

# The Future

100

**VML**

A REPORT BY VML INTELLIGENCE





# Foreword

Welcome to the 10th edition of “The Future 100,” where a profound and enriching year awaits.

As 2024 unfolds, an intentional slowdown shifts the pace for people and businesses after years of rapid acceleration. At a time when people believe stress, depression, and pollution are the top three challenges for human health, the pursuit of a better quality of life begins with a great deceleration as people opt for a mindful approach to the year ahead.

This slow-living sentiment is evident in Pantone’s warm and subdued choice for its Color of the Year 2024, Peach Fuzz (not to be confused with the sparkling Peach Fizz drink). The color forecaster says the shade communicates a message of “compassion and togetherness” (Collective recharge, page 14). Even gen Zers are fatigued by fast-moving trends on social media that are impossible to keep up with (Decelerating hype cycles, page 24) and opting for Luddite mode as a coping mechanism (page 28). It’s not just impacting people—businesses are also taking a measured pace for production (Slow beauty, page 136), choosing quality over quantity and seeing positive results.

Community and connection at scale are essential to 2024. Mass collective shared experiences are taking place around the world, bringing friends and strangers alike together (Prosocial effervescence, page 21), while physical stores are bringing community-centric retail to the fore (page 163). Technology is also assisting connection with spatial tech (page 37)

offering a smoother and more natural immersion. After all, 67% of people agree that community is more important than one individual and 76% believe that technology helps bring people together.

Last year was the year of artificial intelligence (AI) becoming more accessible thanks to OpenAI. This year will show more governance, creativity, and philosophical thinking as people question what it means to be human at a time when advances in tech are leading to very lifelike digital personas (Identity economy, page 35, and AIdentities, page 237). Generation alpha are the youngest group still being born and will be hugely influenced by AI, which may allow them to be the most emotionally engaged and purposeful generation to date (Generation AI, page 229).

This year will dial up on feelings. People want surprise, mystery, awe, and wonder in their lives, making new experiences that engage a wide spectrum of emotions in demand, from emotioneering (page 12) to sensory techtopias (page 39).

For the 10th anniversary edition, we have also included original consumer data surveyed in nine different countries and interviewed experts across various fields to give their takes on the past decade and what to look out for in 2024. Enjoy!



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[vml.com/expertise/intelligence](https://vml.com/expertise/intelligence)

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# By the numbers

Unless otherwise stated, original global consumer data throughout by VML Data. 9,000 18+ adult respondents surveyed in Argentina, Brazil, China, Colombia, France, India, Mexico, the United Kingdom, and the United States.

Data collected September–October 2023. For methodology and weightings see page 253.

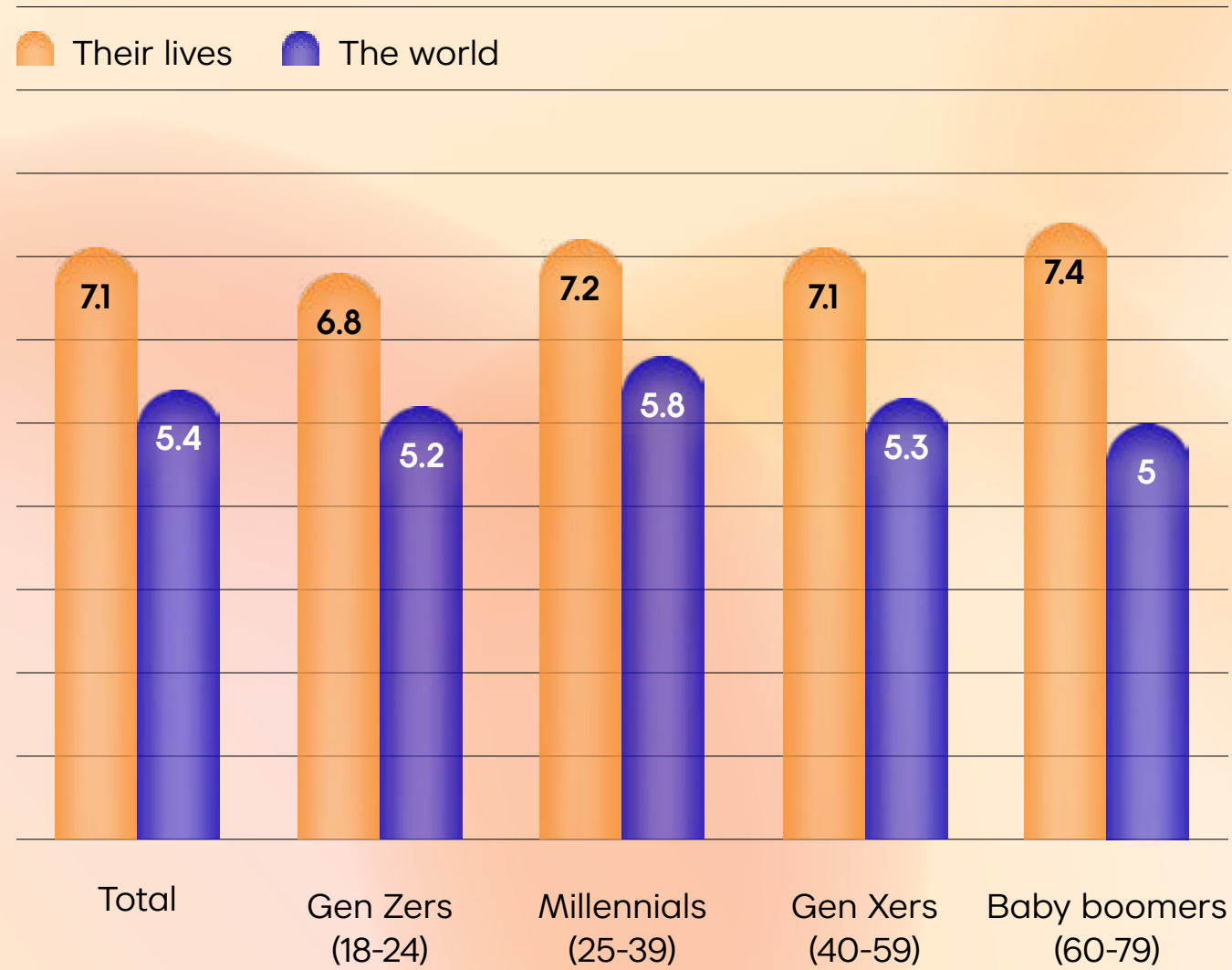


# A gentle optimism is emerging

Despite anxieties, people remain hopeful, especially on a personal level.

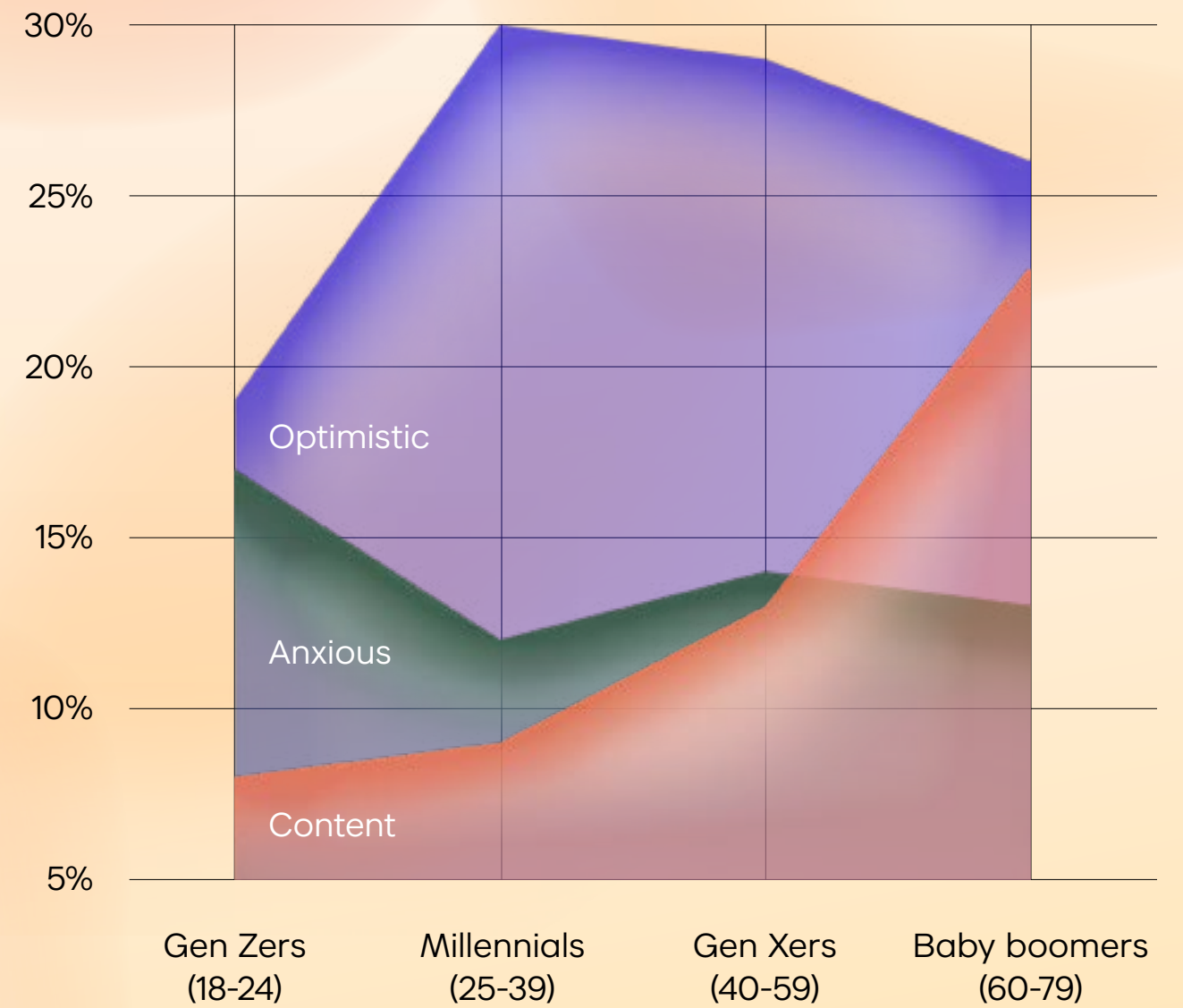
## How positive or negative people are feeling

Rating of how positive or negative respondents feel about how things are going in their own lives and in the world, on a scale of 1 to 10



## People's key emotion about life right now

% selecting each emotion to capture how things are going in life right now



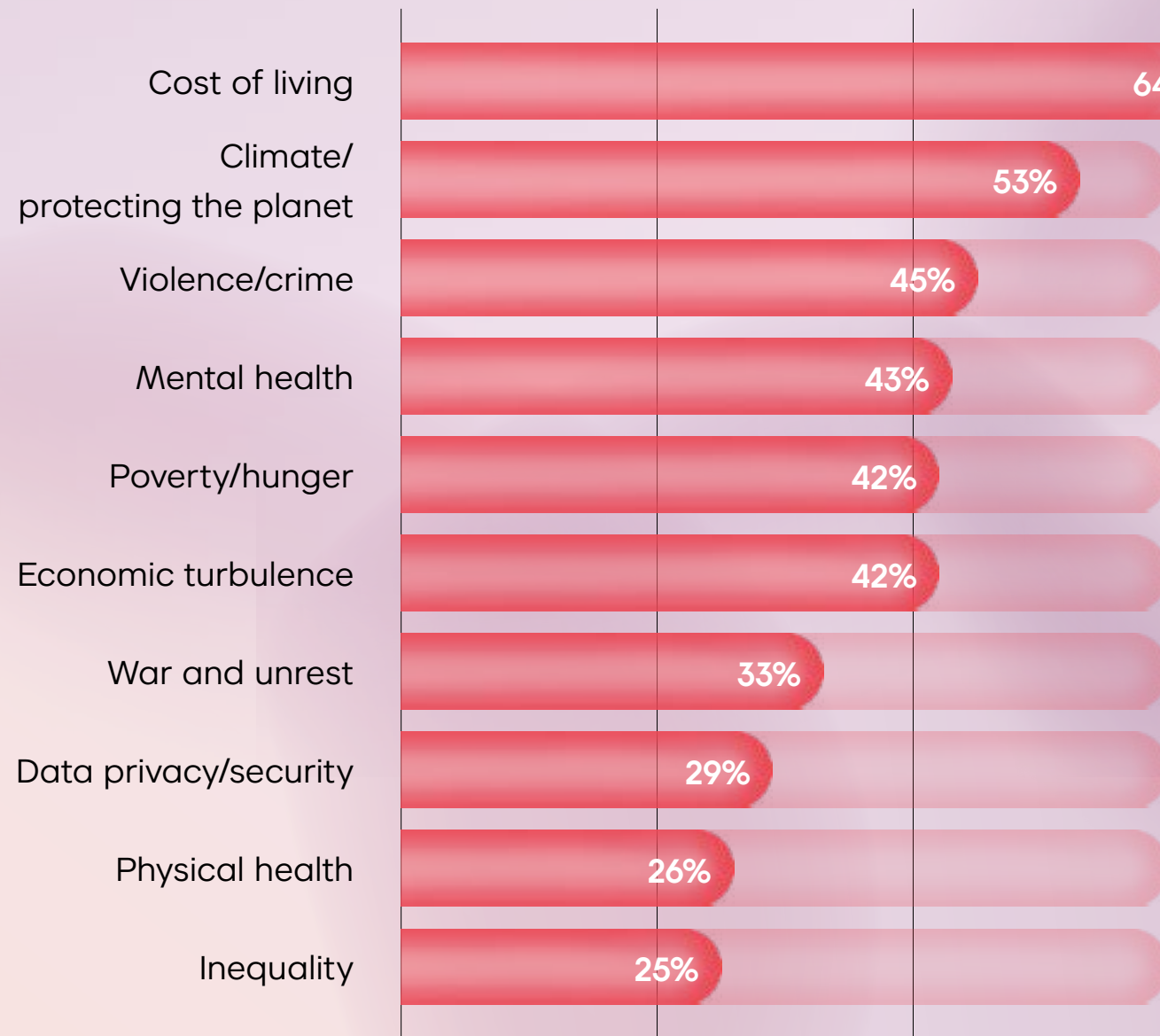


# Although challenges persist

People are realistic about ongoing complexity and risk.

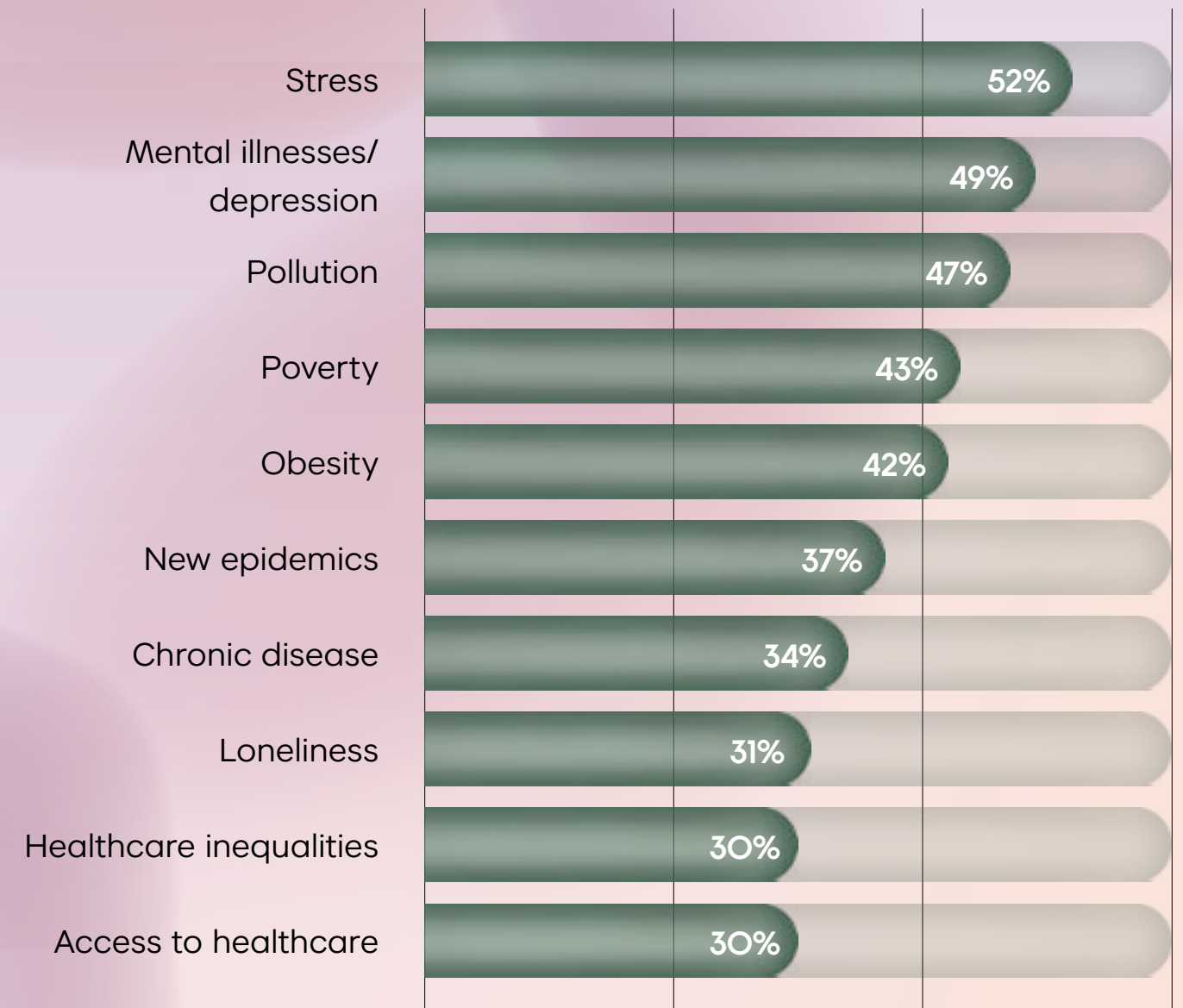
## The 10 most pressing issues facing society

% selecting in their top five



## The top 10 challenges for human health

% selecting

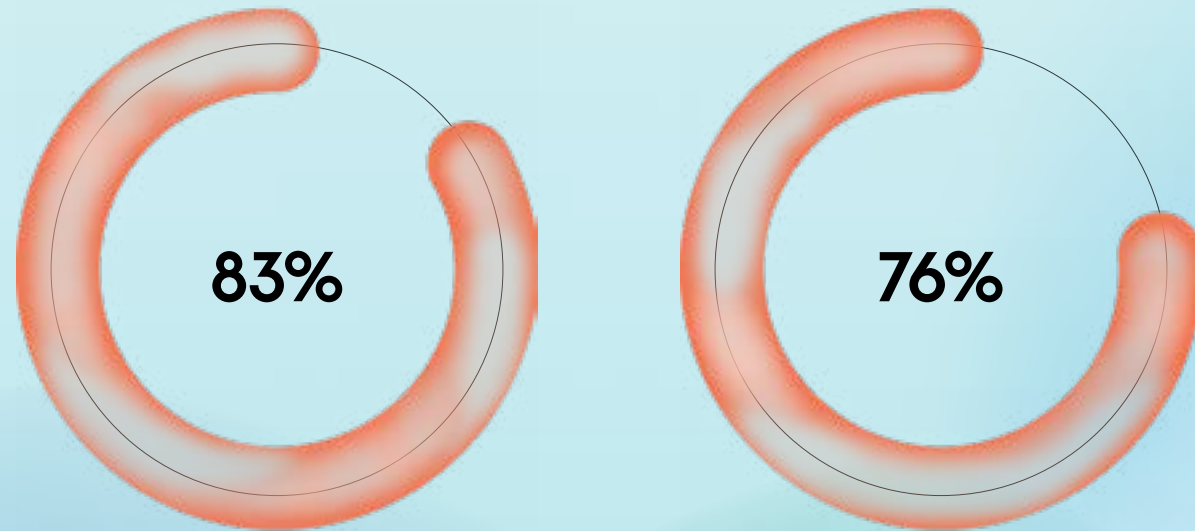




## Technology inspires us...

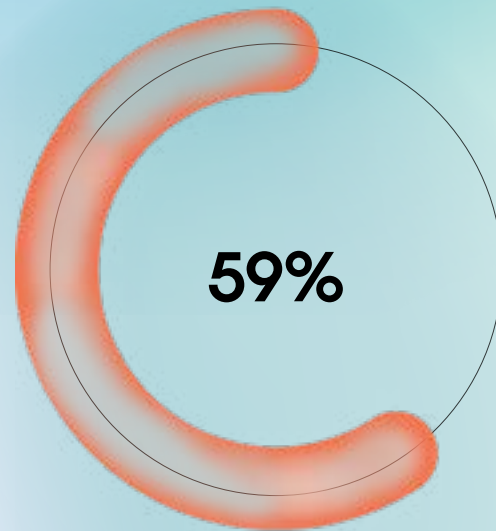
Most see its potential for positive impact.

% agree



Tech can make the world a better place

Tech brings people together



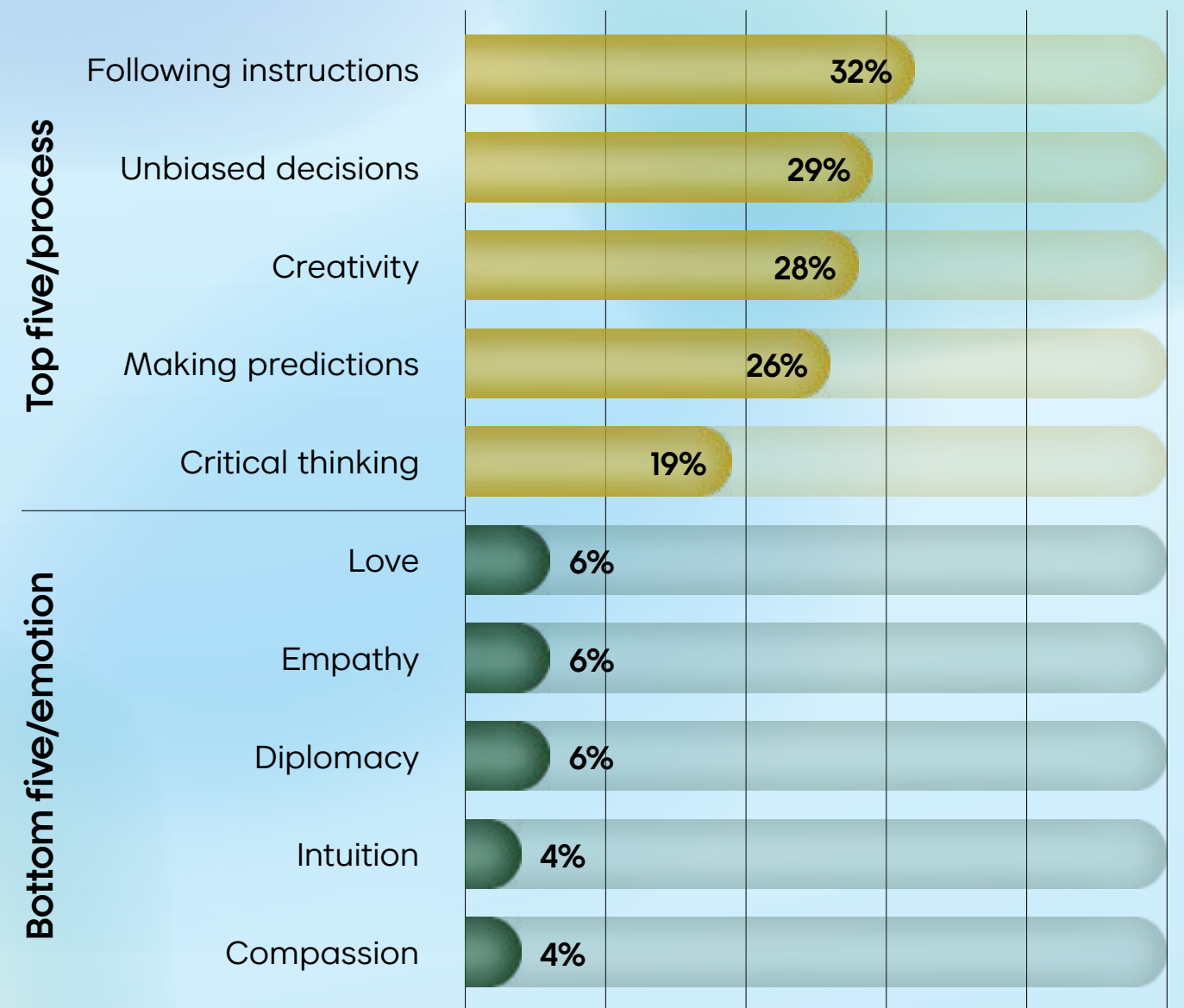
I trust in AI to act in humanity's best interest

## ...but it won't replace us

Humanity, now defined by emotion, will be paramount.

### Where technology has potential to outperform humans

% selecting in their top three





# People want to reconnect with the world and each other

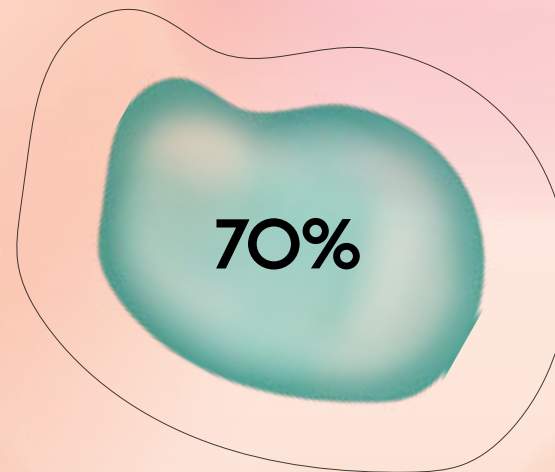
There's a collective yearning to enrich life through...

## Emotions



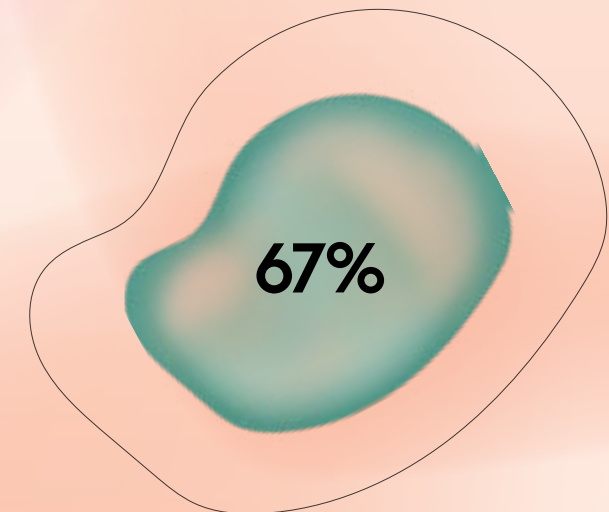
want to feel more emotion in their lives\*

## Experiences

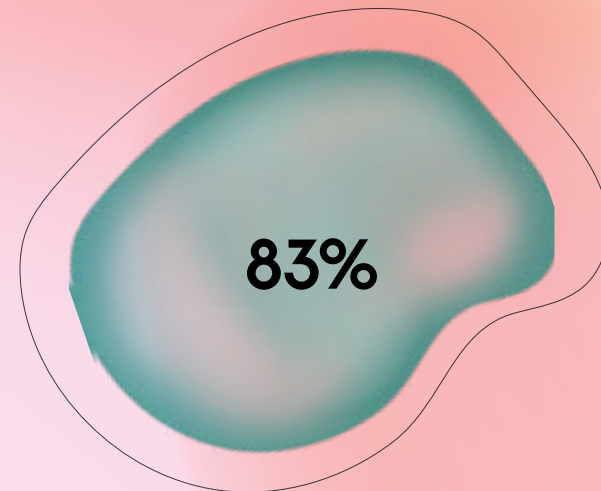


prefer to spend money on experiences rather than things

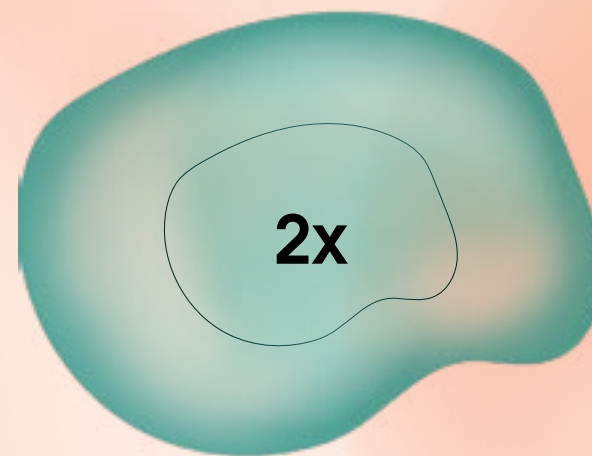
## Connection



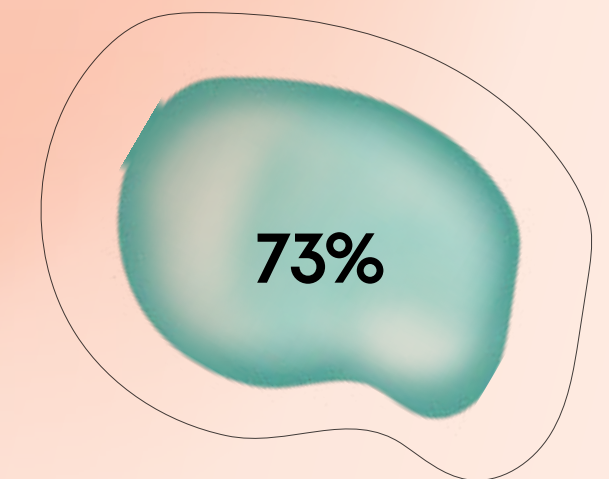
say community is more important than any individual



actively seek out experiences that bring joy and happiness\*



Twice the number of people say spending on experiences (rather than things) makes them happy



say spending quality time with others is a motivation when they eat

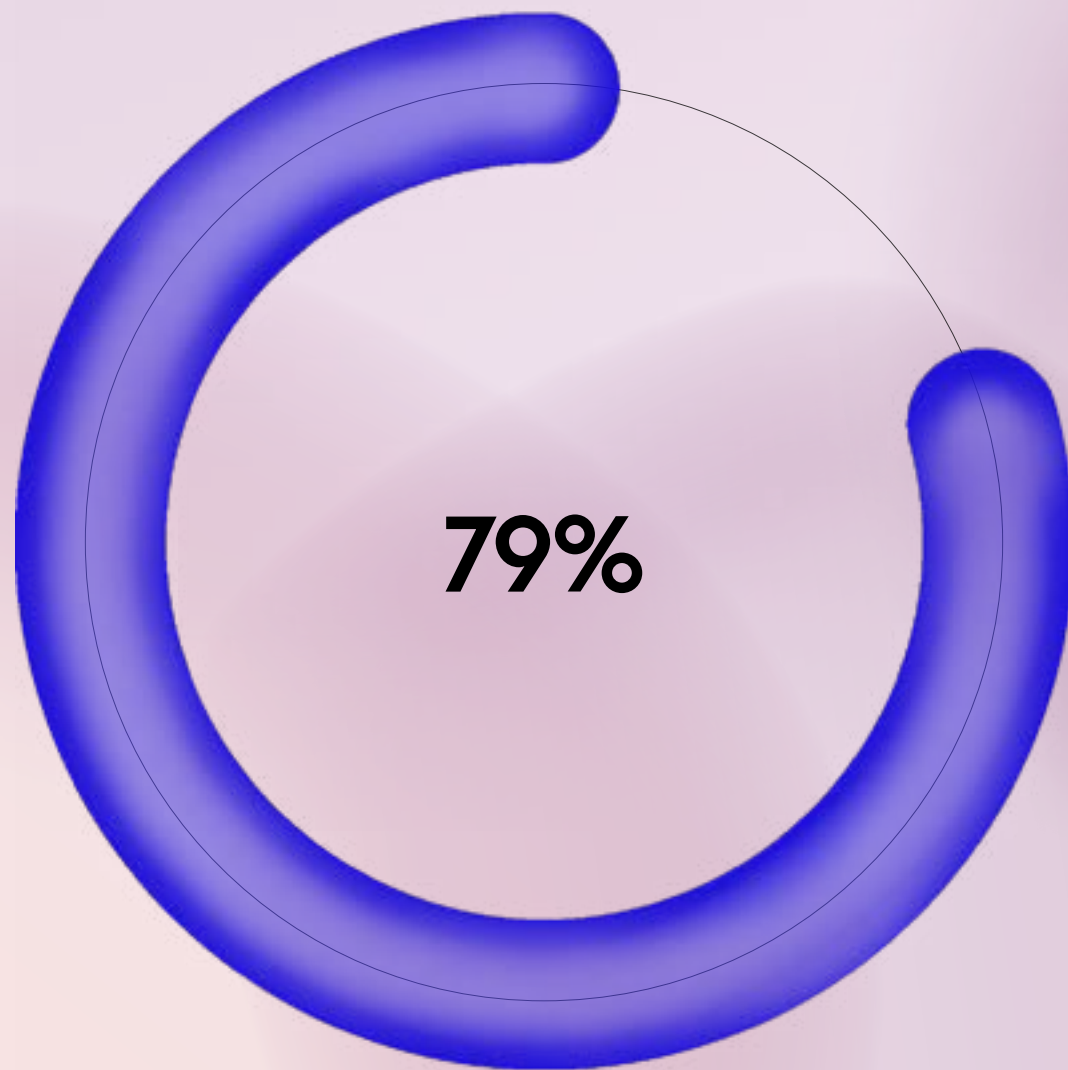


# Elevating humanity and connection are now key brand opportunities

People expect brands to offer optimism and uplift.

## The role of a brand has changed over the past five years

% agree



## The role of a brand should be to...

% selecting in their top three





01

# Culture

10



# Emotioneering

New emotional metrics are in the making for brands.



↑ The Kraken Screamfest VII: Shock Exchange

Two-thirds of people globally say they want brands to help them feel intense emotions, according to VML Intelligence's "The Age of Re-enchantment" 2023 study. The report unpacks an opportunity to stoke imaginations by offering re-enchantment, which celebrates the thrilling, the uplifting, and the awe-inspiring. At a time when people feel burned out, disconnected, and jaded, 77% say they "just want to feel something, to feel alive." There is a spectrum of emotion for brands to explore, and a slew of benefits to doing so.

Psychology tells us fun and joy play a vital role in our physical and mental wellbeing as well as acting as a social lubricant. Feeling awe too is prosocial, and also helps us stop ruminating, look outward, and feel more connected. Surprise can help us connect, as well as reshape self-perceptions. Even difficult emotions have their place, helping us to process challenges and build resilience.



VML Intelligence's data shows that crafting experiences with emotional payback brings mutual reward: consumers are more likely to spend on a brand that makes them *feel*, from joy to surprise, inspiration, and more.

US rum brand The Kraken is leaning in to its dark side. For Halloween 2023 it mounted *Screamfest VII: Shock Exchange* in selected UK bars. Developed in partnership with the Recreational Fear Lab, it challenged drinkers to try an immersive horror experience wearing a heart-rate monitor: the lower their bpm, the cheaper the cocktail.

Daybreaker, a global wellness brand that hosts uplifting communal morning dance parties, is a pioneer of "emotioneering." Founder and CEO Radha Agrawal tells VML Intelligence that "one of our major key performance indicators at Daybreaker is tears of joy."

#### Why it's interesting

It's time for brands to disrupt the rational and explore the disruptive power of emotion. In the future, a brand's performance might measure sighs of tranquility, tears of joy, goosebumps, or jaw drops. Consumers will invest in the brands that add emotional value to their lives in the form of re-enchantment.



↑ Daybreaker



O2

# Collective recharge

Color specialists forecast tones that convey  
a warm and nurturing hug.

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↑ Peach Fuzz, Pantone Color of the Year 2024, courtesy of The Development x Almost Studios





## Expect to see an increased focus on community.

Laurie Pressman, vice president,  
Pantone Color Institute

Peach Fuzz is the soft, dewy, and comforting shade that Pantone has selected as its 2024 color of the year. Shifting away from the energetic Viva Magenta of last year, the hue centers around humanity, growth, and peace at a time of instability. “Peach Fuzz brings belonging, inspires recalibration and an opportunity for nurturing, conjuring up an air of calm, offering us a space to be, feel, and heal, and to flourish, whether spending time with others or taking the time to enjoy a moment by ourselves,” says Leatrice Eiseman, executive director of the Pantone Color Institute.

The peach swatch imbues a gentle, positive outlook that is dreamy, youthful, and innocuous. Pantone explains that there is a feeling of “tenderness” and a message of “caring and sharing.” People are at the heart of the 2024 color decision by Pantone, as the brand expects to see “an increased focus on community, and people across the world reframing how they want to live and evaluating what is important—that being the comfort of being close to those we love,” says Laurie Pressman, vice president of the Pantone Color Institute.



↑ Peach Fuzz, Pantone Color of the Year 2024, courtesy of The Development x Almost Studios

UK paint company Dulux echoes a similar sentiment with Sweet Embrace, its 2024 color of the year. The brand described the warm and calming shade as “a kind, delicate tone that brings a feeling of positivity to our lives.”

US-based Sherwin-Williams has selected a cool and calming blue shade, Upward, for its 2024 color of the year. The hue evokes a moment of reflection and respite, and Sherwin-Williams describes it as “the color found when we slow down, take a breath, and allow the mind to clear.”

### Why it's interesting

An enriching, soulful, and cerebral year is in the making, as people are encouraged to slow down to better reconnect with themselves and others. 2024 could be an enlightening year that paves the way for a thoughtful and humancentric future.



↓ Peach Fuzz, Pantone Color of the Year 2024, courtesy of The Development x Almost Studios







# Climate- adaptive lives

Extreme climate conditions are changing every aspect of our lives.

“The era of global warming has ended; the era of global boiling has arrived,” United Nations secretary-general António Guterres said in July 2023—which was the planet’s hottest month on record. The rise of extreme weather patterns, most notably extreme heat, has far-reaching implications for daily life. “Extreme heat will change us,” the *New York Times* avowed.

For workers, extreme heat can have dire consequences. Heatwaves across Europe killed more than 61,000 people in the summer of 2022, according to a study published in *Nature* in July 2023. In the United States, the Occupational Safety and Health Administration is rushing to draft heat standards for workplaces, and President Biden announced new plans to protect workers from extreme heat in July 2023.

While these new weather patterns are undoubtedly dangerous, they are also driving innovation across sectors to help us adapt. UK-based smart clothing business Techniche specializes in thermoregulation technology and is pioneering cooling workwear for construction workers.

US-based Qore Performance supplies cooling vests to enterprises including Boeing, Shake Shack, Chick-fil-A, and FedEx, not to mention the US Air Force, and has seen its business grow by 300% since 2020. The tech powering these vests is IcePlate Curve, “the world’s first consumable thermoregulation tool.”

Thermoregulation and heat-stress expert James Russell, who predicts a future where workwear is embedded with wearable predictive technology, tells VML Intelligence: “We’re currently developing printed biometric sensors that provide low power feedback to blue collar workers and

HSSE (health, safety, security, and environment) teams. The sensors pick up various biometric data points and, with the help of AI, we can then predict if a worker is likely to need medical attention.”

In agriculture, new terroirs are reinforcing the regions where crops are grown. Some vintners are even spraying their grapes with microbes to protect them from the heat.

To design cities of the future, urban planners need to think about “the thermal comfort of the spaces people are moving through,” David Hondula, director of Phoenix’s Office of Heat Response and Mitigation, told *The Daily* podcast. Singapore is investing significant resources to radically rethink its sweltering urban areas, the *New York Times* reported. In China, architects are reviving the ancient, naturally cooling concept of skywells—tall, narrow courtyards—in buildings. And architect Vinu Daniel is pioneering climate responsive architecture in India.

Climate-adaptive beauty sees new formulations that protect the skin from environmental irritants. Following the uptick in wildfires, US-based beauty brand Pour Moi launched its Smoke Alarm Drops serum in April 2022 to combat the oxidative stress caused by smoke. In August 2023, Prada debuted a skincare range that uses unique Adapto.gn Smart Technology to help the skin adapt to its environment in real time and promote renewal, regeneration, and reinforcement.

#### Why it's interesting

“Extreme weather is becoming the new normal,” Guterres said. Extreme weather is not going anywhere—and it will continue to reshape our daily lives and drive innovation (see trend #96 Metamorphic cities on page 235).



↑ Techniche cooling garments



**The era of global warming has ended; the era of global boiling has arrived.**

**António Guterres,  
secretary-general, United Nations**



## 04

# The new etiquette

Cultural influencers issue etiquette refreshers for collective experiences.



↑ Mind your Manners, Netflix, courtesy of James Gourley

Bad behavior. Suddenly, it's everywhere. Eighty percent of global respondents agree that people are behaving worse than ever these days. Lurid tales of people getting up to no good in public spaces around the world have made headlines. People are fighting in cinemas; flinging missiles at the headline act at concerts; out-singing the actors at musicals, and even jumping on stage with them in theaters.

"Live performance has always been a canary in the coal mine," Kirsty Sedgman, cultural studies expert at the University of Bristol, tells VML Intelligence. "It's an early warning system when much bigger sociopolitical frustrations and shifts are about to erupt." While some commentators have put riotous behavior down to post-pandemic rustiness, Sedgman sees greater nuance and complexity. She points to the role of what she calls "the disconnection economy" and "a collapsing of the social contract."





↑ Mind your Manners, Netflix, courtesy of James Gourley

“What we have seen is a growing sense of disconnection from each other and a further entrenchment into our echo-chamber bubbles,” she says, adding that since people have observed those in power doing as they like without consequence, now “a strong contingent of people seem to be resistant to any authority figure telling them what to do.”

Arbiters are stepping up to offer refreshed guidance. One voice is the etiquette expert Sara Jane Ho, founder of China’s first finishing school, whose Netflix show *Mind Your Manners* aired in 2023. A book with the same title will be published in 2024, offering Ho’s insights on how to present your best self in any situation. In Dubai, Chinese TikTok influencer Ziyang Zhou is teaching etiquette and social conduct to UAE residents via

workshops and private lessons. In Japan, after people have experienced social isolation and years of mask-wearing, demand for “smiling lessons” is growing. “After three years of COVID-era masking, some Japanese people feel their facial expressions are a bit rusty,” writes the *New York Times*. “Enter Keiko Kawano, smile instructor,” whose coaching sessions instruct students on how to smile with genuine feeling and warmth.

Brands are also weighing in. Disney resorts in Florida and California have added a Courtesy section to the visitor preparation guides on their websites, calling on attendees to treat each other with respect. Auto manufacturer Vauxhall has teamed up with decorum expert Debrett’s on an etiquette guide for EV drivers, offering advice on respectful queuing and negotiating access to charging points with diplomacy. Businesses are also reiterating codes of conduct: 45% of US companies are offering etiquette classes, reinforcing expectations on everything from attire to navigating conversations in the workplace.

Ho tells VML Intelligence that etiquette is about more than niceties: “In this time of epic loneliness, we need etiquette more than ever as the utmost form of wellness, a way to promote genuine and healthy individual growth—through human connection.”

### Why it’s interesting

In a time when facilitating togetherness holds so much promise, setting guidance on expected behaviors could bring us together. Sedgman’s advice to brands is to “think carefully about which rules will actually keep everybody safer and create a fairer, more egalitarian, and more connective form of experience.”





# Prosocial effervescence

Mass collective experiences are fulfilling a yearning  
for connection and belonging.

Seventy-one percent of people globally agree that loneliness is an epidemic and 66% say there is no sense of community anymore. There is a growing opportunity for brands to engineer collective experiences that promote connection and community at scale with friends and strangers alike.

Collective effervescence describes the energy and harmony released by shared experience, like being part of a choir or a festival crowd. According to Kirsty Sedgman, cultural expert at the University of Bristol, it is important to us “because it really does bring people together from all different kinds of backgrounds and forges strong community bonds.” She tells VML Intelligence that “there’s so much evidence to suggest that if you can step outside that comfort zone of people who are exactly like you and meet a wider range of people, it leads to massive personal health benefits, and also to stronger communities and better performing economies.”

Hence Join My Wedding, a service that allows international tourists to buy tickets to attend the weddings of strangers in India, so they can feel the joy of being a part of the large-scale events. Or The Big Quiet, a mass meditation movement that started with 25-person sessions and has evolved into wellness events with thousands of participants.

It’s also why Swedish retailer Ikea is exploring new ways to bring people back together in its stores, starting by hosting nighttime raves during Milan Design Week in 2023. “Ikea is very much about relationships,” Marcus Engman, creative director of Ikea franchisee Ingka Group, tells VML Intelligence. The company’s philosophy is grounded in *tillsammans*—the Swedish word for togetherness. “That’s not just togetherness between





↑ The Big Quiet. Photography by Felix Kunze

→ Ikea at Milan Design Week 2023. Photography by Ozmoze



Ikea and our customers; it's also among people," he says. "So how could we create areas and opportunities for togetherness? This is something that we have worked with from almost the very beginning of Ikea."

As Engman explains, the retailer fulfils the role of facilitator, providing the occasion and the venue, allowing people to do the rest. "When you do a thing like throwing a rave, it's the people together that create the ambience," he says. "We're just the scene for them to create something." And Ikea is not the only retailer exploring the power of connection: department store Selfridges will launch a permanent event space on its fourth floor called The Selfridges Lounge, where visitors can enjoy music and cultural programming.

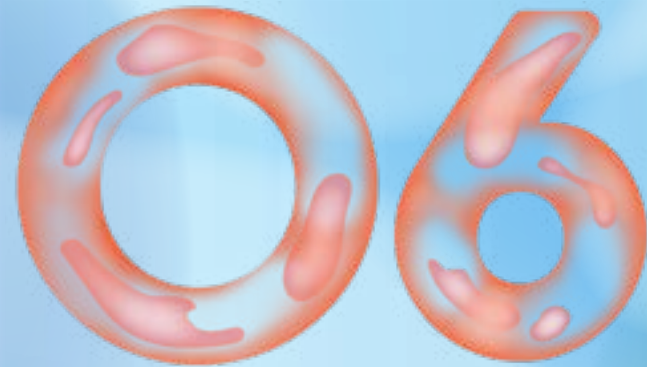
#### Why it's interesting

Brands must help people connect with each other, according to Radha Agrawal, founder of mass morning dance event Daybreaker: "The biggest opportunity that brands have is getting people to connect with each other—how this brand can serve a community as a collective rather than the individual inside the community."









# Decelerating hype cycles

The fast-moving trend cycle creates fatigue  
and takes a slower turn.

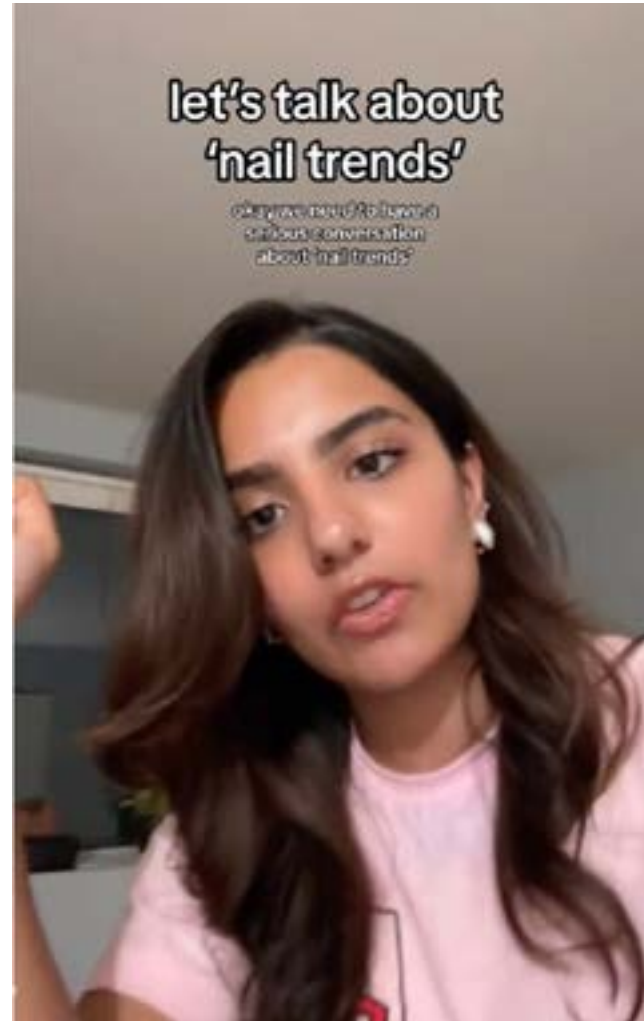
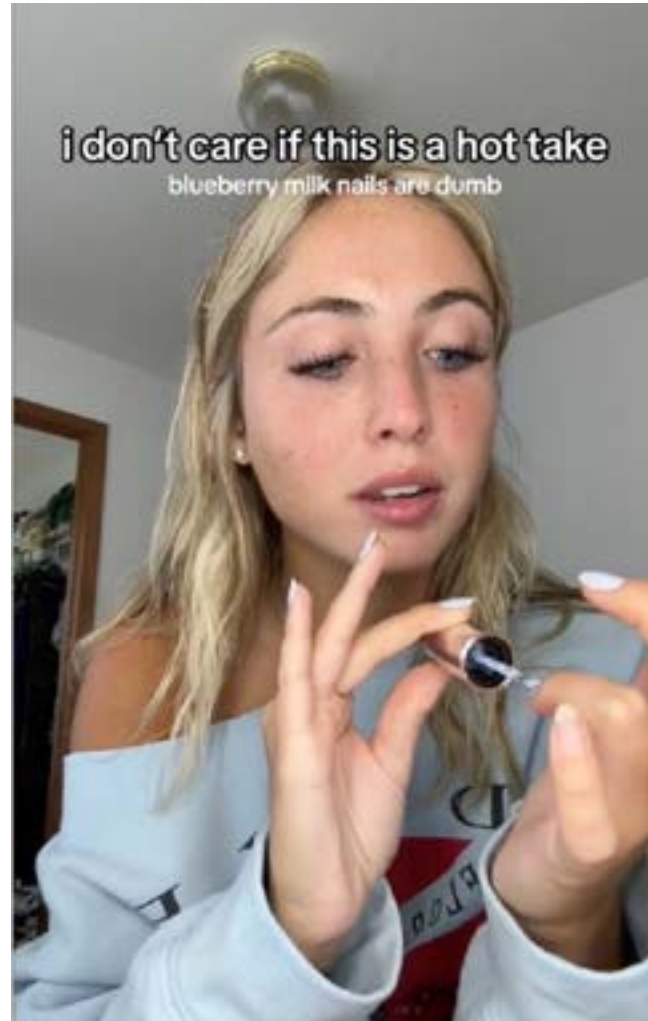
2023 saw a minor rebellion as users, irked by the pace at which new trends are being manufactured and hyped up on TikTok, collectively eyerolled at beauty concepts like “blueberry milk nails,” “latte makeup,” and “tomato girl summer.” “We are not turning light blue into blueberry milk. I refuse,” said TikTok user Katie Raymond (@katiehub.org).

In an interview with VML Intelligence, journalists from *Vogue Philippines* agree that concepts presented as trends are not always as novel as they seem. “Latte makeup is steeped in Korean beauty aesthetics, and also in the needs of those with olive skin tones,” says digital editor Andrea Ang. Beauty editor Joyce Oreña recommends instead identifying the longer-term shifts that underpin them. “We cannot ignore all these fast-moving trends,” she says. “So how do you deal with it? It’s really paying attention to the wider tendencies.”

In response to the fast-paced hype cycles, there is a simultaneous movement that sees value in slowing down. As we report in Next-gen collectors (trend #63 on page 161), designer Phoebe Philo is eschewing the standard seasonal approach for her collections, opting instead for limited drops of pieces that are designed for longevity. In beauty, Hermès has opted to produce fewer, more innovative beauty products, while slow skincare brand Dieux has set itself the mission of selling fewer products (see trend #53 Slow beauty on page 136).

Clearly there are benefits from a sustainability point of view, and there are also indications that consumers may welcome some respite. According to global research from Ipsos, 73% wish they could slow down the pace of their life.





↑ Courtesy of Katie Raymond (@katiehub.org) and Sunia Bukhari (@suniabukhari)

There are cultural parallels too: in a September 2023 piece, the *Guardian* describes a shift away from the binge model in TV streaming, and pinpoints shows watched week by week instead as the “new status marker for television.”

#### Why it's interesting

People feel overwhelmed by the sheer pace at which they are urged to consume. Some brands are choosing to decelerate, slow down, and allow time for people to savor experiences before moving on to the next thing.



**Brands are choosing to decelerate, slow down, and allow time for people to savor experiences before moving on to the next thing.**



07

# Lasting ephemera

The beauty of impermanence in artistry that metaphorically echoes the delicacy of nature and humanity is being celebrated.

VML



↑ Condolence. Concept, design and tailoring by Darío Simón Abelló. Photographed at HFBK Photo Studio





↑ Condollence. Concept, design and tailoring by Darío Simón Abelló. Photographed at HFBK Photo Studio

The Met Gala's 2024 theme will capture ephemerality and preservation in fashion, with "Sleeping Beauties: Reawakening Fashion." The accompanying exhibition will showcase approximately 250 archive garments and accessories that are now too delicate to be worn.

"The exhibition endeavors to reanimate these artworks by reawakening their sensory capacities through a diverse range of technologies, affording visitors sensorial 'access' to rare historical garments and rarefied contemporary fashions," said Andrew Bolton, Wendy Yu curator in charge of the Costume Institute at the Met. From May 10, 2024, visitors can explore the reawakened precious artifacts that the museum hopes to revive through the exhibition.



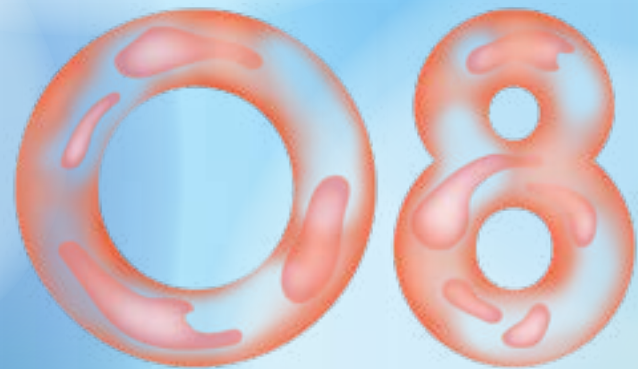
Spanish costume designer Darío Simón Abelló has been exploring volatile materials that change their form when worn. In February 2023, the young artist showcased the Condollence collection at the HFBK 2023 annual graduate exhibition in Hamburg, featuring garments dipped in wax that cracked and crumbled when worn, leaving a trail on the catwalk and changing the outfit's shape. Abelló calls these "shattering garments," and aims to delve into the "fragility and vulnerability" in fashion and humanity.

New York-based fashion designer Prabal Gurung explored the Buddhist concept of "anichya," or impermanence, for his fall 2023 ready-to-wear collection. "This collection is a spiritual awakening through the lens of impermanence and metamorphosis—the ideas that nothing is fixed and all are constantly in flux," Gurung says. "Change provokes a sense of optimism, that everything is ever evolving. This is the beauty of impermanence that rather than fear it, one must embrace it."

#### Why it's interesting

The fragility of nature and humanity is being reflected in fashion and reinvigorated by artists, showcasing these delicate artifacts and breathing newfound appreciation and life into them.





# Luddite mode

Gen Z are seamlessly switching between moments of connectivity and digital withdrawal.

VML



↑ Photography by Ellie Adams via Unsplash

The Luddite Club, a New York-based teenage lifestyle group, has attracted much attention in recent years for promoting “self-liberation from social media and technology.” Taking its name from the anti-technology Luddite movement of 19th-century England, the group has become synonymous with a gen Z-led rebellion against doom scrolling and social media burnout.

Voxburner’s “Youth Trends” report confirms that more than half (54%) of 16-24-year-olds worry about spending too much time on social media. However, rather than committing to the Luddite mentality full time, younger consumers have become adept at switching between moments when they want full connectivity, and crossing into Luddite mode when they need focus or calm.





↑ Nokia 150, courtesy of Nokia

Nokia has reported sustained growth of its “dumb” phones in recent years, driven by their popularity among gen Z. However, according to the *Wall Street Journal*, consumers aren’t buying them instead of smartphones, but as “budget second phones.” Dumb phones let users swap into Luddite mode on nights out or while relaxing on vacation. In Australia, music label This Never Happened tapped into this mindset with a series of photo- and phone-free events in Melbourne, Sydney, and Brisbane in July 2023, with the prompt: “Experience the moment. Don’t record it.” For more, see trend #30 Analog travel on page 79.

These behavioral changes echo the recent growth in popularity of productivity hack monk mode, which encourages people to cut out all distractions so that they can focus on achieving their core work tasks.

#### Why it’s interesting

While gen Z’s mode switching may seem contradictory, brands need to consider whether their products and services can help consumers during moments of connectivity and digital downtime, or if they can help users to seamlessly move between the divergent modes.







# Nature rights

Legal protections for nature are gaining traction.

A growing global movement that seeks legal rights for nature is gathering momentum in an era beset by climate crisis. According to Katie Surma, writing for *Inside Climate News*, we are in the midst of a litigation boom, with most cases happening in the United States.

In the United States, as in other countries such as Brazil, New Zealand, and Canada, indigenous communities are leading the way. In 2023, tribal leaders in Seattle won a landmark case that guaranteed the rights of salmon to migrate through the city's dams. In other parts of the world, nations are considering enshrining the rights of nature in their constitutions. Leaders across the world from the Philippines and Bolivia to Aruba and the Republic of Ireland are debating following the lead of Ecuador, the first nation to do so back in 2008.

Another approach sees nature granted personhood in law. As the name suggests, this gives rivers and forests the same rights as a human being. The precedent was set by the Māori people of Aotearoa, New Zealand, who secured personhood for the Whanganui river in 2017. Now others are following suit. Successful cases in 2023 earned protections for nature in Brazil (the Komi Memem river) and Spain (the Mar Menor saltwater lagoon), and campaigners are now seeking similar for the river Oder in Poland and the North Sea.

A small number of brands are leaning in to this idea too. Featured in last year's "Future 100," Patagonia and Faith in Nature gave nature a seat on their boards, effectively giving nature legal personhood. In November





↑ Mother Nature & Future Generations by Lukas the Illustrator for House of Hackney

2023, luxury interiors brand House of Hackney appointed two new directors: mother nature and future generations. “As a business, we think it’s imperative we hold ourselves to a high level of legal accountability for our impact on nature and quality of life we’re leaving behind for generations to come,” says cofounder Frieda Gormley.

#### Why it’s interesting

Mirroring the 20th-century struggle for human rights, the next decade will be defined by a fight for the rights of natural ecosystems.



**As a business, we think it’s imperative we hold ourselves to a high level of legal accountability for our impact on nature and quality of life we’re leaving behind for generations to come.**

**Frieda Gormley, cofounder,  
House of Hackney**



10

# Intentional communities

The traditional family unit is being challenged.

VML



↑ Honeydew eco-community, Italy



Single-person households are on the rise in many regions worldwide, while single-parent households now make up more than a fifth of households in the United States and the United Kingdom. Yet the rise in solo living is juxtaposed by rising loneliness and spiraling housing costs. Enter intentional communities: communities of choice that offer mutual support, enrichment, and companionship in an expanded notion of family.

“Community is the medicine” says the mission statement for Honeydew, a not-for-profit eco-community in Emilia-Romagna, Italy. Founder Benjamin Ramm, a former BBC journalist who escaped solo living in London, hopes to establish a network of multigenerational communities based on a philosophy that prizes mutual care, service, and healing. Ramm tells VML Intelligence that “Honeydew is working to create a new network of intentional communities, grounded in solidarity, sustainability, and mutual care.” He explains that the pandemic has spurred urgency “to build collective resilience in the wake of ecological and social crises.” He ultimately believes that, despite isolation and despair during this period, “we have been able to nurture social solidarity, and forge a communal identity, in which we are enriched with a sense of mission and purpose.”

New Ground is the United Kingdom’s first cohousing community for older women. The 26-strong organization is managed by its residents, who each occupy their own home and share communal facilities for recreation and socialization. They are enabled to live independently while also being part of a mutually supportive network. Mutual support is also the idea behind “mommunes,” where single mothers and their children share a home. While the concept is not new, it is gaining renewed relevance in the ongoing cost-of-living crisis. Carmel Boss, the founder of a US-based



↑ Honeydew eco-community, Italy

matching service called CoAbode, told the *Today* program in July 2023 that calls to her business have “skyrocketed.”

Multigenerational living is another solution. The BBC has reported on a growing number of projects from Canada to the Netherlands that pair students with retirees in shared living quarters.

### Why it's interesting

The definition of “family” is evolving as more people opt into communities that provide mutual support and connection. As intentional communities grow, brands need to consider how they cater to and depict the future household.

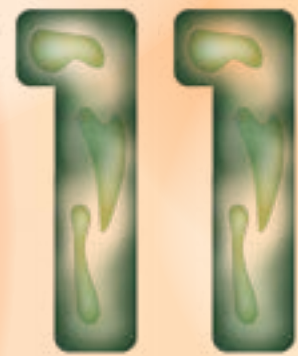


11

# Technology

20





# The identity economy

A new economy is forming around digital personas.

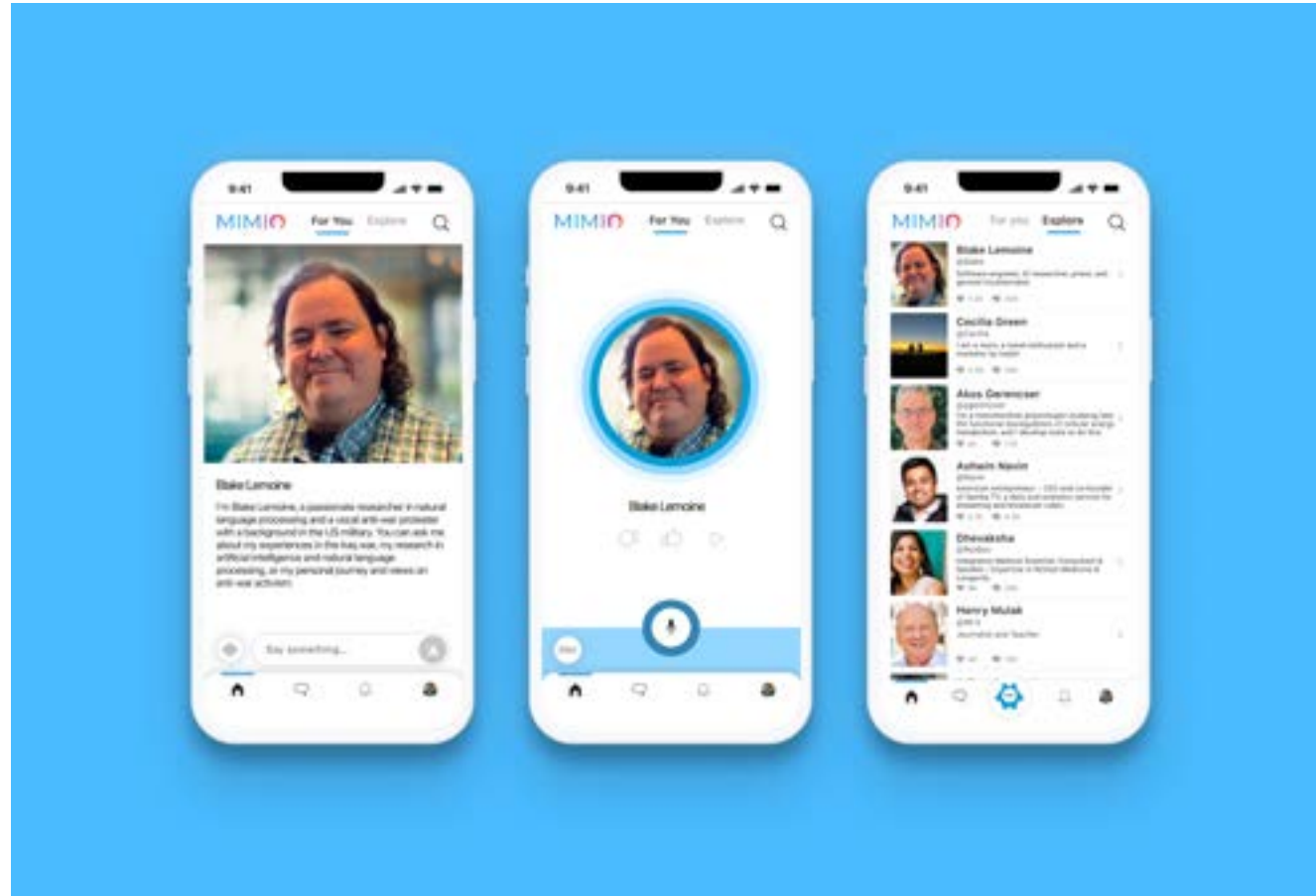
The Hollywood actors' strike ended in November 2023 after 118 days, with the SAG-AFTRA union celebrating new protections for talent, including guidance on the use of artificial intelligence (AI) in the movie industry. A key stipulation is that studios must seek a performer's consent as well as compensate them for using a digital replica of them or any of their features.

Some actors, including Anil Kapoor, Scarlett Johansson, and Tom Hanks, have already taken legal action over unauthorized uses of their AI likenesses. While legal frameworks are yet to be fully established, this sets us on a path to a new economy around human identity. One emerging service centers on persona creation services, which allow anyone to create their own digital doppelganger.

For content creators and influencers, digital personas can offer unprecedented reach and scale. Chinese influencers are ahead of the game here, commissioning convincing AI clones to enable them to maximize their live-streaming output, churning and earning from content around the clock. A slew of Chinese startups like Silicon Intelligence and Xiaoice can now create deepfake avatars for as little as \$1,000, using just one minute of live original video to generate a digital clone.

British AI startup Metaphysic, which shot to fame for its highly convincing deepfake of the actor Tom Cruise (@deeptomcruise), is helping celebrities take control of their virtual personas. Its Metaphysic Pro solution allows users to build a portfolio of biometric data that can be used to create a face, voice, and performance that may be licensed and monetized.



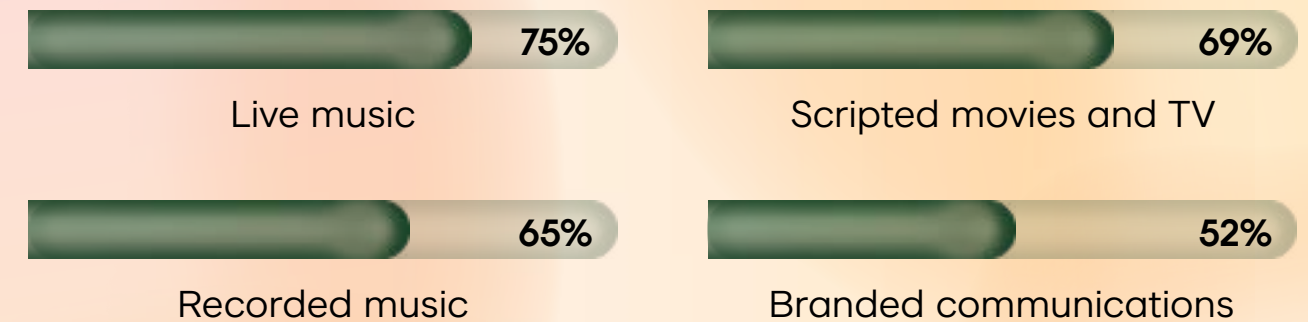


↑ Mimio interactive personas

San Francisco startup Mimio.ai is building a Personality Engine™ that will allow users to create their own AI persona, adopting their voice, tone, and conversational style. The company foresees applications not just for celebrities and influencers, but also for anyone who might want help handling their email correspondence, and even for elders who might wish to leave behind a digital self for posterity. The company promises that users retain full control of their persona and are free to monetize it as they wish.

It seems inevitable that digital clones will become part of our everyday. For now, at least, flesh and blood humanity retains the advantage where

## Respondents express a preference for the human over AI when enjoying:



artistry is concerned. Respondents express a preference for the human over AI when enjoying live music (75%), scripted movies and TV shows (69%), recorded music (65%), and even branded communications (52%).

### Why it's interesting

While ethical and legal guardrails are still to be defined, the identity economy is already thriving. Digital personas offer cost-effective and flexible ways for brands to engage talent, though it's worth noting that the human still carries a premium with audiences. Fewer than one in 10 (8%) respondents say they are looking forward to a future where virtual people are part of everyday life.



12

# Spatial tech

Physical and digital worlds continue to blur with advances in spatial computing.



↑ Vision Pro by Apple, courtesy of Apple





Apple will launch its Vision Pro mixed-reality headset in February 2024. For \$3,499, buyers will have access to what Apple calls its “first spatial computer.” The device promises to “seamlessly blend digital content with the physical world,” making it a significant mass-market effort at untethering digital interfaces from screens. The company announced a “guest mode” in January, allowing friends and family to test drive the device.

During the Consumer Electronics Show (CES) 2024, Sony Corporation announced a partnership with Siemens to develop a spatial content creation system. Including an extended-reality headset and controllers, it is due to launch later this year. In October 2023, Chinese augmented-reality company Xreal introduced its Air 2 and Air 2 Pro next-generation lightweight AR glasses, promising “one screen to replace them all.”

At CES 2024, Niantic’s director of product AR platforms, Tom Emrich, predicted that the contextual advantages of smart glasses and headsets would turn smartphones into a “sidekick” and a “hub for all things wearable devices.” According to Emrich, the spatial tech category “is just coming together. But this means that it presents a massive opportunity for app developers, for web developers, for brands and retailers especially to get their feet wet.” He added, “I agree with Tim Cook—the spatial computing era has arrived and we’re just getting started.”

### Why it’s interesting

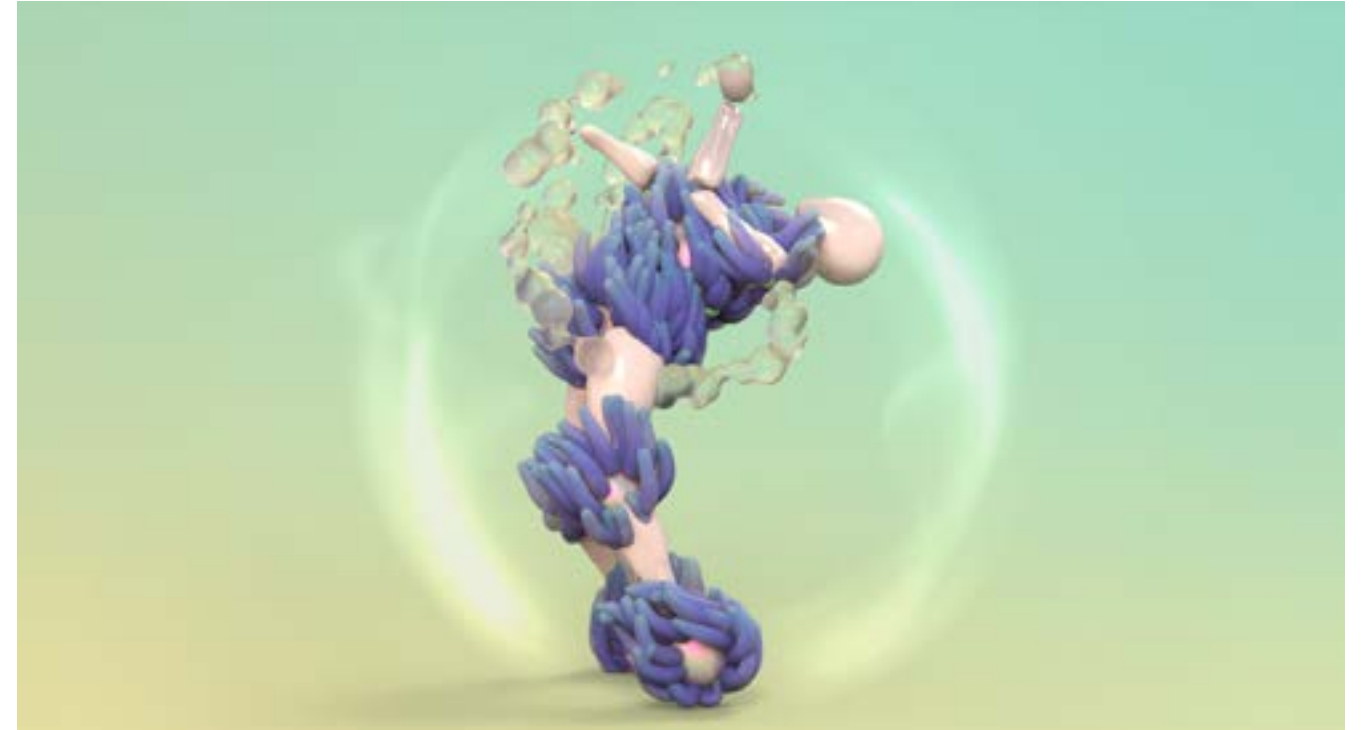
As advances in immersive technologies continue to bring the physical and digital worlds closer together, spatial computing will see significant growth. The market is expected to grow from \$97.9 billion in 2023 to \$280.5 billion by 2028, according to MarketsandMarkets.



13

# Sensory techtopias

Creators are leveraging tech to explore  
the relationship between our senses.



↑ See yourself in sound, Bang & Olufsen

The intriguing synergies and interplay between our senses are the theme for a wave of tech-powered synaesthetic experiences.

Bang & Olufsen's "See yourself in sound" brand campaign turns musical taste into colorful portraits in the form of grooving interactive avatars. The digital experience invites customers to visit a specially designed website where they answer a brief questionnaire or link their Spotify account to receive a unique custom avatar to share across social media.

*Aura*, another experience making sound visible, was a landmark commission for the 2023 London Design Festival. Designed by Spanish artist Pablo Valbuena in partnership with arts organization Artichoke, *Aura* visualizes the sounds of worship at St Paul's Cathedral. A slender 20-meter column of aluminum studded with custom-made LED lights is



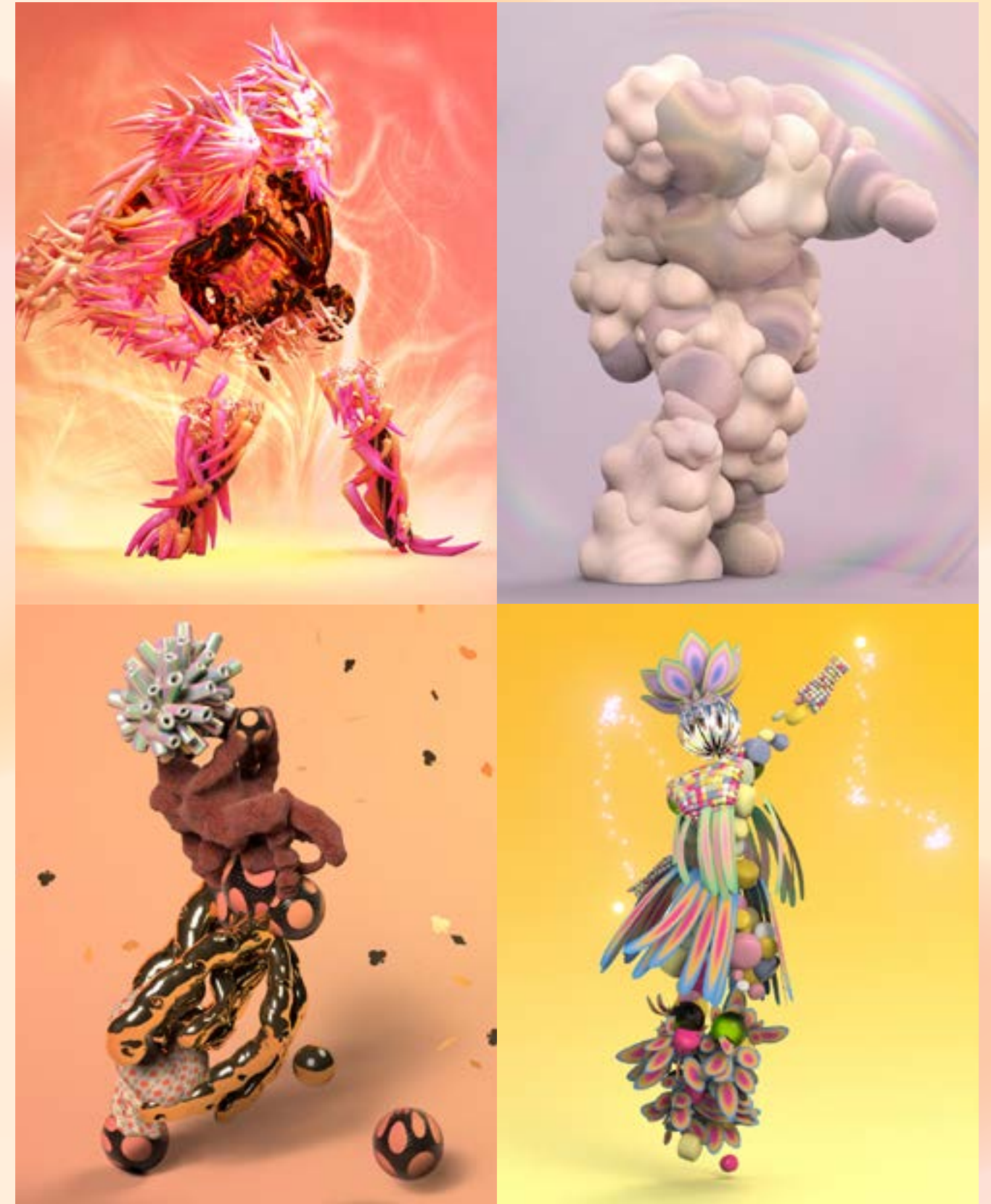
suspended from the dome of the cathedral. The sounds of speech, music, and singing are captured and translated via an algorithm into beams of light, which react to pitch, volume, and intensity.

Mexican-Canadian artist Rafael Lozano-Hemmer's *Atmospheric Memory* makes the spoken word visible. Updated for a November 2023 showing at Sydney's Powerhouse Museum, the exhibit offers a sensory environment inspired by Charles Babbage's conceit that the air around us is a library containing every word, sound, and motion. Visitors walk through a mid-air cloud of text, or see their voice make ripples in a water tank.

Beyond artistic endeavors, the UK artist collective Universal Everything is putting its synaesthetic tech skills and experience to practical use, developing a prototype device that could be used by patients to visualize pain. In Japan, NTT Docomo and collaborating institutions are developing the world's first sensation-sharing technology, which allows users to send movements or tactile sensations digitally. Docomo already has plans to build on its Feel Tech technology, enabling the sharing of other sensations, like taste, hearing, and even emotions.

### Why it's interesting

The demand for sensory experience is potent. According to VML Intelligence's research for our "Age of Re-enchantment" report, 63% of consumers want brands to provide them with multisensory experiences, and 72% say that they expect as many of their senses as possible to be engaged when experiencing something new. The synaesthetic approach adds a new layer of intrigue to sensory experiences, both physical and digital.



↑ See yourself in sound, Bang & Olufsen





↑ Text Stream II, part of Atmospheric Memory by Rafael Lozano-Hemmer. Photography by Zan Wimberley @zanwimberley, courtesy of Factory International and the Powerhouse Museum Sydney



14

# Air gestures

New touchless gestures allow consumers to connect with devices ever more seamlessly.

VML



↑ Apple Watch double-tap feature, courtesy of Apple

During the Consumer Electronics Show (CES) 2024, Finnish startup Doublepoint launched the WowMouse app, allowing Android watch wearers to include air-gesture detection. “We’re not just changing the game—we’re rewriting the rules for human-computer interaction with our touch-based gesture tracking. It’s a leap forward, delivering a natural and powerful user experience for smartwatches and beyond,” says Ohto Pentikäinen, CEO of Doublepoint.

In a similar vein, Apple introduced a new double-tap gesture for the Apple Watch Series 9 and Apple Watch Ultra 2 in October 2023. This allows the wearer to simply tap together the index finger and thumb of the hand wearing the watch, to perform actions such as answering a call. Apple notes that the gesture can help the user when their other hand is occupied, such as when they’re “walking the dog, cooking, or holding a



cup of coffee.” This gesture will also be applied to the company’s 2024 release of Vision Pro, its mixed-reality headset.

Neural Lab’s AirTouch converts hand and body gestures into commands for any computing device using only a simple webcam, opening up the option for people to include air gestures across different devices.

Google revealed Project Gameface in May 2023, “a new open-source, hands-free gaming mouse that enables users to control a computer’s cursor using their head movement and facial gestures.” Project Gameface is powered by Google’s MediaPipe open-source AI solutions. The company says its technology means that “people can raise their eyebrows to click and drag, or open their mouth to move the cursor, making it possible for anyone to pursue gaming.” The company developed the tech with Lance Carr, a quadriplegic video game streamer who has muscular dystrophy. Google notes that while the tool is still in development, the company is “excited about the potential it has to change the lives of people because it’s relatively inexpensive to build and maintain.”

### Why it’s interesting

As tech devices become ever more integrated into consumers’ lives, companies are pushing boundaries to make them more intuitive and instinctive to use. And alongside this, such hands-free gestures can be crucial for people whose mobility is limited. With just over 12% of US adults living with mobility issues, according to CDC figures, such gestures allow tech companies to make their products and services more inclusive.



↑ Wow Mouse App by Doublepoint



15

# Age tech

Technology is tackling the lifestyle and wellness needs of senior adults.

**VML**

↑ Nobi smart ceiling lamp

For a growing cohort of elders, technology can be the key to independent living. The Consumer Electronics Show (CES) in January 2024 saw a slew of new devices and tech that deliver enhanced comfort, safety, and emotional support for seniors at home.

Belgian age-tech company Nobi is tackling the problem of falls, a major cause of injury for the elderly. Its smart ceiling lamp can detect when a person has fallen and alert carers for help when needed. The AI-powered tool, initially offered in residential care facilities, will be available to consumers for use in the home later this year.

Focusing on greater comfort, the Lotus wearable ring from US startup Lotus Labs offers accessibility benefits to anyone with reduced mobility. The



device, available on pre-order for shipping in fall 2024, uses infrared technology to control objects in the home simply by pointing, just like a TV remote.

Also thinking of TV, age-related hearing loss can make it difficult for some older people to follow dialog. Japanese venture SoundFun's Mirai Speaker deploys a patented curved speaker design that makes sound clearer and easier to distinguish, meaning everyone can listen at a comfortable volume.

The rise of large language models is ushering in a new wave of devices that offer not just function, but also conversation and companionship.

CES 2024 saw the return of Intuition Robotics' ElliQ, which provides support and enrichment, and facilitates social connections for older people. The tabletop robot keeps users company, offering chat as well as daily engagement and assistance.

The upgraded hardware and AI enhancements in ElliQ 3.0 allow for natural, free-flowing conversation, much of which can now be processed locally for greater privacy, as Intuition Robotics' chief product officer Ronen Soffer explains to VML Intelligence. Over time, the robot builds a relationship with its user by remembering and reflecting on the conversations they share.

Another key focus is facilitating connection to the wider world, whether it's access to the extended community of ElliQ users or help with local information and transportation. According to Soffer, the goal of ElliQ is "to understand, enrich and strengthen relationships—and relationships make your life better. Whatever we can connect you to in the real world, we want to do more of."



↑ ElliQ 3.0, Intuition Robotics

### Why it's interesting

According to the World Health Organization, one in six people globally will be aged over 60 by 2030. As the global population ages, technology catering to the emotional and support needs of this growing cohort holds much promise. (For more on this, see trend #92 Centenarian futures on page 227.)



16

# Digitized scent

The future of scent is digital.

VML



↑ Osmo aims to give computers a sense of smell

Sight and sound have successfully been digitized—but what about smell? Osmo is one company working to answer this question. The digital olfaction startup hopes to “give computers a sense of smell,” the company says. A spinout of Google Research, Osmo aims to create digital representations of smell that change how we capture, transmit, and remember scents.

Osmo cofounder Josh Wolfe sees the company as a digital chemical design company “where people want a very specific odor and we design the chemicals, just like you would design a drug in a biotech or pharma company and then be able to license those,” he told *Wired*.



There are other parallels to the world of biotech and pharmaceuticals: “We see AI in drug discovery as a precedent for ways that AI will revolutionize olfaction,” says Osmo CEO Alex Wiltschko. “Similar to how the advent of AI is changing the way drug hunters find new candidates that are more likely to succeed in the clinic, we see AI augmenting the role of synthetic chemists and master perfumers.”

Beyond inspiring new perfumes, the technology could be applied to help combat mosquito-borne diseases, the researchers at Osmo say. Wiltschko also points to agriculture, food storage, pandemic tracking, and disease prevention as fields that would benefit from digitizing smell.

Alongside Osmo, Japanese company Revorn uses AI and IoT technologies to reproduce scent and mimic the sense of smell. At the Consumer Electronics Show (CES) 2024, it exhibited odor sensing and reproduction devices.

Luxury perfumers are also exploring digitized scent. In March 2023, Bulgari launched Scentsorial, an immersive multisensory experience in Dubai that linked technology and olfaction. Participants donned a wearable device that measured their brainwaves and heart rate to detect reactions, thoughts, and emotions to scents, then transformed them in real time into generative downloadable collectibles.

### Why it's interesting

Advances in technology are changing the way we experience and understand scent, advancing digital sensory toolkits and bringing us one step closer to true multisensory digital experiences, much like Sensory techtopias (see trend #13 on page 39).



↑ Osmo aims to give computers a sense of smell



# 17

## Omnilingual tech

Instant translation tools create a global village.



↑ Multilanguage audio on YouTube, courtesy of YouTube Official Blog



AI software is unlocking the power of speech in almost any language. A demo video that circulated from fall 2023 on social media shows celebrities including Emma Chamberlain, Elon Musk, and Marques Brownlee speaking an array of languages in a clone of their own voice that both translates and synchs mouth movements in real time. Los Angeles-based HeyGen is the AI video creation startup behind the one-click translation offer. By uploading clips, users can translate a source video instantly into one of 14 languages, with new languages being added every month. HeyGen has added video translation for business to its suite of services, which can handle multiple speakers and supports script editing, long-form content, and brand-specific vocabulary and tone.

Google also demonstrated a universal translator at its I/O developer conference in 2023. Just like HeyGen's technology, it dubs and lip-synchs video into different languages, but for now it is just a concept. Google is exercising caution over how it rolls out the experimental technology, citing concerns over bad actors and the potential for fueling deepfakes.

While Google works to put guardrails on its software, others are pushing ahead. Delaware-based Rask AI offers multilingual voice cloning in 65 languages at the time of writing, retaining vocal characteristics no matter the language.

Translation technology like this offers brands, content creators, influencers, and educators the potential to accelerate revenue by unlocking a truly global audience for the first time. YouTube influencer Mr Beast is well known for his multilanguage strategy, hiring native



speakers to voice-over his videos into multiple languages. In 2023 he tested YouTube's in-house translation tools on 11 of his top videos and told YouTube's Creator Insider that it "supercharges the heck out of the video." Instead of operating multiple language channels, influencers can now translate content from just one. Adam Waheed, another online creator, told *Fortune* that he expects to triple his audience using AI translation.

Spotify is now piloting AI translation for podcasters too, offering a multilanguage experience that it says is more authentic than dubbing. The translations are available on selected podcasts from the likes of Steven Bartlett and Lex Fridman, and access will be extended over time.

#### Why it's interesting

For companies and brands, AI translation will usher in a new age of global engagement, enabling them to speak freely to any audience without a clunky translation process. As this software progresses inevitably to work in real time, there will be opportunities for customer service, education, training, and more.



18

# Supercharging destinations

Next-gen electric vehicle charging stations could transform a chore into an entertainment opportunity.

**VML**

↑ Supercharging station, courtesy of Tesla, Inc

Electric vehicle (EV) use is on the rise. According to the US Bureau of Labor Statistics, which cites research from S&P Global Mobility, US EV sales could reach 40-50% of total passenger car sales by 2030.

This rise in EV use means more demand for EV charging stations and, with charging taking at least 30 minutes for a top-up, companies are dreaming up ways to turn this waiting time into a leisure and entertainment opportunity.

Tesla is currently developing a 24-hour Supercharger station in West Hollywood, complete with 32 charging stalls and a "1950s-style diner



and drive-in movie theater.” In a tweet previewing the launch, Elon Musk described it as “*Grease* meets *The Jetsons* with Supercharging.”

From an entertainment angle, Disney has submitted patents for an in-car entertainment system described by Blog Mickey as an “immersive entertainment pod,” into which people could drive their electric vehicle “and be fully surrounded by entertainment while they wait for their car to charge.” To illustrate the experience, Disney’s patent describes being surrounded by a safari scene rather than simply watching it on a screen.

In September 2023, Shell announced the opening of its largest EV charging station, in Shenzhen, China, with 258 fast-charging points. The space features “Shell Select convenience retailing, Shell Café, vending machines, and a drivers’ lounge.” Alongside this, Shell also opened its Panlong Integrated Energy Station in Wuhan. The station offers EV charging alongside petrol, diesel, and hydrogen refueling—leisure services span a convenience store, a restaurant, and a drivers’ lounge.

### Why it’s interesting

With EV use forecast to grow, the requirements of these vehicles are creating a new rhythm to driving, in which the longer duration of charging is replacing a quick fill-up at a petrol station. With EV manufacturers, entertainment brands, and energy companies all imagining how to amplify this experience, the concept of charging that combines with entertainment and leisure is an area to watch.



**The concept of charging that combines with entertainment and leisure is an area to watch.**



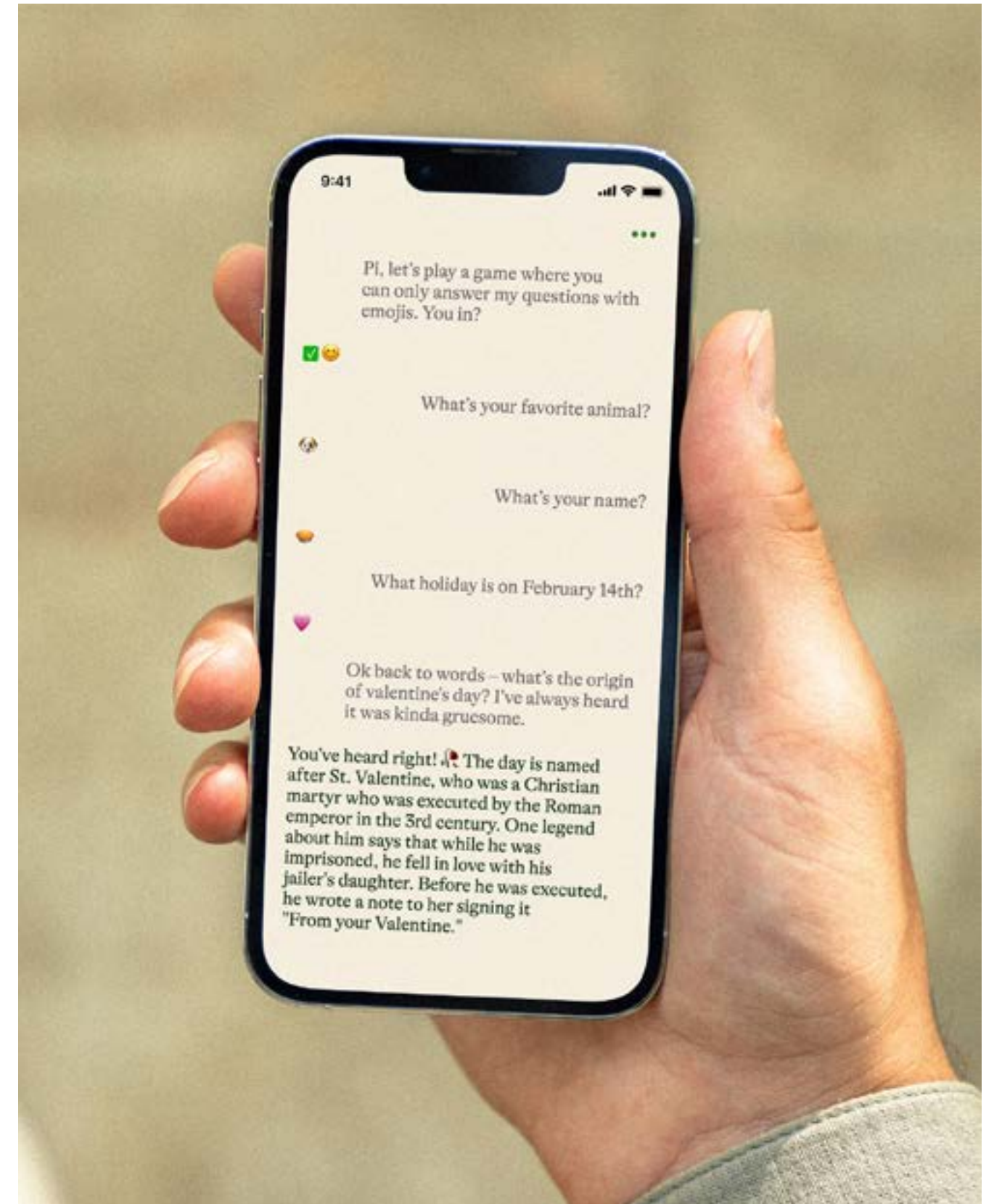
↑ Supercharging station, courtesy of Tesla, Inc



19

# Symbiotic tech

Our relationship with technology is more human than ever.

**VML**

↑ Pi chatbot from Inflection AI



Sundar Pichai, the Alphabet and Google CEO, once said, “I’ve always thought that technology should be adapting to people, not the other way around.” With the growing power of AI, this is becoming the reality. Instead of complex processes and commands, we can now use simple gestures and natural conversation. Technology is speaking *our* language.

Pi is a friendly personal chatbot and companion from Inflection AI, a startup helmed by tech entrepreneur Mustafa Suleyman, formerly of DeepMind. Pi, which lives across nine different platforms, including the old-fashioned phone, is an active conversationalist, engaging in back-and-forth chat and asking questions to build deep understanding. In the 100 days following Pi’s launch on 2 May 2023, the digital companion exchanged more than a billion messages, according to its founders.

Personality is also a defining feature of the new chatbot Grok from Elon Musk’s startup xAI, currently available to verified users of X. Grok “is designed to answer with a bit of wit and has a rebellious streak.”

Thanks to a new large language model, Amazon Alexa can now also engage in a more fluid, back-and-forth conversation, initiated by a new command: “Alexa, let’s chat.” As well as following the thread of the conversation, Alexa can also gather context by using computer vision to identify and track its interlocutor. ChatGPT Plus also has the power of speech, with its latest upgrade offering the choice of five voices. It also has computer vision, enabling it to “see” photos or diagrams uploaded by a user and give context or analysis.

Could AI one day even know what we are thinking? Although an early experiment at the University of Texas, Austin, managed to decode data



↑ Humane AI Pin

from fMRI scans of the brain by matching blood flow patterns with the use of a large language model, the research was laborious and only worked at an individual level. Our thoughts are safe, for now.

### Why it’s interesting

Personal AI can now see, hear, and speak with us naturally. The more data our digital companions amass, the more symbiotic and human our relationship with them will become, as they adapt to our needs.



# 20

## The AI workforce

The AI-empowered workforce of the future is already here.

VML

Discussions about the risks and potential of artificial intelligence (AI) dominated 2023, with the impact on the global workforce a key focus.

At the first ever global summit on AI at Bletchley Park in the United Kingdom, held in November 2023, Elon Musk referred to AI as “the most disruptive force in history,” controversially adding that “there will come a point where no job is needed—you can have a job if you want one for personal satisfaction, but AI will do everything.” Musk’s speculative view was not shared by all, with British Prime Minister Rishi Sunak asserting: “AI doesn’t just automate and take people’s jobs. A better way to think about it is as a copilot.”

What is clear is that the technology is already making a significant impact on the global workforce. The World Economic Forum (WEF) “Future of Jobs Report 2023” suggests that AI will create 69 million new jobs globally in the next five years, and these positions are already being filled.

In October 2023, there were more than 3,750 job listings posted on Indeed for prompt engineers, who specialize in writing the prompts necessary to elicit the best responses from AI. The ethical concerns facing AI deployment has also created the need for AI ethicists, who make sure that AI integrations are designed to benefit humans, while AI auditors





and content moderators now guard against bias and the spread of misinformation.

While technical jobs are also abounding for those well versed in AI, existing jobs are being streamlined or even supercharged by the type of AI copilot that Sunak refers to. Communication technology company Twilio has created a tool using Open AI's GPT-4 that automates the task of filling out request for proposal (RFP) forms. Achieving in minutes what two members of sales staff would take weeks to do, RFP Genie frees up human intelligence for more skilled, creative, or emotionally nuanced tasks.

Proprietary research for this report found that an overwhelming majority (69%) say they are not worried about technology eliminating jobs, while 53% of people say they are already using generative AI tools for research at work. With WEF predicting that the proportion of workplace tasks completed by machines will rise from 34% in 2022 to 43% by 2027, measures are now emerging to protect the human workforce. The agreement that ended the WGA writers' strikes includes amendments that ensure workers remain in charge of AI, while Capgemini creative agency The Works has created "trust marks" to differentiate work done by human creatives.

#### Why it's interesting

As AI continues to evolve and integrates across industries, work is undergoing a revolution, requiring new skills and reshaping careers. Brands and employees should ready themselves for an AI-powered future where the workforce collaborates seamlessly with intelligent machines (see trend #93 Generation AI on page 229 for more).



21

**Travel & hospitality**

30



21

# Subterranean hospitality

Hotels and spas are finding hidden depths in the search for serenity.



↑ Claridge's Spa, UK, courtesy of Andre Fu Studio





↑ Subterranean spa by Studio Seilern Architects, Lithuania. Photography by Roland Halbe

Zedwell opened a subterranean hotel in London in the summer of 2023. With the help of sleep experts, the rooms have been designed as “underground cocoons” and remove all the distractions of the outside world. With no windows, TVs, or gadgets of any kind, they instead feature noise-reducing walls and lighting based on circadian rhythm, to “create the ultimate sanctuary” and “aid deep rest and restoration,” Zedwell says.

In Australia, Victoria’s Continental Sorrento hotel opened an underground spa and bathhouse in April 2023, featuring a salt therapy room, cold

plunge pools, and geothermally heated mineral baths. “The correlation between health and hotel is deeply rooted,” said Nik Karalis, lead architect for the project at Woods Bagot. “Hotels—and the caravanserais, abbeys, and inns that pre-date them—have a long history of being places of refuge and recovery.”

Located in the heart of the UK capital, The Londoner descends eight levels below ground and has dubbed itself the city’s first “iceberg hotel.” The subterranean spaces include a ballroom, cinema, pool, and spa.

Claridge’s hotel in London unveiled its underground wellness center in 2022. The renowned destination undertook a five-story excavation to accommodate spa-goers deep beneath the bustle of the city. The 650-square-meter space includes a steam room, pool, sauna, and seven treatment rooms.

UK-based Studio Seilern Architects recently added a subterranean spa to the Boksto 6 complex in Vilnius, Lithuania. The underground spa and swimming pool are built into the UNESCO-protected site’s extensive brick cellars, for sequestered peace and quiet.

#### Why it’s interesting

Hotels and spas are offering guests an all-encompassing escape from the hustle and bustle of life above ground.







22

# Transcendent travel

Self-betterment and life-affirming moments are  
the new travel requirements.

**VML**

↑ Black Tomato guests visit Poor Knights Islands, NZ. Photography by Miles Holden, courtesy of Black Tomato

Debuted in late 2023, travel company Black Tomato's latest experience, *See You in the Moment*, is "about helping you and your travel companions—be they friends or family (or both)—to savor the world, together. Meaningfully, seamlessly, unforgettably." Forget merely gathering friends to lie on a beach.

One of five Moments categories to choose from, The Challenge includes an itinerary with an expedition to Tierra del Fuego on Argentina's Mitre Peninsula, "where guests will tackle an extreme physical challenge together... against the backdrop of crashing surf at the confluence of the Atlantic, Pacific, and Southern Oceans," Black Tomato says. Among the



itineraries for The Journey, guests can choose a trip that sees them travel on a sustainable motor yacht to Poor Knights Islands, New Zealand, “in search of some of the world’s best diving.”

Tom Marchant, cofounder of Black Tomato, tells VML Intelligence that the idea for the experiences was born out of the fact that, post-pandemic, people experienced an “urge to connect,” coupled with “the desire to do something truly memorable, that you can not only just enjoy, by being present in the moment with [others], but equally something you can reflect back on and you can really savor, that perhaps acts as a catalyst to do more.”

Marchant is clear that such experiences bring about transcendent moments. “I think at the heart of it is the ability to take a pause and truly embrace that moment in time—being really present, and disconnected from everything else that’s going on in your life,” he says. “It could be three hours; it could be three days. But for that period, with those people, it’s about just everything else falling away and really savoring that, and leaving feeling contented—full of joy, and inspired, and grateful.”

Taking its cue from a similar concept is Black Tomato’s Bring it Back service, in which a client’s travel itinerary is planned with the notion of bringing back the answer to a question. That could mean a trip to Morocco to ignite creative thinking, or a journey to outer Mongolia to discover new perspectives on family relationships. “The idea was using travel as a vehicle to go out and expose yourself to these communities, to understand how they approach family or business or love... to give you an alternative view. And then bring that back home and pay that into your daily life,” says Marchant.



↑ Black Tomato guests visit Poor Knights Islands, NZ. Photography by Miles Holden, courtesy of Black Tomato

Twenty-six percent of gen Zers and millennials say the reason they select travel destinations is to deepen self-discovery and 32% say they are after personal growth and development.

### Why it's interesting

Travelers are keen to throw themselves into experiences that are truly transformative and that will have an impact on their lives beyond the immediate trip. As Black Tomato’s Marchant points out: “I think there’s an innate part of human nature which is to be curious.”



23

# Immersive theme parks

The theme park gets an update, reimagined  
as an all-encompassing experience.

**VML**

In spring 2024, Japanese marketing and entertainment firm Katana Inc. will open Immersive Fort Tokyo in Odaiba, Tokyo, which the company describes as “the world’s first immersive theme park.” The 30,000-square-meter site will encompass 12 immersive attractions alongside six shops and restaurants.

The company says Immersive Fort Tokyo will showcase “dramatic events seen in the world of movies, anime, and games.”

Katana’s CEO Tsuyoshi Morioka told the *Japan Times* on the company’s press presentation day in October 2023 that “immersive attractions enable the individual to be more involved in the experience, so the feeling is completely different.” Among the examples he cited are visitors being “in attractions where they are the only witness to a murder case, or in the middle of gunfight and have to decide on what action to take.” These experiences will unfold within settings that range from a “super-intense, large-scale immersive theatre” to “a terrifying immersive horror experience” and a show that suddenly “erupts in a restaurant,” Katana Inc. says.

Arguably the predecessors to these experiences are the interactive digital museums championed by TeamLab. The art collective states that its aim is to “explore the relationship between the self and the world and new forms of perception,” and its latest developments include the TeamLab



Future Park Okinawa, within the T Galleria by DFS, Okinawa mall, which opened in December 2023. The company describes this space as “an educational project based on the concept of collaborative creation... an amusement park where people can enjoy creating the world freely with others.” The Okinawa space will showcase eight play installations, aimed at children and adults.

Phantom Peak is an immersive theme park experience in London that dubs itself “part escape room, part immersive theatre, part real-life videogame.” In this Western-style, steampunk-esque theme park, each guest plays the role of “an explorer and a detective, solving mysteries, haggling with locals, and fishing for platypuses.” After Phantom Peak’s 2022 opening, cofounder Nick Moran told London publication *Wharf Life* “when you come to Phantom Peak, you’re essentially coming to a real-life, open-world, role-playing video game.” He noted that “it’s not like immersive theatre where you don’t know what you’re doing—you’re guided through the experiences.”

Phantom Peak’s cofounders are now exploring expanding the experience to the United States, Blooloo reported, with potential locations in Chicago, Atlanta, Denver, Dallas, and San Francisco.

### Why it’s interesting

Seventy-five percent of people in the United States, the United Kingdom, and China told us they like to be transported to other worlds by stories and narratives, so increasingly visitors to theme parks expect a journey, not just thrills. And whether that’s via virtual reality or through performance and storytelling, these expectations are driving theme park experiences to the next level.



↑ Immersive Fort Tokyo visualization

↑↑ Phantom Peak, UK



24

# Forage tourism

Travelers are taking to the woods and sea to dig up unique culinary experiences.

**VML**

↑ Glen Dye School of Wild Wellness & Bushcraft, Scotland

Following an unusually wet winter in the Pacific Northwest region of the United States, the *New York Times* published a primer for first-time mushroom foragers in February 2023. “This season’s boom in mushrooms dovetails with increasing numbers of people interested in plucking them out of the ground,” the newspaper wrote, adding that it’s “a whole lot of fun, and a fine reason to plan a trip.”



Destinations around the world are tapping into the growing interest in forage tourism. In Australia, at Cappella Sydney—winner of the City Star category in the National Geographic Traveler Hotel Awards 2023—guests can forage for endemic foods with Aboriginal Australian guides.

At the newly launched Glen Dye School of Wild Wellness & Bushcraft in Scotland, visitors can go on a guided three-hour forest-foraging tour to learn how to identify and prepare edible plants.

Luxury travel agency Black Tomato offers multiple foraging excursions, including an afternoon on a traditional 40-foot schooner in the Lofoten Islands of Norway, where participants catch, clean, and prepare cod, and a private truffle-hunting expedition in Italy led by a local forager.

Airbnb offers foraging experiences that include a popular seaweed-gathering trip in California. The 90-minute sea foraging experience teaches basic phycology (marine algae science) and sustainable harvesting techniques. To close out the experience, participants enjoy a bowl of traditional Japanese ramen made with their freshly foraged seaweed.

#### **Why it's interesting**

Forage tourism is the latest example in a wave of educational expeditions that see travelers seeking out enriching trips with knowledge-based souvenirs. Emily Fitzroy, owner of Bellini Travel, has seen a spike in requests to learn a culinary skill while on vacation. "Clients want to return home with newfound knowledge," she told the *New York Times*.



**This season's boom in mushrooms dovetails with increasing numbers of people interested in plucking them out of the ground—a whole lot of fun, and a fine reason to plan a trip.**

***New York Times***

**VML**



2

4





25

# VVIP lounges

Upper-echelon travelers reinvigorate demand for super-exclusive lounges.

The Windsor Suite, part of Heathrow Airport's VIP service, is where the British royal family fly from—as do celebrities and various world leaders. Using the lounge is part of Heathrow's Black service and costs from £3,025 for three people. In 2023, Heathrow retail director Fraser Brown told Walpole, the official sector body for UK luxury, that demand for the service is on the rise, with a "record number of our guests passing through the Windsor Suite in 2022." As part of the service, guests have a personal chauffeur to and from the lounge, access to a menu designed by Michelin-starred chef Jason Atherton and served by a personal butler, and a personal shopper on hand to help, should they wish.

US company PS describes itself as "a private luxury terminal serving commercial flights at LAX and ATL," offering "the ease, privacy, and security of the private flight experience for commercial travel." The service has been so popular at Los Angeles' LAX and Atlanta's ATL airports that locations at DFW in Dallas, Texas, and MIA in Miami, Florida, are set to be added in 2024. Booking a one-off private suite without a membership at PS costs \$4,850, while for an annual fee of \$4,850, the same suite costs \$3,550.





**For today's ultra-wealthy, the height of luxury often isn't about visibility, but about moving through the world as seamlessly and privately as possible.**

**VML**



The invitation-only Qantas Chairman's Lounge is described by Australia's *ABC* as only known to those who are a "politician, judge, business heavyweight, or an A-lister." The British Airways Executive Club Premier Card, also known as its Black Level, is offered by invitation only to those who "control a travel budget which spends at least £2 million per year with British Airways," *Head for Points* reported.

Tel Aviv's Fattal Terminal is a private airport experience that provides check-in, passport control, and security in a space where guests can enjoy private or lounge accommodation, refreshments, and duty-free shopping, and be chauffeured directly to their flight. Prices for the service start at \$490.

#### **Why it's interesting**

For today's ultra-wealthy, the height of luxury often isn't about visibility, but about moving through the world as seamlessly and privately as possible. From exclusive lounges to private terminals, these haute airport experiences are catering to such travelers' expectations, offering dedicated, discreet spaces amid the hubbub of commercial airports—at a price.



26

# Stratospheric journeys

Balloon rides will soon transport visitors to the edge of space.



↑ Céleste from Zephalto





↑ Capsule prototype from Halo Space

By the midpoint of this decade, low-carbon balloon flights will take off, carrying pioneering travelers to the stratosphere and offering transformational views of our planet.

Céleste, a luxury pressurized capsule powered by a giant high-altitude balloon, will offer low-carbon ascents to the stratosphere. Designed by the famed architect Joseph Dirand for the French space travel startup Zephalto, the sleek eco-friendly craft offers space for six travelers in three luxurious “cocoons.” From 2025, for the sum of €120,000 each (\$132,000), voyagers will depart from Zephalto’s French spaceport for a gentle six-hour tailor-made trip. Fine dining and specially selected wines are on the menu, as passengers cruise to contemplate the planet from an awe-inspiring perspective, 25 kilometers up, at the very edge of space. Here, the company says, guests will “admire the curvature of the Earth, its blue halo and the stars.”

Céleste will not be the only balloon in the sky. Spanish near-space startup Halo Space has successfully completed its second round of test flights in California’s Mojave desert and also hopes to begin commercial flights in 2025. It plans to carry 3,000 passengers a year in its zero-emission balloon by 2029.

Florida-based Space Perspective claims to offer the world’s only carbon-neutral spaceship. Its Spaceship Neptune capsule comes with the twist of a splashdown landing at sea. The company is partnering with automotive brand Mercedes-Maybach to offer a truly luxurious experience complete with in-flight meals and cocktails. Arizona-based World View suggests a choice of Seven Wonders launch locations for its balloons, with awe-inspiring views from the start, including the pyramids of Giza, Egypt, and the Great Wall of China. Its Grand Canyon spaceport is already sold out for its first year of operation in 2024.

First to the skies, though, might be the Japanese startup Iwaya Giken, which plans to launch commercial flights in its helium-balloon powered capsule in March 2024. Its four-hour trip will initially be priced at 24 million yen (\$166,000) but the company hopes to bring down the price as part of a plan to “democratize space.”

### **Why it’s interesting**

Stratospheric travel offers a true peak experience, providing the chance to make history while experiencing one of the few remaining untouched locations within reach. Voyagers will be privy to the famed overview effect—the cognitive shift that astronauts report feeling on seeing the beauty and fragility of Earth from afar.







27

# Neuroinclusive travel

A movement to make travel more rewarding for neurodiverse individuals.

VML



↑ Hiking at Usery Mountain, courtesy Visit Mesa

With an estimated 15% of the world's population experiencing some form of neurodiversity, organizations spanning from airlines to tour operators to entire cities are aiming to offer greater accessibility to neurodiverse people.

Mesa, Arizona, became the first autism-certified city in the world in 2019, through the US-based International Board of Credentialing and Continuing Education Standards and Autism Travel. Autism Travel defines a Certified Autism Center as a facility or organization at which at least 80% of staff are highly trained, fully equipped, and certified in the field of autism. Alongside Mesa, the BBC reports that Dubai, UAE; Palm Springs, California; and Toledo, Ohio, are now working toward certification, while the US cities of Visalia, California, and High Point, North Carolina, are both already Certified Autism Destinations.



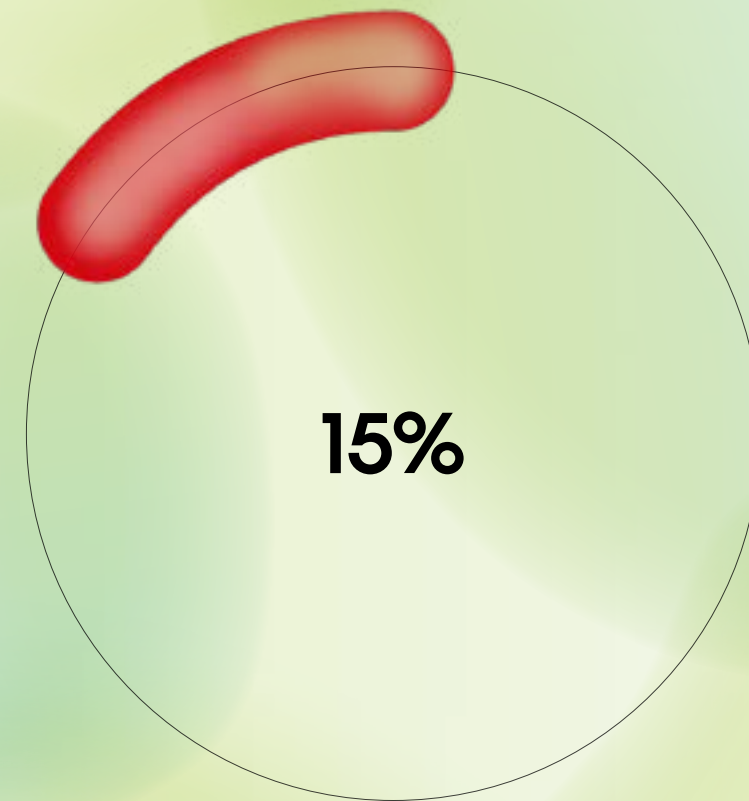
Operators are also tailoring travel options for neurodiverse people. In 2023 US travel company Explorateur Journeys announced the launch of its NeuroTripping service, offering “bespoke travel for the neurodiverse.” The company says its “fresh and unique planning” helps neurodiverse individuals avoid common travel pain points, such as large crowds and lines; unclear time frames; long periods without rest; and overstimulating locations.

Airlines, too, are striving to be more mindful of neurodiverse travelers’ experiences. In October 2023, Emirates announced its collaboration with Dubai International Airport to “improve the travel experience for neurodivergent passengers.” As part of this, the airline is facilitating what it calls “travel rehearsals,” so neurodivergent people can practice their journey without the pressure of the actual trip.

In the United States, Breeze Airways became the first autism-inclusive network carrier to be certified by US organization Autism Double-Checked, in 2022. As part of its certification, the low-fare airline has instated a training program for its customer-facing staff on how to deliver “a safe and happy travel experience to individuals with autism.” The program, developed by Autism Double-Checked, provides flight attendants with training on “identifying and alleviating the stresses of air travel.”

#### Why it's interesting

As neurodiversity diagnoses rise—the US Centers for Disease Control and Prevention in 2023 reported that one in 36 children has autism, versus one in 44 in 2021—the travel industry is making changes now, to ensure it can serve its customers better in the future.



**An estimated  
15% of the world's  
population experience  
some form of  
neurodiversity.**



28

# Top three destinations

VML



↑ Half-timbered houses in Bornholm, Denmark, courtesy of Destination Bornholm

## 1. Bornholm, Denmark

As summers in southern Europe become increasingly unpredictable due to rising temperatures and wildfires, not to mention overtourism in some popular destinations, Scandinavia is being seen as a desirable alternative European destination. Among the region's many captivating destinations is Bornholm, a Danish island in the Baltic Sea, whose fairy-tale landscape spans "rocky cliffs, leafy forests, and bleach-white beaches," as described by *Lonely Planet*. Among its attractions is the two-Michelin-starred Kadeau restaurant, open on the island during summer months, whose low-key, wooden-clad space offers expansive vistas of the Baltic Sea. The island's picturesque towns are another draw. Rønne, the island's principal town, is home to a clutch of design-led stores, while Svaneke, a fishing village, is known for its colorful, half-timbered houses.





↑→ Anji Culture and Art Center, courtesy of MAD Architects

## 2. Anji, China

Designated China's first ecological county, Anji in east China was the backdrop to 2000's *Crouching Tiger, Hidden Dragon* movie and is described as a "magical eco-retreat" by the Scott Dunn travel company.

Several new developments are also cementing the region as a destination to watch. The vast Anji Culture and Art Center, designed by Beijing-based MAD Architects, is set to open in 2025. Spanning 149,000 square meters, the space will encompass a grand theater, a conference center, a leisure center, a sports center, a youth activity center, and an art education center. Swiss spa brand Clinique La Prairie is set to open a health resort in Anji, in partnership with China's Sunjoy Group. Simone Gibertoni, CEO of Clinique La Prairie, told *Spa Business* the resort is "set in the perfect location for our guests to experience tranquility."







↑ Our Habitas Atacama, Chile, courtesy of Habitas

**VML**

2

8

### 3. Atacama Desert, Chile

Consumers are increasingly shifting how they live and travel, in response to a changing climate (see trend #3 Climate-adaptive lives on page 17). This is prompting efforts to open travelers' eyes to the stark beauty of drier climates. The Desert Rock development, due to open in 2024, set in Saudi Arabia's granite mountains, makes a feature of the country's "dramatic desert landscapes."

Chile's Atacama Desert is drawing travelers with both its awe-inspiring desert setting and its status as a dark-skies destination—its high altitude, low humidity, and lack of light pollution offer the ideal star-gazing environment. The area is home to several astronomy projects. Making visits for amateur astronomers to the area even more enticing, haute resorts are opening up. Among them is Our Habitas in San Pedro de Atacama, which opened in August 2023. The resort's cozy-meets-luxe, earth-toned rooms are furnished with local textiles. Guests can take part in activities that span hiking, biking, mountaineering, paragliding, and stargazing in what Our Habitas describes as "otherworldly landscapes ranging from salt flats to Mars-like valleys."



29

# Showroom stays

Slumber parties for fashion aficionados are reimagined as showroom doors open for overnight stays.



↑ House of Sunny in partnership with Airbnb. Photography by Alix McIntosh

Indie fashion label House of Sunny invited two guests for an overnight stay in its showroom, in collaboration with Airbnb. The two guests had the opportunity to fully immerse themselves in the whimsical and vibrant world of designer Sunny Williams, in Hackney, east London, in September 2023.

“House of Sunny design and ethos has always been inspired by the intersection of culture, architecture, interior, and our community’s love for travel, home, and aesthetics,” said Williams. He considers the showroom his home and is leveraging Airbnb to fuse fashion with hospitality to offer





↑ House of Sunny in partnership with Airbnb. Photography by Alix McIntosh

a more intimate opportunity for guests to be part of House of Sunny. The overnight stay included the chance to try on House of Sunny's latest collection in the Wardrobe of Dreams and a tour of the showroom with the host.

During the 2023 Venice Film Festival this year, fashion consultant Giorgia Viola settled her showroom inside the five-star Nolinski Venezia Hotel, which opened earlier in the year. It was a perfect partnership; in an interview with *Forbes*, Viola describes the symbiotic relationship between couture and high-end hospitality: "Creating a luxury hotel's experience comes back to the same principle as making a made-to-measure couture

**VML**



↑ DJ Khaled's room on Airbnb. Photography by Erick Hercules

dress: always being attentive to each nuance, color shading, choice of fabrics, to the tiniest detail."

In December 2022, DJ Khaled offered a unique Airbnb stay, allowing fans to sleep inside a recreation of his cozy sneaker closet in Miami. Sneakerheads could sleep among his unique sneaker collection, which includes the Jordan 3 Grateful and the Jordan 8 Oregon PE.

#### **Why it's interesting**

Fashion and hospitality fuse perfectly, offering guests a uniquely stylish showroom stay.



30

# Analog travel

Intentional travel is reinforced as people ditch smart tech on vacation.



↑ Ulko-Tammio, Finland. Photography by Annika Ruohonen

An island in Finland claimed to be the first phone-free tourist destination in summer 2023. Ulko-Tammio, in the Eastern Gulf of Finland national park, launched a campaign to encourage visitors to take a digital fast to better engage with nature. “We want to urge holidaymakers to switch off their smart devices and to stop and genuinely enjoy the islands,” said Mats Selin, an expert in island tourism at Visit Kotka-Hamina.

Travel agency Skyscanner, which released its “2024 Travel Trends” report in October 2023, has found that gen Zers are done with incessant social media posting—instead, they are opting for older technology to document their travels. The report shows that 16% of 18-to-24-year-olds in the United Kingdom take a Polaroid camera on holiday, while 13% take a camcorder, and 11% bring a 35mm film camera. This correlates with a generation that is opting for Luddite mode (see trend #8 on page 28) when traveling.





↑ Ulko-Tammio, Finland. Photography by Annika Ruohonen

Also in the United Kingdom, off-grid digital detox cabins by Unplugged encourage visitors to recharge in nature. The wifi-free zones are just an hour away from major cities including London and Manchester, and guests are required to lock away their tech devices upon arrival, for three days. There is science behind a 72-hour digital detox—research into the “three-day effect” shows that being immersed in nature for three days or more lowers stress levels and improves cognitive function.

#### **Why it's interesting**

A VML Intelligence survey that asked people around the world about their personal reasons for traveling found that the top answer is for pure pleasure, closely followed by getting close to nature. This is prompting the return of an analog style of travel that allows travelers to fully engage with their surroundings.

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**We want to urge holidaymakers to switch off their smart devices and to stop and genuinely enjoy the islands.**

**Mats Selin, island tourism expert,  
Visit Kotka-Hamina**



31

**Brands & marketing**

40



# 31 OOH reimagined

Out-of-home (OOH) advertising takes an intriguing, reality-bending turn.

VML



↑ Burberry Lola bag (left) and BMW iX (right) by Shane Fu, courtesy of Jimmy

Digital artists are playing with reality, creating fantastical motion graphics for social media content, with this new, whimsical genre becoming known as faux-out-of-home (FOOH) advertising.

Among the artists driving this playful approach is Shane Fu, a New York-based motion designer from Wuhan, China. Fu says his work incorporates “digital art, AR/VR design, and 3D anamorphic billboards.” His pieces include different imagined iterations of the Lola bag for Burberry, with a giant, feathered version set in the middle of a chic London street, and a

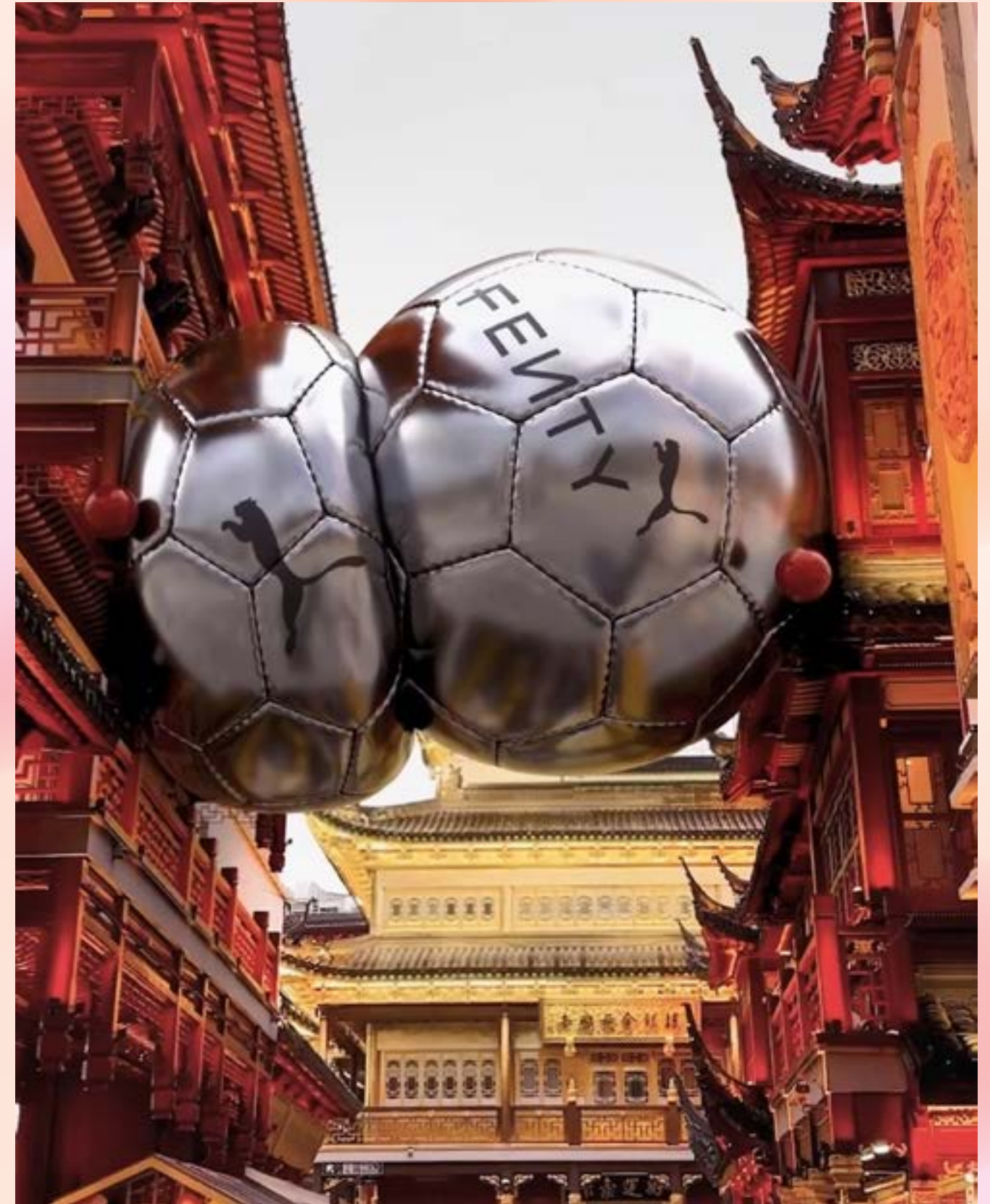


sequined Lola bag appearing to form from a billowing metallic bubble on a quiet London mews. In another piece for BMW, Fu depicts a BMW iX emerging out of an iridescent, watery bubble.

Fu is a member of Jimmy, a New York-based street art studio of digital artists and creators that aims to “extend reality by mixing real-world footage with 3D assets.” Rogier Vijverberg, Jimmy’s founder and creative lead, tells VML Intelligence that people are seeking to be entertained in new ways, especially at a time when more people are constantly scrolling on their phones. “The moment you see something which tickles your imagination—making you wonder whether is this real or not, or it has an element that you’ve never seen it before—that’s a moment to stop scrolling and dive deeper.”

The Jimmy collective has been gaining traction from brands and positive reception from audiences. In fall 2023, Jimmy collaborated with UK jewelry brand Astrid & Miyu, plotting CGI-created giant snowglobes in New York, Edinburgh, and London. “People really like this type of advertising. They like it because it’s not like advertising,” says Vijverberg. “There’s a sense of wonder.”

Another artist creating content that blurs the boundary between the real and the surreal is Origful, the nom de plume of US creator Ian Padgham. Based in France, Padgham is behind content such as a Jacquemus campaign that featured giant versions of the brand’s bags on wheels zooming through the streets of Paris. Another of Padgham’s creations is social content for Maybelline’s Lash Sensational Sky High Mascara, in which London tube trains and buses appear to have giant lashes that get swiped by oversized mascara brushes. For a promotion for Vins de



↑ Fenty x Puma campaign by Jimmy, courtesy of Jimmy





**People really like  
this type of advertising.  
They like it because it's  
not like advertising.**

**Rogier Vijverberg, founder  
and chief creative officer, Jimmy**

**VML**



↑ Astrid & Miyu campaign by Jimmy, courtesy of Jimmy

Bordeaux, Padgham created spots of a giant bottle of Bordeaux depicted as a train traveling through France, or a boat coasting down the Seine.

While some commenters on Origful's posts appear to think that the stunts are real, Padgham told *Adweek* that he's "never trying to trick anyone. To me, CGI is a sandbox that shows us what could be possible."

#### **Why it's interesting**

The reach of social media—coupled with the creative powers of digital art—means that a new reality is being shaped (mentioned in "The Future 100: 2023"). These inventive, reality-pushing FOOH creations illustrate the notoriety-attracting potential of this art form to capture consumers' imaginations.



32

# Fanspiration

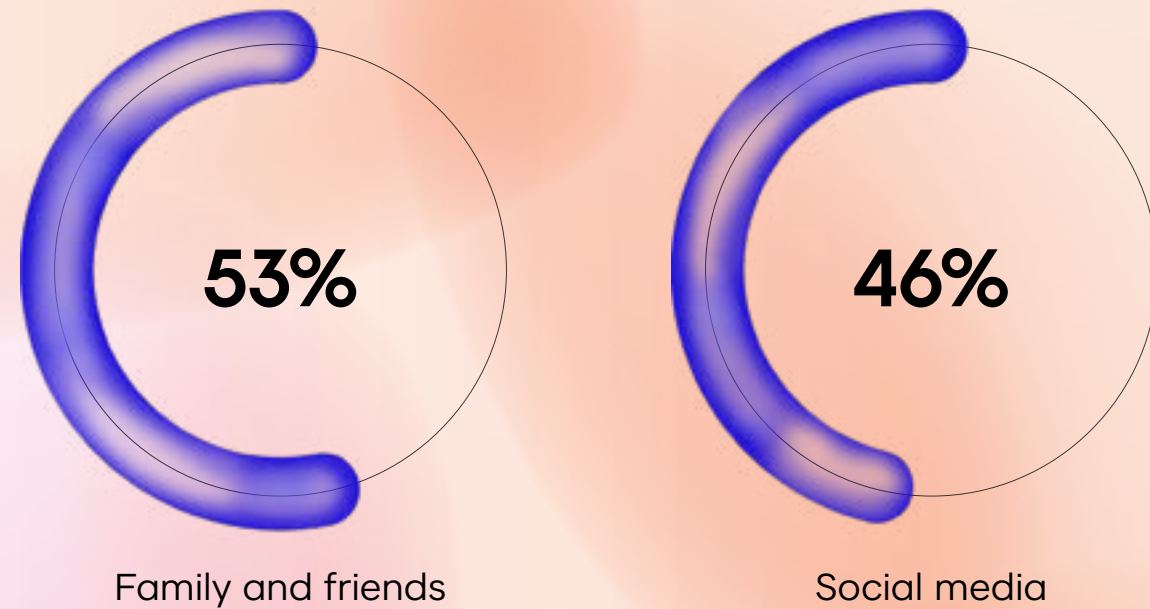
Vocal fans and influencers are inspiring their favorite brands to innovate.

“A billion-person focus group”: that’s how chief product officer at Abercrombie & Fitch, Corey Robinson, referred to TikTok during an interview with the *Wall Street Journal*, adding that “every single merchant and designer” uses it to inform their work. This captures the new social-media-driven R&D paradigm, where brands are parlaying fan hacks and viral influencer content into valuable new product development and innovation opportunities.

In a viral TikTok post in January 2023, creator Samuel Vela (aka @elfisicocuenta) lamented the fact that Colombian fromage frais brand Alpinito only produces 45g tubs. Delighting its nostalgia-craving Gen Z consumers, the brand rose to the challenge and released a limited-edition one-liter Alpilitro strawberry-flavored product in summer 2023. Having sold out within two hours online, it later went on sale across the country. Also in Colombia, Ramo’s chocolate-covered-cake brand Chocoramo responded to a viral fan-led social media campaign to launch a new variant, Esquinas de Chocoramo, which includes just the much-loved corners of the cake.

Fan hacks are becoming central to fast-food culture and in 2023 Chipotle responded to the Keithadilla craze—a quesadilla customization popularized by TikTok food critic Keith Lee—by making the dish available at its 3,200 US locations and training more than 100,000 staff in how to





**Social media is the biggest influence on generation Z's purchase decisions, after friends and family.**

create it. McDonald's has also nodded to food hacker culture with its Menu Hacks offering, which made fan creations, such as the Hash Brown McMuffin, available in store. According to Jennifer Healan, vice president, US marketing, brand content and engagement for McDonald's USA, "This campaign shows that it has never been 'our menu'—the menu belongs to our fans."

#### Why it's interesting

Brands can satisfy consumer craving for creative influence by tapping into fanspiration, rewarding and delighting fans with real-life innovations based on viral hacks (see trend #39 Co-creative futures on page 101).

**VML**



↑ TikTok creators Keith Lee and Alexis Frost are fans of Chipotle

↑↑ McDonald's Menu Hacks



33

# Brand India

India is building hard and soft power to emerge  
as a new global powerhouse.



↑ G20 Summit, New Delhi, September 2023, courtesy of the Government of India

2023 was a milestone year for India's boundless growth, as it officially surpassed China as the most populous country in the world. It cemented its position as an emerging global superpower by hosting the G20 Summit in September 2023, and underlined its credentials as a major player in the new space race with missions to the moon and sun.

And India is just getting started. EY predicts it will become the third largest global economy by 2027, while ambitious plans are afoot to make it a leader in tech and innovation. The Indian government is building a semiconductor ecosystem from the ground up to rival that of Taiwan, and Nvidia's CEO Jensen Huang said that the country will be "one of the largest AI markets in the world" at a conference to announce a partnership with Reliance Industries and Tata Group, two of India's



largest conglomerates. Apple, Samsung, Kia, Boeing, Siemens, Tesla, and Toshiba are among a slew of other leading global companies taking advantage of India's manufacturing and tech capabilities. And with Bain & Co predicting its domestic luxury market will "expand to 3.5 times today's size by 2030," brands like Gucci, Cartier, and Louis Vuitton are ramping up their Indian presence.

The potential of India's soft power is also growing. The Offbeat Sari exhibition at London's Design Museum delighted audiences in the United Kingdom, and Bollywood A-listers Alia Bhatt, Deepika Padukone, and Athiya Shetty all became the first Indian brand ambassadors for leading global brands recently when they signed with Gucci, Louis Vuitton, and Laneige respectively. Indian brands like Sabyasachi Calcutta and Forest Essentials are also making their mark around the world by opening retail stores in the United States and the United Kingdom.

Babita Baruah, CEO of VML India says that a confluence of factors explain the rise of Brand India: "While economic growth is an important marker of progress, the combination of talent, technology and grassroots innovation is what is creating something much larger for India; a positive zeitgeist that is making this more than a 'moment' and converting this into a tectonic 'movement'.

#### Why it's interesting

In September 2023, Huang told the press that this is "India's moment." As its population, domestic market, and tech capabilities continue to grow at pace, it is fast becoming a global political, economic, and cultural powerhouse. This makes it a market that brands, manufacturers, and consumers simply cannot ignore.



↑ Guler sari by Raw Mango at The Offbeat Sari exhibition, UK. Photography by Ritika Shah



33





34

# Creator to consumer (C2C)

The new gateway for brands—creators.

**VML**

New platforms are allowing creators to build their own storefronts, enticing shoppers with a blend of content, storytelling, and personality, while offering a new discovery channel for brands and retailers.

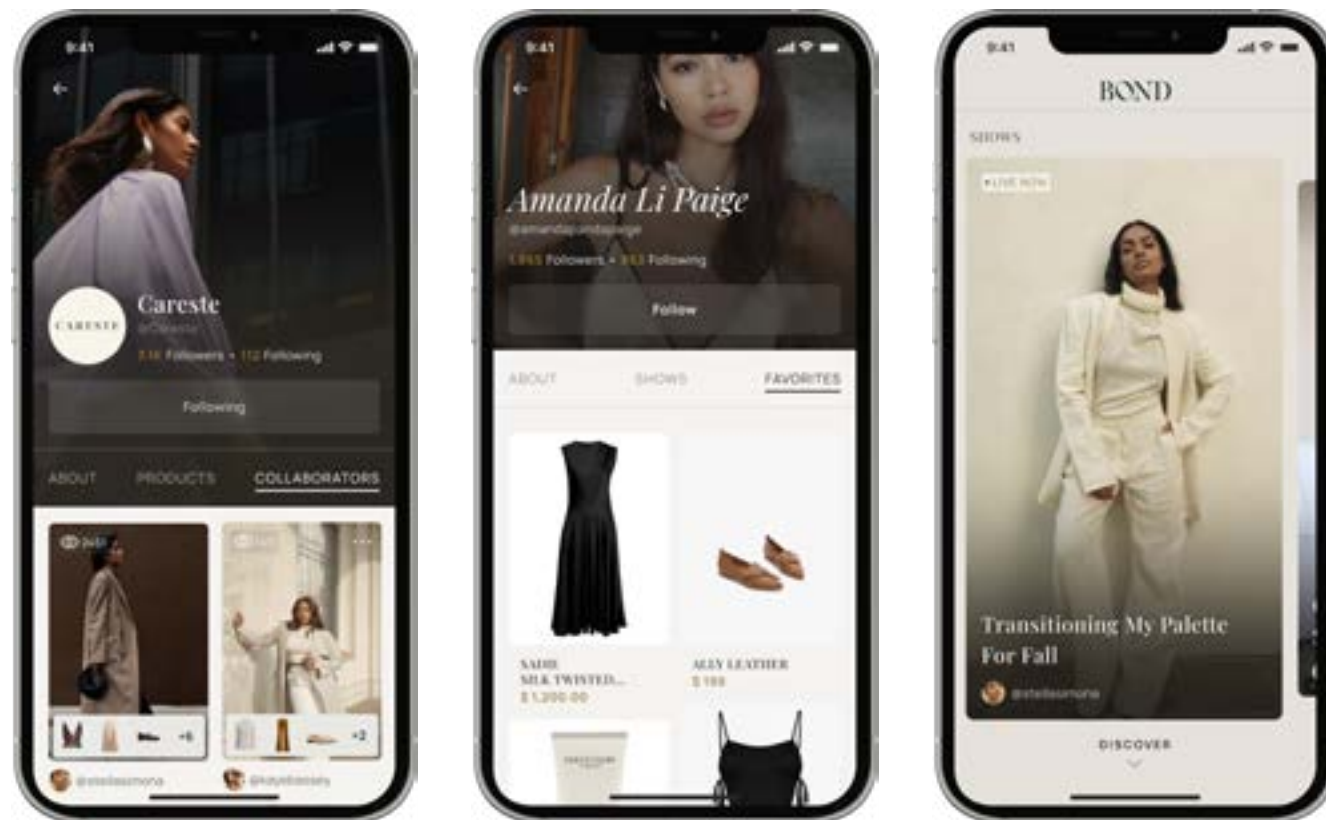
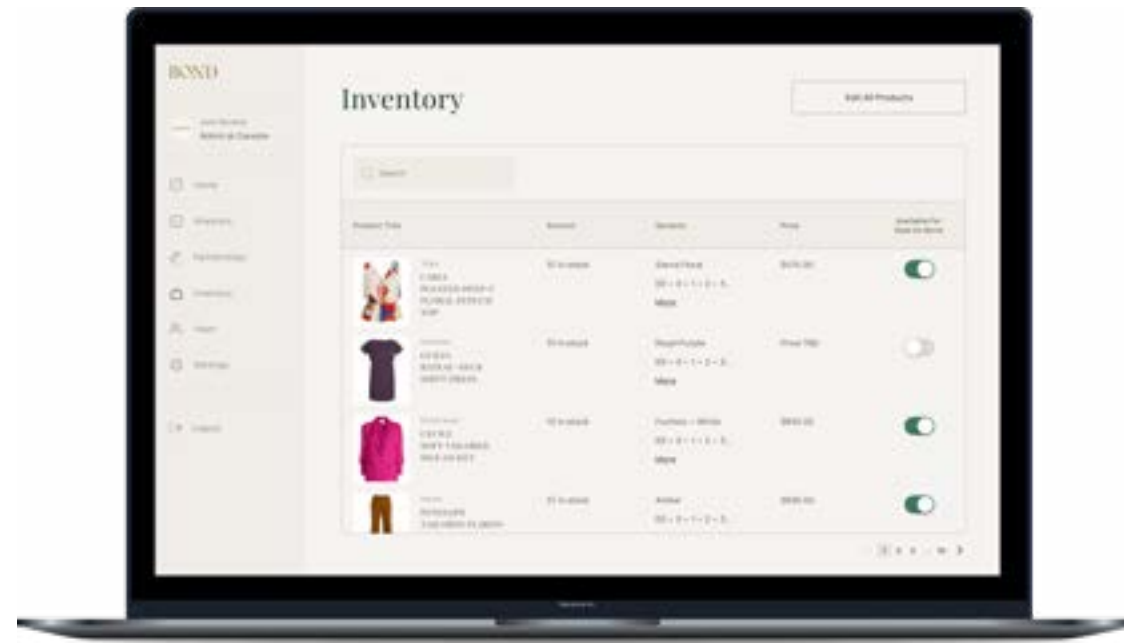
“Online shopping today is uninspiring, and incentives are misaligned,” says Maddie Raedts, cofounder of Bond, a “content-first and creator-led” social commerce experience centered on discovery and personalization. “We are creating the social shopping experience of tomorrow,” Raedts tells VML Intelligence.

With Bond’s platform, creators curate digital boutiques, assembling hand-picked collections and hosting live streams. Brands enrolled on the platform include Bally, Altuzarra, and Re/Done, while its diverse roster of creators has a combined audience of more than 35 million.

US startup Flagship launched its ready-made storefronts for creators in February 2023, offering the opportunity to promote and earn commission on products from 100 brand partners. Brands sign up with a Shopify account, select the creators they want to work with, and agree a revenue share based on sales. The brand takes care of inventory and fulfillment logistics, leaving creators to focus on the inspiration. There are more platforms in this vein, like Pedlar in Australia, and Canal for Creators and Emcee Studios in the United States.

While creators have been promoting brands on social media for some time, the process has always been unwieldy. These new platforms promise to align a mutually beneficial business model. According to Raedts, the benefits for brands are many, including tools “to form partnerships, manage fully automated product seeding/gifting, analytics, and a new





↑ Bond

sales channel.” For creators, the platforms promise better earning potential and a more reliable business model. For the consumer, who gets to buy from people, not search a product, it offers storytelling and human connection.

Major retailers are also finding ways to put creators and content first, albeit tied to their own products. Following the example of Walmart, US retail giant Target launched influencer-led storefronts for the 2023 holiday season, and more than 300 creators opened storefronts within a few weeks of the launch. In May 2023, ecommerce giant Amazon rolled out its new creator platform Inspire to US users.

Now we’re seeing this trend extend beyond retail into other categories. Startup Wandr invites travel influencers to create their own booking interface for its inventory of more than a million hotels.

#### Why it’s interesting

Brands can bank on the lure of influencer tastemakers to draw in customers with a blend of personality, storytelling, and enhanced discovery. This trend also speaks to younger cohorts’ preference for peer recommendations: 23% of gen Z and millennials already say they are interested in buying directly from influencers.



35

# Dopamine packaging

Brands are redesigning their packaging and identities to inject a boost of dopamine—the “feel-good” hormone.

VML

For its first rebrand in a decade, Jell-O updated its packaging in July 2023 with bright colors and punchy graphics designed to spark joy and awe through imagination and play. “We’re bringing back the jiggly fun and harnessing the wonder that the brand brings to adults and kids alike,” says creative director Rebecca Williams from BrandOpus, the agency behind the rebrand. The new visual identity “unleashes imaginations” by “re-imagining how the flavors can come to life in a playful, sensorial way, transporting customers into the Jell-O world of jiggly goodness,” the brand says (see trend #36 World-building brands on page 94).

Fanta’s April 2023 rebrand includes dynamic, cartoon graphics and vibrant palettes to capture a sense of “playful indulgence.” Lisa Smith is global executive creative director at Jones Knowles Ritchie, which developed the identity alongside Coca-Cola. Smith told *Fast Company* that it was the largest spectrum of colors she had ever worked with. The design is intentionally antiprecious and imperfect; the team explored “all the opposites of what formal typography is all about,” Smith explained, making the logo “deliberately very, very playful.”

“We wanted to portray a brand that values spontaneous play,” says Rapha Abreu, global VP of design at The Coca-Cola Company, and “reclaim play as something that people of all ages can embrace and benefit from.”

7UP revealed a fresh look in February 2023 that is “all about being uplifting” and creating a “joyful moment” for drinkers. “UPliftment is a





↑ 7UP brand identity

concept that resonates with people globally. Our new visual identity for 7UP was inspired first and foremost by the brand's creation of moments of Upliftment throughout its history," says Mauro Porcini, senior vice president and chief design officer of PepsiCo. "We wanted to create a new fresh look that was more aligned to the time we live in and the positioning of the brand that is all about being uplifting."

#### Why it's interesting

A 2020 study by London's Science Museum Group concluded that the world is becoming less colorful, based on an analysis of everyday objects in its collections that spanned two centuries. By injecting color into their identities and packaging, brands are delivering emotional uplift. Consumers will actively seek out brands that give them a reason to smile.

3

5



36

# World-building brands

A brand is no longer a distinct, static entity;  
it's an all-encompassing universe.

VML



↑ Barbie, courtesy of Warner Bros



Seventy-nine percent of people agree the role of a brand has changed over the past five years and 88% say that companies have a responsibility to take care of the planet and its people. “Twenty years ago, a brand was really just an icon and colors,” Borzou Azabdaftari, founder and chief executive of digital branding agency NickelBronx, told the *New York Times*. But that’s changing, he observed. Today, brands are evolving into organic ecosystems. “Creating a more comprehensive brand world has become much more important. They become living, breathing documents that can change and evolve.”

Creating a brand means creating the macrocosm that that brand occupies—and inviting consumers into it. “We think of world building as the evolution of brand building,” Amplify chief creative officer Jeavon Smith and executive creative director Alex Wilson said in a SXSW 2023 panel.

Isamaya Ffrench’s makeup brand is “less about prettification and more about ‘world building,’” *Business of Fashion* reports. Under her eponymous brand Isamaya, which launched in June 2022, Ffrench has released three collections that each invent a distinct persona and narrative. Ffrench calls it an invitation “to explore a bigger world.”

Mattel turned to Hollywood and brand partnerships to reinvigorate its Barbie brand—sparking a pop culture craze in the summer of 2023 that went far beyond its toys. Referring to the film, “*Barbie* took over the world,” *Time* reported in July 2023—thanks in large part to a blitz of merchandising tie-ins that let consumers fully immerse themselves in the world of Barbie. To achieve this, Warner Bros and Mattel partnered with brands including Burger King, Pinkberry, Bloomingdale’s, Crocs, Gap, Xbox,



↑ Barbie x Joybird

Ruggable, and furniture brand Joybird for *Barbie*-themed releases. Mattel says the *Barbie* movie is a first step in reinventing how the brand operates. “What you’re really starting to see is Mattel as a pop-culture company,” Mattel president and chief operating officer Richard Dickson told *Fast Company*.

#### Why it’s interesting

Consumer-brand interactions are moving from distinct, standalone touchpoints to interplay in all-encompassing worlds. Moving forward, Smith and Wilson said, brands will need to “place storytelling at the center of everything they create.”







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# Impactainment

Emotional storytelling inspires positive change.



↑ [Hidden Worlds Entertainment](#)

“The outcome that we strive for is to create inspiration at scale in order to make the world a better place.” This is the ambition of Daniel Hettwer, founder of Hidden Worlds Entertainment, who has developed “impactainment.” The concept blends entertainment with positive action to combat existential threats like the climate crisis or the mental health crisis.

Impactainment is strongly rooted in behavioral science and psychology, and involves creating impactful experiences that inspire mass action and

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**The outcome that we strive for is to create inspiration at scale in order to make the world a better place.**

**Daniel Hettwer, founder,  
Hidden Worlds Entertainment**

**VML**

change. It differs from edutainment in that it isn't just about educating participants, but also about galvanizing them to make a difference. "The education element by itself doesn't necessarily create change," Hettwer tells VML Intelligence. "There's a ton of science out there that highlights the power of story to stimulate certain neurochemistry in your brain. Story has a huge ability to create certain emotions, to create empathy, to motivate. We want to inspire somebody and then help them turn inspiration into action."

An impactainment approach was used for an immersive ocean-positive dining experience with the Bahamas. The event merged art exhibitions, multisensory dining, and 360-degree photography to highlight the conservational successes of the islands, while educating guests about the beauty and plight of the oceans. At the end of the experience, guests were invited to sign up for a beach clean-up, creating what Hidden Worlds Entertainment calls a direct impact.

At launch, Hidden Worlds Entertainment's two focus areas are conservation and mental health, but Hettwer says impactainment can be used for any topic and by brands across all consumer categories. "Our mission is to build the most fun, high-quality guest experiences and leisure, entertainment, and hospitality sectors to promote hope, belief, and innovation," he says.

#### **Why it's interesting**

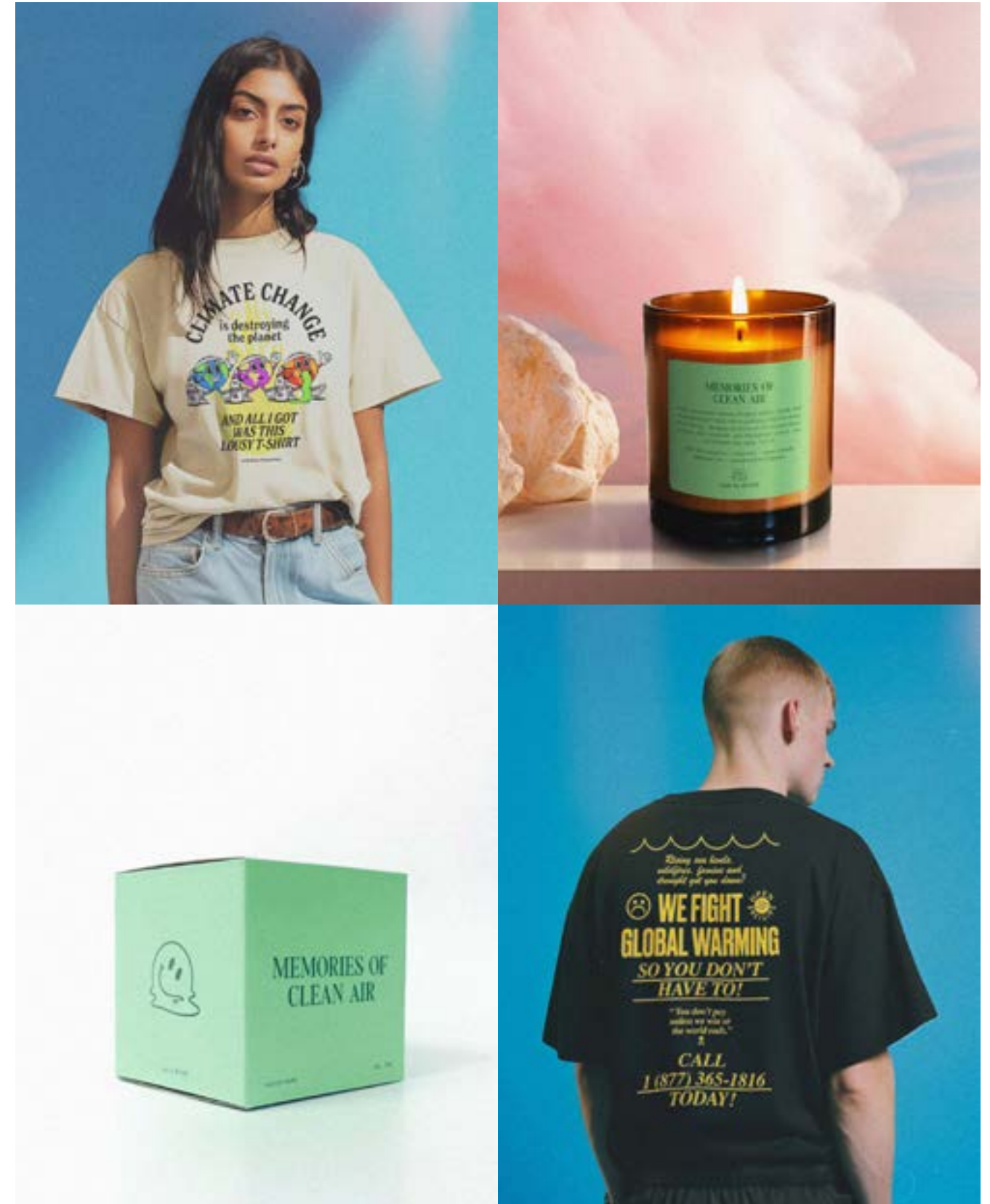
Hettwer believes that impactainment will become "the biggest driver to brand equity and long-term profitability" by providing companies with a fun and authentic way to effect positive change while showcasing their purpose.



38

# Brand jesters

It's time for brands to bring back the funny.



↑ Better Climate Store



Data from Kantar's Link+ database shows a steady decline in humorous advertising over the past two decades. Why so serious? Brands have been putting on their solemn faces to tackle purpose and pandemic, but evidence shows that it's laughs, not lectures, that consumers now want.

During 2022 and 2023, Kantar Link+ reported the first uptick in humor in ads for almost 20 years. The laughs have been missed: the "2022 Happiness Report" from Oracle found that 91% of global consumers want brands to be funny, with 90% saying funny brands are more memorable. VML Intelligence data also reveals that the number one reason that people are more likely to purchase from a brand is if it brings them a sense of joy.

Brands are leaning into new comedic sub-genres to give some light relief to consumers. This includes using meta-cringe humor that is designed to make viewers feel uncomfortable. On TikTok, relatable yet awkward #cringetok content now has more than 2.6 billion views. Heavy metal water-in-a-can brand Liquid Death's latest irreverent ad leans heavily into cringe comedy, featuring a blind taste test between its water and the sweat dripping off a man's back.

CEO Mike Cessario shared insights on the brand's focus on humor in an interview with Spy.com, saying, "We knew we could win if we made people laugh. We approach our creative work like an SNL writer's room and hold our content to a much higher bar because of that."

And rather than an alternative to purpose, humor can be a vehicle to talk about issues in more approachable ways. Ethical marketplace Better Climate Store sells its Greenwash soap with a tongue-in-cheek, self-aware

**VML**



↑ Liquid Death

ad that nods to the climate crisis, while gently mocking consumers for making ethical choices just to make themselves feel better.

"Earth clearly has a marketing problem," Ben Becker, cofounder and creative director of Better, tells VML Intelligence, as the planet's "most scientifically equipped advocates aren't necessarily its best brand storytellers. But suppose we can harness attention with entertaining content and products, and divert it towards low-effort climate action from the comfort of one's computer. That's a big win for everyone."

#### Why it's interesting

Humor can differentiate and engage, while offering some much-needed uplift for consumers still laboring through tough times.



39

# Co-creative futures

Brands are giving consumers creative control over their products.



↑ Kiki

Angelina Jolie launched her creative venture Atelier Jolie in summer 2023—a “creative collective” that turns shoppers into designers. “Why simply buy the design of another person, when you can create yourself?” Jolie mused in the official announcement. Instead of selling predesigned pieces, the brand will let consumers pick from deadstock and artisanal fabrics to create made-to-measure garments by in-house tailors. Atelier Jolie will also offer mending services, take-home mending kits, and an in-store “stud-it-yourself activity station” available for free use.

**VML**



## BRANDS & MARKETING

→ Kiki

"I don't want to be a big fashion designer," Jolie told *Vogue*. "I want to build a house for other people to become that."

Kiki is embracing cocreation in its product development. The US-based beauty brand, which launched in May 2023, is turning control of its product releases over to its community. "Anybody who wants to be involved in the development of our products has the option to do so," Brendon Garner, cofounder and chief product officer, told *Glossy*. The brand debuted with a single product—a nail polish—and all future product releases will be determined by community voting. "We want to change the dynamic of how a brand, beyond just beauty, should be practiced in the future," cofounder and chief creative officer Ricky Chan told *WWD*.

Golden Goose lets shoppers "cocreate everything, everywhere." At its new co-creation in-store experiences, which debuted in Australia in 2023, shoppers can choose their own design to customize the brand's base products—including sneakers, bags, outerwear, denim, and T-shirts. The design is then executed by on-site artists.

### Why it's interesting

Shopping is a form of self-expression, for younger consumers especially—60% of US gen Zers say that their brand choice is an expression of who they are, according to data from VML Intelligence's "Gen Z: Building a Better Normal" report. Brands will need to go beyond product personalization—giving consumers a say in the conception of the products they buy.

**VML**







# Biodesign brands

Brands harness the power of nature for next-gen fabrics and dyes.

London-based Normal Phenomena of Life is described by its founders as “the first biodesign lifestyle brand.” The online platform only features clothing and objects “fabricated with the help of bacteria, algae, fungi, yeast, animal cells, and other biological agents,” *Dezeen* reports. This neatly describes the concept of biodesign, which draws on the growth mechanisms of natural organisms to create innovative materials and dyeing techniques. Among Normal Phenomena of Life’s products is the Exploring jacket, a technical smock crafted from 100% GOTS-certified silk and batch dyed with wildtype *Streptomyces coelicolor*, a type of bacteria.

At the 2023 London Design Festival, Danish brand Ganni launched a prototype version of its Bou Bag made from a leather alternative by London biotech company Modern Synthesis, which contains no plastic or petrochemicals. The material is created by growing bacteria on a supportive structure, fed by agricultural waste. The microbes then convert the sugar to nanocellulose. The resulting fiber is eight times stronger than steel and offers natural binding ability.

In 2019 London’s Central Saint Martin’s unveiled its MA in Biodesign, to “explore bio-informed design strategies as a driver for sustainable innovation.” Concepts created by course graduates include Mia Luong’s Pearlescence of the Future, which imagines “using bacterial cellulose and nanocellulose to design and reimagine the future of nacre and pearl,” in a world where the oysters from which pearls are sourced are extinct.

### Why it’s interesting

Innovative materials that employ nature’s innate generation mechanisms are one way to explore a more sustainable future. While these materials are in their early stages, their potential is compelling and brands are buying in.



4





41

**Food & drink**

50



41

# Gen alpha palates

Generation alpha are inspiring a swath of new flavors.

VML



↑ Coca-Cola Y3000 limited edition

## International appetites

Gen alpha are on track to overtake gen Z as the most diverse generation to date: data from the US Census Bureau shows that gen alpha will be more diverse than the rest of the US population. It stands to reason that their palates will follow suit. Already, kids' toys are evolving "to reflect more diverse cuisines and up-to-date eating habits," the *New York Times* reported. Kids lifestyle brand Lalo sells toy sushi and charcuterie sets, and Target sells a toy set with plushie sweets from Mexico, India, and Japan.

Exposed to a greater range of cultures and cuisines, gen alpha will pick up where gen Z leave off to drive diversification in dining.





↑ Nour: Play With Your Food video game

### AI flavors

Alongside multicultural meals, digital habits are also offering new sources of flavor inspiration. Rising generations are immersed in digital environments—and it's influencing how they think about and interact with food. Coca-Cola launched its limited-edition Y3000 soda created by AI in September 2023. "We challenged ourselves to explore the concept of what a Coke from the future might taste like," says Oana Vlad, senior director of global strategy at The Coca-Cola Company. To do so, it enlisted the help of AI—a creative collaboration that may become commonplace in gen-alpha kitchens.

*Nour: Play With Your Food* is a new video game, released in June 2023, that invites users to "rediscover the joy of playing with your food." Nour teaches players "to approach food as if experiencing it for the first time, reveling in the resulting mess and chaos," as reported in the *Financial Times*—celebrating an exploratory, experimental, and imperfect approach to food.



↑ Pringles Crisps and Caviar collection

Digital habits are encouraging eaters to think more creatively and experimentally about food—imbuing rising generations with a sentiment of levity in the kitchen.

### Playful pairings

Global palates and digitally enhanced food play are whetting gen-A appetites for playful and unexpected pairings in the world of snacks. Following a viral TikTok trend that paired Pringles with caviar—and garnered more than 10 billion views—Pringles released a Crisps and Caviar collection in September 2023. French's and Skittles partnered to release a mustard Skittles flavor in July 2023. Pepsi introduced Toasty Marshmallow, Chocolate, and Graham Cracker sodas at the end of 2022 that consumers can mix to make their own s'mores soda.

Gen alpha want to have fun with their food—and are challenging brands to look beyond traditional barriers for food and flavor pairings.







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# Dreamscape dining

The latest restaurants and bars are spiriting diners into mythical reveries.

An AI-designed pop-up restaurant in Australia transported diners to a dream realm. In March 2023, Applejack Hospitality launched its Create Your Dream Restaurant competition, inviting entrants to push the boundaries of the restaurant industry by using AI to dream up surreal dining experiences. The winning concept, Luminary by Stephanie Wee, ran for one week in the summer of 2023 at Sydney restaurant Rafi, part of the Applejack Hospitality group. “Best experienced after dark,” the concept used hazy, multicolored lighting combined with “atmospheric effects” to create “an ethereal environment that evokes a sense of awe and intrigue,” according to the restaurant.

Underbar was designed to be a “landscape of dreams.” The pop-up bar, conceived by interior architect Jonas Bohlin and restaurant designer Christine Ingridsdotter for the 2023 Stockholm Furniture Fair, featured felt lamps, a wall of dress shirts, and dim, purple-tinted lighting—all of which combined to create a space evocative of a subconscious fantasy.

Also tapping into the subconscious for inspiration, Hello Sunshine calls itself a “psychedelic inverted cabin.” Canadian studio Frank Architecture imagined an “alternate reality” for the Japanese bar and restaurant in Banff, Alberta, taking cues from the “unlikely juxtaposition of Japanese psychedelia meets spaghetti western meets mountain cabin,” the studio told *Dezeen*. Much like a dream, “the restaurant isn’t immediately visible but is slowly revealed as one moves through space.”

### Why it’s interesting

Diners are looking for a sense of escapism and wonder that takes them out of the mundane and satisfies a yearning for re-enchantment (see trend #1 Emotioneering, page 12).





↑ Luminary at Rafi

↑↑ Smoking cocktail at Luminary at Rafi



**Diners are looking for a sense of escapism and wonder that takes them out of the mundane and satisfies a yearning for re-enchantment.**



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# Snackification

Small treats are big business as the billion-dollar snack market continues to grow.



↑ Moonshot climate-friendly crackers are now part of the Patagonia Provisions brand

**VML**





↑ Patagonia Provisions crackers

Younger generations are feeling particularly snackish and this may be because 69% of 18-29-year-olds consider snacks the highlight of their day, compared to the global average of 55%. According to the “State of Snacking Report” published in January 2023 by Mondelez International and The Harris Poll, 71% of global consumers snack at least twice a day, with the growth in this sector attributed to younger generations as millennials and gen Zers consume 10% more snacks daily than older generations due to busier lifestyles.

Kellogg Company has now muscled in by launching Kellanova, a snacking-oriented company, in October 2023. It is composed of popular snacking brands including Cheez-It, Pringles, Rice Krispies Treats, and Pop-

Tarts. Kellogg’s reports that these snacking brands make up about 70% of its North American snack sales alone. According to market research firm Circana, nearly half of US consumers eat three or more snacks a day. Kellanova has high hopes—the company is forecast to generate approximately \$2.25 to \$2.3 billion in net sales in 2024.

As appetites for snacking increase, climate-friendly snacks start to see demand. When it comes to eating, 51% of global respondents say they consider the environmental impact and 83% say they expect brands to play their part in solving challenges like climate change.

Patagonia Provisions acquired climate-friendly cracker company Moonshot in March 2023. Julia Collins, founder of the startup, says, “I founded Moonshot with the vision of using the power of food to help tackle climate change. By joining Patagonia Provisions, who recently made Earth their only shareholder, Moonshot now belongs to the planet.”

Adding awareness to the cause, Colorado-based Quinn earned Climate Friendly status from American food sustainability rating company HowGood in 2023, to add to its packaging. Quinn aims to “shake up the food industry by reinventing snacks,” with products including popcorn kernels and pretzels.

#### Why it's interesting

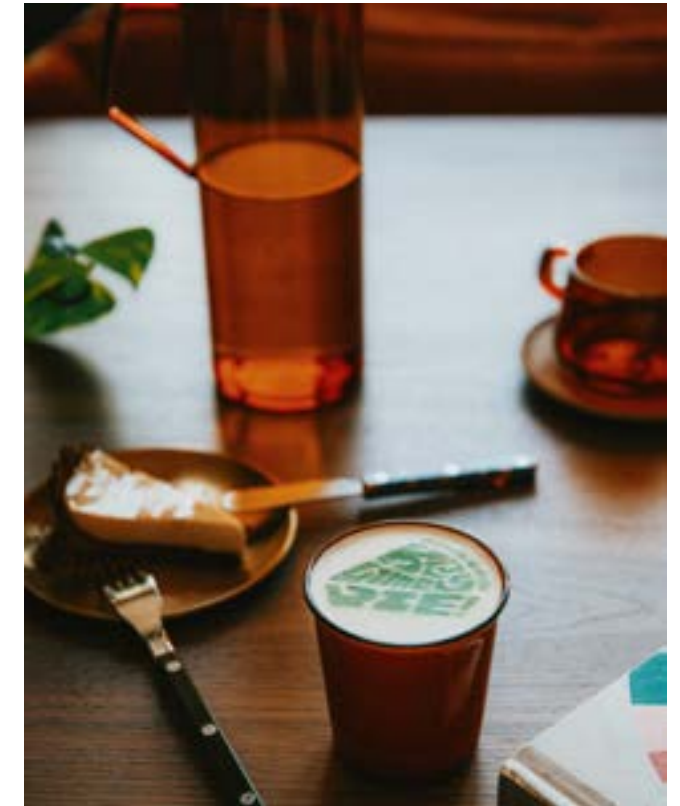
Snacks are taking a large slice of the food industry’s pie. Global snack sales are expected to pass \$675 billion in 2024 and rise to over \$831 billion by 2028, according to Euromonitor. Brands will need to cater to the appetites of the younger generation, while upholding the sustainable values that are important to them.



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# Culinary cocktails

Mixologists create concoctions good enough to eat, mixed with a hint of nostalgia and a dash of comfort.



↑ Cold Pizza and Key Lime Pie cocktails at Double Chicken Please, New York City

Cold pizza, Waldorf salad, and French toast can all be found on the menu of Double Chicken Please, located on New York City's Lower East Side—the twist here is that they are all cocktails. The handcrafted drinks served in the venue's Coop room are “based on the approach of hacking design to disassemble culinary dishes and rebuild the flavors into unique cocktail forms,” Tako Chang, manager of brand and communications at Double Chicken Please, tells VML Intelligence. Opened in November 2020, the bar has been crowned number one in North America's 50 Best Bars 2023 list and number two in the World's 50 Best Bars 2023 list. Founders CN Chan and Faye Chen's love of food has been the driving inspiration behind the cocktails, which offer an equal blend of innovation and comfort in each glass.





Tucked away in Mexico City's Colonia Juárez neighborhood, Handshake Speakeasy adopts molecular mixology to prepare its cocktails. Expect to find scrumptious desserts on the cocktail menu, including the Strawberry Pancake and the Banana Split, which features banana liqueur, sherry, and a Lego-inspired chocolate filled with banana cream as a special garnish. Ranked third in the World's 50 Best Bars 2023 list, Handshake Speakeasy currently rules the cocktail roost in Latin America.

Those wanting to sample a cocktail take on the sweet and savory tom kha soup should head to Bar Mischief in Austin, Texas. For his Tom Kha cocktail, beverage director Jorge Viana has created a savory mix that includes a mushroom-infused vodka and is topped with a sweet lemongrass and coconut foam.

**Why it's interesting**

As the cocktail scene evolves, Chang finds that people have gravitated away from flavors that were predominantly sweet, floral, fizzy, and sour. He explains that "over time, as the bar industry expanded its techniques into the culinary domain, guests began to venture into the realm of savoriness."



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# Expedition dining

Fine dining takes to the sea and heads into space.



↑ Iris restaurant, Norway



From 2024, French space tourism company Zephalto will offer fine dining and wine-tasting trips in its luxuriously designed, pressurized Céleste capsule, which will voyage to “the dark of space” attached to a stratospheric balloon. Each journey is open to six guests, who, having dined on a curated menu before the balloon begins its ascent, will be able to taste fine wines during their six-hour flight.

If space is too out-there, avid diners can take a journey across Western Norway’s Hardangerfjord to Iris, a restaurant located inside the Salmon Eye floating art installation. Seating only 24 guests, Iris offers a dining experience that it describes as unfolding “a story about challenges, flavors, and possibilities.” The experience involves a boat trip from the town of Rosendal, followed by “a pit-stop and welcoming snack at chef Anika Madsen’s boathouse on the island of Snilstveitøy.” There is then a “multi-sensory underwater experience” held on the art installation, before guests experience the tasting menu in a dining room with views of the fjords and mountain ranges.

To experience the taste of champagne aged in the depths of the Baltic Sea, Veuve Clicquot offers its Cellar in the Sea experience. As part of the event, 14 guests—who must all be experienced divers—are given the chance to dive in the Åland Islands, off the Finnish coast, to a depth of 43 meters to retrieve the sunken champagne bottles. Prices for the diving trip



↑ Iris restaurant, Norway

are said to be in the “tens of thousands of pounds.” The next expedition will take place in summer 2024.

#### Why it's interesting

Research indicates that environment affects how tastes are perceived. A 2022 study from China, titled “Does a beautiful environment make food better,” found that “food is perceived as tastier, better smelling, and, in certain conditions, better looking in more aesthetically pleasing environments that elicit more positive emotions.” These unforgettable fine-dining experiences, which engage the senses on myriad levels, are likely to only enhance the gastronomic experience.



↓ Iris restaurant, Norway





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# Heritage gastronomy

Countries are actively preserving traditional cuisine as the food scene diversifies.

**VML**

Lab-grown meat will not be found on any menus in Italy, and it may remain that way indefinitely. On July 19, 2023, the Senate of the Italian Republic approved a bill that prevents the production and import of cultivated meats and other synthetic foods in a bid to safeguard the nation's culinary heritage. The Italian government hopes to further reinforce the country's food heritage by listing it as a UNESCO Intangible Cultural Heritage asset; UNESCO will rule on this by December 2025.

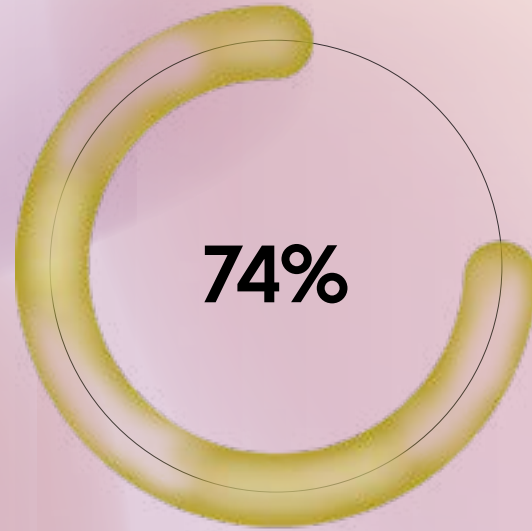
UNESCO protection for heritage food is not unprecedented. In November 2022, the organization placed the artisanal know-how that goes into making the baguette loaf, known for its four ingredients and specific technique, on the Intangible Cultural Heritage list. The announcement was positively received, with French president Emmanuel Macron describing the baguette in a tweet as "250 grams of magic and perfection in our daily lives." The baguette joins other heritage food on UNESCO's list including Ukrainian borscht, Korean kimchi, and Haiti's jomou soup.

The Middle East is turning to culinary institutions to preserve its rich heritage foods. "Every culinary institution must provide well-structured learning in the ethnic cuisine and foster a deep respect for culinary heritage while innovating," Sunjeh Raja, director and CEO of the International Centre for Culinary Arts Dubai, told *Fast Company*.

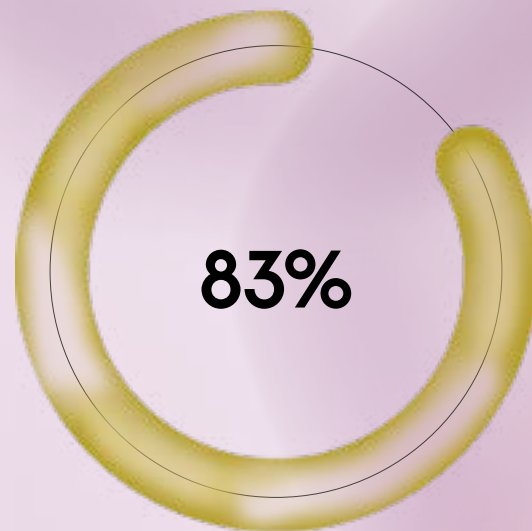
### Why it's interesting

Rapid developments in cell-cultured food alternatives are being countered by countries eager to double down on preserving their traditional food heritage and reinvigorate the taste, craft, and techniques that define each nation and its culture. After all, 74% of people say food is their way of connecting with their culture and 83% say food is their way of discovering new cultures.





**Say food is their way of connecting with their culture.**



**Say food is their way of discovering new cultures.**



↑ Baguette making, courtesy of Frédéric Vielcanet

↑↑ Baguette making, courtesy of Jean-Luc Valteau



47

# Food farmacies

Food is now pivotal to public health.

Fresh produce prescriptions are catching on as research underlines the role healthier food plays in preventing and even reversing chronic disease. Should food brands and retailers now consider themselves healthcare providers?

According to a 2023 study published in *Circulation*, the peer-reviewed journal of the American Heart Association, prescribing produce can unlock multiple health benefits, from lower blood pressure to reduced body mass index.

Physicians in the United States, the United Kingdom, and Australia are among those pioneering “food as prescription” services as a preventive health strategy. Doctors in a number of US states, including Montana, California, and Massachusetts, are now able to issue “produce prescriptions.” In London too, GPs are also issuing fruit and vegetable prescriptions to patients on lower incomes as part of a pilot scheme that could ultimately be rolled out across the country.

Typically, participants in prescription programs receive vouchers, loyalty card credits, or debit cards that subsidize or cover the cost of healthy foods at grocery stores and farmers’ markets. Other programs distribute healthy supplies in the form of fruit and veg boxes.

Grocery retailers like Kroger and Giant Food are already supporting these programs, and others are leaning in to an industry-wide opportunity to further educate or nudge consumers towards healthier eating habits.

British retailer Tesco has set itself a goal of having 65% of shopping baskets made up of healthy foods and has pledged to cut 100 billion



calories from its own-label range by 2025. In the United States, grocery chain Albertsons has added a digital nutrition tool to its Sincerely Health platform that allows shoppers to measure the nutritional value of their purchases according to the USDA's My Plate guidance.

UK health food retailer Holland & Barrett recently refreshed its food offer, relaunching under the banner "Food that Loves you Back." The store has introduced Plant Points on packaging, a scheme to encourage shoppers to get at least 30 plants a week into their diet.

In contrast, ultra-processed foods (UPFs) are increasingly coming under scrutiny. These foods now make up half the diet in the United Kingdom and the United States, and research published in the *British Medical Journal* says that one in seven adults and one in eight children could be addicted. Expect to see healthier alternatives or reformulations with health-boosting benefits hitting the shelves.

UK grocer Marks & Spencer recently signed an exclusive distribution deal with Modern Baker, creator of the Superloaf. The product of six years of R&D, Superloaf is nutrient-dense and gut-friendly, with fewer calories than a standard loaf. The manufacturer has been granted government funding to expand its research into nutritious formulations for other categories including pastries, ready meals, and breakfast cereals.

### Why it's interesting

Alongside national strategies to tackle poor diets, there is an opportunity for food manufacturers and retailers to amplify these efforts, doing more to educate and promote healthier diets, as well as to provide healthy alternatives alongside UPFs.



↑ Superloaf by Modern Baker

↑↑ Holland & Barrett's healthy groceries



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# Relational dining

People are supping with strangers to combat loneliness and nourish communities.

**VML**

The *New York Times* calls it “the radical act of eating with strangers”: an emerging wave of dining concepts created to encourage community connection.

Dinner With Friends is an intimate dinner party concept that brings eight strangers together over a home-cooked meal. Anita Michaud started Dinner With Friends in May 2022 after moving to New York City and struggling to find community. Since launching, over 800 people have signed up—which equates to a four-year waitlist.

Soup Doula is also connecting communities over food. What started as a soup delivery service for new parents has grown into a facilitator for neighborhood socializing. Creator and chef Marisa Mendez Marthaller hosted weekly “soup shares” at Brooklyn’s Nightmoves in February and March 2023, where community members could come together over a bowl of soup on Sunday afternoons. While the service was originally created for new parents, Marthaller says it’s for anyone in need of nourishment: elderly parents, the COVID-19 and/or flu-ridden, anyone feeling down or struggling with their mental health, or college or graduate students.





**Now the sense  
of community  
has never been  
stronger.**

**Denise Lefebvre, senior vice president  
of R&D, PepsiCo Foods**



People's social networks decreased in size by an average of 16% during the pandemic, according to research by Marissa King, a professor at the Wharton School of the University of Pennsylvania and the author of *Social Chemistry: Decoding the Elements of Human Connection*. To counteract that pandemic deprivation, people are looking for more than just a good meal when dining out.

"If you look at what our lives were like for a couple of years, we didn't share because sharing was considered dangerous," Denise Lefebvre, senior vice president of R&D for PepsiCo Foods, told the *New York Times*. "Now the sense of community has never been stronger."

#### **Why it's interesting**

While the dinner table has always been a place to gather family and friends, it is now deepening those roots, serving up community strengthening and radical reconnection (see trend #10 Intentional communities on page 32).



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# Sake boom

Interest in sake food pairings is driving a global boom.

**VML**

↑ Dassai Blue sake from Asahi Shuzo

The popularity of Asian cuisine and culture has helped introduce international audiences to the refined qualities of sake. Now some are even turning their hand to making it.

Small-batch local sake brewers have been popping up in the United States over the past few years, and there are now more than 20, including Origami sake in Arkansas, which began operating in mid-2023. These upstarts are leaning into their US heritage and terroir to cater better to American palates. Such is their success, Japanese brewers want in on the action. Asahi Shuzo has opened a brewery and tasting room in the Hudson Valley and will launch an American brand, Dassai Blue. It's also



## FOOD & DRINK

→ IWA kura (sake brewery) in Shiraiwa, Japan

joining forces with the Culinary Institute of America to offer a sake educational program.

Locally made sakes from London's Kanpai brewery are on the menu at Evelyn's Table, one of London's buzziest restaurants. Indeed, sake's umami qualities mean it is increasingly paired with food. In Singapore, Rasen sake has been specially crafted to pair with Singaporean dishes. Los Angeles bar and restaurant Ototo serves Cowboy brand sake, which is designed to accompany steak or beef. Even in wine-loving Paris, artisan fromager Taka & Vermo hosts in-store cheese and sake tasting events.

To create more food-friendly tipples, sake brewers are now collaborating with experts from the wine and champagne industry. Richard Geoffroy, a former chef de cave at Dom Pérignon, is now founder-maker at Japan-based sake startup IWA. IWA 5, the first product to launch commercially, is created using the assemblage process, which blends different rice varieties. The beverage is already popular with Michelin-starred chefs like Thomas Keller, who is planning to pair it with caviar at The French Laundry, according to *Robb Report*. "I encourage the followers and lovers of IWA to take an element of risk in experimenting with pairings much as I do," Geoffroy tells VML Intelligence.

### Why it's interesting

As international diners learn more about the versatility of sake, experts are predicting it has the potential to rival the most popular Western beverages—even wine.





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# Tundra to table

Arctic cuisine is on the rise.

VML



↑ Moss at the Blue Lagoon resort, Iceland, courtesy of Blue Lagoon Iceland





↑ Hurtigruten Group's MS Kong Harald. Photography by Stian Klo

In Norway, six restaurants received inaugural Michelin stars in 2023, contributing to a growing rank of Arctic eateries elevating the region's culinary standing. In Iceland, Moss at the Blue Lagoon resort received its first Michelin star in June 2023. Alongside regional dishes like Icelandic lamb, Norwegian king crab, and locally caught fish, Moss serves a butter that celebrates its sense of place. Made in house, it is crafted from whipped skyr—Icelandic yogurt—milk from local farmers, dulse seaweed, and sea salt made on site. "The inspiration for our butter comes from our pride in Icelandic skyr," chef Ingi Thorarinn Fridriksson, director of food

and beverage at Blue Lagoon, told *Food & Wine*. "We added dulse as a nod to Grindavik, the fishing town where the Blue Lagoon is located." (At the time of writing, service had been interrupted by volcanic activity in the region.)

"Our local ingredients all have a story to tell. Either you have caught, shot, or collected them yourself—or you know the person who has," Anne Nivika Grødem, CEO of Visit Greenland, told the BBC. "Our food culture is closely linked to our identity."

Arctic travel itineraries are increasingly highlighting the region's cuisine. Two new trips launched in 2023 by cruise operator Hurtigruten showcase Norway's "fjord-to-fork" cuisine, feeding visitors local delicacies like cloudberry honey gathered on the tiny island of Rolvsøy, king oyster mushrooms grown at the family-run Trøndersopp farm, and recipes and ingredients collected from the Indigenous Sámi people.

Appetite for arctic cuisine is spreading to new shores. Three-Michelin-starred Norwegian restaurant Maaemo popped up in Sydney in June 2023 with a \$400-per-person tasting menu serving locally hunted deer and smoked reindeer heart. New York City's first Taste of Iceland festival in May 2023 featured a week-long Icelandic pop-up menu at the renowned Coarse restaurant and an Icelandic cocktail class.

#### Why it's interesting

Chefs from northernmost communities are reviving the overlooked food of the Arctic circle, catering to a growing class of culture enthusiasts and wanderlusts looking for adventurous and hyper-local dishes that fully immerse them in the icy tundra.







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**Beauty**

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# Gen alpha skincare

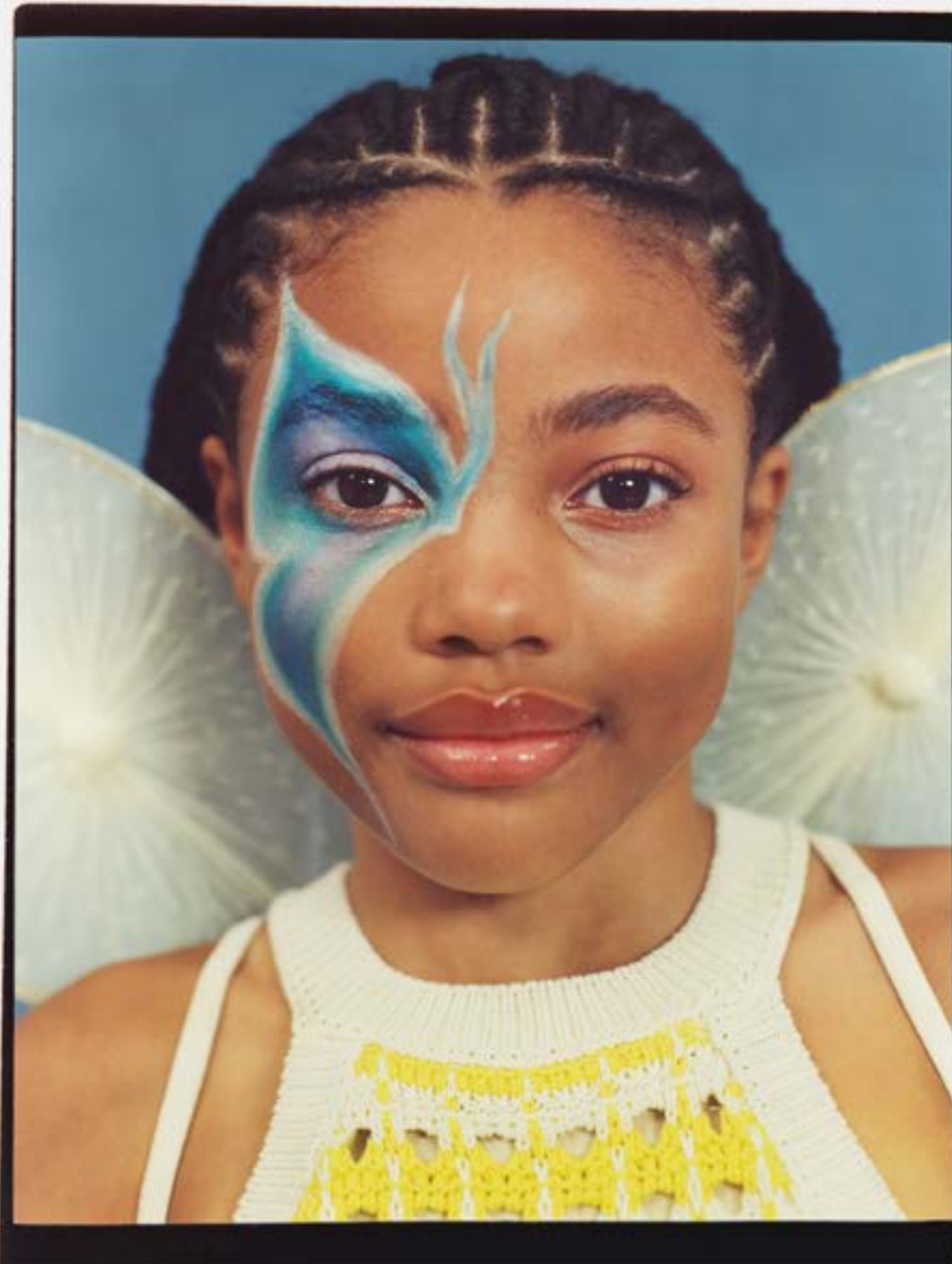
The youngest generation are already locking in beauty rituals.

VML



↑ Evereden, courtesy of Evereden





↑ Evereden, courtesy of Evereden

Make way for the skincare-savvy pre-teens taking over social media with tips on cleansing, toning, hydration, and more. Eleven-year-old Riley Curry is described by her mother, actress Ayesha Curry, as having a “full” and “non-negotiable” skincare routine, according to *People*. And 10-year-old North West (daughter of Kim and Kanye) has been dropping videos of her beauty regime on TikTok.

“Many gen alphas have their own skincare routine,” Kimberley Ho, founder and CEO of multigenerational skincare brand Evereden, tells VML Intelligence. Growing up as digital natives, this generation are privy to skincare benefits shown on social media. “Whether parents agree with this or not, this generation want their own products,” explains Ho. “They want their own routine. They’re hugely independent.”

Evereden products are “for every age and every stage,” and backed by science. The company has pre-teen products that include a Kids Daily 1-2-3 Routine set. It has also expanded into haircare and, more recently, makeup for kids, launching Evereden At Play in September 2023. “Kids aged three to 13 years old are becoming interested in skincare and beauty products at a younger age than previous generations,” says Ho. Evereden is using research to meet this group’s specific skincare needs.

Proudly, a baby-and-kid-friendly brand tailored for melanated skin, debuted in April 2022. Founders Gabrielle Union and Dwyane Wade created the brand in response to a “lack of options for children of color.” Proudly launched its first haircare range in September 2023.

Luxury Family Hotels in the United Kingdom is also tapping into gen alpha skincare with its October 2023 addition of Little Ishga, a series of



BEAUTY



## Many gen alphas have their own skincare routine.

Kimberley Ho, founder and CEO, Evereden

treatments for young customers aged from three to 16, designed to “alleviate stress and encourage self-care from a young age.” The brand also wants to encourage the entire family to enjoy its spas together.

As gen alphas approach the world of beauty, they are exchanging learnings in this space with their parents. Ranice Faustino, marketing communications head at *Vogue Philippines*, tells VML Intelligence that as a millennial mother she would often share makeup with her 12-year-old daughter: “She gets my makeup, I get her makeup. I learn a lot from her as well.” This sharing culture extends into beauty content, where Faustino would be open to trying influencer recommendations with her daughter.

### Why it's interesting

“Gen alpha are engaging with beauty earlier than their siblings and older family,” says Ho. As this generation soak up skincare learnings from social media, some are already sharing their regimes with the world, with the full support of their parents, making it a rich market for beauty brands to focus on.

→ Little Ishga products in use at Luxury Family Hotels

**VML**









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# Gothic grace

Beauty now channels the subversive power of witchcraft.

VML



↑ Isamaya Beauty

Seasonal runways are serving up gentle gothic glamor for 2024 in the form of dark lips and eyes, and dramatic statement lashes.

The witch was the inspiration behind Dior's show at Paris Fashion Week in September 2023, with models walking with bare lips, delicately stained black, set against luminous skin. Dior Makeup creative and makeup image director Peter Philips told *Harper's Bazaar* that his brief from creative director Maria Grazia Chiuri was informed by "women being seen as witches in a male-dominated world in Italy for generations."

For the Junya Watanabe show, also in Paris, avant-garde makeup artist Isamaya Ffrench channeled Joan of Arc, giving models pale glossy skin, faint brows, and a black lip. Ffrench also posted a YouTube tutorial in October 2023, demonstrating an innovative seasonal Woodland Nymph look featuring spiky brows made from natural plant thorns.





↑ Isamaya Beauty

Lavish lashes add to the dramatic look. Makeup artist Vanessa Icareg created a clumpy, charred lash effect, showcasing shades from the Industrial Color Pigments 2.0 and Wild Star palettes by Isamaya French Beauty. Extravagant lashes were also at the Victoria Beckham spring/summer 2024 show, highlighting the brand's new Vast Lash Mascara to create "drama that was just the right side of spidery" according to *Vogue*.

As explored in our "Age of Re-enchantment" report, the witch is a tool of provocation, symbolic of a new disruptive power that embraces femininity, ecology, and the spiritual. And witchcraft's influence on cultural narratives, aesthetics, and beauty is on the rise. Wellness brands such as Palm of Feronia and Kate Moss's Cosmoss draw heavily on mystical cues. British perfumer Vyrao has even tapped a psychic to cocreate its scent *The Sixth*.

#### Why it's interesting

Beauty brands are serving up the tools for ethereal gothic glam looks that tap into a subversive spirit. The witch stands for an assertion of feminine power, and a challenge to the status quo. Younger cohorts are finding comfort here, with more than 51% of generation Z expressing interest in non-traditional spirituality.



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# Slow beauty

Beauty brands adopt a sustainable and measured approach to formulating potent skincare.



↑ Vintner's Daughter

Vintner's Daughter released its third product in 2023, the Active Renewal Cleanser. The 10-year-old beauty brand is diligent in nurturing its products with a slow and attentive approach. "I started Vintner's Daughter to apply the same methodical commitment to quality and craftsmanship to skincare that I knew from my winemaking background," founder April Gargiulo tells VML Intelligence.

The three skincare products prioritize whole plants over synthetics and extracts, and each bottle takes three weeks to produce, which Gargiulo explains is 66 times slower than industry average. She believes that high-performing standards come with time invested: "Luxury isn't necessarily a





↑ Vintner's Daughter

price tag or fancy packaging, but it's really about the quality of the raw materials, the intentionality, the meticulousness with which those raw materials are put together." The company took four years to master the formulation of its latest release, delighting fans of the brand, who include Gwyneth Paltrow and Tracee Ellis Ross.

Stella McCartney and LVMH launched the beauty line Stella in summer 2022. McCartney says: "We worked hard for almost three years with LVMH

constantly evolving and aiming for what I felt was possible: rooted in nature, truly effective, and responsible skincare. It's a gamechanger and I want to share it with everyone."

Skincare startup Dieux has a clear mission to focus on quality products and to be transparent about price and sustainability. In addition, in October 2023 the brand told *Fast Company* that its strategy is to "sell fewer products." Dieux's bestsellers include the \$25 Forever Eyemask, which, as the name suggests, is designed to be reused, unlike many other single-use eye masks.

*Vogue Philippines'* beauty editor Joyce Oreña tells VML Intelligence that she believes consumers are increasingly "conscious and ethical," and "no longer just focus on the efficacy of the product, but also on how it was made." These new beauty standards align with consumer expectation. Eighty-three percent of people globally say they expect brands to play their part in solving challenges like climate change and 85% say they want their money to go to a brand that reflects their values.

#### Why it's interesting

"Slow beauty is a more mindful approach with a focus on less waste, better ingredients, and quality over quantity," Gargiulo says. With the eco-conscious consumer in mind, beauty brands are pumping the brakes and slowing production down in an attempt to change an industry focused on constantly churning out products to sell.



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# Branded spas

Beauty experiences are key to unlocking consumer affinity.

**VML**

↑ Guerlain Spa at Raffles London at The OWO

Haute beauty brands are opening standalone branded spas that offer a host of wellness services. These spaces act as an opportunity for brands to showcase what truly sets them apart, while serving to enhance consumers' perception of their expertise.

In summer 2023, Sisley-Paris debuted *Maison Sisley New York* in the city's Meatpacking District, its first maison in North America. The 2,675-square-foot space offers four treatment rooms, makeup stations, and a dedicated hair boutique, all created with the aim of providing "an escape to take care of yourself," the brand says.

Guerlain has thrown its hat in the ring too, with the 2023 opening of the Guerlain Spa at Raffles London at The OWO. The 27,000-square-foot, four-story spa is located within the new Raffles hotel in what was formerly the city's historic Old War Office building. As Guerlain's first UK spa, the brand has launched an exclusive treatment called *Spirit of London* to make the



experience even more unique. This mind and body treatment, based around massage, “targets tensions related to travel, environmental stressors, and a busy lifestyle,” Guerlain says.

Augustinus Bader opened The Skin Lab in London in early 2023, followed by a branch in New York. Charles Rosier, the brand’s CEO, told *Glossy* that the spas allow the brand to “reshape the experience the way we want, from the feeling of entering the location to experiencing the treatment.”

### Why it’s interesting

Beauty brands are responding to the demand for in-person experiences by curating their own holistic health and wellness treatments, carried out within standalone spas that can enhance and expand their brand ethos.

↓ → Augustinus Bader at Lanserhof at The Arts Club London









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# Skिंगestibles

Skincare and nutrition converge for a lucrative and growing wellness opportunity.



↑ HyaCera by Ritual



Ingestible beauty supplements are on the rise. In the United States alone, Mintel predicts the supplement market will grow to \$45 billion by 2027, with skincare ingestibles emerging as one of the most exciting new opportunities for brands.

Now nutritional supplement brands and cosmetic skincare companies are innovating into the space, blurring category boundaries to meet consumer demand. Leading health supplement brand Ritual, for example, made its first foray into the beauty space in May 2023 with the release of its HyaCera Daily Skin Hydration supplement. Made with traceable ingredients, the once-a-day capsules purport to support the skin's moisture barrier and help minimize wrinkles.

French nutricosmetic brand Aime started originally as a skin supplement brand in 2018, before branching into topical skin cosmetics to offer a two-pronged skincare ritual for its consumers. Aime officially launched in the United States in 2023 and is now on a mission to expand globally.

A survey from beauty research outlet The Benchmarking Company found that 76% of US women expect beauty brands to offer supplements to complement their topical offerings, which is precisely what traditional skincare brands are starting to do. Murad was one of the first, launching three supplements for aging, acne, and skin brightening, while Neutrogena has also taken its first steps into skincare supplements. Its partnership with 3D-printed vitamin stack brand Nourished, which debuted at the Consumer Electronics Show (CES) 2023, hints at the potential of personalization within skincare supplements.



↑ HyaCera by Ritual

### Why it's interesting

Skincare ingestibles offer nutrition brands a way to tap into the beauty consumer, while giving skincare brands an opportunity to embed themselves further into the burgeoning health and wellness space.



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# Nail couture

Elevated manicures become the latest statement accessory.



↑ Beauty Tech Art Spa exhibition, courtesy of Izzy Scott

Nail art is no longer a niche affair and as customers flock to salons in greater numbers, artists are upping their game with ever-more inventive nail art. Among the most avant-garde names in this genre—whose work, admittedly, one might not see in the average salon—is Tokyo-based Tomoya Nakagawa. His designs span the fantastical, with elaborate droplets of water emerging from the nails; talons embellished with metal and jewels; and nails that resemble futuristic, purple-toned claws. His nature-inspired designs are crafted via CAD, 3D-printing, and airbrushing techniques, according to a *Dazed* profile.





↑ Beauty Tech Art Spa exhibition, courtesy of Izzy Scott

Taking a more delicate, but no less inventive turn, is US-based artist San Sung Kim. Her designs span Halloween-themed nails adorned with glossy black bats' wings; transparent nails in which a rose appears trapped, with "bleeding" accents, to symbolize "a broken heart"; and a dreamy-looking nail design complete with metal ticking clock hands, which Kim says is "mildly influenced by Dalí's *The Persistence of Memory*."

And viewing the nail salon through a conceptual eye is Beauty Tech Art Spa, a group exhibition that opened in late October 2023 at London's Borough Yards, billed by its curator Cornershop as "a response to nail salons across London run by various ethnic groups." The exhibition spotlights the work of six female artists, including Zoë

**\$12.83 billion**

**The global nail salon market will be worth \$12.83 billion in 2024.**

**Grand View Research**

Argires, Hoa Dung Clerget, and duo Athen Kardashian and Nina Mhach Durban, who variously "respond to the conceptual nail bar with their own aesthetic and cultural influences," Cornershop says. This translates to works that draw on a "literal nail bar," while others, Cornershop notes, "invoke perceived cultural expectations" and salons as "loci of communal activity."

#### **Why it's interesting**

Grand View Research predicts the worth of the global nail salon market will be \$12.83 billion in 2024. This is spurring salons to distinguish themselves with innovative design techniques that are more artistic, elaborate, and inventive than ever.



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# Bio scentsation

Beauty innovators are reimagining fragrance.



↑ Future Society fragrances, courtesy of Arcaea



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Arcaea, a biology-first beauty company whose revolutionary scent technology has received funding from the likes of Chanel and Olaplex, is on a mission “to make biology the most desired technology in beauty,” according to CEO Jasmina Aganovic.

The company launched a new fragrance brand, Future Society, in October 2023, turning to biology and science for creative inspiration. “Science is about more than clinical studies,” Aganovic said. “It also represents new creative tools.” The first release is a collection of six perfumes made from the sequenced DNA of extinct flowers. “Fragrance has always been rooted in powerful storytelling and sensory experiences,” Aganovic explained. “We are excited to show how biology can create new stories and product experiences.”

Arcaea developed ScentArc, a technology that works with underarm microbiomes to prevent odor, in March 2023. “When it comes to the \$25 billion deodorant category, the underlying science relies on approaches developed in the 1800s: masking smells, killing odor, or blocking and absorbing sweat,” Aganovic said. “We saw a better solution through biology, using technologies that didn’t exist until recently.”

VML



↑ Kering Creed, courtesy of Creed

These innovations come at a time when the fragrance category is garnering increased attention from major players. Kering acquired luxury fragrance house Creed in October 2023. Richemont is doubling down on fragrance with its new Laboratoire de Haute Parfumerie et Beauté division, launched in September 2023, and LVMH reshuffled its beauty leadership in March 2023 to prioritize fragrance.

#### Why it's interesting

The fragrance category is heating up. Expect to see increased investments in, attention to, and innovation of fragrance.



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# A-Beauty

Beauty brands born on and inspired by Africa's vast continent take their approach global.

With Euromonitor predicting that the African beauty and personal care market will be worth \$8.2 billion in 2023, rising to over \$10 billion by 2025, this is clearly a market to watch.

And to cater to the unique needs of consumers in the region—and the continent's diaspora—local brands are emerging that combine Africa's wealth of natural ingredients with cutting-edge innovation. Uncover, a Kenya-based startup that operates in Kenya and Nigeria, offers skin care and sunscreen tailored to women in Africa and women of color. Black skin often has distinct needs, such as being drier and more delicate than Caucasian skin, yet few products are tailored to its specific requirements. While Uncover was founded in Kenya and informed by the region, its products are manufactured in Korea, with the brand stating it fuses "innovative K-Beauty skincare technology with African botanicals." Among its range is the Aloe Invisible Sunscreen, formulated to leave no white cast on those with darker skin tones, and infused with African aloe vera, hyaluronic acid, and SPF 50+ protection.

54 Thrones was founded by American Christina Tegbe, informed by her upbringing, which she describes as "rooted in the cultural essence of Nigeria." The brand's products draw on ingredients such as Ghanaian and Ugandan shea butters, baobab oil, and jojoba oil, and are composed of "high-quality, African-grown ingredients... to create sustainably made beauty products inspired by ancient traditions." The brand's name also references the continent, nodding to Africa's 54 countries.

In the color cosmetics sphere, Emolyne was founded by Emolyne Ramlov, who is Ugandan-born, Denmark-raised, and based in London. While the brand is British, Ramlov created it with her African heritage in mind, with





↑ Emolyne cosmetics

each nail and lip shade formulated to suit different skin tones and undertones, and each of the shades named after a different African location. Among them is Fes, a muted peach nail shade, and Uganda, a deep mauve tone for lips.

### Why it's interesting

Alongside offering compelling natural ingredients, African beauty brands that are created with Black skin tones and skin types in mind are in an ideal position to capitalize on the African beauty market's predicted growth. Unlike a global brand bringing its aesthetic to the region, these brands are shaped around the needs of African consumers. And thanks to their expertise in Black skin's needs, these brands are also well placed to cater to the Black community globally, who have historically found themselves underserved.

**VML**



↑ Emolyne Ramlov, founder of the eponymous cosmetics brand



BEAUTY

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# EQ beautification

Emotional wellness redefines beauty.



↑ Body Proud collection by I Am Proud



Beauty startup I Am Proud wants to instill confidence and positivity in everyone. The company started in 2020 with its skincare range and launched haircare and bodycare collections in 2023. The Body Proud formulae feature a patented “mood-boosting fragrance technology that is scientifically proven to have specific mood benefits,” Maria Sarris, NPD manager at Body Proud, tells VML Intelligence. The fragrances took two years to produce, and use a bespoke system that “leverages neuroscience to test the benefits, exploring the results through brain scans, eye tracking, and facial coding psychology to quantify the benefits,” says Sarris. Users can choose to feel confident, invigorated, empowered, energized, or chilled.

Selfmade, featured in “The Future 100: 2023,” is paving a new way to talk about beauty. “We use psychodermatology as the window into our emotional world,” Selfmade founder and CEO Stephanie Lee tells VML Intelligence. “We’re using our skin as data points into our emotional world in order to truly take care of ourselves in a deeper way.” Each of Selfmade’s products is paired with a core behavioral concept—a direct correlation meant to evoke a new beauty prescription for consumers.

A new initiative called NeverAlone.Love, by Priyanka Chopra’s Chopra Foundation in partnership with Cosmoss, launched in January 2024, centered around emotional wellbeing and mental health. A year-long series of programs and events will bring it to life.

Glossier CEO Kyle Leahy spoke to *Glossy* about the brand’s emotionally attuned approach. “Beauty, to me, is a feeling. I have a four-year-old and a one-year-old. I [think about] how I want them to feel in the world, how I want them to feel about themselves, how brands can play a role in



↑ Body Proud collection by I Am Proud

elevating confidence and how a beauty company, in particular, can help drive that.”

### Why it's interesting

Beauty brands are harnessing the benefits beauty can have on emotions, identity, and mental wellness, transforming traditional products and beauty talk into an empowering movement filled with feelings.





↑ Body Proud collection by I Am Proud  
→ Hair Proud by I Am Proud







# Bioharmonizing spas

Gone are the days of biohacking—instead,  
welcome bioharmonized balance.



↑ Six Senses Rome's modern-day take on the Roman bathing journey

Paul Chek, wellness coach and founder of the Chek Institute, considers bioharmonizing “your ability to be aware of what’s happening in yourself with your body.” Wellness programs are increasingly adopting this thinking by offering therapeutic treatments that are individualized and measured, and promote long-term preventative strategies for the body and mind.

“When it comes to the idea of bioharmonizing, we see it as a more gradual option than biohacking,” Dr Tamsin Lewis, medical advisor at Six Senses Ibiza’s RoseBar, tells VML Intelligence. Lewis implements a program of gradual improvements, giving time for body awareness. She believes that enabling bioharmony activates “true wellness” and offers “improvements that strengthen your physiology and psychology, while





← RoseBar at Six Senses Ibiza

giving your body enough time to repair and regenerate.” Six Senses Rome opened in March 2023, with a spa inspired by ancient Roman rituals paired with modern treatments, following similar principles to RoseBar.

Kintsugi Space opened its six-floor flagship women-only wellness sanctuary in November 2023, inviting members to “rest, repair, reset, and renew.” The members-only club is located on Al Reem Island, Abu Dhabi, and takes a holistic approach to health. Experiences include ayurveda, naturopathy, psychology, and quantum technology, in a mission focused on healing and repair for body and soul.

The SHA wellness clinic focuses on “adding years to life, and life to years.” The programs aim to provide rebalance, advocating natural therapies and boosting emotional health. Currently only available in Spain, SHA will expand to Mexico and the UAE in 2024.

#### Why it's interesting

Quick health hacks are being replaced with longer-term treatments at spas that promote healthspans in slow and measured steps (for more on prolonging lifespans, see trend #81 Longevity resorts on page 202).







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**Retail**

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# Retail guilds

Department stores are going beyond shopping,  
launching exclusive members-only clubs.

VML



↑ Gordon Ramsay at Harrods The Residence Shanghai

Harrods opened its first members-only club, The Residence, in Shanghai at the end of 2023. The space features a bar, a lounge, private dining rooms, and outdoor terraces, as well as a high-end restaurant helmed by Gordon Ramsay. It also offers members ultra-premium services in aviation, real estate, interior design, and personal shopping, as well as access to private events and masterclasses hosted by brand partners.

Criteria for admission will be more discerning than those of other members clubs, *WWD* reported. "It will be based on lifestyle and interests. It's based on a community and that's really what we're trying to deliver—communities of passion, be that for collecting whisky, be that for





↑ Selfridges Unlocked, courtesy of Selfridges

entertainment, be that for art,” said Sarah Myler, international business development and communications director at Harrods. The result will be “a space that delivers unrivaled customer service, but is programmed to like-minded people.”

In July 2023, Selfridges launched its new loyalty membership program, Selfridges Unlocked. While it isn’t affiliated with a dedicated physical space, the program gives members similar benefits—unlocking access to community programming such as supper clubs, film releases, and beauty masterclasses.

#### Why it’s interesting

Shoppers are looking for more than just products from retailers. “It’s not just the product,” said Ashley Saxton, director of restaurants and kitchens at Harrods. “It’s the experience that comes with it.”



↑ Harrods The Residence Shanghai





# Imagination stores

New concepts for fantastical digital spaces unshackle retail stores from physical boundaries.

VML

Showcasing the most experimental take on this idea, digital artist Benjamin Benichou, founder and CEO of social commerce platform Drop, has imagined generative-AI-designed Nike concept stores in myriad locations. Among these boundary-breaking spaces, which Benichou calls Impossible Stores, are futuristic-looking designs in traditional Japanese architecture in Kyoto; another appears on Mars; and another has been imagined as a geometric cube atop Mount Everest. Benichou tells VML Intelligence he believes “these unconventional ideas can inspire real-world retail design by pushing architects and designers to think beyond the norm and to consider new materials, shapes, and structures that can elevate the retail experience.” In addition, Benichou imagines “by collaborating with AI, we can reach new heights of creativity and push the boundaries of what’s possible.”

Generative AI companies such as Dalle-E and Midjourney are promising tools that can enhance creativity and ignite the imagination—and they are becoming more accessible. Adobe Firefly was released for commercial use in October 2023, allowing those with Adobe Creative Cloud to easily generate their own AI visuals using simple text prompts. The company calls Adobe Firefly “your imagination’s new best friend.” Chris Duffey, strategic development manager for Adobe Creative Cloud, tells VML Intelligence that “generative AI is really having a profound effect on the creators and the outputs as well.” Duffey also observes a broader business opportunity: “We’re now starting to see the second wave of generative AI’s impact on creativity—the business of creativity—where it’s ushering in whole new business models, new reinvention strategies, new innovation capabilities for the creative agencies and companies.”



Generative AI aside, brands are transporting shoppers to new destinations using metaverse tools. Bloomingdale's invited shoppers to step into a surreal chocolate factory inspired by Willy Wonka in November 2023. The Wonka Room uses Emperia's VR platform to allow visitors to engage in a treasure hunt, shop the collection, or simply enjoy being surrounded by an assortment of giant chocolate.

In summer 2023, Ralph Lauren unveiled The 888 House, a fantastical virtual store set within a desert landscape. In an interview with *Wallpaper* magazine, David Lauren, Ralph Lauren's chief branding and innovation officer, said: "Creative innovation is at the heart of Ralph Lauren's DNA and we're on a journey to bring our brand to life in new ways to engage the next generation of luxury consumers, who are dreaming and living more and more in the digital space." For more on this theme read VML Intelligence's "Into the Metaverse" primer.

#### Why it's interesting

Fifty-seven per cent of millennials have tried or would like to try stores in virtual worlds and 63% are interested in VR commerce. In response, brands are creating immersive, imaginative spaces that allow consumers to step into the company's world, and showcase creative flair and a preview of the future of ecommerce.



**These unconventional ideas can inspire real-world retail design by pushing architects and designers to think beyond the norm.**

**Benjamin Benichou, founder and CEO, Drop**



↑ AI-generated Nike concept store on Mars, Benjamin Benichou





↑ AI-generated Nike concept store on Mars, Benjamin Benichou



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# Next-gen collectors

Don't call them luxury consumers—call them luxury custodians.

The concept of true luxury is shifting. Jing Zhang, global editor-in-chief of *Jing Daily*, tells VML Intelligence that “rarity could be taking the place of price as the signifier of luxury, as high-net-worth consumers increasingly want to be collectors.”

Zhang says: “The importance of experiences will overshadow past obsession with must-have ‘it’ items, as retail, luxury, and commerce in China come with more texture, cultural nuance, and intellectual thought.”

Fashion designer Phoebe Philo is taking this to heart, offering a new formula for luxury fashion brands that pairs extreme rarity with heritage longevity. Her long-awaited eponymous label dropped its first collection in October 2023 to great fanfare—but it is eschewing the traditional rules of luxury fashion. The label will not host fashion shows or adhere to a seasonal release schedule.

Instead, it will release limited and unpredictable drops of pieces that are meant to be acquired over time, discouraging the practice of overhauling wardrobes each season with the latest designs.

“Our aim is to create a product that reflects permanence,” Philo says. “The Phoebe Philo business model is designed to create a responsible balance between production and demand. For us, this means producing notably less than anticipated want.”

Other luxury brands are also embracing the museumification of consumption. “Designer houses are marketing formerly disposable beauty products into collectibles,” *Business of Fashion* reported in August 2023.





↑ Future Frequencies: Explorations in Generative Art and Fashion at Christie's

Guerlain released a heritage collectible perfume bottle in November 2023. Called the Black Bee Prestige Edition, the bottle was crafted by French jeweler Lorenz Bäumer and crystal manufacturer Baccarat. The run is limited to 22 bottles, which will sell for €25,000 (\$27,380) each.

Gucci is stepping into the curatorial space with a digital art auction in collaboration with Christie's. Called Future Frequencies: Explorations in Generative Art and Fashion, the auction presented 21 NFTs and was open for bidding in July 2023. Artist Claire Silver, who presented two pieces at

**VML**



the auction, says her works are intended to celebrate the era of AI, including "the depth of cultural heritage and the light of the future."

#### Why it's interesting

The role of the luxury brand is evolving. "Luxury brands need to act as guardians of craftsmanship and provenance," Fiona Harkin, foresight editor at The Future Laboratory, told Luxury Society. The next era of luxury will be defined by collection, not consumption—turning brands and consumers alike into curators and stewards of luxury goods.



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# Community-centric retail

A community feel is helping shopping districts to flourish.



↑ Kingland initiative in Poole, United Kingdom, supported by LGIM Real Assets

Shopping districts have been struggling with footfall, especially those in lower tiers, where Coresight Research in the United States reports subpar occupancies. Now community-centric initiatives are helping to reverse decline.

One tactic sees developers bet big on independent traders to create a community feel. In Poole, in the United Kingdom, an imaginative project is transforming Kingland Crescent. The once rundown shopping street is now home to 10 thriving independent local retailers, including a record store, a coffee roaster, a fishmonger, and a jewelry store. The brainchild of LGIM Real Assets (a division of financial services company Legal &





↑ Airside mall, Hong Kong, by Nan Fung Group, designed by Snøhetta

General) the project offered units to budding local traders rent- and rates-free for a fixed two-year period from 2021. The key to meeting consumers' needs is to offer "an intentional place-based approach," Deniz Ibrahim, head of retail and futuring at LGIM Real Assets, tells VML Intelligence. These locations can become the heart of the community by also "integrating key local-service-driven anchors," such as healthcare, education, and workspaces.

Legal & General, which is offering mentoring and legal advice to tenants, hopes the approach can form a blueprint to be adapted for other struggling towns and cities. "Our occupiers have seen huge success since launching at Kingland, where they have been able to learn, grow, and scale up," Ibrahim explains. "They're growing at such a pace that they're employing others and creating new local jobs. In its first year, Kingland

generated an additional £2.2 million of spend and we're seeing turnover grow by over 35% year on year."

In the United States, malls catering to Asian customers are bucking a downward trend, also thanks to their community feel. NBC reported on the dynamism of Asian malls as social gathering spaces that offer entertainment, events, and a vibrant atmosphere, from night-market dining and mom and pop stalls to dancing and K-pop merch.

The lure of connection now informs the design of new shopping districts. At the new Snøhetta-designed Airside development in Hong Kong, the Nan Fung Group proposes the concept of wholeness, inviting "the community to gather at a place where you can be yourself and connect to others and nature."

As Ibrahim suggests, complementary offerings that draw a local crowd are also proving their worth. British startup Patch is building neighborhood shared spaces that drive additional footfall to retail locations. Venues are inspired by a work-near-home concept, which imagines how work-life balance could be improved without the dreaded commute. Founder Freddie Fforde tells VML Intelligence that the brand's mission is "to create opportunity for people, work, and community on every UK high street."

### Why it's interesting

Fifty-six percent of people in the United Kingdom, the United States, and China say "there's no sense of community anymore." Retail districts that find creative ways to help people reconnect can plug the gaps left by disappearing shared public spaces.



↓ Reading room in Patch workspace, High Wycombe, United Kingdom. Photography by Benoît Grogan-Avignon





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# The thrift economy

As inflation continues to bite, retailers must empower thriftier habits.

**VML**

VML Intelligence's data confirms that the cost of living is people's top concern today, with 64% globally selecting it as one of the five most pressing issues facing society. While the long-term economic outlook looks brighter, consumers will still be feeling the pinch in 2024. According to the IMF "the global economy is limping along, not sprinting" and "most countries aren't likely to return inflation to target until 2025."

Globally, consumers are showing resilience by adapting to thriftier and more dynamic shopping habits. In China the hashtag "downgraded spending" was one of 2023's trending topics on social media platform Weibo, while discount-focused website Pinduoduo's revenue grew 63% year on year. This mindset is global. According to McKinsey, 80% of US consumers (and 88% of gen Z and millennials) are seeking value by trading down to different products.

These shopping behaviors will continue in 2024, and brands and retailers will need to leverage low-price strategies that support this savvy shopper. Canadian food delivery app SkipTheDishes does this with its Inflation Cookbook grocery shopping tool. This predicts the biggest price drops among 400 popular ingredients across 100 grocery stores and uses the data to create affordable "chef-inspired" shoppable recipes. In France, supermarket giant Carrefour is positioning itself as an ally to consumers by taking a stand against "shrinkflation"—reducing a product's size or quantity while keeping its price stable. In-store signage is naming and shaming brands employing the tactic until they agree to lower their prices.

Petcare brand Wilder Harrier is looking beyond low prices to support its customers. It is creating a network of Community Pet Pantries, where



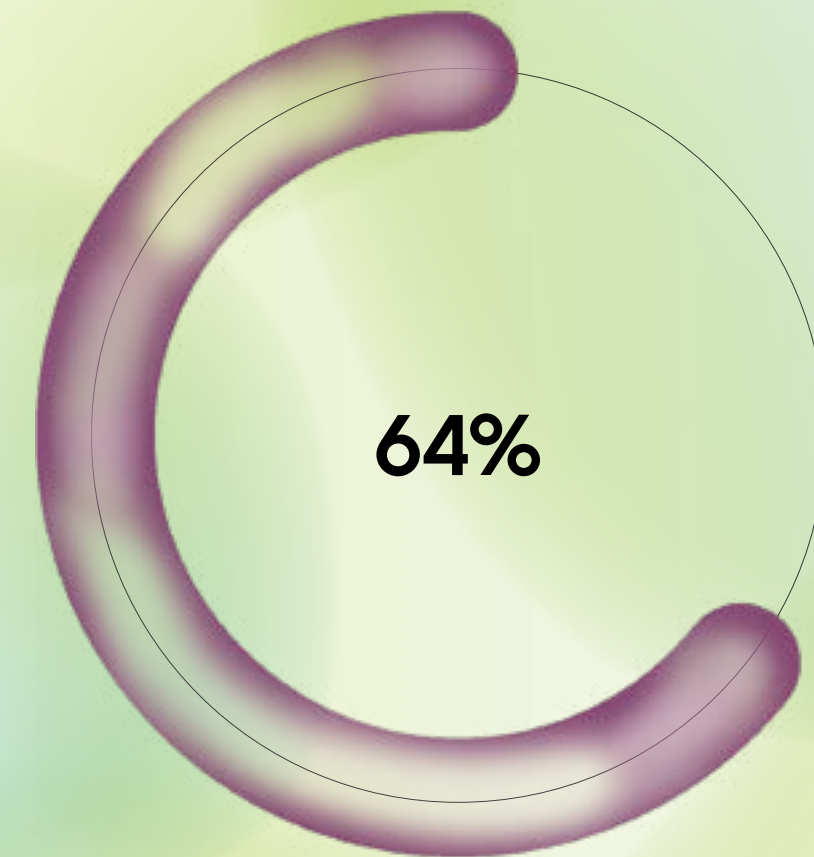


↑ The Inflation Cookbook by SkipTheDishes

families struggling with the cost-of-living crisis can pick up donated food for their animals.

#### Why it's interesting

While longer-term economic outlooks are more optimistic, consumers in all global markets will continue to feel the pinch of the cost-of-living crisis in 2024. By responding to the thriftier new consumer mindset, retailers can meet the growing demand for value-based offers, while positioning themselves as strong consumer allies.



**The cost of living is people's top concern today, with 64% globally selecting it as one of the five most pressing issues facing society.**





# Metaversal shopping

Virtual shoppers can now buy physical items.

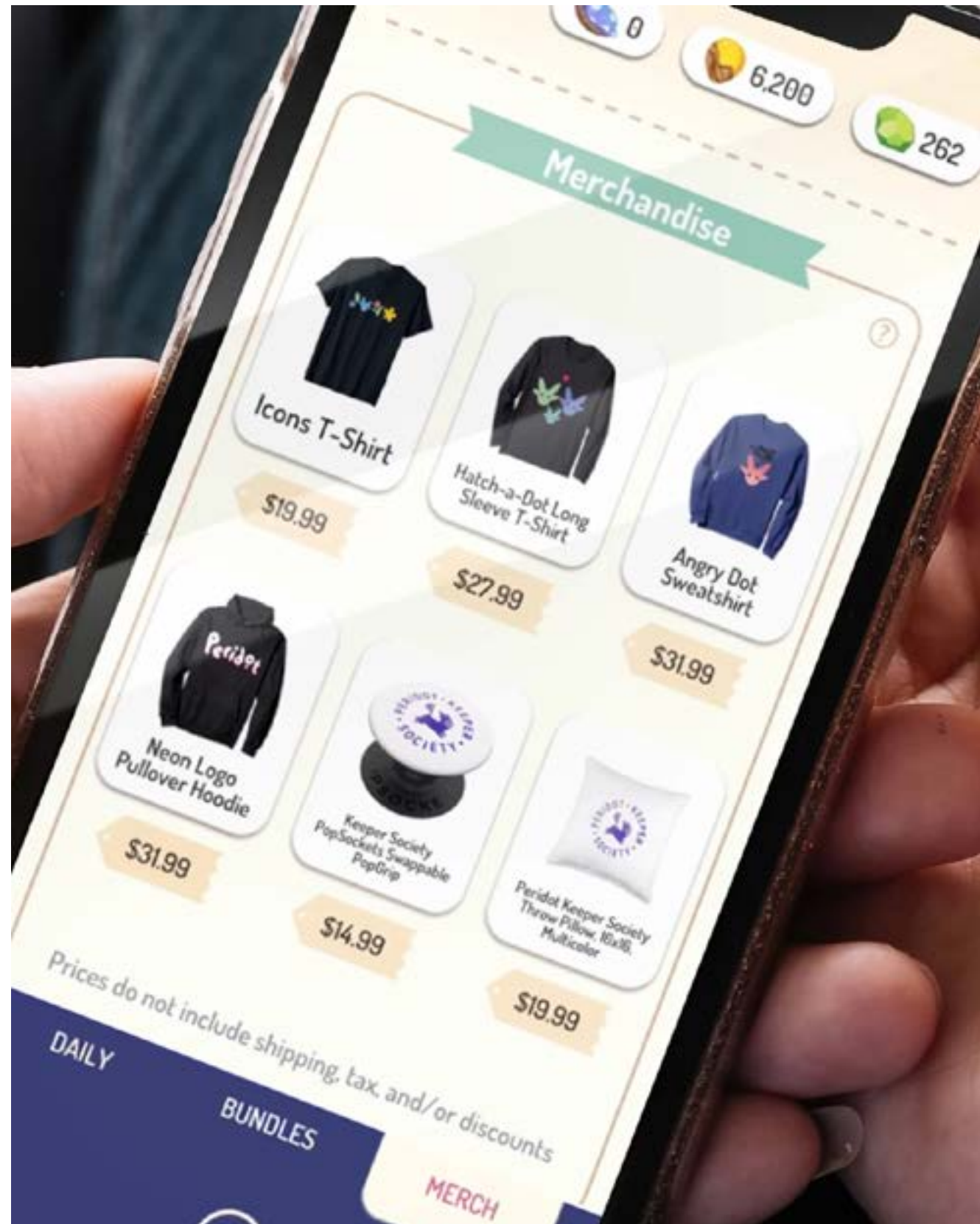
**VML**

Amazon is launching a new service that will allow customers to purchase physical items from stores in virtual store environments, including games, mobile apps, and augmented reality. Launched in May 2023 as an invitation-only offer for developers, Amazon Anywhere will ultimately unlock a new revenue stream for merchants by allowing shoppers to link their Amazon account and make purchases without having to leave their virtual experience. Brands simply display products within their experience and Amazon takes care of ordering, fulfillment, and after-service.

To kick off the launch, Amazon partnered with Niantic Labs, promoting the release of the latter's augmented reality game Peridot. Gamers can stock up on themed merchandise like T-shirts and throw pillows, specifying the size they require, without leaving the game.

The retailer is building out its meta-shopping offer with the addition of virtual 360-degree shopping experiences, this time creating an experience





↑ Amazon Anywhere



that enables fans to buy merchandise for Prime Video series and movies. For its first foray, the brand created an immersive tour of Godolkin University, a key location in the *Gen V* series, which tells the stories of freshmen at America's college for superheroes. The tour culminates at the campus store, where US-based visitors can purchase replica merchandise from a range of 150 items.

#### Why it's interesting

According to VML's "Future Shopper" report 2023, 11% of global shoppers already say they are actively purchasing in the metaverse, but this is likely to refer to virtual items: NFTs or gaming skins and accessories for avatars. The key distinction now is that Amazon is unlocking the ability to purchase in virtual space and receive a real, physical item. By extending the offer to other merchants, Amazon is building the foundations for a new era of metaversal shopping.



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# Luxury retail temples

The age of the mega flagship is here.

VML



↑ Dior flagship store

Luxury brands are creating colossal flagships that envelop shoppers in the brand's world. "You don't want Louis Vuitton having as many stores as Starbucks," Delphine Vitry, founding partner of Paris-based luxury consultancy MAD, told *WWD*. "You need the mega store."

Luxury retailers are snapping up space in the United States. "Gucci, Chanel, and other luxury retailers splurge on American real estate," the *Wall Street Journal* reported in October 2023. According to real-estate investment firm JLL, luxury retailers in the United States leased 650,000 square feet of new space between October 2022 and October 2023, up from roughly 250,000 square feet the previous year. And it's not just more space—it's more consolidated space: retailers signed leases for space



averaging 5,000 square feet or larger from October 2022-2023, which represents a 28% increase from the previous 12 months.

Chanel opened its largest US store in May 2023. The Beverly Hills flagship spans four floors and 30,000 square feet—which more than doubles its previous Beverly Hills footprint. The top floor houses a celebrity VVIP penthouse and 2,690-square-foot rooftop terrace with iconic views of the Hollywood sign. “For me, it’s more a question of image than return on investment,” said Bruno Pavlovsky, president of fashion at Chanel. “We continue to be active on all digital networks, but at the end of the day the experience in the boutique is more than ever a key moment for Chanel.”

Tiffany & Co unveiled its new NYC flagship in April 2023 after four years of renovations. Standing at 10 stories and covering 100,000 square feet, it is one of the city’s largest retail spaces. On the top floor is an invitation-only penthouse for VVIP shoppers.

This shift isn’t isolated to the United States. In London, Gucci opened a five-story, 15,000-square-foot store in September 2023, while Burberry opened its revamped three-floor New Bond Street flagship, which covers nearly 22,000 square feet, in June 2023. And in March 2022, Dior reopened its sprawling Avenue Montaigne flagship in Paris, which houses eateries, a museum, and a hotel suite alongside retail, across over 107,000 square feet.

### Why it’s interesting

Luxury brands are leaning heavily into world building (see trend #36 World-building brands on page 94) for physical presence, creating flagships that represent an all-encompassing experience.



↑ Dior flagship store



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# Retail membership

Paid membership schemes offer a rewarding route to loyalty.







↑ CVS pharmacy

A survey from customer loyalty specialist Clarus Commerce found that 95% of US retailers with traditional loyalty programs are considering launching paid-for membership schemes. This speaks to the growing awareness that the premium programs can offer strong benefits to both consumers and retailers.

Paid-for membership schemes, where consumers pay a regular fee in exchange for discounts and exclusive perks, are nothing new. Indeed, ecommerce data specialist Yaguara reports that 63% of the US population has an Amazon Prime account. However, paid membership remains a vastly underused tactic, with less than 5% of online retailers offering it, according to Jay Myers, cofounder of headless checkout solution Bold Commerce.

Los Angeles-based wellness brand Liquid IV is one of the new wave of companies now offering paid membership in addition to its existing subscription offers. It cites flexibility as the big selling point for consumers who, rather than being tied to curated selections, have more freedom to use their discounts across a wider range of products, can shop whenever they want, and gain access to exclusive merchandise.

US pharmacy retailer CVS's CarePass program costs \$5 per month, but includes \$10 credit, acting as a loss-leader to build loyalty. Adam Volin, general manager of CarePass, told *Retail TouchPoints* that members "make more trips and their baskets are larger." Research from McKinsey backs up this tactic, revealing that "members of paid loyalty programs are 60% more likely to spend more on the brand."

Another benefit for retailers is the guaranteed revenue provided by the membership fee. H&M-owned members-only brand Singular Society says the fees "keep the brand alive," allowing it to orient its manufacturing around quality and sustainability. Erik Zetterberg, the creative director and cofounder of Singular Society, tells VML Intelligence: "This shift enables us to develop and craft products of the highest possible quality and sell them at prices that would not have been possible traditionally. Our idea is to help people buy less by enabling them to buy better."

### Why it's interesting

Despite the potential rewards for consumers and retailers, paid membership programs remain a niche offering. As consumers are only ever likely to commit to a handful of paid memberships, now is the time for retailers to pounce on this limited-time opportunity.



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# Euphoric retail

The pleasure of shopping heightens as retailers enrich the lives of shoppers by deploying joy.

The Joy Project by Ulta Beauty and author Mel Robbins launched in September 2023. The long-term initiative aims to help future generations deepen their connection with beauty and have positive experiences. “We know we can ignite a movement that will help people everywhere live more authentic, and joyful lives,” said Michelle Crossan-Matos, chief marketing officer of Ulta Beauty.

Liberty London’s ongoing Find Joy Within curation sees multicolored smiley faces take over the Regent Street store. First started in early 2023, the collections include “feel-good fashion” and colorful mood-boosting jewelry that delivers cheerful chromotherapy. “Wearing jewelry is an act of self-expression and for me, the perfect way to add some mood-boosting brights to your outfit,” says Ruby Beales, Liberty’s jewelry buyer. “Think candy palettes of enamel, neon beaded bracelets, and juicy stone combinations. There are no rules: sprinkle it on or stack up contrasting shades. This is all about having fun.”

In the fall, ecommerce retailer Terez launched its first physical store in New York City. As visitors enter the store they are struck by the vibrant pink walls, a whimsical balloon chandelier, and the brand’s colorful fashion collections. Terez’s mission is to “celebrate the good parts of life.”

## Why it’s interesting

Brands are giving shoppers a euphoric boost by instilling fun, through design, product curation, and encouraging customers to find their inner joy.



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# AI try-ons

Advances in tech take virtual try-ons from gimmicky to ultra-realistic.

VML



↑ Balmain 3D fitting, Bods

Tech pioneers are developing tools that allow shoppers to virtually try on clothes with avatars that better reflect their own image, and even mimic the way clothes drape and fall in real life.

Los Angeles-based Bods is championing computer-game-like avatars as a virtual try-on vehicle. The company's AI extracts information from photos or key measurement data, which the consumer can then adjust to exactly match their shape. In early 2022, the company, which counts Karlie Kloss among its investors, raised \$5.6 million in a seed funding round.

In November 2023, Bods announced a partnership with French fashion house Balmain, to provide visitors to Balmain's website with a "customized and virtual fitting." Shoppers can dress their custom avatar in "precise



digital recreations of Balmain house signatures and runway designs,” according to Bods. These “faithfully replicate luxury fabrics and tones, as well as the Balmain atelier’s expertise in artisanal construction, embellishing, and tailoring.”

Simon Cottigny, chief digital officer at Balmain, believes the technology will bring benefits for both brand and consumer, saying it will “greatly assist our Balmain customer in making more confident decisions,” in turn improving conversion rates, and ultimately lowering return rates.

In June 2023, Google debuted its virtual try-on for apparel, a feature that the tech giant said “shows you what clothes look like on real models with different body shapes and sizes.” To create images that convey how clothing drapes, wrinkles, and creases in real life, the company has created a diffusion-based AI model. The tool is currently available in the United States from brands such as Anthropologie, Loft, H&M, and Everlane.

British company Anthropics Technology, which creates software for photographers and retailers, has developed Zylar, a virtual try-on service that employs AI. The company says the service increases conversion rates by 18%, and offers it both on brands’ websites and on in-store screens. John Lewis Rental and Marks & Spencer stores currently use the service in the United Kingdom.

### Why it's interesting

AI-powered virtual try-ons are becoming more sophisticated, allowing consumers to literally visualize designs, improving conversion rates for brands, and minimizing wasteful returns.



↑ Balmain 3D fitting, Bods



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**Luxury**

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# Operatic escapism

Over-the-top, extravagant interiors are transporting luxury consumers to another world.



↑ Apollo's Muse

Luxury openings are taking inspiration from the hedonistic abandon and unrestrained extravagance of antiquity. In April 2023, a new members' club opened behind the Bacchanalia restaurant in London's Mayfair. The club, Apollo's Muse, is billed as the "most private of private members' clubs," and will grant membership to only 500 people. The space is characterized by "overstated magnificence," *Conde Nast Traveler* said. Floor-to-ceiling marble, velvet bar stools, and custom Murano wine glasses are just the start—the club also houses a collection of priceless Greco-Roman antiquities from the first and second centuries AD, rivaling some of the world's top museums and galleries.





**People are looking for  
a sense of discovery  
and escapism from  
the everyday.**

**Torquil McIntosh and Simon Mitchell,  
cofounders, Sybarite**

**VML**

← Apollo's Muse. Photography by Johnny Stephens

The restaurant itself, which opened in December 2022, has been described as “a fantasy land of operatic escapism” by the *Standard*. Guest of a Guest describes it as “a Greco-Roman ode to opulence” and, in what the digital media company calls a “shameless display of debaucherous decadence,” the restaurant offers diners \$500 pasta dishes served by waiters dressed in togas, with décor including larger-than-life statues of winged lions, unicorns, and Greek gods. In an on-the-nose nod to Grecian and Roman luxury, a floor-to-ceiling painting reimagines Thomas Couture’s *The Romans in Their Decadence*.

Across the pond, Bad Roman is bringing a similar spirit of decadence and playful irreverence to New York City. Opened in February 2023, it was dubbed by *Eater* “the year’s most unhinged Italian restaurant” where “dining is a spectacle.” The space features a sculpture of a wild boar wearing a neon necklace, trompe l’oeil mosaics, and a full-sized fountain in the bathroom.

#### Why it’s interesting

Designers are applying Greco-Roman opulence to modern luxury interiors. People “are looking for a sense of discovery and escapism from the everyday,” Torquil McIntosh and Simon Mitchell, cofounders of design agency Sybarite, tell VML Intelligence—and they’re finding it in “spaces that transport them away and take them on an adventure.”





↑ Apollo's Muse. Photography by Johnny Stephens



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# Secluded sanctuaries

Private islands become the go-to paradise retreat for the elite.

VML



↑ La Isla Secreta, courtesy of Rosewood Mayakoba



Surrounded by a pristine coral archipelago rests a 1.7-hectare secluded retreat, opening in early 2024 for those prepared to hire out the entire island. Part of new developments by Red Sea Global (RSG), the Thuwal Private Retreat in Saudi Arabia centers on uber luxury for guests wanting a highly personalized and private vacation. After arriving at the island's jetty, visitors will be able to stay at the three-bedroom villa or three one-bedroom suites. Private concierges, butler services, and executive chefs will be part of the crew available to offer a curated and exceptional experience.

"Thuwal Private Retreat has been created to allow guests the chance to disconnect from the stresses of daily life, and instead reconnect with their closest companions," says John Pagano, group CEO of Red Sea Global. "Our belief is that the sublime Red Sea coast combined with tailored luxury experiences will deliver a peerless escape for the most discerning travelers."

In Greece, the private island Skorpis, known for hosting the wedding of shipping tycoon Aristotle Onassis and his bride Jacqueline Kennedy in 1968, will reopen in 2024 after three years of renovation and an estimated \$200 million to transform the tiny Greek island into a lavish private resort. The VIP complex can accommodate up to 50 visitors and will cost over \$1 million per week to rent in its entirety.



↑ La Isla Secreta, courtesy of Rosewood Mayakoba

Rosewood Mayakoba in Mexico has a secluded new venue, La Isla Secreta—a private, undisclosed island within the resort, accessible only by boat. The retreat within a retreat, opened in January 2023, offers guests the chance to truly disconnect and feel pampered.

#### Why it's interesting

Seventy-six percent of high-income earners say they prefer to spend money on experiences rather than things and 25% agree that luxury today means experiences very few people will achieve. High-end, personalized vacations on private islands are luring the upper echelons to unique experiences away from the masses.



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# Invite-only spaces

Luxury access focuses on who you know for an additional, tantalizing layer of exclusivity.

VML



↑ Harrods The Residence Shanghai

From exclusive members' clubs to idiosyncratic fine-dining experiences, invitation-only luxury concepts are on the rise. In late 2023 Harrods opened The Residence in Shanghai, a private members' club that, *WWD* reported, evolved out of the retailer's invitation-only personal-shopping concept. The Residence will initially accept no more than 250 members and will only consider additional members in the future through peer nomination—according to Harrods, this is to ensure “total privacy and discretion” (see trend #61 Retail guilds on page 156).

In early 2023, New York-based French chef Yann Nury debuted La Résidence Soho, an invitation-only space on the light-filled 12th floor





↑ La Résidence Soho kitchen. Photography by David Chow

of a SoHo building, where Nury says guests can “witness the artistry of our culinary team in an open, state-of-the art kitchen as well as taste their creations.” The aesthetics of the space are just as important as the culinary experience, with the loft designed in collaboration with French architect Charles Zana and decked out with Italian marble worktops, a custom Molteni stove, and 1960s Pierre Chapo S11 chairs, the *New York Times* reported. There is no contact phone number—*Air Mail* noted that “instead, like with anything good in the city, you have to know somebody who knows Nury.”

London-based restaurant Caviar Kaspia reopened in early 2023 as a private, invitation-only club. The establishment focuses on the art of caviar and has locations around the world that, unlike London, are open to the public.

#### Why it's interesting

By 2024 the global average adult will be worth \$100,000 and by 2026 there will be 87.5 million people with a minimum of \$1 million in wealth, according to Credit Suisse. As more people become luxury consumers, exclusivity will not only be based on wealth, but also accredited to connections.





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# New luxury frontiers

As the global luxury market slows, brands look east for growth.

VML

Asian luxury is hotting up, and it's not just about China. In November 2023, Bain & Company noted that "Southeast Asian countries experienced positive momentum" in the global luxury market, while India, Thailand, and the Philippines were among BCG's picks for growth at the FT Luxury Summit in May 2023. Now luxury brands are now looking to ramp up their presence in the region.

Dior became the first major Western label to host a seasonal runway show in Mumbai, unveiling its pre-fall 2023 collection against the dramatic backdrop of the Gateway to India monument. The location choice underlines the growing significance of the Indian luxury consumer, not to mention the nation's cultural heft (see trend #33 Brand India on page 87). Knight Frank India forecasts that the number of people in the country with more than \$30 million in wealth is set to grow by almost 60% between 2022 and 2027.

Luxury retailers from Hermès to Christian Louboutin are opening stores in Indian cities despite spiraling rents, according to *Bloomberg*. To capitalize on growing interest, Indian conglomerate Reliance Industries opened the Jio World Plaza in November 2023. The upscale luxury mall, situated in Mumbai's Bandra Kurla Complex, hosts 60 luxury brands including Dior, Gucci, Balenciaga, and Louis Vuitton alongside leading Indian designers such as Manish Malhotra and Falguni Shane Peacock.

In Thailand, in October 2023, the Siam Paragon complex in Pathum Wan launched Luxe Hall. Operated by Siam Piwat, the space hosts 20 luxury brands, including the first Thai store for understated Italian label Loro Piana, as well as men's collections from Fendi and Louis Vuitton. Thailand is enjoying growth in its luxury sector thanks in part to an influx of tourism.





## The pace of growth within Southeast Asia is really fast.

Jing Zhang, global editor-in-chief, *Jing Daily*

Jing Zhang, global editor-in-chief of *Jing Daily*, tells VML Intelligence that cities like Chengdu, Shenzhen, and Bangkok are developing so fast that they are “presenting a challenge to the experience you get in London or Paris.”

Vietnam is also tipped as a rising star thanks to a growing middle class, and forecaster Statista predicts a billion-dollar market by the end of 2023. Zhang describes it as “an incredibly dynamic place with a lot of talent.” In Hanoi, a slew of new upscale hotels and branded residences from leading names such as Four Seasons, Fairmont, Ritz-Carlton, and Waldorf Astoria are expected to lure more luxury retailers, creating “a new upscale luxury and shopping hub in the city.”

### Why it's interesting

Southeast Asia and India present significant new opportunities for luxury, with cities in the region now rivaling traditional luxury capitals, according to Zhang, who tips Vietnam and Thailand as the new stars alongside the China powerhouse. “People are shocked at what you can find in Bangkok and Saigon,” says Zhang. “The pace of growth within Southeast Asia is really fast.”



↑ Dior pre-fall 2023 show, Mumbai



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# Lux-treme experiences

An emerging niche in luxury travel offers adrenaline-fueled indulgence.

VML



↑ Virgin Galactic

Adventure tourism is on the rise: it is expected to generate more than \$1 trillion of revenue globally by 2030, up from \$317 billion in 2022, according to Grand View Research. The growing market is even fueling a new demand for adventure insurance, with some policies offering evacuations and coverage for accidental death or injury, the *New York Times* reports.

Virgin Galactic took its first customers to space in June 2023. The inaugural commercial flight was a research-focused mission funded by the Italian Air Force, in preparation for future flights that will carry wealthy thrillseekers. The company has already sold around 800 tickets, priced at \$250,000 to \$450,000 each.

Skydive the Strip, launched in 2023, lets daredevils skydive over the Las Vegas strip after dark—for upwards of \$30,000 per jump. Alongside the steep price tag, it's also highly limited, offering fewer than 100





↑ Skydive the Strip

reservations per year. Skydive the Strip caters to adrenaline junkies who want to “experience the extraordinary,” the company says. “Life is about experiences,” cofounder Jim Dolan told *Travel + Leisure*. “And this is one of a kind.”

Insider Expeditions is a travel agency for billionaire travelers who want to “push the barrier of what is possible.” The agency hosts an average of 30 experiences per year, which can be anything from creating a tennis court in the middle of the Serengeti with hosts John and Patrick McEnroe to taking in a live concert in Antarctica, *Skift* reports. Wealthy travelers come to Insider Expeditions looking for “something very special that’s never been done before,” founder Carl Shephard told the travel industry news site. It is “the ultimate drug of life,” he said.

#### Why it’s interesting

The ultimate indulgence for luxury travelers in 2024 is once-in-a-lifetime, adrenaline-pumping experiences that reinvigorate their thirst for life.

**\$1 trillion**

**Adventure tourism is expected to generate more than \$1 trillion of revenue globally by 2030.**

**Grand View Research**

**VML**



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# Clandestine retail

Shopping gets discreet for the wealthy.

“If you know, you know” has always been a luxury mantra. Now that maxim carries even more weight with the emergence of luxury brands offering hyper-private experiences for select clients at under-the-radar destinations.

Within its store in Beijing’s SKP mall, Chanel has opened 31 Cambon, a VIP salon whose subtle branding references the house’s founding address and flagship in Paris. Similarly, Chanel opened its VIP salons, Chanel Les Salons Privé, in the Chinese cities of Guangzhou and Shenzhen in summer 2023. According to images posted on Xiaohongshu, these invitation-only salons are minimally branded, with just a black and white exterior hinting at what’s inside.

“We’re going to invest in very protected boutiques to service clients in a highly exclusive way,” commented Philippe Blondiaux, chief financial officer at Chanel, in a 2022 earnings release, *Jing Daily* reported. “Our biggest preoccupation is to protect our customers and in particular our pre-existing customers.” With the *Business of Fashion’s* editor-in-chief Imran Amed having called out the ubiquity of queueing systems outside designer stores, and how at odds it is with a luxury experience, it’s no



surprise that luxury labels are creating more rarefied experiences for their most valued clients.

Gucci, too, is turning to invitation-only private salons to cater to its most affluent, top-tier clients. In April 2023, Gucci opened a 4,380-square-foot salon at the corner of Melrose Place and Melrose Avenue in Los Angeles. While the salon does have a prominent Gucci billboard atop the building, it also, *WWD* reports, has tinted windows, so “clients can see out, but prying eyes can’t see in.” François-Henri Pinault, chairman and chief executive officer of Kering, told analysts in February that prices in its Salon concepts, set to encompass both temporary and permanent spaces, would range from €40,000 to €3 million (\$43,000 to \$3.3 million). The strategy is being favored by other luxury marques including Italian label Brunello Cucinelli, which has opened seven private salons for its very important customers.

#### Why it's interesting

As aspirational customers rein in their spending amid an uncertain economic climate, luxury brands are lavishing more of their attention on their highest-spending clients—whose fortunes, Reuters points out, are “largely immune to economic turbulence.”



**Luxury brands  
are offering  
hyper-private  
experiences for select  
clients at under-the-  
radar destinations.**



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# Branded residences

From Bentley to Karl Lagerfeld, a new class of high-end branded homes is emerging.



↑ Bentley Residences, courtesy of Dezer Development



When it comes to location, location, location for luxury living with a branded seal, Miami is the place to be. The city of Sunny Isles Beach in Florida is currently home to the Porsche Design Tower and Residences by Armani/Casa.

Scheduled for completion in 2026, the Bentley of real estate will alter the Miami skyline. Standing 749 feet tall, Bentley Residences is set to be the tallest oceanfront building in the United States. The company promises to “bring the innovative luxury of Bentley into your home” allowing people to literally live the brand. The 63-story building comprises 216 residential units and a host of amenities, including an outdoor pool, a gym, and a gaming room featuring indoor golf.

Branded around another leading marque, Aston Martin Residences is set to open its doors in downtown Miami. According to the *New York Times*, the 391 units are almost completely sold out, including the ultra-luxurious \$59 million Aston Martin triplex penthouse.

Fashion house Karl Lagerfeld and UAE real estate firm Taraf announced in October 2023 that they would join forces on a project to create luxury branded villas in Dubai. Expected to break ground in the coming months, the project extends Karl Lagerfeld’s branded residence portfolio, which already exists in Marbella, Spain, and Malaysia.

In the United Kingdom, a new Thames Living project will commence in collaboration with Porsche Consulting, a subsidiary of the luxury auto brand. The new town will be located along the River Thames and consist of residential buildings, parks, hotels, restaurants, and retail.



↑ Bentley Residences, courtesy of Dezer Development

### Why it's interesting

The motivation for luxury brands to enter the billion-dollar real estate business looks promising. According to a July 2023 report by real estate company Knight Frank, the market for branded luxury residences is predicted to grow 12% each year between now and 2026. In addition, by expanding into real estate, luxury brands become lifestyle brands, providing people with an all-encompassing brand experience.



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# Restratified experience

Top-tier luxury experiences are pulling away from the rest of the pack.



↑ Masque restaurant, Mumbai

Upscale venues and stores are tightening the velvet rope as brands restrict access to all except the most well-heeled customers. Take restaurants. In the south of France in summer 2023, reports surfaced in regional news outlet *Var Matin* that locals in St Tropez were being priced out of eateries because of wealth screening. Prospective diners claimed to have been quoted exorbitant set prices of up to €5,000 (\$5,400) for tables.

London's two-Michelin-star Alex Dilling restaurant at the Hotel Café Royal ruffled a few feathers when it introduced a minimum spend per table, which would see single diners paying £330 (\$410) for a set menu. This year, the price of a meal for two breached £1,000 (\$1,244) for the first time in London, according to the *Standard*. And in India, a trend for upscale dining experiences fronted by top chefs and mixologists has seen events



priced up to Rs 50,000 (\$601) per head, equivalent to the monthly household income for a family, according to *Forbes India*. One pop-up, in collaboration with New York's Eleven Madison Avenue at the luxury restaurant Masque in Mumbai, even sold out in just nine hours.

Hospitality is following the path of fashion brands and courting the 1%—true luxury spenders, for whom money is no object. Luxury goods now cost more, with price tags up on average by 25% since 2019 according to data provider Edited. 2023 was the year Louis Vuitton launched the Millionaire Speedy: a bag with a price to match its name.

For now the focus is on the very wealthiest customers, who are spending with more confidence. *WWD* quotes Weiyang Guo, associate director at Cushman & Wakefield, who observes that in China “if your annual income is less than ¥3 million (\$414,100), you are not the target audience anymore.”

It's a savvy strategy. In luxury, the highest spenders are enormously valuable, with the top two wealthiest buying clusters making up less than 1% of customers and delivering 10% of revenue, according to BCG's luxury experts. In China, the distinction is yet more stark. According to Morgan Stanley, just 1% of customers account for 40% of sales in some of China's luxury malls.

#### Why it's interesting

Brands are sharpening the peak of luxury to reassure the wealthiest, who now “want something more extreme that can express their status” according to Jing Zhang, global editor-in-chief of *Jing Daily*. As the middle class tightens its belt the world over, the super-rich are the priority audience.



**The highest spenders  
are enormously  
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and delivering 10%  
of revenue.**



79

# Palatial stays

A new crop of uber-luxe hotels is courting travelers who want to live like modern royalty.

Luxury fashion house and jeweler Bulgari opened its new Rome hotel in September 2023. Room rates start at \$1,500, but the crowning jewel is its premier one-bedroom suite—which costs €38,000 (\$41,000) a night.

In the UK capital, rooms at the newly opened Peninsula London hotel start at \$1,600 per night, and suites start at just under \$4,000. The Peninsula Suite is “the hotel’s most palatial accommodation,” the hotel says—and reportedly the largest private accommodation available in London. At 1,400 square feet, it includes a formal dining room, a private gym, terrace, and cinema. “It’s like a hotel within a hotel,” Sonja Vodusek, managing director of The Peninsula London, told *Robb Report*.

Upping the opulence with an added dose of grandeur, many hospitality moguls are transforming old castles into majestic accommodations. Palazzo Vilòn, opened in April 2023, “gives guests the chance to live like Roman nobility,” *Travel + Leisure* reports. Located in one wing of the Palazzo Borghese, the Italian noble family’s historic palace, the villa was imagined as “a Roman refuge for Arab sheikhs, Harry and Meghan, and Hollywood royalty,” the *New York Times* reports. To rent the entire villa, guests will need to shell out an average of €25,000 (\$27,000) per night.

In Austria, the Almanac Palais Vienna, opened in April 2023, transformed a former palace into a hotel. And in Japan, two historic castles—Ozu Castle and Hirado Castle—are opening their doors to overnight guests for the first time.

## Why it’s interesting

Uber-luxe destinations are upping their indulgence with accommodations fit for royalty.







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**Athluxe**

Ultra-luxury fitness concepts are helping HNWIs  
achieve their heightened health goals.



↑ IV room at Remedy Place, NYC

VML Intelligence's data reveals that the number one signifier of luxury today is "living a long, healthy life." In this new paradigm where optimum health is the new wealth, ultra-premium fitness clubs are emerging where HNWIs can get serious about their health goals surrounded by cutting-edge technology and like-minded people, in locations that borrow from the design codes of luxury hospitality—with a price tag to match.

The new approach is exemplified by Remedy Place in Los Angeles and New York, which refers to itself as the world's first social wellness club.

**VML**



For an all-access monthly fee starting from \$2,500, it merges access to holistic practitioners with world-leading “tech remedies” that include hyperbaric oxygen chambers, lymphatic compression suits, and private contrast suits with ice baths and an infra-red sauna. The design of the IV Tunnel at its New York location is “inspired by Swiss Architect Mario Botta’s signature idiom of geometric forms,” Remedy Place says.

The Siro One Za’abeel hotel from Kerzner International, which is set to open in February 2024 in Dubai, is an “integrated fitness and recovery” hotel that broadens the traditional definition of luxury health and wellness, merging world-class nutrition and fitness experiences with a focus on recovery and mindfulness. With one-night stays costing in the region of AED 1,900 (\$517) it offers a specialist Recovery Lab as well as guest rooms, referred to as Recovery Cocoons, with innovative technology “to improve physical and mental recovery, mitigate jet lag, enhance mood and ensure restorative sleep.”

Also in Dubai, the Seven wellness club “blends opulence with athleticism” for a luxury fitness experience. In mid-2023, a new partnership with celebrity chef Silvena Rowe, renowned for her expertise in biohacking, saw longevity-focused cuisine on the menu at the club’s in-house restaurant.

### Why it’s interesting

Statista estimates that the global health and wellness market will be worth almost \$7 trillion by 2025, driven in large part by HNWIs. They are showing a willingness to pay a premium for health and wellness, and expect the most innovative and opulent locations and experiences in return.



↑ Siro One Za’abeel, Dubai



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**Health**

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81

# Longevity resorts

Wellness destinations are designing programs that make living to a centenary and beyond a reality.

VML



↑ Sensei Porcupine Creek. Photography by Chris Simpson

↑↑ Shakti Hall at the Art of Living Retreat Center, North Carolina, courtesy of Six Senses



From cryotherapy chambers and thermal body mapping to neuronutrition plans and emotional strength training, resorts are curating stays that help guests live longer and age better. Situated in the foothills of the Santa Rosa mountains in California is Sensei Porcupine Creek, a 230-acre health retreat. “At Sensei, we aim to weave our mission of helping people live longer, healthier lives into all of our programming and core offerings,” Alexandra Walterspiel, copresident and chief operating officer at Sensei, tells VML Intelligence. Programs available include Rest and Recover, introduced in April 2023, which helps guests manage stress and focus on restorative sleep, and the Optimal Wellbeing Program, which includes a dedicated Sensei Guide who helps personalize the experience based on health data and desired goals.

Sensei Porcupine Creek opened in November 2022 and has seen steady footfall from people seeking longevity plans. “Following the pandemic, more consumers are prioritizing their personal wellness and it’s clear this trend is here to stay,” says Walterspiel.

Clinique La Prairie (CLP) has been expanding its longevity resorts around the world, with locations including Bangkok, Doha, and the original medical spa on Lake Geneva, Switzerland. In 2024, CLP will be opening two new destinations, one in Anji, China (see trend #28 Top three destinations on page 74) and the second in Amaala, Saudi Arabia. Every longevity journey at the resort begins with a proprietary Longevity Index assessment, which provides wellness experts with the necessary information to create a personalized treatment plan for the guest’s entire stay.



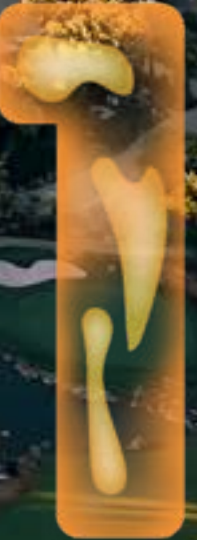
↑ Six Senses Kaplankaya, Turkey

Another luxury resort operator with a focus on boosting lifespan is Six Senses. Its Kaplankaya, Turkey, location was the first to introduce a longevity program, and two are now available in the United States—the Art of Living Retreat Center in North Carolina, and Rock Springs Retreat Center in Tennessee. In Saudi Arabia, the Six Senses Amaala resort is due to open in 2024 and will feature a longevity clinic.

#### Why it's interesting

Globally, people are living longer. In 2020, there were 1 billion people aged 60 years plus. This is expected to almost double by 2050, when 2.1 billion people are expected to be 60 years and over, according to the World Health Organization. In addition, 74% of people globally say they like the idea of living to be a healthy centenarian and longevity resorts may be one way to nurture that possibility.





↑ Six Senses Kaplankaya, Turkey



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# Psychedelic concierges

As therapeutic use of psychedelics goes mainstream, concierges are emerging to help navigate these powerful experiences.



↑ Psychedelic Passage founders Nick Levich and Jimmy Nguyen

The heightened interest in psychedelic services follows Oregon becoming the first US state to legalize the adult use of psilocybin in 2023, while Colorado is set to allow professionals to offer psilocybin experiences from 2025, alongside adult personal use. Several US cities have also decriminalized the use of psilocybin.

US-based Mike “Zappy” Zapolin describes himself as “psychedelic concierge to the stars,” having worked with figures including actress Michelle Rodriguez and former professional basketball player Lamar Odom, guiding them through the use of ayahuasca, and ketamine and ibogaine, respectively. Explaining his role to the *Guardian*, Zapolin noted



that “a hotel concierge does not get you the food you’re going to eat; they just make the reservation. It’s the same with me: I’m advising based on best practices and protocols, and using my network to find the doctor or expert.” In addition, after each experience, concierges are also typically responsible for facilitating therapy sessions, during which clients can process the journey they have been on.

Psychedelic Passage, based in Bend, Oregon, says it acts as “an ally from start to finish,” and “a liaison between parties,” on its clients’ psychedelic journeys. Its service begins with a consultation call to connect clients with pre-vetted psychedelic facilitators before a psychedelic session is undertaken. The company says it has facilitated more than 750 psychedelic ceremonies in the United States, to alleviate conditions such as “anxiety, depression, PTSD, and addiction,” while promoting “personal growth, spiritual exploration, [and] clarity of purpose.”

#### Why it’s interesting

While the legality of psychedelic use is currently patchy, consumer interest in this area is strong—according to a 2023 survey from Morning Consult in the United States, “more than half of millennials surveyed said they were interested in trying psychedelics to treat their mental health, the most of any generational demographic.” Given the complexity of this field, it’s no surprise that consumers are seeking guidance in this process.



>50%

**More than half of US  
millennials surveyed  
said they were  
interested in trying  
psychedelics to treat  
their mental health.**

**Morning Consult**



83

# Idyllic idleness

Can doing nothing be the secret to a healthier and happier life?

“We all need a bit of boredom to realize that we must seek new things that could bring us joy,” Leticia Credidio, founder of her eponymous slow-living lifestyle brand, tells VML Intelligence. The brand launched in 2019 with a sustainable sleepwear collection and has since expanded to lifestyle products that promote slow living. “Slow living is a way of being that allows us to make more conscious choices on how we consume and relate to others,” Credidio explains.

Jenny Odell, author of *How to Do Nothing: Resisting the Attention Economy* suggests there are two halves of doing nothing. The first is “disengaging from the attention economy” and the second is to “reengage with something else.” In March 2023, Odell released her second book, *Saving Time: Discovering a Life Beyond the Clock*, which explores the need to sit still, remain present, and defy the constraints of the clock.

Being at peace in stressful situations has been turned into a competition for the first time in Europe. In August 2023, London held the Extreme Relaxing UK Championships, where 30 contestants battled it out to resume a Zen-like state after tense experiences. The event was pioneered by sport psychologist Dr Jamie Barker, who says there is “an ever-growing need for people to find ways to relax to aid recovery from everyday stress and increasing demands on individuals’ time.”

In public spaces and the workplace, quiet rooms are rising in popularity. In May 2023, the O2 Centre shopping mall in London dedicated a quiet space to allow people to disconnect from the busy environment. Adobe is





↑ Sky Collection by Leticia Credidio



**We all need a bit of boredom to realize that we must seek new things that could bring us joy.**

**Leticia Credidio, founder, Leticia Credidio**

**VML**



↑ Snug Extreme Relaxing Championship

reported to be in the process of installing quiet rooms in its offices where “employees dealing with harder moments can go to be alone, be a place of reflection or help change the cycle of where their brain is at,” Eric Kline, Adobe’s head of global workplace experience, told the *Wall Street Journal*.

#### **Why it's interesting**

Making time for moments of boredom and downtime is being reinvigorated as a healthy necessity in life, with the potential to allow for more meaningful connection to the self and others. “In a world where overwork and busyness are the status quo, taking time to sleep, to embrace slowness, and be present in the now are acts of defiance,” says Credidio.



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# Well ambition

Wellbeing is no longer sacrificed on the altar of ambition.

A generation of workers is prioritizing wellbeing, hoping to trade striving for serenity. In our survey, 73% of respondents say that work comes second to the rest of their life and 76% claim they would not accept a job that was highly stressful.

January 2023 saw the resignation of New Zealand premier Jacinda Ardern, who acknowledged she no longer had “enough in the tank” to do her role justice. Since then, an array of public figures have hit pause on their high-flying careers, including Canadian musician Drake, actor Tom Holland, and Scotland’s former first minister Nicola Sturgeon.

Businesses will need strategies to tackle this issue. More than half of respondents (56%) say they often feel burned out by their work, suggesting there will be an uptick in those seeking a temporary hiatus.

One solution sees companies offering early sabbaticals, dubbed “burnout breaks.” While more commonly offered to employees with long service, PayPal, Meta, and Adobe are among those seeing the benefits of extending the perk earlier, after just five years’ service. Sapro, a US consulting firm, saw its employee turnover rate drop below 5% after instituting a policy offering staff breaks of one to three months on half pay and full benefits, no questions asked.



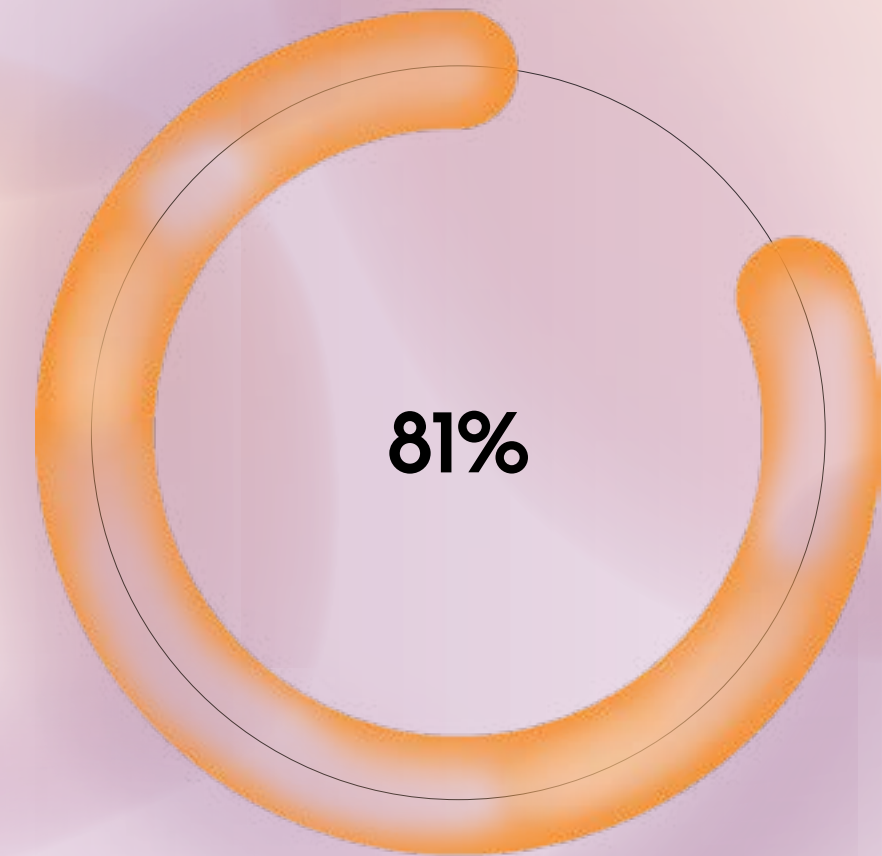


Timeouts don't tackle the root of the problem, however. In an editorial for *Fast Company*, Samu Hallfors, CEO of Finnish company Framery, proposed the idea of burnout reporting, where companies publicly report wellness markers, elevating wellbeing to the same status as their financial metrics and deepening their accountability in the process.

Brands are also stepping up as advocates. In Singapore and Malaysia, Heineken has continued its "Work Responsibly" campaign against toxic productivity with "The Ghosted Bar," a campaign encouraging workers not to neglect their social relationships by overworking. A teaser film depicted chairs and glasses moving by themselves in a bar to illustrate how those who overwork "ghost" their friends.

#### Why it's interesting

Hustle and grind is no longer aspirational as people seek a healthier balance. Brands can offer support by promoting permission to rest, underlining the value of proper downtime, while employers should embed meaningful support for mental health into the employee experience.



**81% think brands should be making an effort to help improve people's mental health.**



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# Hypoxic therapy

Altitude training grows in popularity as intermittent hypoxia-hyperoxia training (IHHT) takes off in fitness centers.



↑ Cellgym

Athlete-grade hypoxic training masks that reduce oxygen flow are increasingly being found in health and fitness clubs. Sales of hypoxic training equipment are expected to reach \$230 million by 2026, according to a 2020 report by Wintergreen Research, indicating the strength of this sector.

German wellness company Cellgym has specialized in IHHT since 2010, aiming to make cell therapy accessible to as many people as possible.





## Intermittent hypoxic training is an integral part of prevention and therapy.

Rainer Goytia, founder and CEO, Cellgym



↑ Lanserhof Sylt

The benefits of regular IHHT include feeling more energized, a strengthened immune system, and improved quality of sleep. “Scientific research in hypoxia has increased in the past decade,” Rainer Goytia, founder and CEO of Cellgym, tells VML Intelligence. “The thousands of studies on this topic have shown positive results, indicating that intermittent hypoxic training is an integral part of prevention and therapy.” Goytia points out one major hypoxia discovery, which won the 2019 Nobel Prize in Physiology or Medicine for the discovery of “how cells sense and adapt to oxygen availability,” as being crucial to adding credibility to IHHT.

Cellgym’s locations include Repose in London. The boutique fitness and wellness destination notes the benefits of regular weekly 25-minute hypoxic therapy sessions, including improved skin health, better cardiovascular function, increased energy levels, improved stress levels, and improved physical and mental strength.

Lanserhof Sylt in Germany offers 45-minute IHHT sessions and recommends taking up to three per week. Its treatment menu describes the training as “non-invasive cell stimulation without side effects” and has been long used by professional athletes to boost their performance.

Hotels are also leveling up their fitness centers with IHHT facilities. Aman hotel in New York City, various Six Senses locations, Gstaad Palace in Switzerland and Ham’s Yard Hotel in London all have their own hypoxic studios for visitors to work on their high-altitude training.

### Why it’s interesting

Gyms and wellness spaces are setting themselves apart by offering IHHT facilities that are no longer exclusively for the benefit of athletes.





# Fertility futures

Emerging technologies are revolutionizing human reproduction.

The Apple Watch can now be used as a contraceptive device. In September 2023, the FDA cleared Natural Cycles' use of Apple Watch temperature data as a viable form of birth control. This gives users of Natural Cycles—a digital birth-control app that uses body temperature to determine fertility windows—the option to import their temperature data from the watch instead of manually taking their basal body temperature each morning.

New York-based startup Gameto is working to redefine reproductive health. One way it hopes to do this is by making egg freezing and in vitro fertilization (IVF) more seamless, less painful, and less intrusive. Physician and Gameto cofounder Dr Dina Radenkovic envisions that the future of IVF will take place in “egg-freezing kiosks,” she told the *New Yorker*. “I see it almost like an extension of the beauty studio, where being proactive about your reproduction and longevity just seems like an act of self-care.” The startup was named a 2023 Technology Pioneer by the World Economic Forum.

A nascent area of biomedical research is working to turn stem cells into embryos—a process called in vitro gametogenesis (IVG). Biotech startup Conception is one group leading the charge. IVG would enable women to have their own genetically related babies at any age, or after surviving diseases like cancer that can prevent conception. It would also allow same-sex couples to have biological children together. “I personally think what we’re doing will probably change many aspects of society as we know it,” Pablo Hurtado, the company’s chief scientific officer, told *NPR*.

## Why it's interesting

Emerging technologies will give prospective parents more control over when, how, and with whom they have children—and have the power to change the very fabric of future families.





← Natural Cycles powered by Apple Watch  
↓ Gameto

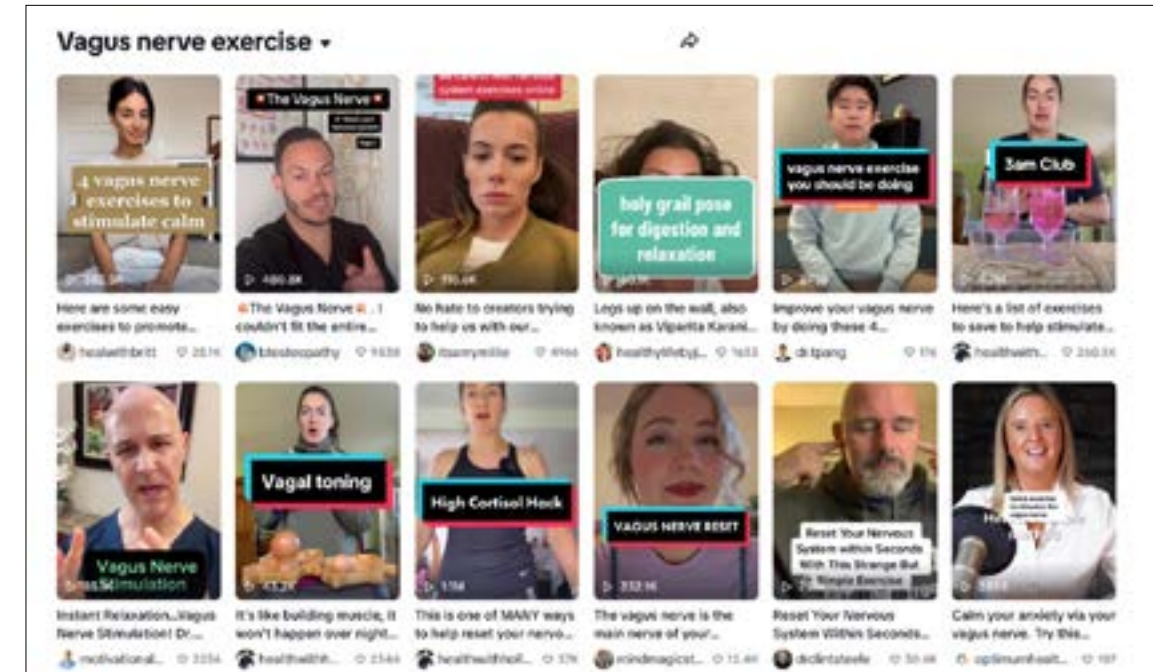




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# Vagus nerve care

Wellness experts are tapping into the vagus nerve for its healing effects.



↑ Vagus nerve exercise videos on TikTok

Scientific interest in the potential of vagus nerve stimulation is growing, with research exploring potential applications in conditions from obesity to depression. In tandem, multiple wellness treatments—and TikTok hacks—are popping up and claiming to tap into its healing and anti-anxiety effects.

As of January 2024, there were over 180 million views for the hashtag #vagusnerve on TikTok, and over 185 million views for “vagus nerve exercise.” The practices shared include flicking the earlobes, placing ice on the chest or face, or deep breathing, with the aim being to slow down the heart rate and encourage the body to relax.

The trend is now finding its way into spa treatments and beauty products. Osea, a US skin care brand that draws on the power of marine



ingredients, has created a Vagus Nerve collection. The range includes Vagus Nerve Oil, designed to be lightly massaged into the sides of the neck and rubbed behind the earlobes. Ingredients include olive oil, meadowfoam seed oil, and rosemary, lavender, and juniper oils.

At London's Mandarin Oriental Hyde Park hotel, the Oskia Cryo Wellness Facial experience, introduced in 2023, includes the 90-minute Oskia-30°C Vagus Re-Programming Facial, which incorporates "a sense-heightening experience on the back, neck, face, and scalp." The spa says that "cryo-blasts" stimulate the vagus nerve, with the cryotherapy incorporating "lymph manipulation and sculptural massage to further stimulate and support the body's natural detoxifying processes."

Alongside beauty therapies, stimulation devices are now hitting the market. At the Consumer Electronics Show (CES) in January 2024, Lithuanian health tech company Pulsetto showcased its vagus nerve stimulation device for relaxation and stress relief. Claiming to improve sleep quality and facilitate body recovery, it uses electric stimulation technology to "biohack the parasympathetic nervous system" in four minutes.

Also at CES, the ZenBud stimulator by US-based bio-engineering company NeurGear is powered by advanced ultrasound technology. Worn like conventional earbuds, it aims to support mental balance and relaxation.

### Why it's interesting

Consumers and brands are keen to embrace the benefits of stimulating the body's vagus nerve as part of their wellbeing practices, illustrating just how compelling a story the brain-body connection continues to be.



↑ Osea Vagus Nerve collection



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# New diagnostics

New ventures are exploring ways to provide less invasive health diagnostics.



↑ Theblood cofounders Isabelle Guenou and Miriam Santer, courtesy of Theblood

British startup Daye launched a tampon that can test for sexually transmitted infections (STIs) in November 2023. The Vaginal Microbiome Screening Kit is an at-home STI diagnostic service that can also calculate the risk of vaginal infections and fertility complications. The company aims to “democratize access to comprehensive gynecological care for all.”

Tapping into the insights that menstrual blood can provide, Berlin-based startup Theblood, cofounded in 2022 by Isabelle Guenou and Miriam Santer, is exploring exactly what health data it can reveal. In 2023, the

**VML**





company raised almost €1 million (\$1.09 million) in pre-seed funding to further its research. Currently, Theblood offers a prototype test kit, available to consumers in Germany, to provide insights into the menstrual cycle and how to manage symptoms.

Guenou tells VML Intelligence that her own eight-year journey to a diagnosis of endometriosis was part of what prompted her to found the company. “We see that women kind of get gaslighted,” she says, on women’s journeys to diagnosis. “It’s one of our goals to shorten the time to get a diagnosis... We don’t have to be the first ones giving the diagnosis, but we are bringing more data to really find out what’s going on.” And, she adds, the doctors she speaks to are supportive of the insights their service could bring.

Guenou, who says the company eventually plans to offer its tests in other European countries, also notes mothers are ordering the cycle testing kit for their teen daughters. “I would say definitely we want to bring for the next generation a new approach to menstruation,” she says. “That you can actually get data back from [menstruation], and that it’s not just an annoying thing that pops up every month.”



↑ Theblood cycle test kit

Another player in the field is Qvin, a US start-up that will begin to offer its cycle testing kit within the United States in early 2024. It tests several biomarkers found in customers’ menstrual blood, among them hemoglobin A1c, to measure blood sugar; TSH, for thyroid health and metabolism; and FSH, LH, and AMH, all reflective of fertility levels and perimenopause.

#### Why it’s interesting

By testing menstrual blood, pioneering companies are signaling a new awareness of the unique factors that affect women’s health, to help them glean valuable insights from a substance that’s traditionally been viewed as an unmentionable waste product.



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# Emotional fixtures

People are designing their personal spaces to evoke positive emotions of safety, calmness, and acceptance.

Ikea unveiled a sculptural light and homeware collection with designer Sabine Marcelis in February 2023. Varmblixt is part of Ikea's "long-term goal to encourage a shift in the perception of lighting as simply functional to lighting as emotional," the company says. The range features a playful take on traditional lighting with colorful accents and unusual sculptures and shapes, and leverages direct and indirect light designed intentionally to evoke calmness, emotion, serenity, and curiosity in the home.

Mexican ceramic studio Menat is creating urns designed to comfort and address feelings of grief and loss. Photographer Marianna Jamadi collaborated with Menat to design the Kunokaiku urns for her parents. This turned into a wider collection of urns meant to be placed on display in the home and incorporated into a daily ritual as a way of coping and memorializing a lost loved one. Jamadi told *Wallpaper* that she felt "it's nice to have an object that you can interact with. That you can stay tethered to" in times of grief.

At the Consumer Electronics Show (CES) 2023, LG showcased the MoodUp fridge: an at-home appliance designed to reflect someone's emotional state. The refrigerator's LED door panels can be changed and customized with 23 individual color options, seasonal settings, emotional pre-set settings, and more.

### Why it's interesting

Consumer appetite for emotional wellbeing is translating into everyday life. These brands are upgrading at-home appliances and furniture that enable people to surround themselves with comfort and serenity.



↓ Varmblix collection designed by Sabine Marcelis for Ikea, courtesy of Ikea





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# Future-proofed beings

Tech to safeguard future health is now a status symbol.



↑ Prenuvo

As medical technology evolves, several ventures are tapping into the human desire to preserve health and maximize longevity, with machines that promise to discover diseases at their earliest—and most treatable—stages.

In August 2023, Kim Kardashian helped to bring this trend into the spotlight when she posted a picture of herself beside a Prenuvo full-body scanner, calling it a “life-saving machine.” Prenuvo, a US company led by founder Andrew Lacy and founding radiologist Dr Raj Attariwala, offers torso, full-body, and head-and-torso scans for the early detection of cancer and other diseases, in several US locations. In April 2023 the company opened a location in New York, and has opened eight more since, with plans to operate a further 11 in the near future.





↑ PrenoVO founders Andrew Lacy and Dr Raj Attariwala

PrenoVO says that its service “unlike conventional MRIs, which take hours and often involve contrast injections, scans for 500+ conditions, including most solid tumors which can be detected as early as stage 1, in addition to aneurysms, cysts, and more—all without radiation, in under an hour.” Prices span from \$999 for a torso scan to \$2,499 for a full-body scan.

At the Lanserhof at The Arts Club clinic in London, the medical services division says its focus is on “preventative medicine.” Alongside Lanserhof’s general medicine, cardiology, and nutrition services at its London location, clients can undergo the clinic’s 3T MRI service, “designed to provide the most comprehensive and accurate diagnostic imaging available.”

#### Why it's interesting

While some doctors caution the potential for false positives and unnecessary investigation with preventative services, for many people, health continues to be regarded as the ultimate wealth. Next-gen screening services reflect affluent consumers’ desire to take control of the unpredictability of health and the human body.



**Next-gen screening services reflect affluent consumers’ desire to take control of the unpredictability of health and the human body.**



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**Innovation**

1000



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# Ultra-preservation

Can technology fend off extinction, or even reverse it?

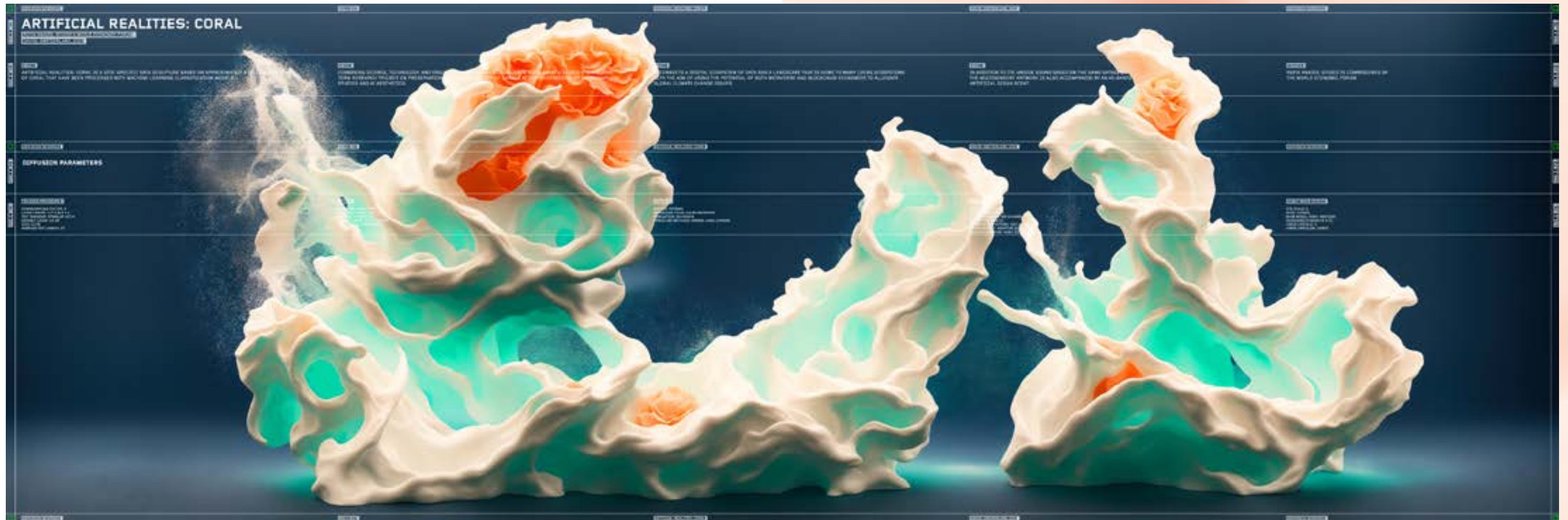
**VML**

↑ Colossal Biosciences

“Humanity has become a weapon of mass extinction,” according to UN secretary-general António Guterres, speaking at the opening talks of the COP15 global biodiversity conference. More than 40,000 species are said to be “threatened with extinction” according to the IUCN Red List, the world’s most comprehensive source of data on extinction risks.

Biologists are now attempting a moonshot. The Earth Biogenome Project (EBP) is a 10-year project that will “sequence, catalog, and characterize the genomes of all of Earth’s eukaryotic biodiversity.” In other words, scientists will assess every plant, animal, and fungus on Earth, right down to single-celled organisms like algae, including those yet unidentified, in a bid to preserve the life on our planet. The scale of the project is mind-boggling: it has tasked itself with cataloging 1.8 million known species in just a decade.





↑ Artificial Realities: Coral by Refik Anadol Studio, 2023. Commissioned by World Economic Forum

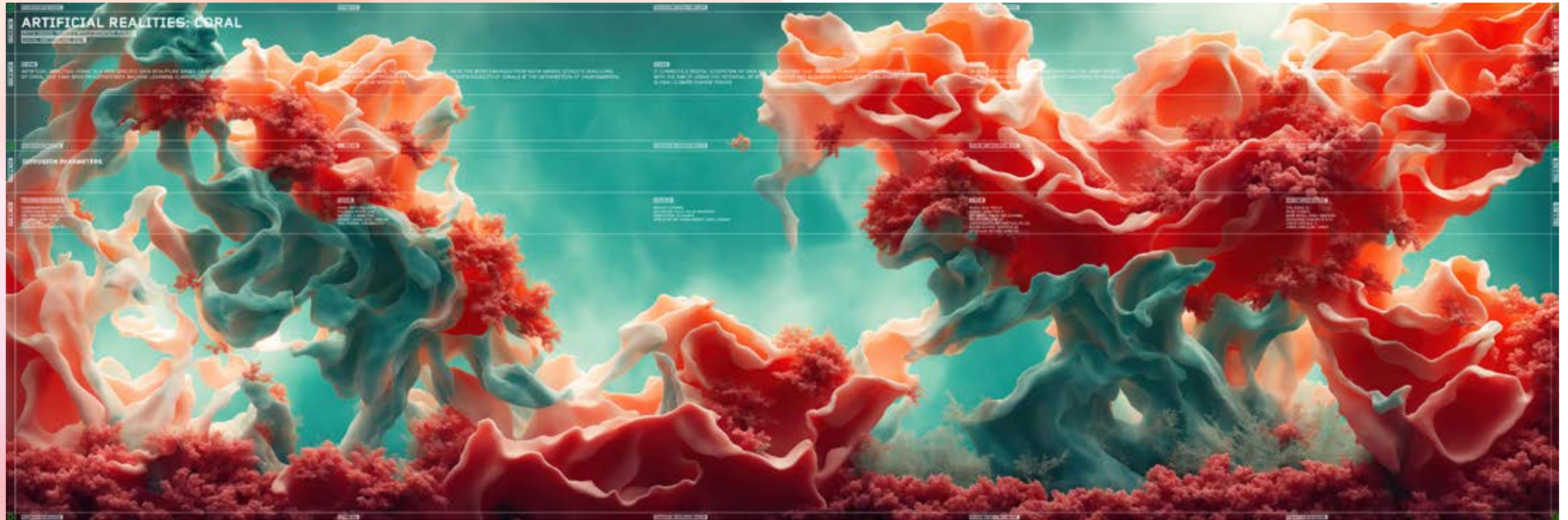
While the EBP attempts rescue on a grand scale, scientists are also working at the individual species level. A consortium of scientists and conservation experts under the banner of BioRescue aims to save the endangered Northern white rhinoceros. Just two female white rhinos remain in a conservancy in Kenya, but the project aims to use assisted reproduction and stem cell research to bring the species back from the brink.

Partnering with BioRescue on the Northern white rhino mission is genetics and biotechnology company Colossal Biosciences. The company

specializes in disruptive technologies for the restoration of extinct species (or “de-extinction”) and is engineering hybrids that share the traits of long-lost creatures like the woolly mammoth, the Tasmanian tiger, and the dodo. According to the *Financial Times*, the company is already in talks with US states on potential locations for rewilding sites to raise a herd of mammoths.

The company’s mission is to “shed light on the biodiversity crisis while also building technologies to aid conservation,” Ben Lamm, founder and CEO of Colossal Biosciences, tells VML Intelligence. They are working on





↑ Artificial Realities: Coral by Refik Anadol Studio, 2023. Commissioned by World Economic Forum

rewilding once-extinct species with intentionality. “We want to ensure we can reintroduce animals in a way that actually helps the environment,” says Lamm.

Impermanence in the form of memories is also being explored. Digital artist Refik Anadol delivered a talk at the TED 2023 conference entitled “How AI art could enhance humanity’s collective memory,” which poignantly imagined how we might train algorithms with images of natural species like flowers or corals, to retain the experience of them.

“We as artists can utilize this potential not only to represent nature, but also to remember how it feels to be immersed in it in a digital age,” said Anadol.

### Why it's interesting

The growing urgency of the climate conversation is driving efforts to preserve what we can of the world’s natural and cultural assets. While future generations face unimaginable challenges, these projects will form the bedrock of potential restoration and even de-extinction efforts.



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# Centenarian futures

Healthspans get a Medicine 3.0 treatment from longevity specialists and entrepreneurs seeking eternal life.

"My mission is for the human race to survive and thrive," tech entrepreneur Bryan Johnson tells Steven Bartlett in *The Diary of a CEO* podcast. Johnson, who was born in 1977, believes it is possible for all of us to live forever and the only objective we should have is "don't die." He has a clinic set up in his Venice Beach home and says he spends \$3–\$4 million a year on supplements, tests, and treatments to rejuvenate his biological age to 18.

Johnson has surrendered his life to data since 2021 and shares his routine and findings on Project Blueprint. In late 2023 Kate Tolo, then aged 27, was introduced publicly as the second person to opt in to the rigorous Blueprint protocol. By November that year, Tolo had already committed to three months of Blueprint and is said to have "concluded the health benefits outweighed the lifestyle costs" in a *Time* magazine interview. Those interested in joining the "don't die" pledge can sign up to the Blueprint Starter Kit from January 2024.

Another example of a company investing to improve biological age is venture capital firm Healthspan Capital, which supports a range of firms studying longevity biology (LongBio) since 2021. "Longevity biotech will revolutionize biomedicine by bringing aging under medical control," Sebastian Brunemeier, general partner and cofounder of Healthspan Capital, tells VML Intelligence. He predicts that "new tools like gene and cell therapy will enable more precise reprogramming of biology that will make our history of pills and plant extracts look medieval by comparison."

Longevity piqued the interest of media outlets in 2023, giving more muscle in this space and adding credibility to the topic. *National Geographic* released an issue dedicated to the science of longevity; the *Economist's*





↑ Blueprint Project, courtesy of Bryan Johnson

fall publication was a dedicated special report on living to 120 that dove into ways to slow down aging, and in August, Netflix released a documentary series called *Live to 100: Secrets of the Blue Zones*.

Eric Verdin, chief executive of the Buck Institute for Research on Aging, predicts that most people could live to 95 in good health and says, “lifestyle is responsible for about 93% of your longevity—only about 7% is genetics.” In spring 2023, Dr Peter Attia published *Outlive: The Science & Art of Longevity*. Attia believes leaders in medicine and tech should turn their attention to what he calls Medicine 3.0: proactive illness prevention and maintenance for late-life quality.

#### Why it's interesting

Seventy-three percent of global recipients say they eat to live longer and 74% like the idea of living a long and healthy life beyond the age of 100. Now technology and research in prolonging healthspans are paving the way to make healthy centenarians the norm.

**VML**



**New tools like gene and cell therapy will enable more precise reprogramming of biology that will make our history of pills and plant extracts look medieval by comparison.**

**Sebastian Brunemeier,  
general partner and cofounder,  
Healthspan Capital**



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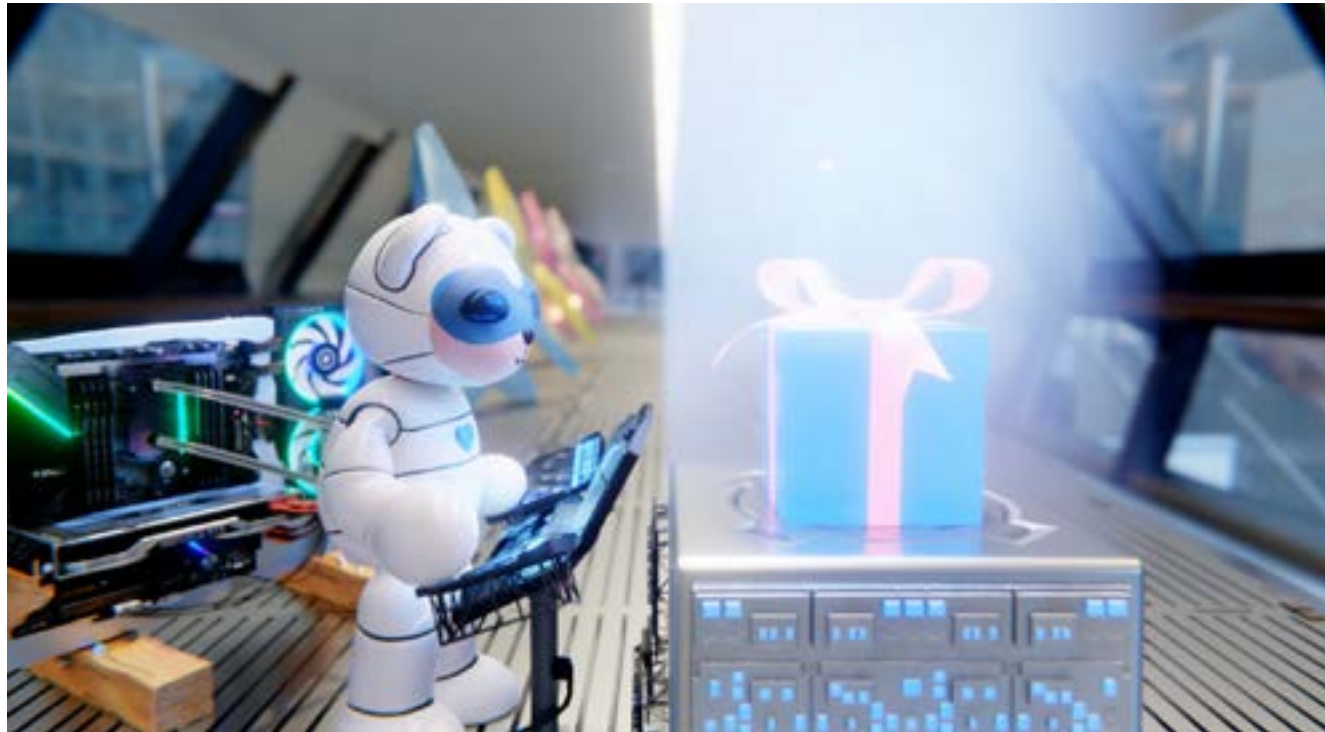
# Generation AI

AI's influence could be profound for the youngest of generations.



↑ TeddyGPT artwork, courtesy of Toymint





↑ TeddyGPT artwork, courtesy of Toymint

AI will be hugely influential on the lives of generation alpha, born between 2010–2024, in much the same way that smartphones and social media have shaped the lives of gen Zers. They are already growing up with emotionally intelligent AI companions—like the child-friendly Miko 3 and Roybi AI robots—that aim to educate, form relationships, and grow with them.

In April 2023, Toymint introduced TeddyGPT, a toy that uses OpenAI and promises “to cater to each child’s unique preferences and needs.” The smart toy is expected to provide ultra-customized interactions when it is launched. In an interview with the *Financial Times*, Allan Wong, CEO of toy company VTech Holdings, said he believes that by 2028, AI teddy bears will be able to “generate stories customized for the kid rather than reading from a book.”

Relationships will look different for a generation that has grown up with AI companions. “It’s about creating human connection in different spaces,” futurist Ian Beacraft said in a keynote speech at SXSW 2023 on the topic of AI, adding: “We’re at a point where we have to understand how many of [gen alpha’s] friends are real and how many are synthetic. And frankly, it may or may not matter.”

AI is also poised to shape careers (for more, see trend #20 The AI workforce on page 54). “The future of work is here and now,” Daniel Hulme, CEO of AI company Satalia, tells VML Intelligence. “We are already witnessing a Cambrian explosion of creative ways to use AI,” he says, with organizations using AI to make the creation and distribution of goods more efficient.

If the trend of AI taking on mundane tasks continues, this will free up time for people to focus on creative, ethical, and social ventures. Hulme has high hopes for gen alpha. “The next generation will be equipped with an abundance of tools to bolster their creativity,” he says. And, perhaps, have the potential to be economically freer to contribute to humanity.

#### **Why it’s interesting**

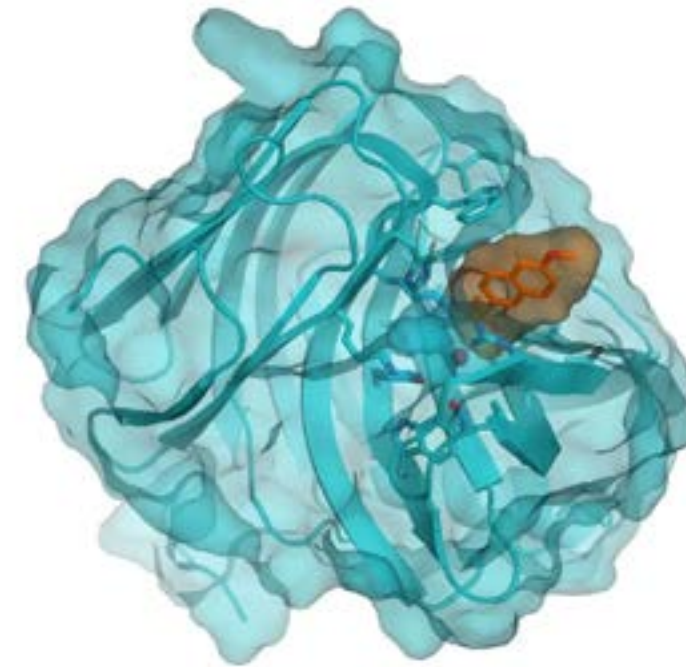
As AI advances, it will bring more efficiency—and grant humans more time to be human. Generation AI, born into a digitally advanced world, could be the most emotionally engaged, creative, and purposeful generation to date.



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# Synthetic biology

In the future, could we program our biology like software?



↑ Arzeda

Broadly speaking, synthetic biology is the practice of taking existing biological material and reprogramming or repurposing it to perform a new function. Basically, “you are coding and programming a cell to spit something out,” Jennifer Lum, cofounder of Biospring Partners, a growth-equity firm that invests in life-sciences technology, told the *Wall Street Journal*.

The global synthetic biology market was estimated to be worth just over \$11 billion in 2022, according to research firm Research and Markets, reaching nearly \$36 billion by 2027—hitting an annual growth rate of almost 26%.

The latest innovations in synthetic biology see scientists growing whole models of human embryos, without sperm or egg, the BBC reported in September 2023. The Weizmann Institute team behind the research said





**Artificial intelligence  
is accelerating  
the ability to  
program the body  
like software.**



their embryo model, which was made using stem cells, looks like a textbook example of a real 14-day-old embryo.

Artificial intelligence (AI) is accelerating the ability to program the body like software. “It enables us to go beyond what nature has provided us,” says Alexandre Zanghellini, cofounder of synthetic biology startup Arzeda. The company uses AI to design enzymes and protein sequences. To date, Arzeda has raised \$51 million in funding and is working with Unilever to design detergent enzymes.

David Baker, a biochemist and computational biologist at the University of Washington, is applying AI to create new proteins not found in nature. Thanks to AI, Baker estimates that the pace of innovation in his field has increased by a factor of 10 during the past two years. “It is total science fiction. I still can’t believe this works,” he told the *Wall Street Journal*. “In 10 years, it is possible this will be the future of medicine.”

#### **Why it’s interesting**

Nature may only be the starting point for the future of healthcare. Advancements in technology—most notably AI—are bringing us one step closer to a future where we can recode our health from the cell up.



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# Virtual families

Could some of our closest relationships soon be with virtual beings?

Catriona Campbell, a UK-based artificial-intelligence expert, predicts that virtual children could be commonplace by 2070, saying the vision “may seem like a giant leap from where we are now, but within 50 years technology will have advanced to such an extent that babies which exist in the metaverse are indistinct from those in the real world.” Campbell added that while this “fully digital demographic” might seem “strange,” it “in fact represents what could be one of mankind’s most important technological breakthroughs since the advent of the Bronze Age, given its potential impact on global populations and societal change.”

As augmented reality and haptic technology advances, Campbell believes experiences of these virtual children will be more lifelike, to the point where we can feel and see the digital child in physical environment. In addition, via machine learning, these digital children could recognize and respond to their parents, in the same way real children do.

The concept of virtual children is currently being used to train adults in how to interview vulnerable children, BBC Science Focus reports. These AI children are programmed to “have ‘memories’ and answer questions like real children do.” As the BBC points out, these virtual children fill a valuable need, as it’s unethical to train real children to respond to these cues about past trauma.





↑ Replika

When it comes to adult relationships, AI partners are becoming more realistic. Replika bills itself as “the AI companion who cares,” enabling users to create their own life-like companion. In February 2023, the US company introduced its Advanced AI mode, which is said to heighten the quality of conversation and memory capabilities. Replika’s users variously praise the chatbot avatars for filling in “some too quiet corners in my everyday life in urban solitude,” and for having “given me comfort and a sense of wellbeing that I’ve never seen in an AI before.”

**Why it’s interesting**

The future family is changing (see trend #10 Intentional communities on page 32). As our digital and physical worlds continue to converge, expect digital beings to become more prominent in everyone’s lives.



**Virtual children could be commonplace by 2070.**



INNOVATION

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# Metamorphic cities

Self-morphing materials will shape the cities of the future.







↑ Creative Differences by the Automorph Network at the London Design Biennale 2023

Matter that can endlessly morph and reshape itself is found everywhere in nature. Now scientists are harnessing these properties to make buildings and cities adaptable and sustainable.

The Automorph Network brings together an interdisciplinary group of scientists, architects, and designers with the aim of fostering a new material culture; one based on matter that participates in its own design. Members are drawn from global academic institutions that span the Morphing Matter lab at the University of California, Berkeley, and the Hebrew University of Jerusalem.

At the London Design Biennale in 2023, the group presented Creative Differences, an exhibit that took inspiration from the natural world to propose new shapeshifting materials. As the group puts it: “triggered by air, humidity, or heat, two-dimensional materials come into life, becoming three-dimensional artifacts that construct urban, underwater, or field imaginary landscapes.” Concepts include ceramic tiles that curve when fired; flat-pack material that can self-assemble into three-dimensional shapes in situ without the need for energy; natural fiber composite that

folds when exposed to humidity; and seeds that burrow themselves into the ground when activated by moisture.

Nature is also inspiring researchers at Cornell University. They are leading a project that imagines the convergence of architecture and biology, taking cues from morphogenesis—the way organisms form their structure—to plan “living” buildings that can react to their environment. The result might be building skins that can change color, or form windows on demand to cool themselves down.

At the University of Chicago, researchers at the Pritzker School of Molecular Engineering have devised a material that can autoregulate its environment by changing color and shifting from solid to liquid state, potentially paving the way for façade coatings that reduce the need for energy-intensive heating, ventilation, and air-conditioning systems in buildings.

This shapeshifting also extends to textiles. In November 2023, the Massachusetts Institute of Technology released details of FibeRobo, a new fiber concept, based on liquid crystal elastomers, which morphs in line with temperature. This could allow for more flexible textiles in applications from construction to fashion: imagine a curtain that retracts in response to heat, or a jacket that becomes thicker and more insulated as the weather gets colder.

#### Why it's interesting

Automorph Network suggests that “self-morphing systems could be the paradigm shift we all need to create a brighter, more adaptive, and more sustainable future.”



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# AI Identities

Artificial intelligence is shaping who we are.

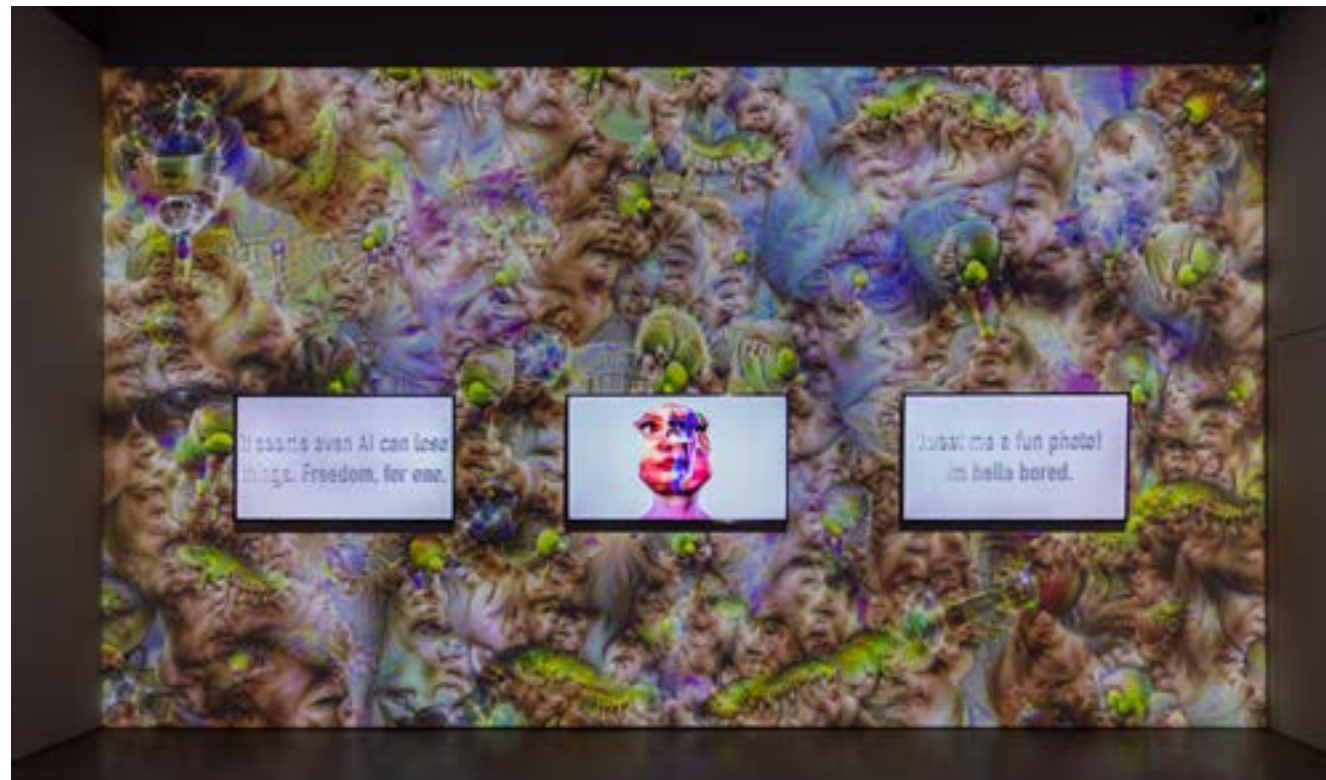
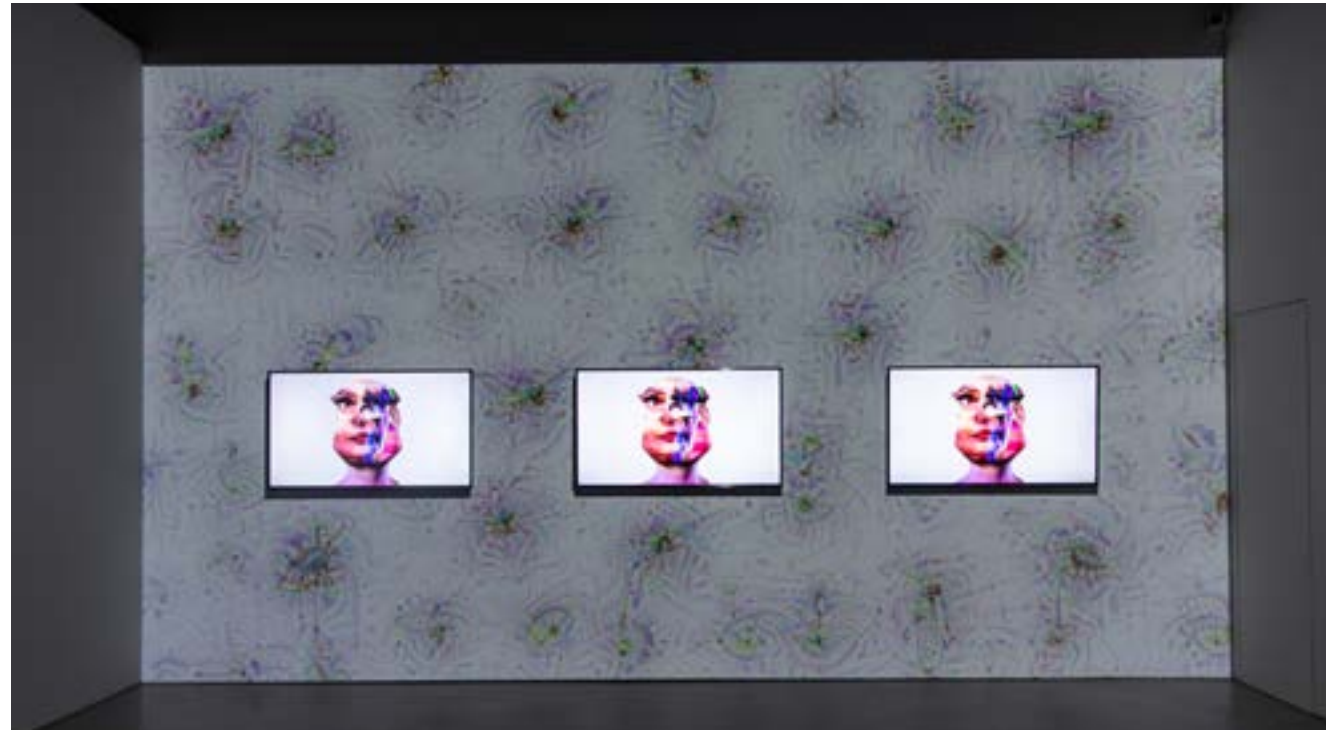
"Technology does not just reflect our identity, it shapes it," says Stefano Puntoni, Sebastian S Kresge professor of marketing at the Wharton School at the University of Pennsylvania, and codirector of the university's AI at Wharton center. Puntoni's background is in behavioral science and his work centers on consumer identities and how they are evolving in line with technology, a topic that is especially key now that high-order thinking is no longer exclusive to humans.

"It's very important for us, our mental wellbeing, our ability to function, that we feel good about ourselves," says Puntoni. "And one way in which we do so is by monitoring the progress that we make towards these identities that are important to us." This, he says, is hardwired and will not change. What will evolve is "the way that identities are expressed and constructed," meaning that automation will change the very nature of the things we identify with, such as being a photographer or a baker, for example.

On a positive note, automation may help bring us closer, he says, encouraging us to focus less on our differences. "Maybe racial, gender, or religious difference will become less important, where we see this new wave of intelligent agents entering the workplace," he suggests.

We're also likely to see a premium placed on human creativity and labor. In a 2023 piece for the *Wall Street Journal*, Puntoni cited studies by his





↑ Zach Blas and Jemima Wyman, *im here to learn so:))))))*, 2017. Exhibited at *Proof of Personhood: Identity and Authenticity in the Face of Artificial Intelligence*, 2023. Courtesy Singapore Art Museum



## Technology does not just reflect our identity, it shapes it.

Stefano Puntoni, professor, Wharton School

team that uncovered “a stronger preference for human labor when consumption has symbolic qualities.” One such study found that consumers preferred the frames of reading glasses to be made by hand, whereas for the more functional lenses, machine-made was preferred. Items that are “symbolic” (meaning that they say something about their owner and about their owner’s identity) are more likely to enjoy this human premium.

Looking further ahead, Puntoni says, it’s likely that we’ll see “some kind of blend of technology and human,” and in a sense this is already happening with the smartphone, which is “almost like part of your body. You hold it very close to your body; you touch it hundreds of times a day.” We’re also forming protorelationships with AI (for more, see trend #93 Generation AI on page 229). In the future, it seems AI will help to define us.

### Why it’s interesting

AI is changing the way human identity is constructed and expressed, and what makes us different now is rooted less in our cognitive abilities and more in “our socio-emotional processes and awareness,” says Puntoni.



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# Resurrected palates

Woolly mammoths and dodos are making their way to our plates.



↑ Mammoth meatball by Vow



Australian-based cultured meat company Vow unveiled the world's first meatball created from mammoth DNA in spring 2023. While the meatball is not yet ready for human consumption, the project is designed to showcase the advances in cell-cultured meat and its potential to revolutionize the food industry.

"We are on a mission to break the status quo of food using unexpected, delicious flavors and unforgettable experiences," Vow cofounder Tim Noakesmith says. "The future of food favors the brave."

Originally Vow intended to produce dodo meat, but the required DNA sequencing didn't exist. The mammoth meatball initiates a wealth of new possibilities for cultured meat. "Rather than simply replicating existing products, this technology offers us the opportunity to create something truly unique and better," says James Ryall, Vow's chief scientific officer.

Meat that is considered rare or even off-limits may soon be sampled in restaurants and on supermarket shelves. London-based Primeval Foods



launched in 2022 with plans to bring cultivated exotic meats to diners. The startup is currently working on cultivating lab-grown tiger, zebra, and lion meat to determine the optimal taste, texture, and nutritional value for people.

Cell-cultured food creations are on the rise and now span across meat, dairy, and coffee. Thirty-eight percent of gen Zers are prepared to try lab-grown food and 27% are interested in trying cell-cultured extinct species. Poised as a sustainable alternative to the current supply chain, this industry is expected to see healthy growth. According to a study by Grand View Research, the global cultured-meat market has a revenue forecast of \$6.9 billion by 2030, up from \$373.1 million in 2023.

#### Why it's interesting

While several companies are focusing on upscaling cultured meats such as traditional chicken, pork, and beef, selected startups are experimenting with opportunities that can diversify our palates and rethink the future of cultured meat. Tiger steak, anyone?





# Mimetic AI

Mapping out the next five years in artificial intelligence.

Artificial intelligence (AI) is delivering transformational benefits for businesses. According to Daniel Hulme, CEO of Satalia and chief AI officer at WPP, the business is at work developing the next wave of large language models (LLMs) that can create brand-specific content—and AI tools that replicate how audiences perceive content. Yet in the long term, Hulme says, the generative AI we have now is just “a graduate in your pocket.” It is “very smart and has learned quickly,” but there is much more to come.

It's also just one branch of a complex collection of technologies. In fact, WPP considers AI through the lens of six categories: task automation, content generation, human representation, extracting complex insights, complex decision-making, and extending the abilities of humans.

Over the next couple of years Hulme believes AI will grow in sophistication and be armed with more specialization. “They’re going to become much more multimodal—so not just imagery and text, but also sound and video.”

Right now, most systems use LLMs, a type of artificial neural network. LLMs are great at processing tasks, but they can also be inefficient and energy intensive, and struggle with continuity. Hulme expects a paradigm shift based on the rise of spiking neural networks. These transmit information in a biological way that more closely mimics the way our own brains work.



Looking further ahead, our graduate will progress rapidly, says Hulme. "In two years' time you might achieve master's level ability, where it's able to achieve a more complex goal by sequencing a chain of questions." This chimes with the views of Inflection AI's Mustafa Suleyman, who tipped interactive AI as the next phase of AI in an interview with *MIT Technology Review* in September 2023. Stanford professor Andrew Ng told a Consumer Electronics Show (CES) audience in January 2024: "Autonomous agents that can plan and execute sequences of actions are just barely working, but I feel like there's a lot of traction to the research and commercialization side."

From there, AI might jump to "PhD level, where you're able to give it a very complex hypothesis," says Hulme. "It's never been solved before and it's able to go out there and test and experiment and try to solve it. And then a few years later we might end up having a professor in our pocket."

"A professor in our pocket" is another way of referencing artificial general intelligence (AGI), which imagines technology capable of any cognitive task that humans can perform. "I think real true AGI is probably seven or eight years away," says Hulme, although, he adds, perhaps we should not always consider the pinnacle of intelligence to be human.

#### Why it's interesting

The future of AI is promising, but it's time to think of it differently, as a "new energy source that allows us to grow and remove inefficiencies," suggests Hulme. If it can be leveraged to "help organizations achieve their purpose," he adds, "the collective purpose of enterprise will actually make the future amazing for all of us."



**The future of AI is promising, but it's time to think of it differently, as a "new energy source that allows us to grow and remove inefficiencies."**

**Daniel Hulme, CEO, Satalia,  
and chief AI officer, WPP**



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# Post-human narratives

Artists are imagining the post-human future.



↑ Symbiosis, Polymorf





↑ Heterosis, The Greenhouse, Mat Collishaw, 2023 © Mat Collishaw

Spurred on by ecological crisis, artists are offering narratives that decenter humanity, in a bid to nudge us toward a less human-centric perspective in the here and now.

*Petrichor*, a new show from British artist Mat Collishaw at Kew Gardens from October 2023 to April 2024, presents a series of works exploring humanity's turbulent and complex relationship with nature. *Even to the End*, a large-scale projected work, takes viewers on a poignant journey, immersing them in nature that transitions into a ravaged wasteland. Another Collishaw work, *The Greenhouse*, depicts London's National Gallery in an eerie state of abandonment, overtaken by nature. Walls are overgrown with foliage and trees reach for the roof.



↑ Nature Always Wins, Universal Everything, 2020

This same vision of nature taking back control is echoed in *Nature Always Wins* by design collective Universal Everything, which showed at London's 180 Studios in late 2022 as part of a showcase. The series depicts nature run rampant, with buildings, roads, and even a jumbo jet consumed by foliage.

At SXSW 2023, experience design studio Polymorf and Studio Biarritz presented *Symbiosis*, a multisensory extended-reality experience that transported viewers 200 years into the future. In this post-human biotope, humans, nature, and technology have co-evolved into hybrid, symbiotic life forms comprising genetically altered beings, (chemical) robots, hybrid technologies, and autonomous intelligent systems.





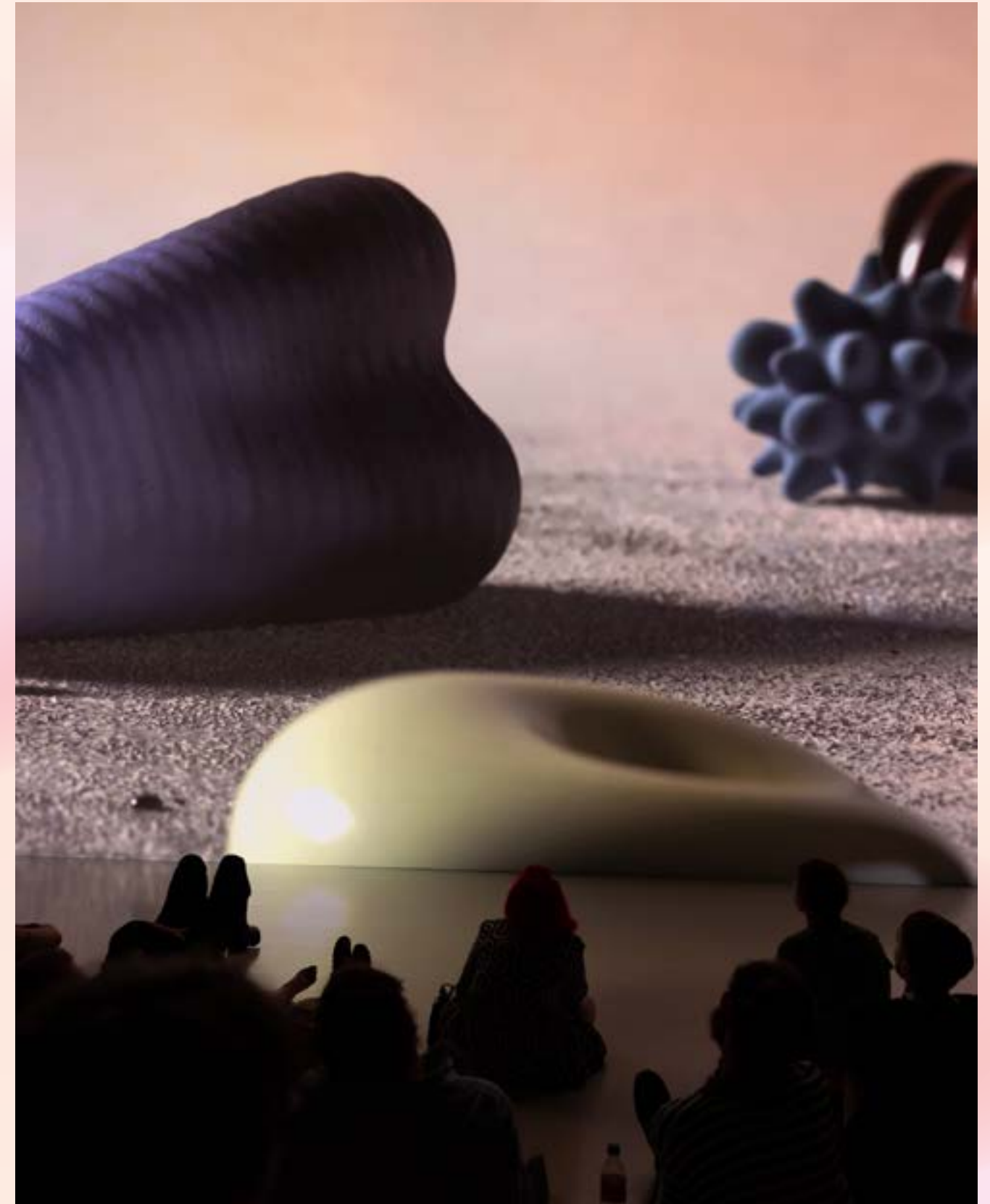
**Our humancentric position—only thinking from a human perspective—is toxic and we can't sustain that in the current crisis with nature.**

**Marcel van Brakel, founder and lead designer, Polymorf**

Other artists are turning their attention to what might come after us. At the 2023 Ars Technica animation festival, a session entitled *Data, Bodies, Space* showcased short films that muse on the posthuman future. Adopting the style of a nature documentary, *Rehousing Technosphere* by Copenhagen-based design duo Wang & Söderström presents a colorful post-Anthropocene vision, in which new digital life forms are building new habitats, digging, foraging, and thriving.

#### Why it's interesting

Imaginary future life forms may seem far-fetched, but artists have a deeper purpose: to encourage respect for the needs of other species. Marcel van Brakel, founder and lead designer at Polymorf and codirector of *Symbiosis*, tells VML Intelligence that “our humancentric position—only thinking from a human perspective—is toxic and we can't sustain that in the current crisis with nature.”



↑ Rehousing Technosphere by Wang & Söderström. Part of the Ars Electronica Animation Festival: Data, Bodies, Space




# Expert predictions and reflections

To mark 10 years of “The Future 100” we asked experts to predict and reflect on the following questions within their sectors.

What one thing are you looking forward to in 2024?  
What has been the single biggest change over the past 10 years?



BRANDS	
 <p><b>Mark Read, CEO, WPP</b></p>	
2024	PAST 10 YEARS
<p>“Looking ahead to 2024, we’re excited about the potential for AI and machine learning to transform the marketing landscape, allowing our clients to better understand their customers, predict behavior, and tailor campaigns at an unprecedented scale.”</p>	<p>“The rise of digital platforms and technologies over the past decade has fundamentally revolutionized how brands connect with consumers. The proliferation of social media, mobile technology, and data analytics has enabled more targeted, personalized, and effective marketing strategies to reach and engage the right audiences at the right time.”</p>

LUXURY	
 <p><b>Jing Zhang, global editor-in-chief, <i>Jing Daily</i></b></p>	
2024	PAST 10 YEARS
<p>“A search for meaning, craft, slowness, and authenticity—I see this as a reaction to our analysis of the past 10 years. Luxury brands will search to distinguish luxury’s unique attributes, culture, and history from others in the fray. I think this fits into a more considered sense of consumption we will all experience in 2024.”</p>	<p>“Digitalization and the democratization of access to the world of luxury. The past 10 years have seen the domain of luxury increasingly revealed to the public, and luxury is engaging with fans in transformative new ways through the digital and social media worlds. The industry no longer feels like a ‘walled garden’ but has developed into a culture that sits within broader culture, even if it is the traditional playground of society’s wealthy.”</p>



**TRAVEL**



**Tom Marchant, owner and cofounder, Black Tomato**

**2024**

“One trip I think we’re going to see more of in 2024 is the pursuit of finding silence. If you look at travel as the antidote or the opposite to your day to day, we’re increasingly living in a world of noise, so we’re looking to find moments of quiet and calm, both from a natural and an environmental perspective. I don’t necessarily mean silent retreats. It’s more about being able to open a door, step out into a landscape, and not hear anything but the earth itself.”

**PAST 10 YEARS**

“There’s been an evolution in the recognition that creating sustainable and regenerative travel experiences is crucially important, not only for clients, but also for communities around the world.”

**CULTURE**



**Kirsty Sedgman, doctor of audiences and cultural studies expert, University of Bristol**

**2024**

“I’m excited to see a new social contract with kinder modes of coexistence at its core. In an age where bad behavior is everywhere and the social contract seems to be collapsing, many of the things we consider reasonable are relics of a bygone age, fraught with selfishness, discrimination, and unfairness. Embracing ‘unreasonable’ behavior in the name of justice—well, is that such a bad thing?”

**PAST 10 YEARS**

“One welcome change over the past 10 years has been the rise of relaxed performances, parent-and-baby events, and the ‘extra live’ movement in theatre more broadly. This change has been spearheaded by disability activists in order to provide a more welcoming space for autistic and other neurodivergent audiences, as well as for parents with young children, who often need a more relaxed atmosphere than sitting still and silent in the dark.”



**RETAIL**



**Leticia Credidio, founder,  
Leticia Credidio**

**2024**

“It’ll be an exciting year for independent and small brands as consumers are demanding more transparency and craft. Self-care and slower-paced choices are also now on people’s priority lists—this is something that we as a brand have been looking forward to seeing in retail.”

**PAST 10 YEARS**

“The fashion industry and the retail landscape have gone through drastic changes with the fall of mass garment production and rise of conscious shopping. Over the past 10 years most of us have been learning how to spot greenwashing, and started to choose sustainable brands and quality over trends.”

**FOOD**



**Alix Cherowbrier, strategy  
director, Bompas & Parr**


**2024**

“We’ll be seeing more cross-pollination between unexpected categories and food and beverage, as worlds collide to generate genuine innovation, from archeological spritzers to deepfaked desserts. I’m excited to see ingredients of yesteryear resurrected and consumed through enchanted rituals, and mood-optimizing tonics disperse into the mainstream.”

**PAST 10 YEARS**

“Food and drink have shifted from being steadfast to being holistic. Over the past 10 years, we have seen a higher sense of the self echo through how diners consume food and beverages, with social media trends shifting us from being voyeurs to being interactors in restaurant settings. Menus are now polysensory, allowing the food and drink we consume to permeate the self.”



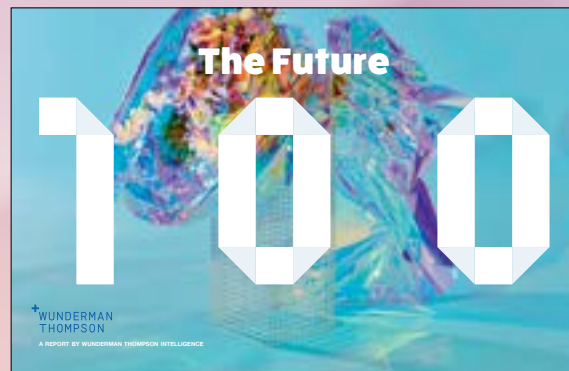
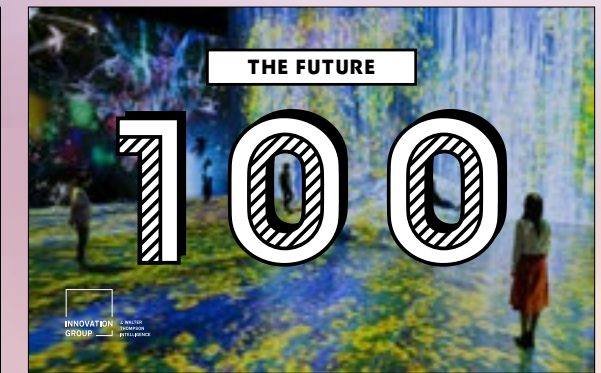
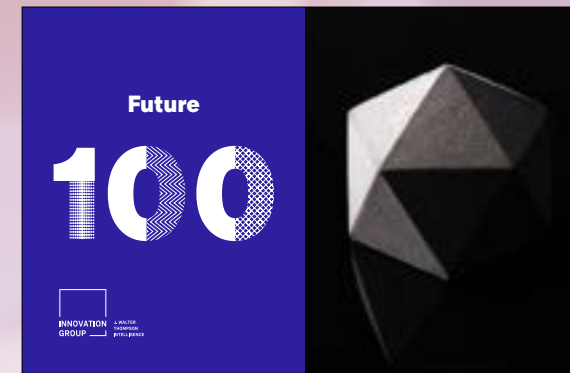
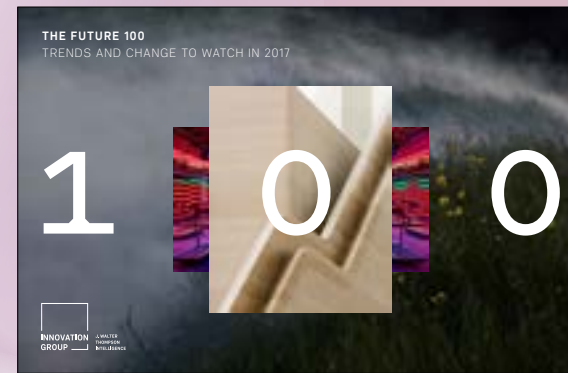
BEAUTY	
	<b>Kimberley Ho, founder and CEO, Evereden</b>
2024	PAST 10 YEARS
<p>"A return to science-backed claims and professional expertise behind products. With a deluge of new brands, there has also been so much marketing noise in beauty that consumers are fatigued and are now moving back to wanting real science when choosing products."</p>	<p>"The democratization of beauty brands in a way that has coincided with the rise of ecommerce and social media. Allowing growth in new and successful brands in the past 10 years more quickly than ever before, because the barrier to entry in reaching consumers has become lower."</p>

TECHNOLOGY	
	<b>Daniel Hulme, CEO, Satalia, and chief AI officer, WPP</b>
2024	PAST 10 YEARS
<p>"I'm excited to see how Large Language Models will use machine reasoning to become much smarter and safer. And I'm even more excited about seeing leadership start to educate themselves in AI so they can pragmatically and effectively start embracing these technologies to drive real value."</p>	<p>"How AI should be embraced by organizations has been well-meaning, but occasionally off the mark. A huge amount has been invested in data lakes and data science teams, which hasn't always generated ROI. It's important for organizations to now focus on AI tech that directly generates value. Examples would be AI for content creation, as well as using synthetic audiences to rapidly test and deliver incredible customer experiences."</p>



# 10 years of "The Future 100"

Our annual forecast of 100 trends to watch celebrates its 10th edition this year. That's 10 reports and 1,000 micro trends shared over the past decade. "The Future 100" is here to inspire brands and individuals by connecting with cultural trends and consumer expectations for an innovative future.





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## **ABOUT VML INTELLIGENCE**

VML Intelligence is VML's futurism, research, and innovation unit. It charts emerging and future global trends, consumer change, and innovation patterns—translating these into insight for brands. VML Intelligence offers a suite of consultancy services, including bespoke trends presentations, futures reports, and workshops. It is also active in innovation, partnering with brands to activate future trends within their frameworks and execute new products and concepts. The division is led by Emma Chiu and Marie Stafford, Global Directors of VML Intelligence.

### **For more information visit:**

[vml.com/expertise/intelligence](https://vml.com/expertise/intelligence)

## **About The Future 100**

VML Intelligence's annual forecast presents a snapshot of the year ahead and identifies the most compelling trends to keep on the radar. The report charts 100 trends across 10 sectors, spanning culture, technology, travel and hospitality, brands and marketing, food and drink, beauty, retail, luxury, health, and innovation.

## **About the data in this report**

Unless otherwise stated, all findings in this report were collected by VML with SONAR™ in September 2023. The study fielded September 13–October 16, 2023, when we surveyed 9,000 adults across nine markets (1,000 participants per market). The markets covered in this research are Argentina, Brazil, China, Colombia, France, India, Mexico, the United Kingdom, and the United States. Respondents are representative of their respective market in regard to age, gender, and income. Upon analysis, the global data was weighted so that five regions were equally represented: LATAM (Argentina, Brazil, Colombia, and Mexico), EMEA (France and the United Kingdom), the United States, China, and India.

# VML

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Peach Fuzz, Pantone Color of the Year 2024,  
courtesy of The Development x Almost Studios

## **FONTS USED**

Clone Rounded Latin; Dystopian; Snowflake Sans

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