powerful forces reshaping how we view the youth, media and technology sectors

Out-of-work Networks

The impact of Covid-19 left a record 27.4% of young Americans aged 16–24 without jobs in April 2020 (source: YCharts). Now, 18 months later, with employment opportunities booming, there is an opportunity for workplaces to re-assess the competitive nature of job-hunting, repositioning it as a fun, collective pursuit.

According to **Contra**, a platform for next-gen freelancers, **TikTok** and **Instagram** Reels brought in 80–90% of its Gen Z users. As its CEO Ben Huffman tells The Washington Post, TikTok is not just about dance trends. 'It's: how do I land a remote job? What am I going to do after graduation?'

Meanwhile, alternative job search platform **UCandu** is positioned as an antidote to the phenomenon of 'job-ghosting'. The platform not only makes job-hunting easier with its all-in-one system that manages contacts, job applications and interviews, but it creates a friendly and collaborative community for the not-yet-employed.

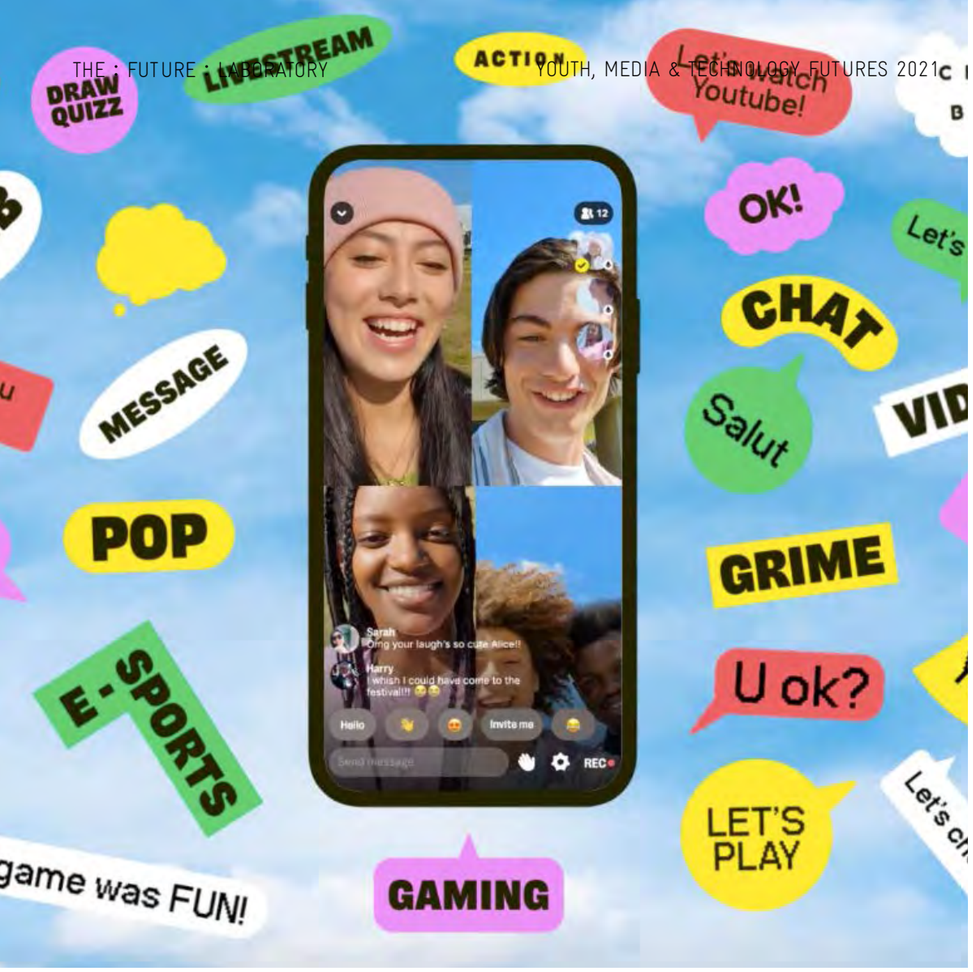
Although the job market is rebuilding, young people from marginalised backgrounds still have more barriers to cross when it comes to finding steady employment. One company addressing the needs of LGBTQ+ residents who are homeless or at risk of being homeless is **Unity Works**. Connecting 16–24-year-olds with jobs or paid internships at businesses that are committed to fostering inclusive work environments, the scheme goes beyond job training, making mental health, educational and legal support freely available.

• *Read more on LS:N Global*

What are Trends Rising?

Trends Rising are the nascent trends forecast to grow in influence across the food and drink sector in the next one to three years. These trends are global in their reach, and focus on consumer, customer experiences or business operations

Black Girls Code has opened an educational space in New York for young girls of colour that aims to demystify technology. Designed by architect Danish Kurani, US



Yubo, France

Provocation Platforms

The societal impact of Resilience Culture has led consumers to eschew comfort zones in favour of external perspectives. Now, this search for discomfort is filtering into youth media.

Gen Z are often stereotyped as risk-averse and non-confrontational. But this cliché is losing its truth. A study by **Knight Foundation** found that more than two-thirds (68%) of US college students say that their campus climate prevents them from expressing their true opinions for fear of offending their classmates.

Instead, they are turning to digital platforms to find their voice – and hear others. French social network **Yubo** is using live-streaming to bring people together across borders, letting teenagers learn from a globally diverse range of voices.

Debating app **Polemix** is more explicit in its approach, using a video format inspired by **TikTok**, while also challenging algorithm-led social media. When watching debate videos, viewers use on-screen buttons to 'respect but disagree' or show they have been 'convinced by you'. The debate points are set by the platform's leaders, a group of 40 young people involved in the app's creation.

The desire to expand one's horizons is also evident in China, where **Kuaishou**, a competitor to the short video app **Douyin**, is pinning its hopes on the currency of knowledge. Its educational video series features topics snubbed by schools, including money, gender inequalities and consumption culture.

• *Read more on LS:N Global*

Curator Kids

In a world in which more than 50m people consider themselves digital creators, according to **SignalFire**, the influencer market and the incessant cycle of newness it creates are finally reaching breaking point. 'This push for everyone to be a creator seems disingenuous,' says Jack Innanen, a 22-year-old TikToker. 'It makes me feel very disposable.' Even TikTok veteran Charli D'Amelio announced she'd 'lost the passion' for the video app.

But a new paradigm offers a solution to our excessive content problem – the curator economy. 'When it's impossible to absorb everything from the flood of information, the best we can do is pick and choose what matters to us most – or, better yet, find the people who can do the curating for us,' writes investor Gaby Goldberg.

Startupy is an expertly curated digital playground by design strategist Sari Azout for people to navigate the start-up marketplace, using the database to flow between content, people and topics with the same fluidity as their mind. Other platforms include **Somewhere Good**, another digital playground that allows users to curate their own 'worlds'.

As more brands launch tools to help creators take control of their finances, soon young people will establish full-time careers as curators. With the tagline of 'make money while you sleep', US-based platform **Emcee** is letting young people earn a passive income by curating online stores that feature their favourite products from the web. If a browser clicks to buy a brand's product, that curator – known as an Emcee – will receive a commission for fuelling the sale.

• *Read more on LS:N Global*



Anita Chhiba, founder of Diet Paratha, an Instagram account curating South Asian excellence in the creative industries. Photography by Shaye Laree for Highsnobiety, UK

‘This push for everyone to be a creator seems disingenuous… it makes me feel disposable’

Jack Innanen, 22, TikToker



Autonomous Albums

Designed to mimic a physical album, Sleevenote by Tom Vek is a portable music player allowing users to showcase their curated music libraries physically through visible album artwork, UK

Crypto-cliques

Amid a big tech backlash, cyber-savvy consumers are gathering in decentralised social spaces that use blockchain to unlock elite communities. In the US, 72% of adults say social media companies have too much power and influence in politics today; hence, they're seeking smaller alternatives (source: Pew Research Center).

As the popularity of closed platforms rises, maintaining privacy is paramount. **Collab.land** is a system that uses cryptocurrency to manage **Telegram** or **Discord** chat groups so that only those with a certain number of tokens are permitted entry, with a bot acting as a bouncer to keep the channel's guest list exclusive.

This is leading to a future of elite digital clubs. The members' club model favoured by creative tastemakers in the physical realm is being transported to the virtual world, such as **Friends With Benefits (FWB)**, a cultural membership powered by a community of Web 3.0 artists, operators and thinkers who each share rebellious values.

When it was launched in March 2021, the group had a waiting list of 3,000, and now gates its community with $FWB tokens and a strict vetting process. While **FWB** is built for the internet – its **Discord** channels cover a diverse range of interests – the platform is also expanding its influence into the real world, with members gaining access to real-life meetings and after parties, as well as co-created city guides described as 'an experiment in decentralised curation'.

• *Read more on LS:N Global*



'People no longer want to exchange their privacy for free services… to be held hostage by tech monopolies'

Pavel Durov, founder, Telegram



Left: Discord: The Movie (2021) directed by Finn Keenan with AKQA and Riff Raff films; Above: Finesse, US

Coterie Consumerism

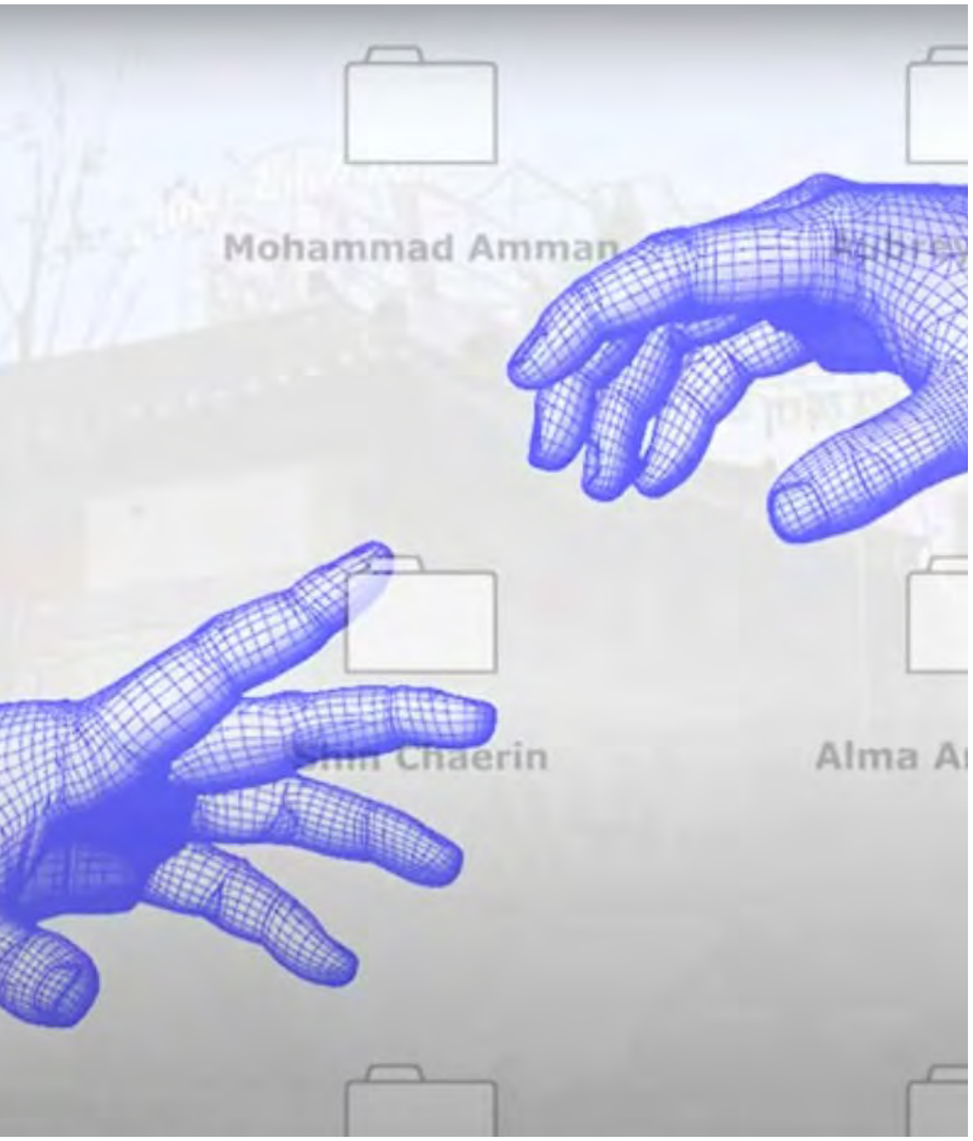
Shut inside during a formative period in their lives, a dearth of in-person social contact has had devastating effects on young people's mental health. A UK study revealed that Gen Z were five times more likely to say they felt lonely in the past week than those aged 65–74 (source: Office for National Statistics).

It's only natural, then, that there is a renewed desire for togetherness retail after a year of solo shopping online. Shanghai-based fashion retailer **ENG** opened a youth-led store to cater for this demand. With events including holographic projections, 24/7 vending machines and a cyberpunk aesthetic, ENG is applying Gen Z's passion for metaverse socialising to the real world.

As young shoppers re-enter the physical realm, sustainable initiatives will follow. **Loanhood**'s clothes swapping events thrive in offline spaces and even cultivate new friendships. 'Beyond lockdown [in the UK], there will be more opportunities for people to experience the community aspect of Loanhood, says Jen Charon, co-founder of Loanhood. 'This will include 'meet the loaner' events and try-on sessions, as well as pop-ups.'

Elsewhere, Gen Z's go-to social network **TikTok** is influencing the retail sector, with fashion disruptor **Finesse** building brand hype by moving nine TikTok creators into a Los Angeles property, giving them Finesse clothing and leaving them to serve up daily content while encouraging virtual audiences to provide instant feedback on looks.

• *Read more on LS:N Global*



Common Accounts explores an eco-friendly funeral for a digital future and afterlife, South Korea

In the US, **90%** of adults don't know what will become of their data after they die

Source: GoodTrust

Digital Afterlife

Technology is advancing in the afterlife industry, with the tragic global pandemic increasing demand for more immersive and experimental ways to honour the dead.

With the recent surge of cyber-funerals making commemorative events more cost-effective and accessible, we can expect investment in the integration of virtual reality (VR), deepfakes and avatars. The next frontier could be gaming platforms like **Animal Crossing** or **Roblox**, where personalised digital shrines offer a new level of intimacy.

'Compared to **Zoom** or **Skype** they give you an additional feeling of immersion,' says Johanna Pirker, professor at **Graz University of Technology**.

DeepNostalgia, a rising deepfake technology, recently went viral for offering animated photos and video clips of the deceased as a consumer service, while brands such as **Myheritage** and **GoodTrust Memories** are collaborating with **D-ID**, a deep learning technology provider, to lead in this field. Future afterlife services could include AI, holograms and non-fungible tokens (NFTs) that blur the lines between remembrance and revival. The ghostly hologram of Robert Kardashian gifted by Kanye West is currently only available to an elite few, but, judging by a rise in affordable holographic products, could soon become a viable future option for everyday consumers. Equally, a Chadwick Boseman NFT launched for the Oscars 2021 shows how these tokens can be used as bequeathments, extending the legacy of influential figures.

• *Read more on LS:N Global*



Miró Rivera Architects imagines a floating burial place to memorialise those lost due to coronavirus, US

Global Youth Snapshot

A glance at the universal state of youth, from Saudi Arabia's civic thrift shoppers to the chameleon-like identities of young Hispanics

America's Hispanic Promise

Marketers have long failed to capture the diversity of Hispanic youth – a consumer group that includes first-, second- and third-generation Americans from over 20 countries. Their multi-faceted identity means that one-size-fits-all strategies simply don't work: 'Hispanics are living the hyphen,' says Michael Roca, managing director of multicultural at **PHD Media**. 'They're Mexican-American, Cuban-American… they're two different cultures coming together.'

A push for a more granular representation of beauty mirrors their embrace of hyphenated living; some 75% of Latinx people agree that beauty is an important part of their culture compared with 56% of non-Hispanics (source: **Univision**). Meanwhile, rapper Cardi B has announced the launch of an Afro-Latina hair product line created in response to offensive online comments. 'It's time for people to educate themselves on nationality, race and ethnicity,' she writes on Instagram. Then there's **Ceremonia**, which honours this demographic with natural ingredients sourced from Latin America.

In music – an industry that Spanish-speaking artists like Bad Bunny and Sech are taking over – **TikTok** has become a hub for Latinx artists, with related hashtags totalling over 31bn views. Reggaeton, a rhythm born out of Panama and made popular in the Puerto Rican music industry, is leading this movement. Highlighting its commercialisation is Maluma's collaboration with **Balmain** and a partnership between **Crocs** and Bad Bunny for a special-edition shoe, which sold out in 16 minutes.



Ceremonia, US

What is a Global Youth Snapshot?

The Global Youth Snapshot presents key statistics, case studies and analysis of the world's emerging youth markets, providing global insight into the changing attitudes, subcultures and digital habits of future consumer groups



RE.DESIGN by Reserved invited Gen Z creatives to collaborate on a collection showcasing the diverse passions and ever-evolving tastes of generation authenticity, Poland

9% of Polish people identify as non-heterosexual, a higher share than South Africa, France and Italy

Source: Ipsos

Post-censorship Poland

Since the election of the Law and Justice Party in 2015, Poland has undergone a wave of anti-gay, racist and sexist sentiments designed to appeal to ultra-conservative Catholics. Gen Z have become acclimatised to conflict – but this doesn't mean they're willing to accept it. Following a 100,000 people-strong protest against Poland's near total abortion ban, high school students such as Krysia Paszko are 'almost 100% sure our generation will change this country'.

For a second consecutive year, Poland has been reported to be the least LGBTQ+ friendly EU country (source: Rainbow Europe Index). But in times of uprising, politically driven publications naturally emerge. **Zurnal Zine** is championing the voices of, and fundraising for, Poland's LGBTQ+ communities, using a camp tone of voice, glamorous aesthetics and wit to express its queerness, which, still perceived as controversial in Poland, means the zine is run from London.

TikTok allows Gen Z to communicate without mainstream media censorship; campaigner Katie Jagielnicka restyles words such as 'ab0rti0n' so her posts are not removed. Young activists are also injecting nightlife with politics. **KEM**, **MESTIÇO** and **Radio Kapitał** all stand up for marginalised people, supporting Black Lives Matter, citizens of Belarus or denouncing the subjugation of migrants, while the collective **Club Service**'s slogan sums up this attitude: We dance together, we fight together.



Image of Generation Z by Zalando empowers Gen Z activists to reach wider audiences, spotlighting the digital natives using the more traditional yet unconventional communication of portraiture, Poland



Above: The cast of sitcom Casa da Vó on Wolo TV, the first streaming platform focused on the Black population, Brazil;
Right: Aesthetic Relativism by Mouaath Moh is a photographic series exploring the definition of beauty in Saudi Arabia, UAE

Afrofuturism in Latin America

Slavery and colonialism have historically erased the culture and identities of Black communities in LATAM. But over the years, Black people have gone through a process of healing in order to regain their power. 'Despite the gaps, Latin America has never been more willing to face ethno-racial discrimination as it is today,' says Germán Freire, a social expert at **World Bank**. 'In many countries, a class of Afro-descendant leaders is consolidating. All of this is reason for optimism.'

With the recent #WhoCodesBR study by **Preta Lab** revealing that 33% of responding companies didn't have a single Black person in the tech department, Salvador, the capital of Bahia, has found its feet as the 'Black Silicon Valley'. It's home to **TrazFavela**, a **Google**-supported food delivery start-up that stands out from its rivals by strengthening local businesses, especially those operating in peripheral areas and slums, where the most popular delivery services often don't reach.

When it comes to wider issues of cultural representation and understanding, change is being driven by people rather than media outlets. **Wolo TV** is a streaming platform that focuses its content exclusively on Black audiences, with subjects that include urban culture and regional diversity. 'The Black population consumes an average of R$1.7 trillion (£221bn, $305bn, €263bn) a year, but we still don't see tv series that show Black families in a position of success,' says Leandro Lemos, CTO of Wolo TV.

'In many countries, a class of Afro-descendant leaders is consolidating'

Germán Freire, social expert, World Bank



Sanguine Saudi Arabia

As the Crown Prince's ambitious plans for Vision 2030 draw closer, optimistic members of Gen Z are standing at the forefront of their country's major socio-cultural changes. The latest Arab Youth Survey found that 98% of Saudi youth believe the Kingdom's economy is 'heading in the right direction'.

Sustainability forms part of this hopeful future. As the country with the lowest penetration of 'eco-active' shoppers on the planet, at just 7% of households, a new generation of worldly, social media-savvy teenagers are establishing ways to slow down consumption habits (source: Kantar).

They're also finding ways to bridge international cultures and imbue the heritage-rich nation with Eastern and Western influences. In addition to a new generation of chefs disrupting the Saudi food scene with multinational flavours, the entertainment sector is getting its own dose of global creativity. Music streaming platform **Anghami** has announced the launch of a series of **Anghami Labs** – venues with a lounge, stage and studio where creators can experiment with and co-create music inspired by both Arab and international cultures.

There's also a rising subculture of Japanophilia. Izuru Shimmura, consul general of Japan, recently highlighted this cultural phenomenon, having met young Saudis who are 'strongly fascinated with Japanese pop culture, such as anime and manga, as well as Japanese traditional arts such as Shodo, which drove so many people to learn the Japanese language'.

98% of Saudi Arabian youth say that the Kingdom's economy is 'heading in the right direction'

Source: Asda'a BCW

Dubai-versity

Aesthetic Relativism by Dubai-based influencer Mouaath Moh is a photographic series exploring the diversity and definition of beauty in Saudi Arabia, UAE



Above: Beta Cinema by Module K re-imagines the Art Deco glamour of the cinema-going experience for a new generation of film fanatics, Vietnam; Right: LAZYTHINK, Vietnam

Vietnam's Creative Renaissance

Vietnamese youth are a demographic that cannot be ignored. Today the nation is benefitting from a shift in societal structures that has been described as a demographic bonus – a term that denotes the country's status as having the largest number of young people in its history (source: UN Vietnam).

Fuelled by a new-found patriotism amid the nation's effective handling of the pandemic, Vietnamese youth are capitalising on their home-grown industries. With many international brands having shifted their supply chains from China to Vietnam in recent years, it's becoming easier for local creatives to establish careers in the country, with low manufacturing costs and rich cultural influences making musicians, artists and fashion designers primed for success (source: Quartz).

'In my opinion, the difference between Vietnam's creative scene and others is that in Vietnam it's easier for us to execute our ideas because costs are cheaper and the production conditions are easier to manage,' says Wean Todale, a 22-year-old rapper and owner of fashion brand **LAZYTHINK**.

This distinct sense of self-expression is also playing out in online spaces, as young people embrace Western social media platforms synonymous with visual creativity, such as **TikTok** and **Instagram** (source: Statista). The power of social networks in Vietnam is set for significant growth in the coming years – 72% of its youth population are currently online (source: UNICEF).

> 'In Vietnam, it's easier for us to execute our ideas because costs are cheaper and the production conditions are easier to manage'
>
> *Wean Todale, 22, owner of LAZYTHINK*



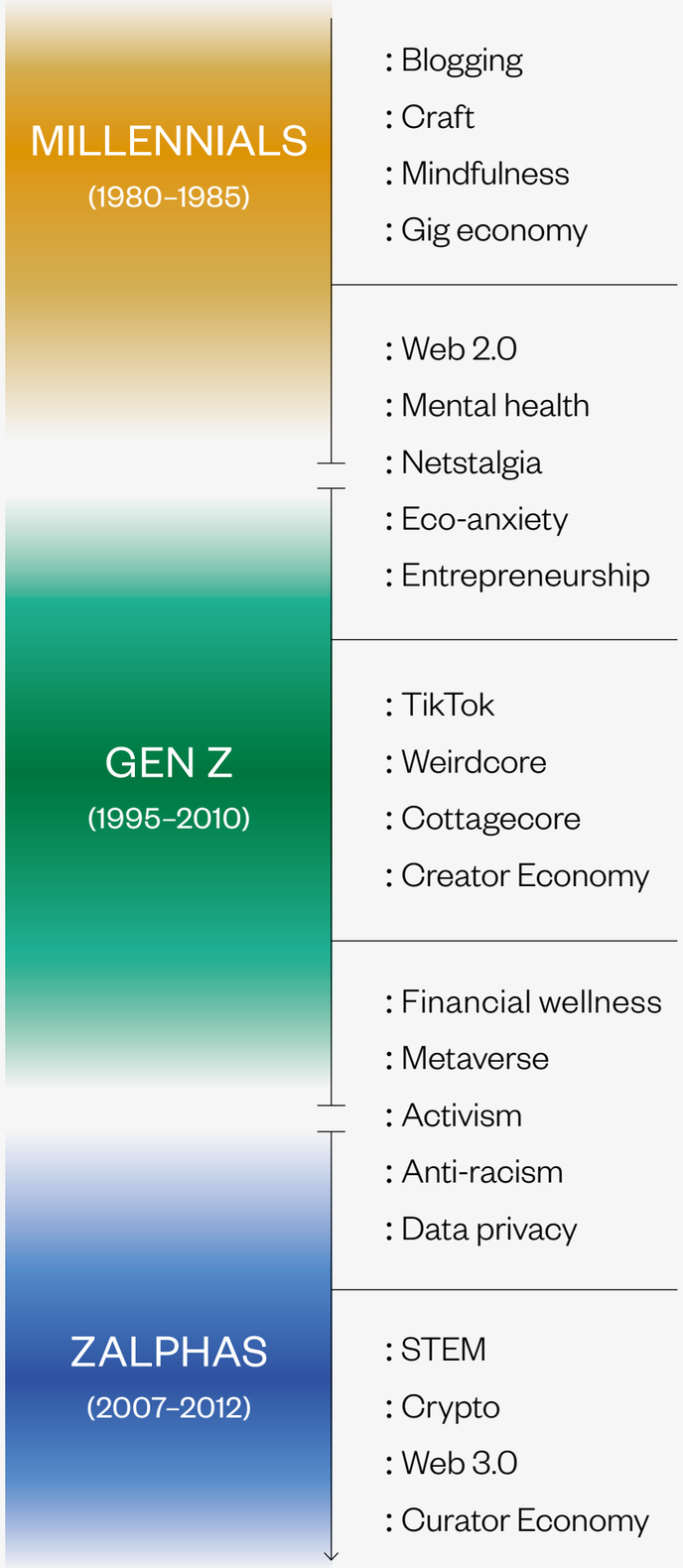
MACROTREND

The Zalpha Reckoning

A hybrid generation of Zalphas are entering brands' consciousness. Wise beyond their years, these products of climate change are using their childhood – once a time of innocence – as a time for productivity



Role Models by H&M highlights the young activists striving to make the world a better place, UK



Discipline is something traditionally enforced by parents, care-givers and teachers, educating children about the do's and don'ts of the world. But now, as a transitional generation of Zalphas – the youngest of Generation Z and eldest of Gen Alpha – enter their adolescence in the shadow of the climate crisis and economic recession, the tables are turning.

'Many youth culture brands have only just got their heads around the contradictory behaviours of Gen Z, who have navigated serious issues such as mental health and activism with an undercurrent of irony,' explains Holly Friend, senior foresight writer at The Future Laboratory. 'But with the oldest Gen Z approaching 30, they're passing the baton onto their sage younger siblings – a group we're calling Zalphas.'

'For the first time, we have a complete picture of where and how children are vulnerable to climate change… Virtually no child's life will be unaffected'

Henrietta Fore, executive director, UNICEF

Aged between nine and 14, these children of Millennials have inherited a number of traits from their predecessors – an innate sense of digital nativism, social good and will power – while dropping those that do not advance their institutional reformation, such as the time-wasting and self-deprecation rife on apps like **Instagram** and **Twitter**. It makes sense, then, that these Web 2.0 platforms are losing touch with younger generations, who are swapping procrastination for the productivity that thrives in Alternet spaces such as **Discord** and **Roblox**.

It is in these formative years that Zalphas are shaping their identities, not to mention their savings accounts. **Beano**'s Million Pound Kids report has found that British children saved a collective £38m ($52m, €45m) during lockdown in 2021, with nearly two thirds (63%) revealing they have their own money to spend as and when they want. But they won't be kids for ever. By 2030, many Gen Zalphas will be navigating adulthood as consumers and employees.

The climate crisis is also central to this reckoning. With a staggering 45% of global youth saying that climate anxiety affects their daily lives (source: Bath University), Zalphas' awareness of environmental issues is not tied to politics – it's an unavoidable reality. 'For the first time, we have a complete picture of where and how children are vulnerable to climate change,' explains **UNICEF** executive director Henrietta Fore. 'Virtually no child's life will be unaffected.' The landmark report she's referring to reveals that nearly half of the world's children live in countries that are at an 'extremely high risk' from climate impacts.

Consequently, this generation have no time for childhood wonder. Among global societies that must unlearn old ways of living, working and consuming, they are becoming our redeemers. In this future, youth is no longer innocent – it's an exercise in salvation. From educating elders to inventing climate solutions, brands must prepare for a landmark moment in history in which children take the reins as disciplinarians.

Our **Inter-generational Values** tracker shows the behaviours, habits and passions that consumers continue to inherit from one another over time

Value shifts of the Zalphas

- : From self-promoters to scientists
- : From digital natives to hybrid inhabitants
- : From satirical to sincere
- : From eco-anxiety to eco-salvation



Everyday Dreamers

Lego's Launderette of Dreams by Yinka Ilori responded to how children suggested rebuilding the everyday space to bring people in the community together. Photography by Mark Cocksedge, UK

Drivers

Zalphas are carefully selecting which values they inherit from generations before them, taking on the Wild West of influencer culture, the burden of climate compassion and the urgency of financial wellbeing

Neo-nurture

When understanding the values of this generation, we must first look at their Millennial parents. After all, this is the demographic that spurred collective shifts towards self-improvement, small-batch consumption and ultimately drove the creation of blands.

Millennials are faced with countless parenting challenges compared with past generations, and are less likely to have partners or physical schools to support them (source: Pew Research Center). According to **YouGov**, 58% of UK parents found it difficult to cope with their children during lockdown. In China, highly pampered 'little emperor' Millennials – products of the one-child policy – are struggling to care not only for their children but also for elderly family members.

Brands are stepping in as guardians, and technology companies are cranking down on child safety after years of misbehaviour. **TikTok** will now prevent 13–15-year-olds from receiving notifications after 9:00pm, while **Facebook** is delaying plans for its long-awaited **Instagram for kids**. These formative experiences – along with their parents' cautious rejection of capitalism – have shaped the way Zalphas view, and expect more from, businesses.

Global Driver: Evolving Demographics

The population is in flux, as ageing consumers pass down their habits, mindsets and brand values to the most diverse generation yet

What are 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



Ovoid House by Gregory Orekhov is designed as a shelter from the stresses of the everyday, recreating the tranquility of life before birth, Russia. Photography by Ivan Erofeev

Charity donations among UK children increased by **59%** in the first lockdown of 2020

Source: gohenry



The Children's Courtroom by Counterspace Studio is designed to familiarise children with the workings of the law, rights, and equality, South Africa



Inherent Empaths

Gen Z may be the driving force behind shitposting, **dogecoin** and meme brands, but to Zalphas this landscape of irony no longer feels appropriate. After all, more than half of young people surveyed in a study led by **Bath University** and published in **Lancet Planetary Health** believe that humanity is doomed.

Where digital natives once used liminal internet aesthetics such as weirdcore to seek refuge from societal realities, they are now facing chaos head on. According to **Pew Research Center**, 32% of US Gen Z have taken at least one of four actions – donating money, contacting an elected official, volunteering or protesting – to help address climate change in the past year.

This will be the first generation who do not need to unlearn antiquated behaviours, thus becoming a group of radical compassionates and diversity natives. For the first time, children of colour comprise more than half (53%) of the total US youth population (source: Brookings Institution). Plus, population growth is coming from the Global South – by 2034, India will have surpassed China as the world's most populous nation (source: McCrindle).

Global Driver: Climate Change and Resource Scarcity

This generation have a deeper relationship with the planet – and its destruction – than any before them, and will use all the tools at their disposal to save it

Circadian Creators

While it's often viewed as a siloed industry, the layer of the creator economy is being applied to every strand of culture. Describing it as a 'horizontal', Olivia Yallop, author of Break the Internet, explains: 'We need to stop thinking about the creator economy as selfie-takers and streamers, and start thinking about it as an add-on to what you already do, whether you're a lawyer or work in retail.'

Influencing has already moved far beyond social media platforms. While a study by **Harris Poll** for **Lego** in 2019 found 'YouTuber' to be the most sought-after profession of Gen Z tweens, in 2021, 44% of British children aged 11–16 say their career goal is to become a scientist (source: OnePoll). It's no coincidence that **TikTok**'s medical and science influencers are thriving.

But there is a growing acknowledgement of the laborious inner workings of the digital economy. **Bloomberg**'s business reporter Shelly Banjo reports that TikTok creators will 'sit there for hours and hours making 15-second videos that appear fun and authentic'. Meanwhile, in India, where kidfluencers reign, 47% of Gen Z students are looking for a career that offers a better work-life balance (source: INTO).

Global Driver: Accelerating Technologies

Digital existence is at the very core of Zalphas, who are demonstrating their role as natives of a decentralised internet – one that they have the power to shape and govern





Left: Social Tourist by Charli and Dixie D'Amelio for Hollister, US. Teenager Charli D'Amelio made headlines after revealing the reality behind TikTok stardom in The D'Amelio Show, a new Hulu docuseries about the influencer family; Above: Real-estate start-up Bilt has launched a credit card that rewards renters to help get young people off the property ladder, US

Pocket Money Economy

Having witnessed the catalysing effects of the pandemic at first hand, young people are investing in the security of their future at an earlier age than ever. Research by **gohenry** reveals that 66% of UK children say they now worry more about money than they did at the start of the pandemic.

Even more so than the generations that came before them, Zalphas are taking control of their finances and wising up to positive money habits. They're even learning about money in gaming spaces such as **Minecraft**'s Fintropolis world – a fictional city that uses real-world scenarios to demonstrate financial concepts.

And with **Beano Brain** highlighting that 17% of British children have added to their own pocket money by making and selling things on the internet, this entrepreneurial streak is compelling them to invest in non-traditional channels.

Indeed, some 43% of UK students already own cryptocurrency, with 40% believing that it will replace traditional currency within the next decade (source: Unidays).

Global Driver: Dislocated World

Braced for the economic aftershocks of the pandemic, young people are introducing productivity into every aspect of their lives in order to safeguard their futures

Insight

Radical rationality is manifesting across industries, as brands respond to young people's precocious nature with age-agnostic retail, entertainment, food and fintech innovations

Co-study Spaces

Driven by the cult of workism, the cultural importance of co-working spaces has been dulled over time. The next iteration will instead create room for next-generation determination – or the physical manifestation of #ProductivityTok, a viral trend in which Gen Z document their self-motivation with aestheticised list-ticking and study hacks.

In China, where schools are already staying open later to ease the burden on working parents, creating new opportunities for after-hours learning, self-study spaces are being carved out on social media platform **Bilibili**, where influencers live-stream their studies every day. The country's **Timing** app also received investment to build virtual study rooms in which users are monitored by others to boost their motivation. In the US, James Scholz has brought this concept to **YouTube**, where he invites students to study with him via 12-hour live-streams.

With nearly half (47%) of Gen Alpha preferring to spend money on the high street than online, retailers are well placed to be repurposed as self-discipline spaces (source: Beano Brain). **Staples** has turned its stores into academic hubs, while the new **Stavros Niarchos Foundation Library** in New York goes beyond reading rooms to offer technology training, career exploration, life-skills help and personal enrichment.

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

The Design Gallery at the Young V&A, which is undergoing a £13m rebranding to become a hub for children up to the age of 14 to play, create, debate and design for tomorrow. Image by Picture Plane, UK





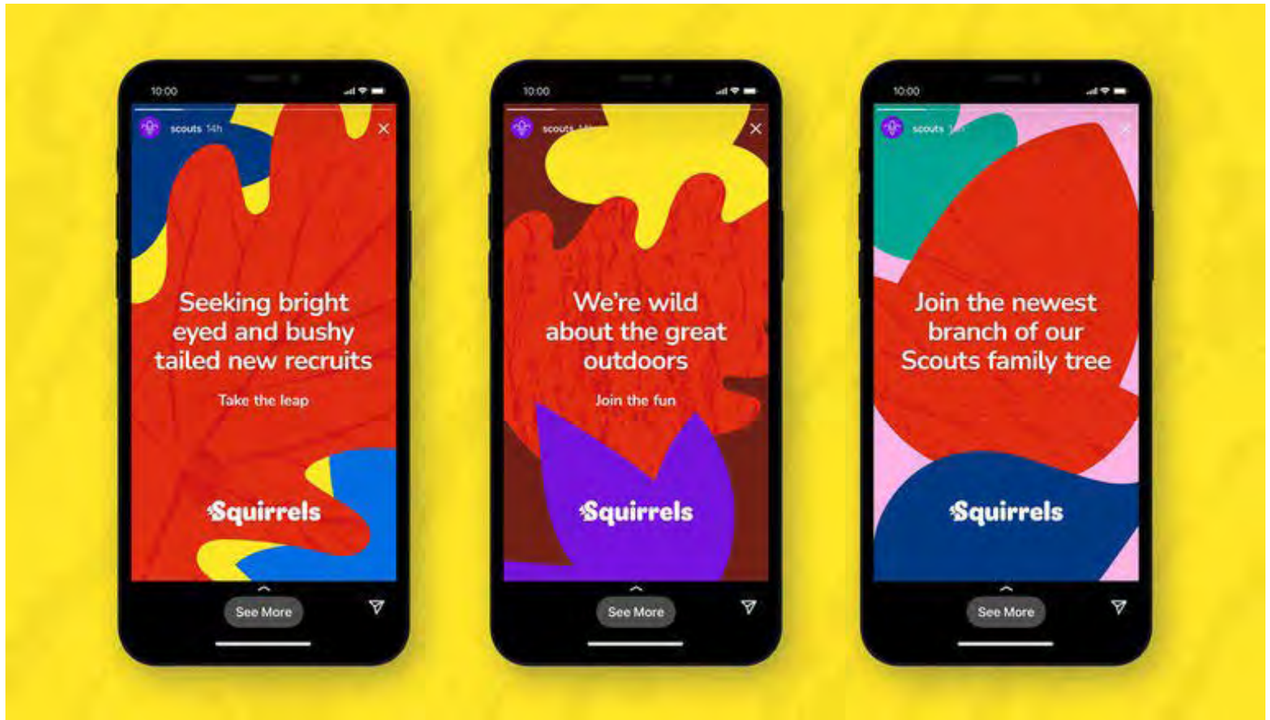
Immaterial Play

As supply chain issues simultaneously put strain on the largely unsustainable toy sector, young people are craving experiential play, driven in part by a childhood spent immersed in gaming and digital realities.

The metaverse has embodied this concept of Immaterial Play, allowing Zalphas to socialise with friends in a virtual universe that they helped design – half of 9–12-year-olds in the US, Canada, New Zealand and Australia play either **Roblox** or **Minecraft** (source: Seeking Alpha).

‘Single city kids are able to do [LARP] with friends or people they don’t know, so this role play simulates the social network idea’

Xiaolei Gu, innovation director, Fabernovel



Top left: The Squirrels programme by Scouts, UK; Top right: Vans World on Roblox is a skatepark-style space in the metaverse for digitally native consumers to interact with the brand and their peers; Bottom: The Squirrels programme by Scouts, UK

With kids now living hybrid lives in these self-governed worlds, brands are responding by highlighting the ways in which the offline world can complement – rather than overrule – these activities. **Scouts** has launched its first new brand in 35 years, **Squirrels**, in response to the isolation that children experienced during the pandemic. Designed for 4–5-year-olds, the programme will operate in the UK’s most deprived areas, nurturing real-world social skills through tasks such as spending money in shops and meeting new friends.

The digital escapism proffered by the metaverse is also being mirrored in real-life entertainment. Live action role play (LARP) games, for example, are boosting young people’s imaginations while promoting offline immersion. In China, where the market size of LARP is expected to reach £1.9bn (Rmb17bn, $2.6bn, €2.3bn) by the end of 2021, such entertainment is so popular that innovators are launching overnight travel packages that centre on *Hanfu*, a tradition favoured by Gen Z (source: iiMedia).

Coaxing Curiosity

Kaleidoscopic Home by Tin & Ed for Space10's Everyday Experiments invites Zalphas to apply their curiosity for the digital world to everyday spaces, enticing play in the physical realm, Sweden

Half of **9–12**-year-olds in the US, Canada, New Zealand and Australia play either Roblox or Minecraft

Source: Seeking Alpha

Venture Capital Kids

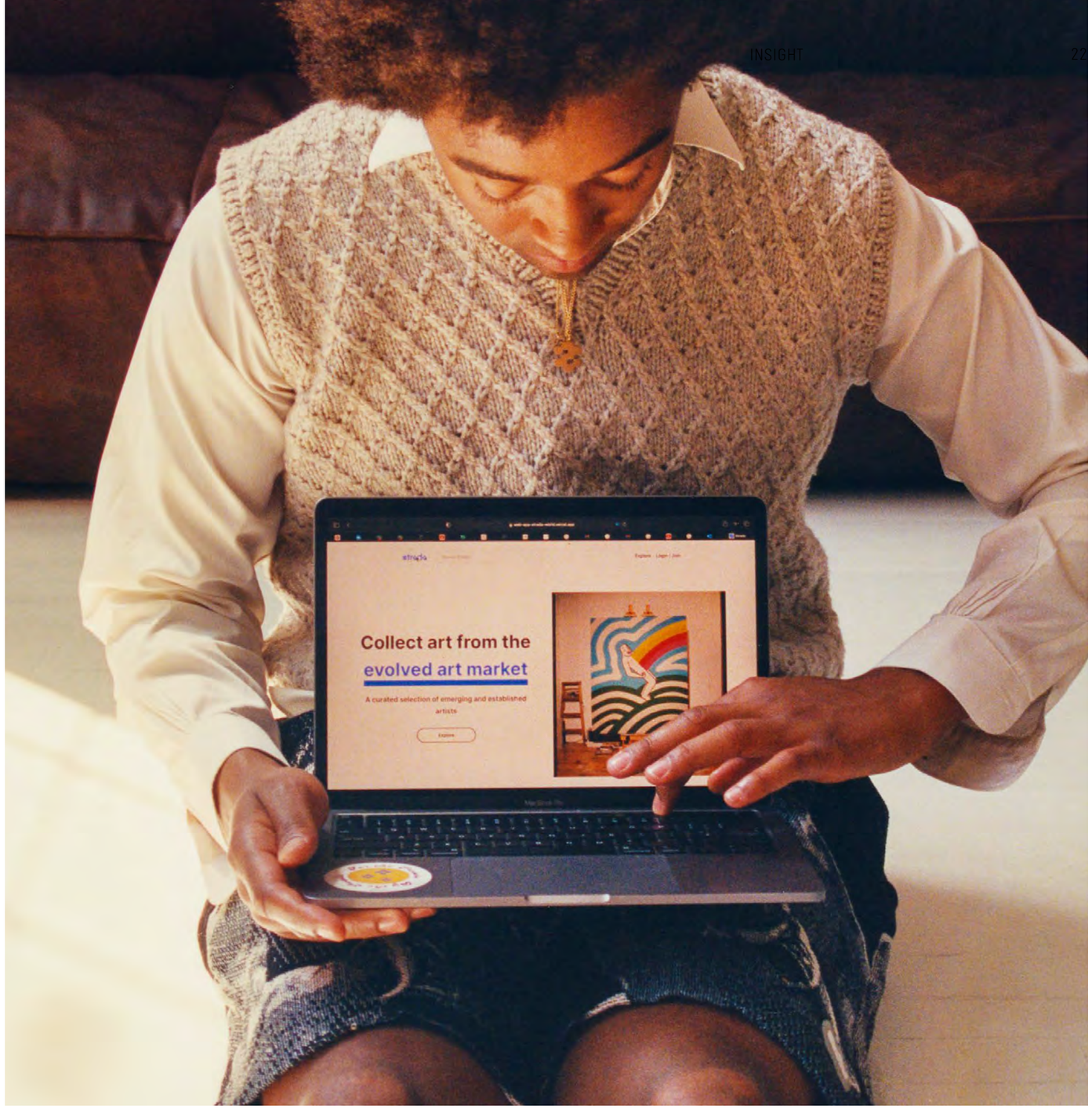
From **Robinhood** rebels to **StockTok**, investing is no longer the domain of an exclusive group of stockbrokers. As they turn pocket money into financial capital, new tools are making it easier than ever for children to trade in everything from stocks to art.

Finding a sense of belonging is crucial for aspiring investors, who are building their own inclusive communities that centre on women and marginalised groups. **Gen Z VCs** is a **Slack** collective home to more than 10,000 young founders and angel investors, and its founder, Meagan Loyst, 24, recently hosted its first Gen Z investing summit.

Fintech companies are catching on. In 2021, banking app **Greenlight** launched **Greenlight Max**, an investment platform that allows kids to buy shares in their favourite brands – with no minimum age limit – and 'lay the foundation for building generational wealth'.

But with 42% of Gen Z distrustful of the average American company, according to **Forrester**, scepticism about corporations will benefit new apps like **Strada**, a Black-founded platform digitising the selling and collecting of art for a generation whose knowledge of non-fungible tokens (NFTs) makes them natural fine art investors. 'The majority of people fighting for climate change regulations are our age. We're focusing on: how can we make the world a better place? And we don't want to invest in things that are going against that,' its founder Paul Hill tells LS:N Global.





Paul Hill of Strada. Photography by Sophia Wilson, US

Nearly half (49%) of Gen Z in the UK invest their money for no more than five years

Source: Barclays



Impossible Foods, US

Planet-based Diets

Set to be the largest generation of plant-based eaters in the world, Zalphas won't face stigma about planet-friendly diets or need to unlearn early nutritional mindsets that once revolved around dairy and animal meat.

The marketing cliché of finicky young eaters is petering out, with planet-positive and experimental dietary behaviours manifesting among youngsters. A study by **BBC Good Food** found that 8% of UK children are already following a vegan diet, with a further 15% expressing an interest in doing so. 'Far from being fussy eaters, children want to take over the nation's kitchens – baking and preparing meals, trying different kinds of foods,' explains Christine Hayes, editor-in-chief of BBC Good Food.

A great rebranding of vegan foods for children, as well as plant-based education, is contributing to this shift. Faux meat brands such as **Impossible Burger** are showing up in school lunchrooms, ensuring greater access to alternative foods for all socio-economic backgrounds. Meanwhile, long-standing meat-free brand **Quorn** is also targeting young eaters with its dinosaur-themed vegan nuggets, **Roarsomes**, which provide families with a 'tasty and fun way to engage children at mealtimes, making an early and delicious transition into meat-free', says its marketing director Gill Riley.

One in five children aged **4–16** don't know that steak, sausages and ham are meat

Source: Meatless Farm



This Is Not the Horizon by Anne-Iris Espinat Dief is a space in which people can practise speaking up and listening as a way of liberating them from apathy and fear, The Netherlands

De-patronising Media

Legacy media platforms are recognising the maturity of the Zalpha generation, working with children to create entertainment with no cartoons or condescension in sight.

In June 2021, cooking show **America's Test Kitchen** launched a children's **YouTube** channel, broadcasting recipe shows that enable the **ATK Kids** community to film their own videos. With co-creation driving adult media, in the youth sector it allows entertainment brands to tap into the enterprising visions of young people.

The New York Times is taking a similar approach, turning its Kids edition into an app compliant with the Children's Online Privacy Protection Act (COPPA) featuring informational journalism, alongside an opinion project researched by a different fourth-grade class each month. Meanwhile, the **Kid Reporter Program** is a mentorship programme by **Time** that encourages readers to act as micro-journalists. 'Contributing to a project is really gratifying when they're able to see their own content published in the pages of the magazine,' says Matt Stevenson, vice-president of progress marketing at Time.

Having played second fiddle to streaming platforms, satellite broadcasters are renewing their traditional ideologies to reach sapient Zalphas. Launched on **NBC**'s **Universo**, **Club Mundo Kids** is a new educational series aimed at first- and second-generation Latinx children. As well as using bilingual hosts to target young Hispanics – who comprise more than one in four new-borns in the US – the show's puppets discuss topics such as space exploration, endangered animals and climate activism (source: Pew Research Center).



Vibrant Veganism

Wholly Veggie is a brand that creates sustainable and plant-based meals and snacks designed by Public Address, a Canadian design studio whose aim is to push industry boundaries and boldly redefine plant-based products to show desire without compromise, appealing to a new generation of planet-conscious consumers

‘Far from being fussy eaters, children want to take over the nation’s kitchens’

Christine Hayes, editor-in-chief, BBC Good Food

‘When it comes to sustainability, our future is quite literally in the hands of our kids – so we’ve given them this cheeky tool to help educate their elders’

Curan Mehra, founder and CEO, Gelo





Build the Change by Lego is a handbook by children targeting policy chiefs on how to tackle the climate crisis, presented ahead of the global climate summit, UK

Educating Elders

Children are quickly becoming bearers of wisdom. To promote a future of inter-generational exchange, marketers are creating dialogue that encourages older consumers to learn from their successors.

Climate-conscious brands are using campaigns to subvert the narrative of parents condemning their children’s misbehaviour. **Oatly**, for example, launched a strategy to convert oat milk’s most sceptical demographic: dads. The resulting ads featured kids catching their fathers partaking in ‘scary levels of dairy drinking’ and even offered an educational microsite to Help Dad embrace plant-based options.

Children are exercising real purchasing power, with more than a third (36%) of American parents saying that their children have influence over purchasing decisions for the entire household (source: National Retail Federation). What’s more, Zalphas are increasing their elders’ sense of climate urgency. According to a **Nature Climate Change** study, children can boost parents’ levels of environmental concern by an average of 23% – and 40% when they follow conservative ideologies.

These findings inspired soap company **Gelo** to launch The Parent Track, a digital hack that allows kids to circumvent their parents’ not-so-eco-friendly purchases. When children instal the tracker on their parents’ devices, they will be inundated with ads that ‘follow them around the internet’, urging them to ditch single-use plastics and embrace greener shopping behaviours.

Foresight

In the 2030s, this generation's passing into adulthood will appear to come several years too late. So they will look ahead even further – reshaping policymaking, family structures and the very meaning of youth

Positive Recklessness

With the boundaries between work and play blurred to an even greater extent, burnout will become the next global epidemic. As a result, those who traded in their adolescence for early adulthood – starting businesses, trading cryptocurrency, attending protests – the 2030s will be a time to loosen their societal obligations and reclaim the impulsiveness of youth.

People are looking to balance their sense of responsibility with the excitement of risk. This is particularly prevalent in the digital sphere – as the Alternet expands, it's not just crypto that people are gambling their lives on. Instead, average citizens are becoming shareholders in everything from digital property to human lives. 'This paranoid mode is common to content-creators and crypto-investors,' explains Olivia Yallop. 'It's like the performance of your content or stock – and thus your identity – is fluctuating according to the tides of the internet.'

It won't be long before brands position hedonism as a critical resource for stabilising our increasingly prolific lifestyles. Scandinavian insurer **Hedvig** is using the simple tool of billboard ads to tell college kids to 'go get in trouble', positing insurance to alleviate consumers' anxieties about having fun – a significant concern in the post-pandemic era. With some 75% of American high school students reporting feeling stressed, such brand services designed to decelerate the pace of adulthood will multiply in the coming years (source: Elsevier).



What is Foresight?

Foresights examine speculative future scenarios 5–10 years in the future. Building on the Insight section, they showcase new directions, divergence or developments

Pangaia Moods allows kids to wear their personality with pride, with traits including the Professor and Rocket Scientist, UK

Inter-gen Habitats

As society wakes up to the unique expertise proffered by young people, new opportunities for inter-generational relations will redefine our ways of living and learning. In 2020, 15% of US home-buyers chose multi-generational homes – the highest share since 2012 (source: National Association of Realtors).

Urban farm housing project **Agrihood Santa Clara**, for example, is building a new breed of community living space that unites generations. Set to welcome tenants from 2023, the residence will include mixed-age hangout spaces where people can exchange ideas and partake in agricultural activities, signalling a future in which living arrangements could help spark connections among what **Harvard** reports to be the two loneliest generations – young adults and the elderly.

Cross-generational education could change the way we structure school systems, creating opportunities for older people to learn from Zalphas' cognisance of social issues. The **LGBTQ+ Intergenerational Dialogue Project** connects youth and elders who identify as LGBTQ+ to promote meaningful, long-term interactions through themed dialogues and shared dinners. This approach could be mirrored by educational institutions, even leading to the emergence of ideological campuses that host a curriculum based on values – regardless of age.





Left: Three-Generation House by BETA office for architecture and the city provides a blueprint for inter-generational living, The Netherlands; Above: Brainport Smart District by UNStudio enables residents to produce their own resources, such as food and energy, manage their own waste disposal and own all of their data, The Netherlands

'Young people have so much to share with the elderly… not just technology, but new and important ways of thinking about race, justice, sexuality and gender'

Richard Weissbourd, psychologist, Harvard Graduate School of Education





Employment opportunities for environmental scientists will grow 8% over the next 10 years

Source: US Bureau of Labor Statistics

Eco-partisans

As the prospect of ecocide becoming a prosecutable offence edges closer, Zalphas will unleash a widespread attitude of accountability. Driving this is the fact that young people are ageing into positions of power earlier than ever – the UN has already proposed a Youth Office to allow young people to directly shape global policy.

In the next decade, environmental careers will take off in both desirability and salary, as more businesses commit to ambitious environmental, social and governance (ESG) goals and the budgets to fund them. Employment opportunities for environmental scientists will grow 8% over the next 10 years, with an average of 9,400 openings projected each year (source: US Bureau of Labor Statistics). As Mimi Ausland, 25, tells The Guardian: ‘I cannot imagine a career that isn’t connected to even just being a small part of a solution.’

With minds like this behind policymaking, expect an influx of next-gen legislation as early as 2035, ranging from food crimes to fast fashion fines and even travel violations. Already, from China to the Middle East, ostentatious displays of wealth are being challenged not only by netizens but by social media operators seeking to reduce the amount of showiness broadcast in the digital realm. Vast global inequalities – as well as both national and individual carbon goals – will justify such crackdowns on over-consumption.

Left to right: Earthkinology by Alisa Ruzavina is an interactive installation made out of waste materials that engage the public with urban eco-systems thriving in our streets, UK; Role Models by H&M highlights the young activists striving to make the world a better place, UK

‘Millennials are not having children, and that pattern will probably continue with Generations Z and Alpha, so that means fewer young people’

Parag Khanna, author, Move





Above: Robust Nest designed by Fabien Roy is a new-born incubator adapted to the context of district hospitals in sub-Saharan countries, Africa and Switzerland; Right: Happily Ever After by Linda Huijbers questions outdated societal constructs such as marriage, The Netherlands

Coveted Youth

As the world ages, and young people find themselves cast as in-demand resources, the youth market will need to be redefined.

Once-powerful nations are growing older at an astonishing rate. China’s census data shows that births are continuing to fall, despite the government’s newly imposed three-child rule, meaning that, by 2050, more than one third of the country’s population will be over 60 years old (source: National Health Commission). As Zalphas enter their 20s, we’ll start to see the truth behind claims that as many as four in 10 are hesitant about having children (source: Lancet Planetary Health). If indeed they form family structures that do not centre around procreation, we can expect rich nations’ birth rates to plummet even further.

The effects of child-free living – linked, of course, to overpopulation and climate change – will alter the very notion of youth. As children and teenagers become an increasingly rare species, their unique knowledge will make them prized possessions for governments and brands. ‘Some countries are offering benefits and tax breaks to young people, like Poland, to desperately stem the emigration of talented youth,’ explains Parag Khanna, author of Move.

For brands that have long targeted young people, this could mean being required to de-youth strategies and create content, services and products that engage groups beyond the limits of age, breaking the illusion of demographics and replacing strategies to fit one ageless market.

Strategic Implications

In 2022 and beyond, Gen Zalpha will rapidly rise to prominence as the most imaginative, pragmatic and diverse generation in history.

As the first generation born entirely in the 21st century, to connect with them, brands will need to forget old youth tactics and the silos of IRL versus URL living, and acknowledge the countless paradoxes and expectations of young people today



Olifantenpaadje by Léa Cruard, The Netherlands

Strategic Actions

As the currency of youth becomes ever more in demand, these are the steps that can be taken today to prepare for a tomorrow inhabited by natively diverse and eco-partisan Zalphas

Ensure advertising is post-patronising

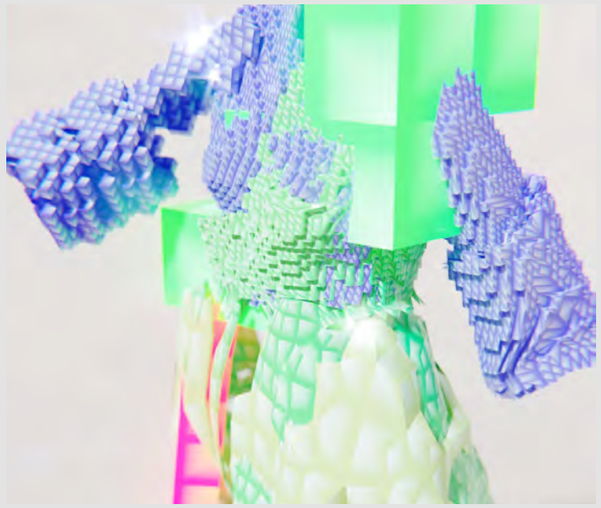
With more children educating their elders, brands can work with this generation to create learning frameworks for eco-education and anti-racism. Be a post-patronising brand by creating a two-way dialogue to let them infuse your campaigns with their responsible values.



Lick Click Bite Spit by Bianca Schick, The Netherlands

Empower metaversal play

For Gen Zalpha, customisation and play are part of the same thing – self-expression and exploration. Build omni-experiences that empower their desire for immaterial play and building social connections. Recognise that these gamified platforms will also influence their real-life interactions.



Decrypted Garments by Santa Kupca, The Netherlands

Help them achieve enterprising visions

As natural investors and innovators with high levels of self-discipline, Gen Zalpha are already confident they will experience financial success. Brands can empower the pocket money economy by giving them creative tools and spaces to exchange their expertise and instil confidence as future leaders.



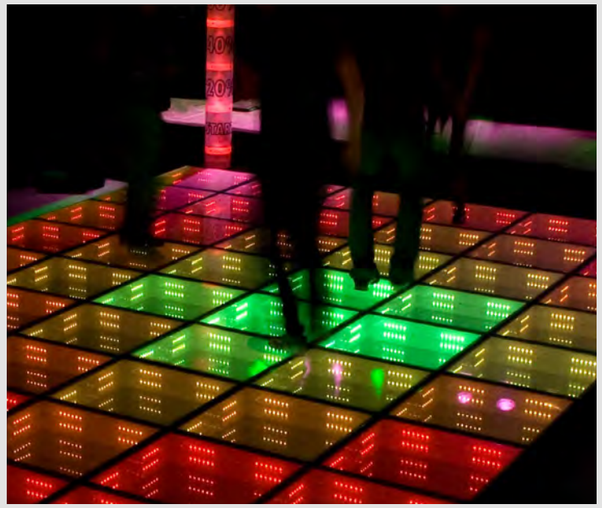
Rebuild the World by Lego

Thought-starters

If organisations want not only to exist in a decade's time, but also to thrive and flourish, then understanding Generation Zalpha and the future they will be shaped in and contribute to is imperative

Embrace the responsible rebellion

With the world on their shoulders, Gen Zalpha will need help to loosen their sense of societal obligation and reclaim the impulsiveness of youth. How might you help them embrace new forms of play and manage their eco-anxiety?



Sustainable Dance Floor by Daan Roosegaarde, The Netherlands

Develop intergenerational strategies

Consider how this generation's diverse and pragmatic world view will influence parental purchasing and brand accountability in the future. Beyond that, how might they shift intergenerational relations and create expectations for totally inclusive, ageless strategies?



LittleHuman by Petit Pli, UK

Prepare for jobs that don't yet exist

With the World Economic Forum predicting that 65% of those entering primary school today will work in jobs that don't yet exist, Gen Zalpha's career paths will be fluid. Is your talent pipeline set up for a generation who will demand even more versatility from their employers?



Groupthink by Khôi Pham, US

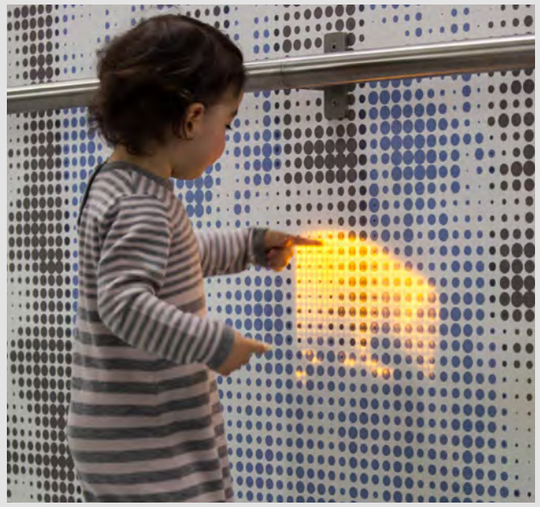
Related Macrotrends

2013

Gen I

Back in 2013 we began tracking the behaviours of Gen I, a group of iPad natives born after 2002. Even early on in childhood, their innate relationship with technology pointed to a future lived with a constant layer of augmentation.

• *Read more on LS:N Global*



Nature Trail at Morgan Stanley Wing at Great Ormond Street Hospital, UK

2018

Anxiety Rebellion

Five years later, Generation Z found themselves in the media spotlight for their risk-averse behaviours. Rather than numbing themselves with vices, these teenagers were turning their anxieties into action.

• *Read more on LS:N Global*



Off The Block magazine by Francesco Loy Bell, UK

2019

Paradox Personas

Having gained a sense of control over their futures, it became time for Gen Z to establish their identity. In the social media age, it transpired that self-enrichment was the new self-promotion, leading to a redefinition of what it means to exist online.

• *Read more on LS:N Global*



Zalando Sneakernet by Superimpose, Germany

2020

Reformation Generation

In 2020, young people turned their attention to the outdated systems at play, using their unique social awareness to decolonise, decentralise and reform outdated institutions – bringing brands along as allies.

• *Read more on LS:N Global*



Unforgettable Denim by Diesel, Italy

Strategic Worksheets

This strategic worksheet is to help you apply this macrotrend to your business



Carolina Carballo for The Future Laboratory

Prioritisation

Consider the following:

Which human need is most relevant to your brand/business?

Attainment | Belonging | Curiosity | Identity | Purpose | Security | Fulfilment

Which driver will have the most impact on your brand/business?

Urban Mindset | Dislocated World | Accelerating Technologies | Evolving Demographics | Climate Change & Resource Scarcity | Global vs Local



Influence

Consider the following:

How will this trend affect how you fulfil that need?

What impact could these drivers have on the business?

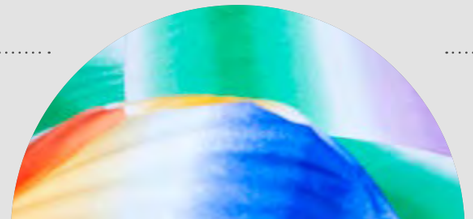
Select two insights that feel most relevant to your brand/business:

How do these insights align with your brand's trajectory?

How could you apply these insights to your business?

Which foresight scenario is your company least prepared for?

What is most surprising about this foresight scenario?



Consider how this macrotrend could affect the following pillars of your brand:



01 Culture

What cultural conversations are emerging and who are the tastemakers?

How do we add value to culture?

What will our consumers pay more for in the future?



02 Category

What's our greatest opportunity?

How is the competition evolving?

How can we differentiate?

Left to right: Role Models by H&M, UK; Lego's Launderette of Dreams by Yinka Ilori, UK

Consider how this macrotrend could affect the following pillars of your brand:



03 Consumer

What's our greatest opportunity?

How is the competition evolving?

How can we differentiate?



04 Business

What are our biggest challenges?

What part of the value chain will add the most and least value?

What are the strengths of the brand in this future?

Left to right: Impossible Foods, US; Eco Card by GoHenry, UK

Planning

YEAR 1

Over the next 12 months, how will this macrotrend affect your team?

YEAR 2

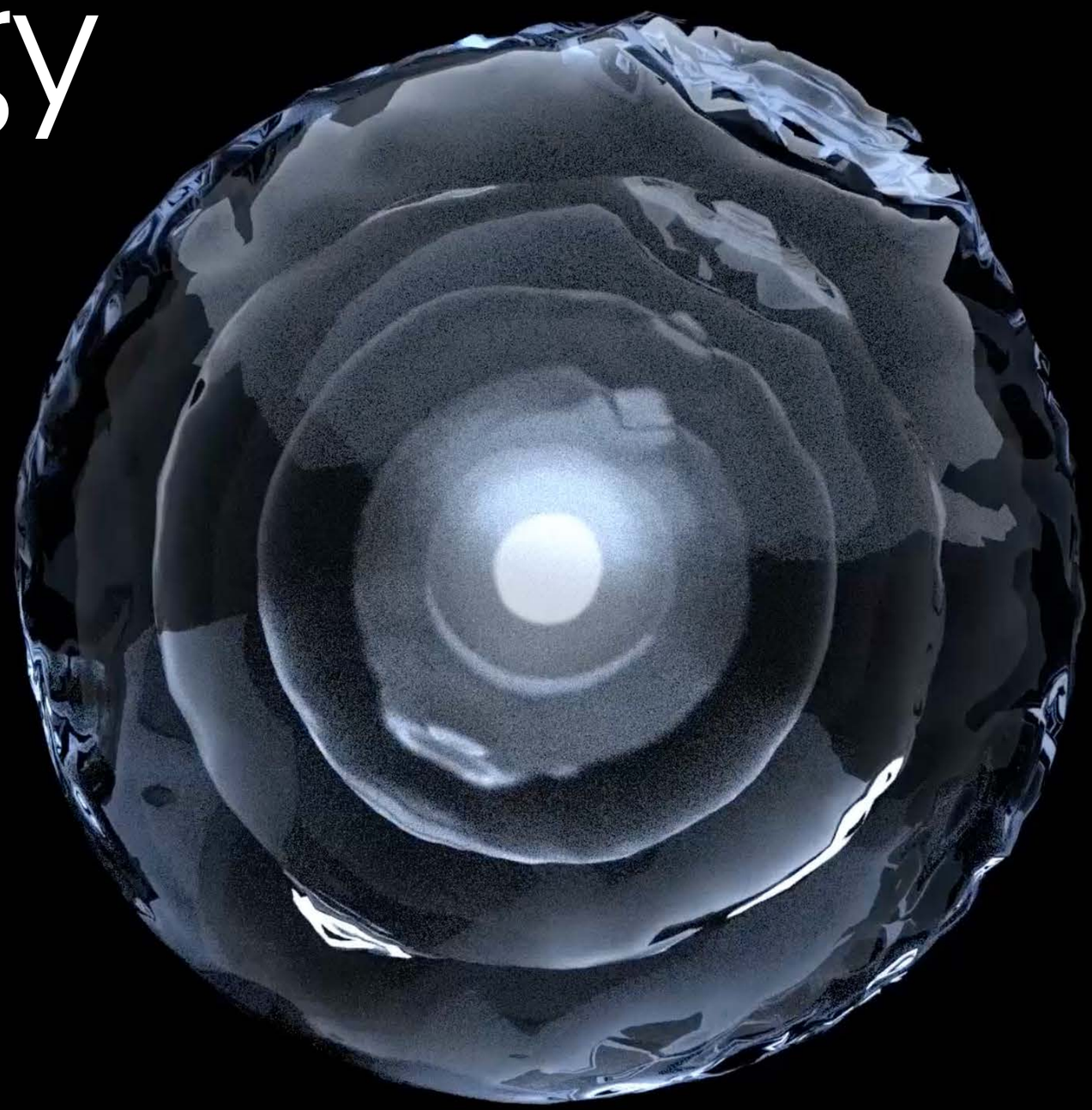
In three years, how will this macrotrend change the brand?

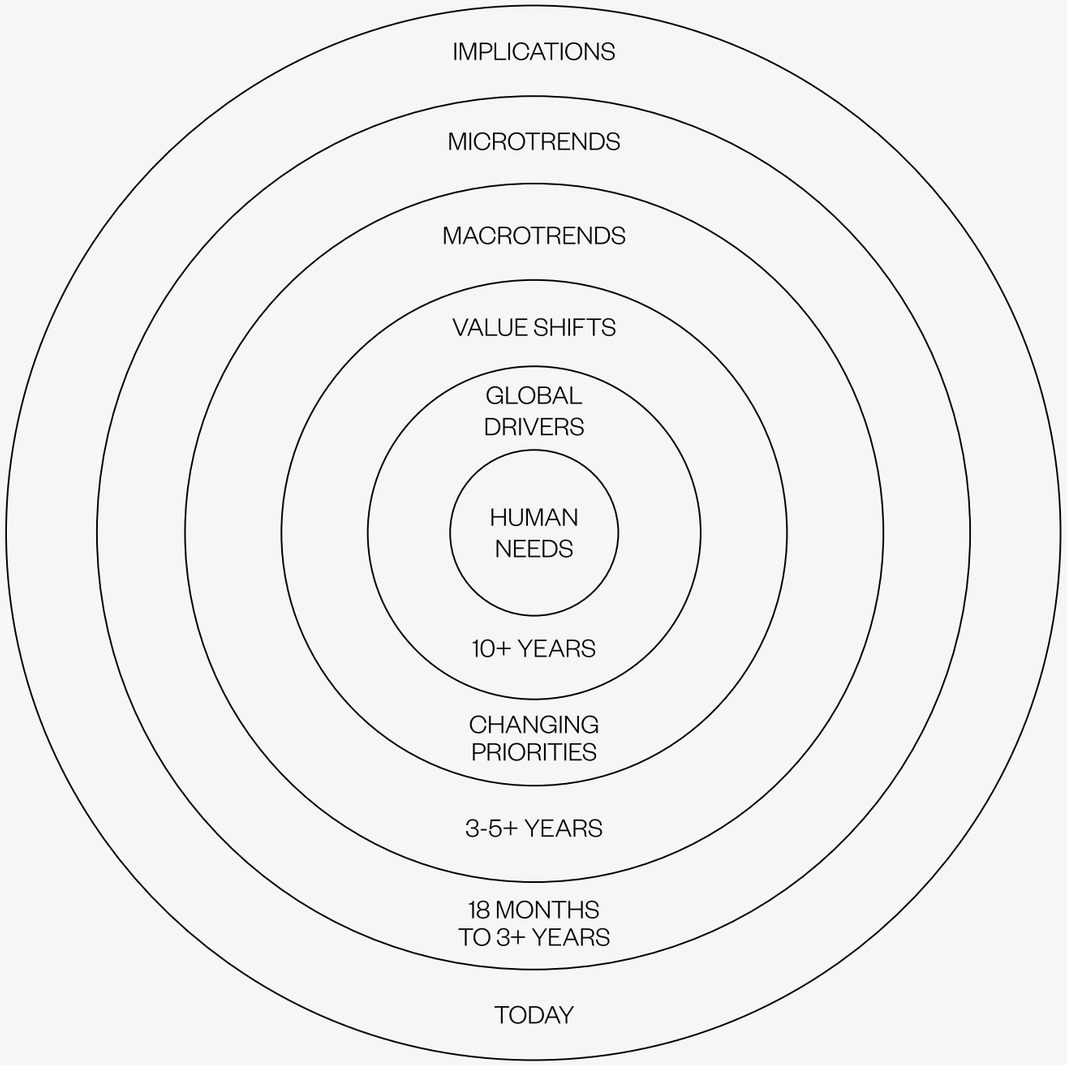
YEAR 3

In five years, how will this macrotrend change the business?

Methodology

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





The Future Laboratory's proprietary foresight methodology

Introduction

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

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

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

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

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

Futures Taxonomy

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

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

1 Human Needs

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

2 Global Drivers

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

3 Value Shifts

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

4 Macrotrends

The cultural manifestations of new and emerging attitudes worldwide

5 Microtrends

Influential short-term signals indicated by innovation

6 Implications

Future implications for brand and business growth



The Seven Human Needs

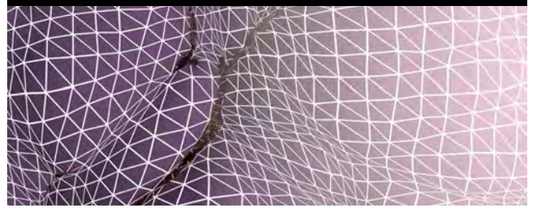
The seven human needs are timeless and universal. Based on a value system that supports human nature's physical and emotional programming, each human need is of importance to us as individuals and together they form the foundation of society as well as that of our methodology:

Why they matter:

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

The Seven Human Needs

Security

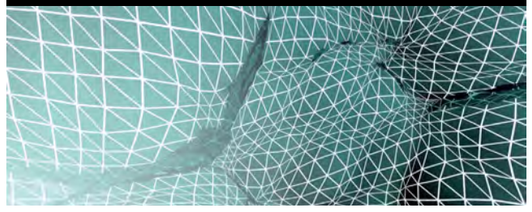


At the core of humanity is a fundamental need for structure, control, certainty and stability. It is a basic human survival instinct to protect ourselves and our loved ones from perceived physical, emotional and economic threats

KEY ELEMENTS

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

Fulfilment

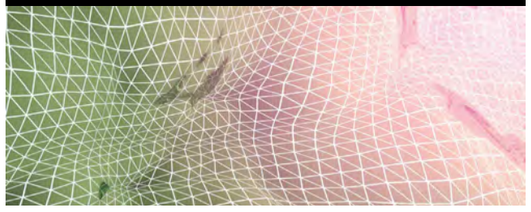


There is a human desire to direct our own lives, to create forms of freedom and to find deeper meaning and balance in life. It is the psychological need to fully realise our personal potential with the resulting feeling of satisfaction

KEY ELEMENTS

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

Belonging

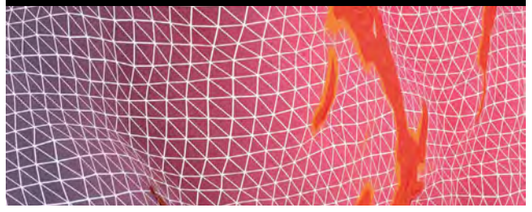


It is a social need to be physically connected to a group of like-minded people. We have an emotional urge, on an individual level, to create support systems and relationships that provide us with acceptance and approval

KEY ELEMENTS

Nationalism, Tribalism, Roots, Conviviality, History, Culture

Curiosity

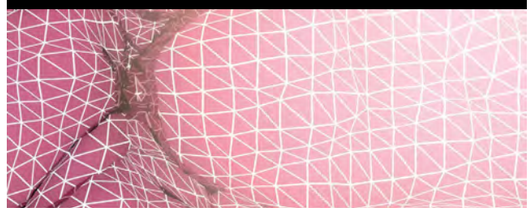


To both create and co-create makes us push the boundaries of what is ultimately humanly possible. Our in-built intuition makes us inquisitive beings with a shared inclination to discover or challenge the norm

KEY ELEMENTS

Exploration, Education, Connoisseurship, Discernment

Identity

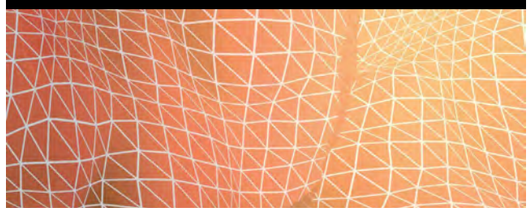


We have a need to distinguish our character or personality from others and to feel unique and respected for who we are. We build our sense of who we are through a personal exploration of gender, sexual orientation, ethnicity and age

KEY ELEMENTS

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

Attainment

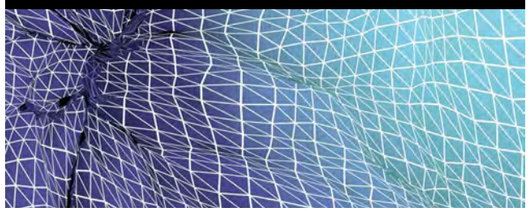


All human beings need to feel respected and recognised among their peers, which drives the desire to constantly express our significance and success, our knowledge and tastes, with our achievements often reinforced through the acquisition of symbolic goods

KEY ELEMENTS

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

Purpose



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

KEY ELEMENTS

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

The Six Global Drivers

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

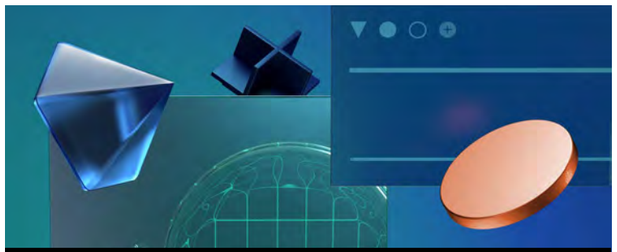
Why they matter: What's next

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



Mutant Matter by Dutch Invertuals. Photography by Barbara Medo

The Six Global Drivers



Accelerating Technologies

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



Climate Change and Resource Scarcity

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



Dislocated World

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



Global Versus Local

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



Evolving Demographics

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



Urban Mindset

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

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



Victoria Ling for The Future Laboratory

The Value Shifts

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

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

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

Why they matter: What to plan for

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

Macrotrends

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

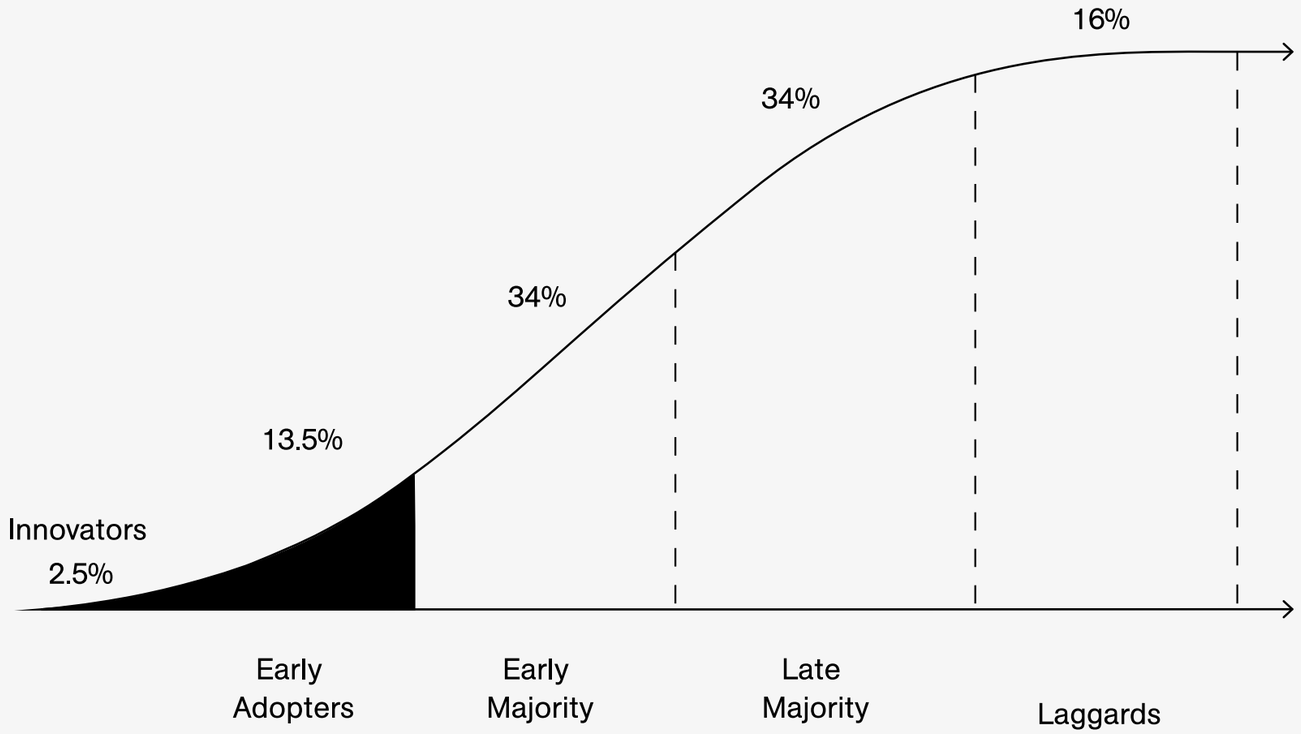
Why they matter: Where to play

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

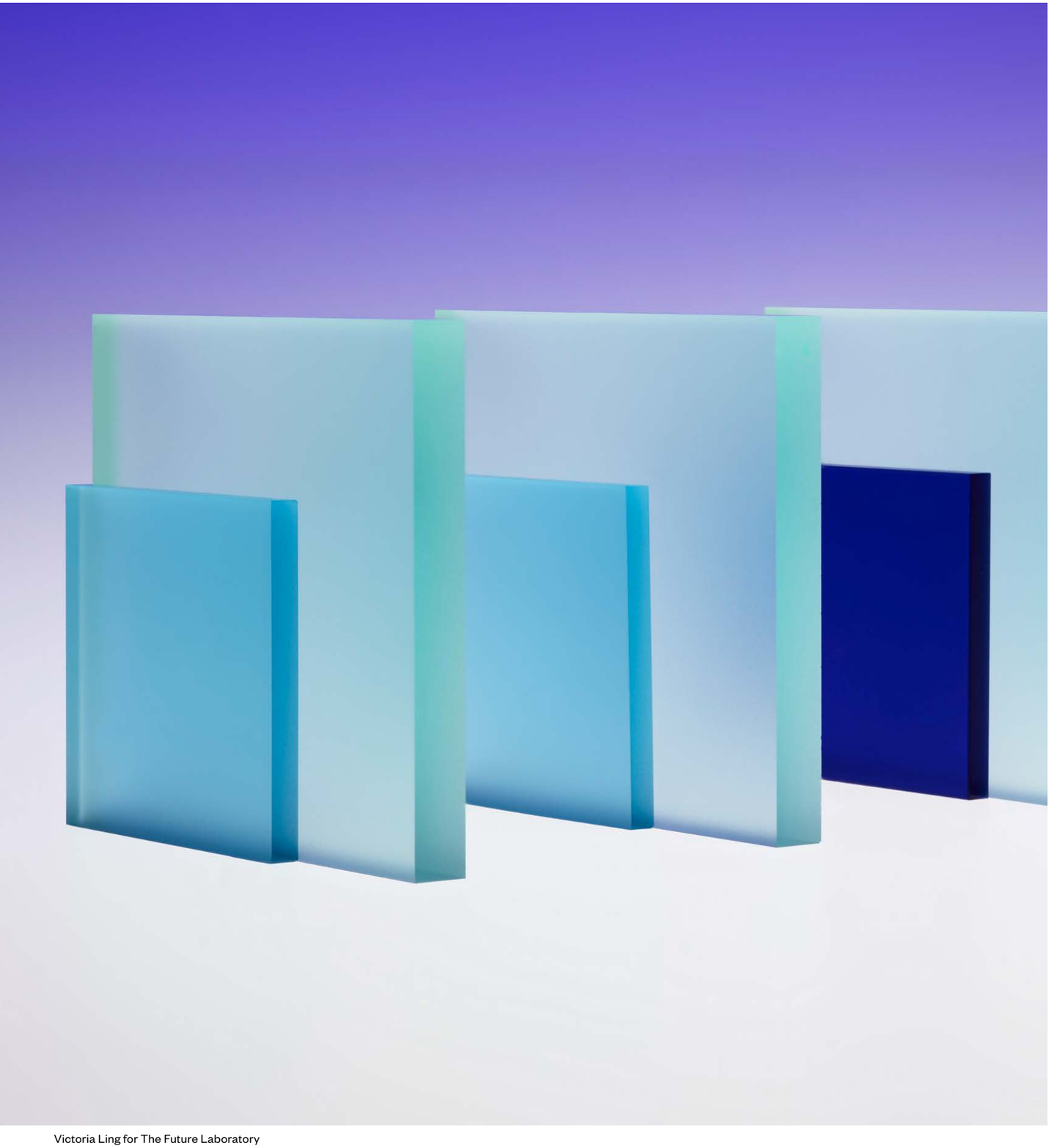
By understanding these consumers, we can help our clients deliver a business strategy that appeals to early adopters and the late majority – ultimately future-proofing your business.

The Diffusion of Innovation curve

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



DISCOVER MACROTRENDS



Victoria Ling for The Future Laboratory

Microtrends

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

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

Why they matter: How to win

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

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

Strategic Implications

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

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

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

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

BOOK A STRATEGIC CONSULTATION



Carolina Carballo for The Future Laboratory

The Zalpha Reckoning

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

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

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

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

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Foresight editor : Kathryn Bishop
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Senior production planner : Madeleine Watts
Senior events manager : Philip Franklin-Slattery

Brand and content marketing manager : Louise Lee
Marketing assistant : Emily Kelly

The Future Laboratory
26 Elder Street, London E1 6BT, UK
Phone: +44 20 7791 2020
Email: office@thefuturelaboratory.com

The Future Laboratory is one of the world's foremost strategic foresight consultancies. Members of our trends intelligence service LS:N Global get exclusive access to the mindsets defining tomorrow and the early adopters driving global change across eight industry sectors.

Find out more: LSN.global : thefuturelaboratory.com

Contact: For further information on all our services please contact hello@lsnglobal.com or call +44 20 7186 0776

Carolina Carballo for The Future Laboratory