

THE FUTURE

100



INNOVATION
GROUP

J. WALTER
THOMPSON
INTELLIGENCE

INTRODUCTION

Welcome to the Future 100 2019! What a rollercoaster year of change it has been. We're seeing the big, disruptive political, economic and environmental currents play out in culture, consumer behavior and emerging trends, as consumers seek to navigate the storm.

Wellbeing, stress management and health are all prompting a continued evolution of new products and services to help sooth unstable, constantly connected lifestyles. Meanwhile the definition of wellbeing continues to expand, encompassing everything from spirituality to lighting design.

Brands are also evolving. They're becoming civic leaders, advocates, even therapists (see our Brand Therapy trend). They're driving dialogue change by reinventing how we address taboos in everyday life, tackling everything from sexual health to menopause to hair loss—and are empowering refreshing, open new dialogues. They're also stepping in to solve world problems, leading material science innovation and creating new environmental policies at scale. It's clear that brand sustainability, once viewed as “nice to have” and limited, perhaps, to recycled packaging, is now a mandate and a base expectation for consumers. Likewise, the wellbeing movement—once the preserve of coastal US millennials and established markets—is now going truly global. We saw this in our deep dive into wellbeing in the APAC region.

Technology continues to shapeshift at a rapid pace but we're seeing seed change appear. Silicon Valley is having a reputational reckoning, as awareness

of this group's scale, reach, and ethical behavior (or lack thereof) becomes clear. As a result, we're seeing tech brands, big and small, start to differentiate with more ethical or empowering privacy policies. Silicon Valley is also coming up against a powerful rival—a competitor in the shape of China Tech.

When it comes to shopping and consuming, the influences on purchasing decisions are becoming ever more decentralised, personal and visual. Taking stock of our list this year, I was struck by how integral Instagram has become to trends, shopping, visual language, and culture—and also by the degree to which all consumers, not just influencers, see themselves as brands, curators, and creators. That also has its downside. For a long time, brands have successfully used visually compelling experiences, environments and packaging to inspire organic social sharing, but consumers are getting wise and starting to pull back.

What's next? We're sure to see more disruption as 5G (charted in our 2018 report) truly lands. We're also seeing a wealth of activity in sound as a channel for entertainment, culture, news, and brand interaction—interestingly, in sync with multichannel entertainment ecosystems. Fashion brands are creating podcasts, streaming platforms are creating original content, social networks are becoming entertainment channels, and it's all increasingly centered on the smartphone as the primary portal. Bring on 2019!



Lucie Greene
Worldwide Director of the Innovation Group
JWTIntelligence.com

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CULTURE

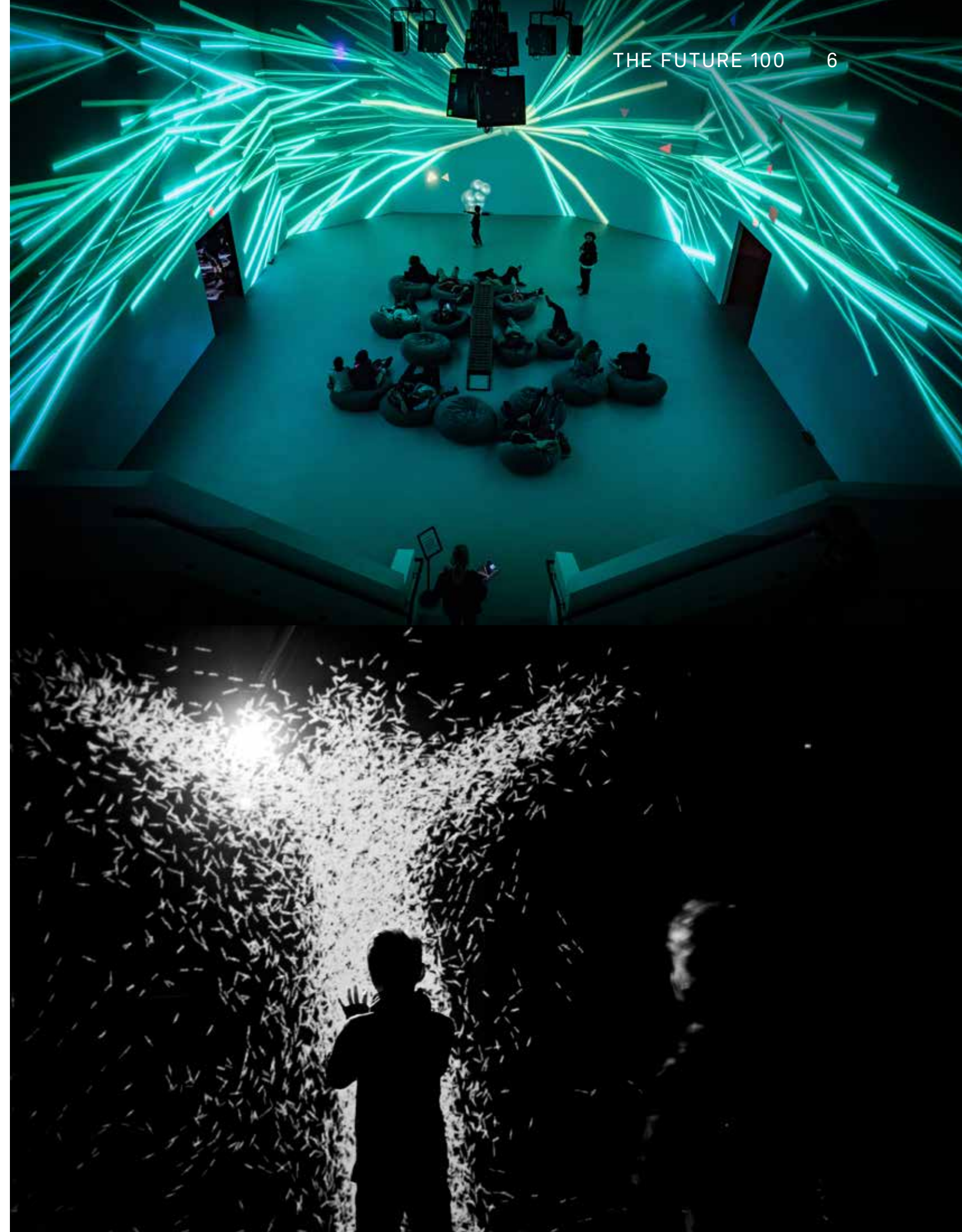
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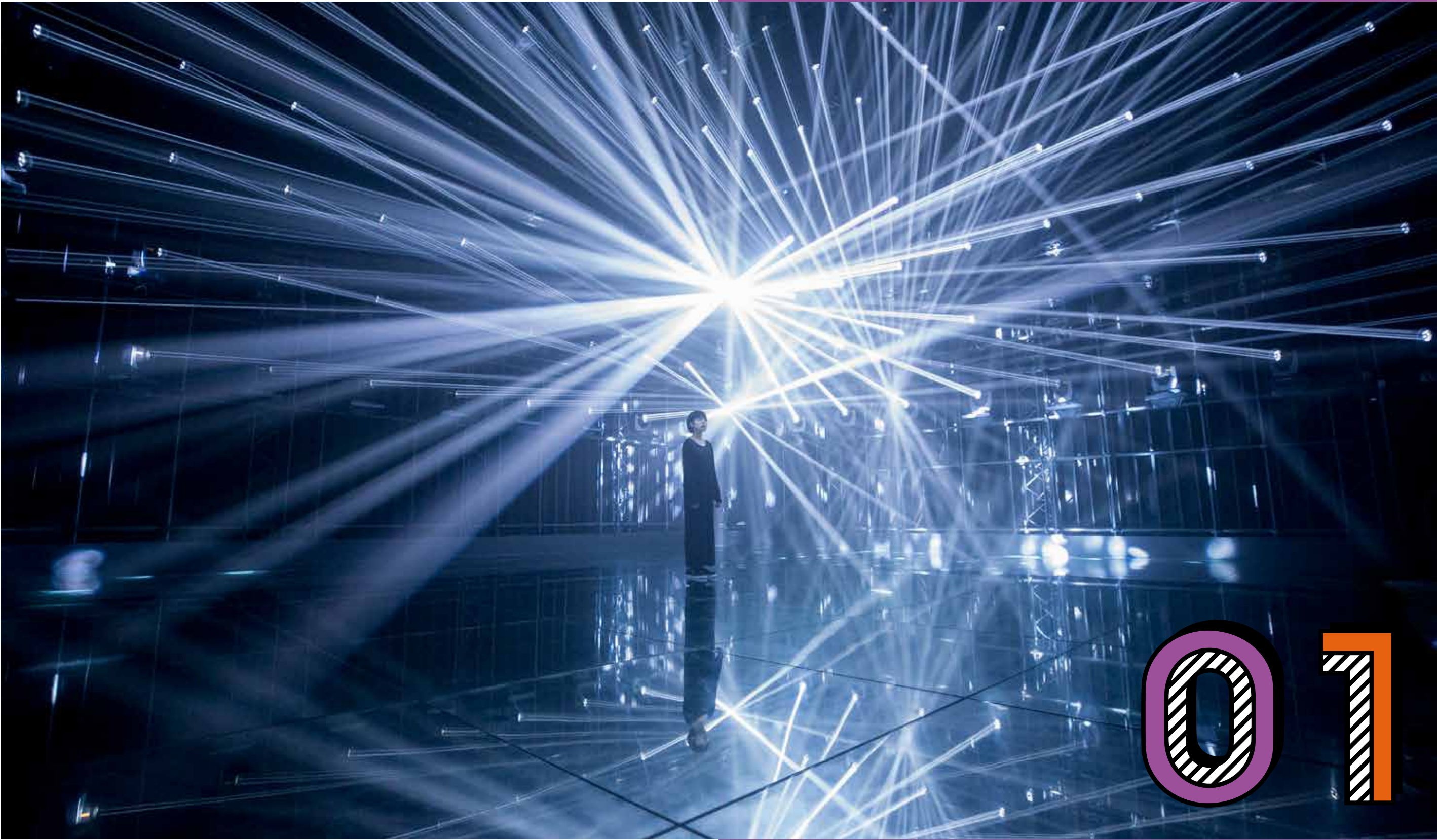
MUSEUM FUTURES

Curators and artists are moving beyond made-for-Instagram exhibitions to create immersive and interactive museums that inspire new levels of stimulation and engagement.

Unlike the recent wave of pop-up museums designed to woo social media-savvy millennials, the teamLab Planets and Borderless installations in Tokyo instruct patrons to leave their selfie sticks at the door. These larger-than-life digital art exhibitions make the visitor the protagonist. Nature-themed environments are filled with virtual ponds of rainbow-colored light that ripple as a person moves through them. Walls of projected images respond to motion and touch.

teamLab's technological twists on the traditional museum experience delve deeper than the legions of 2018 installations inspired by the Museum of Ice Cream. Instead of designing spaces intended to ultimately look good for a 2D medium like Instagram, teamLab creates a sensory blend of art and digital, allowing visitors to become a part of the art itself in real time. The 500-strong team of animators and software engineers are also taking their work outside





"Artists are challenged to rethink the role of the viewer, giving them a new sense of agency."

the exhibition hall to historical and spiritual landmarks such as Japan's Kochi castle, giving visitors a modern way to reconnect with centuries-old attractions.

Washington DC-based digital art space Artechouse is on the road until spring 2019 with its XYZT: Abstract Landscapes experience. The project, by French multimedia choreographers Adrien Mondot and Claire Bardainne, stops in cities from Albuquerque to Miami, allowing visitors to immerse themselves in interactive lightscapes. XYZT, which stands for the four dimensions—horizontality, verticality, depth and time—is intended to woo people of all ages and transform the dispassionate museumgoer into one who's captivated.

WHY IT'S INTERESTING:

The new immersive museum employs state-of-the-art technology like virtual and augmented reality to engage generations whose exceedingly digital world has made them accustomed to visual stimulation on demand. Artists are challenged to rethink the role of the viewer, giving them a new sense of agency. This newest phase of experiential art is primarily reserved for temporary installations at present, but it's a model that could inform designs for future theme parks, shopping malls, and even restaurants.

02

XENNIAL POLITICIANS

Xennials are starting to enter politics with a new agenda: witness Alexandria Ocasio-Cortez, who won the Democratic primary in New York's 14th congressional district aged 28 in June 2018, running as a social democrat and sensationally fending off incumbent Congressman Joe Crowley; Jason Kander, born 1981, army veteran and Obama-tipped Democratic party future superstar; and Andrew Gillum, born 1979, and 2018 Democratic nominee for Governor of Florida.

We first explored the Xennial cohort in a study we published in 2017. This group, aged 30-45 and comprising older millennials and younger generation Xers, is becoming increasingly influential in culture, consumption and politics, combining adult spending power and habits (they've got kids now) with millennial values—concern over climate change and gender equality are just two. Now they are engaging in politics to grapple with the unique systemic challenges they've inherited, from student debt to house prices.





"Many emerging adults are realizing that student debt and precarious work arrangements aren't temporary difficulties, but structural issues that need to be addressed. No wonder this group is pushing back, politically, against a status quo that seems to be stacked against them."

WHY IT'S INTERESTING:

As we pass the 10th anniversary of the global financial crisis, it's easy to forget that the opportunities missed by millennials and gen Xers during the depths of the subsequent recession have had lasting effects. Many emerging adults are realizing that student debt and precarious work arrangements aren't temporary difficulties, but structural issues that need to be addressed. No wonder this group is pushing back, politically, against a status quo that seems to be stacked against them.

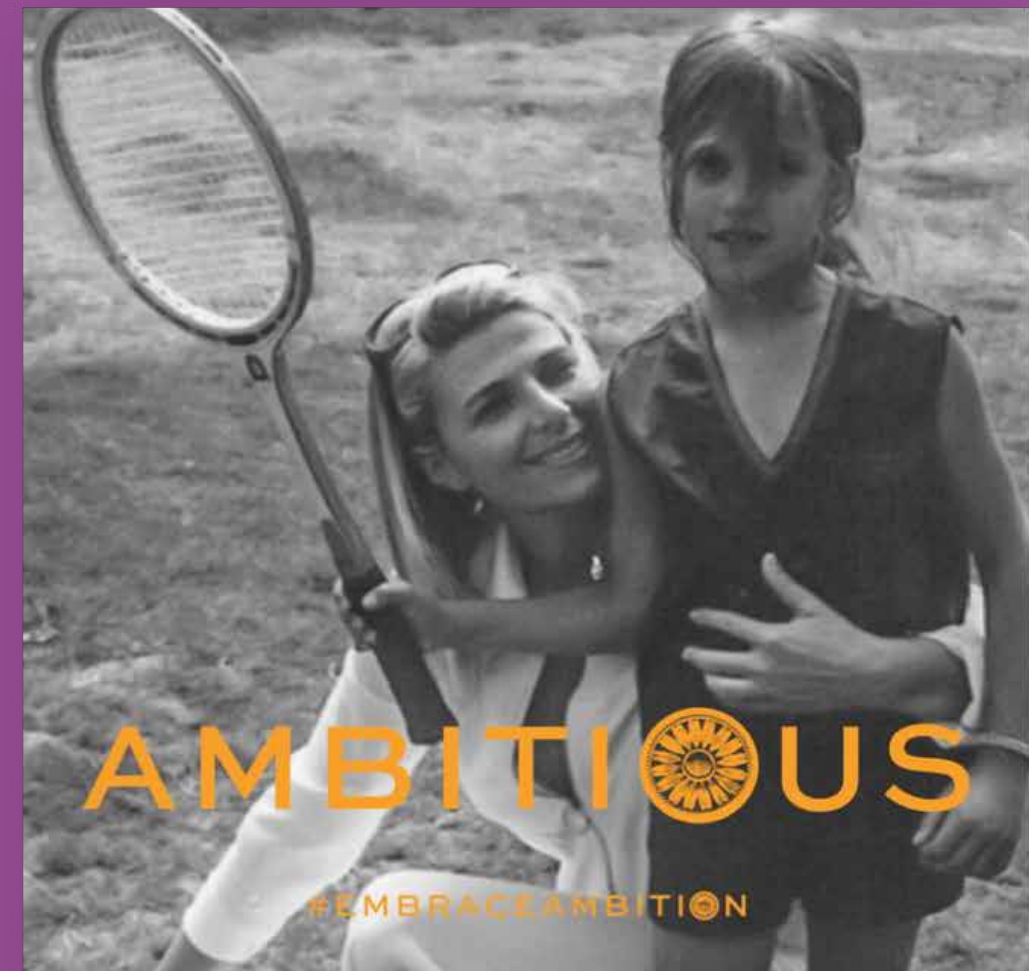
Today's New Adults will form the core of tomorrow's voters, carrying significant influence over national issues. In the 2016 US election, millennial and gen X voters outnumbered boomers for the first time, according to the Pew Research Center. In the United Kingdom, their impact is already visible. Although Labour's surprising gain in the share of seats in the 2017 general election was credited mostly to younger voters, an *Evening Standard* poll revealed significant shifts to Labour among 35-54-year-olds.

03

MOTHERS OF AMBITION

Motherhood is being rebranded. From fashion models and comedians to influencers and high-profile execs, women are leading a positive new dialogue about what it means to be a mother.

In summer 2018, audiences cheered as *Sports Illustrated* swimsuit model Mara Martin walked the runway in Miami in a glittery gold bikini while breastfeeding her five-month-old-daughter Aria. Slick Woods graced the July 2018 cover of *Elle* and also took to the runway for the New York Fashion Week 2018 Savage x Fenty lingerie show, alongside another heavily pregnant model. Designer Marta Jakubowski sent a model sporting the Elvie wearable breast pump down the runway during London Fashion Week 2018. Model Chrissy Teigen regularly posts frank portrayals of motherhood on Instagram, including one shot of her pumping breastmilk in the car before dinner.



Dear Mom,

You inspire me to #EmbraceAmbition
because you have always encouraged me to
think of negativity as noise.

Thank You
TORY

“Real and raw portrayals of motherhood are rejecting the reductive notion of mothers as passive caregivers, turning instead to a language of bold empowerment that eschews the outdated either/or of motherhood and career, and shines a light on the expanding definition of modern motherhood.”

Comedian Ali Wong performed while over seven months pregnant in her breakthrough Netflix special “Baby Cobra” and again in the sequel “Hard Knock Wife.” With her biting commentary on breadwinning and breastfeeding, Wong is normalizing the ambivalence and anxiety that so many mothers have previously had to face silently.

Sarah Lacy, CEO of tech news platform Pando, seeks to rebrand working motherhood with Chairman Mom, a subscription-based online community launched in spring 2018 that connects working moms and helps them solve the toughest problems they face. With Chairman Mom, Lacy pushes back against the trope that motherhood leads to a career dead end.

WHY IT'S INTERESTING:

Real and raw portrayals of motherhood are rejecting the reductive notion of mothers as passive caregivers, turning instead to a language of bold empowerment that eschews the outdated either/or of motherhood and career, and shines a light on the expanding definition of modern motherhood.



04

REFRAMING MASCULINITY

Brands, marketers and newsmakers have intensively zeroed in on the female experience of late—and rightly so. But now, insights agencies, research groups and think tanks are starting to ask: what about men?

Faith Popcorn's BrainReserve released a study at the summer 2018 Cannes Lions International Festival of Creativity exploring how masculinity is evolving and what these changes mean to marketers. The Future Laboratory's "New Masculinity" report, released in spring 2018 by the London-based futures consultancy, takes a deep dive into the shifting definition of manhood. Carl Martin (formerly of Burberry and UsTwo) launched Menmade, a collective for men who do not recognize themselves in negative, one-sided pop-culture narratives.

Trailblazing brands such as Harry's, Hims, Bonobos and Axe have started working to present a more multifaceted view of masculinity in marketing, with campaigns that make an effort to consciously adapt the portrayal of masculinity to allow for more nuance, flexibility and compassion.

"I think what this entire conversation has been about and what it's brought up is the need to allow men to exist in a plurality of different versions of their



manhood, rather than defining specific boundaries in which they should exist if they want to perform masculinity ‘correctly’ in 2018,” Peter Maxwell, senior journalist and author of the Future Laboratory’s “New Masculinity” study, tells the Intelligence Group. “There’s a need for brands to become involved in providing better role models for men and to undo some of the damage that they’ve been complicit in subjecting society to over the last 50 to 100 years.”

WHY IT’S INTERESTING:

Brands have undeniably been “culpable in reinforcing or creating some of the stereotypes” that have contributed to the problem of toxic masculinity, notes Maxwell. Now, it’s time to make amends by presenting a more nuanced version of masculinity.





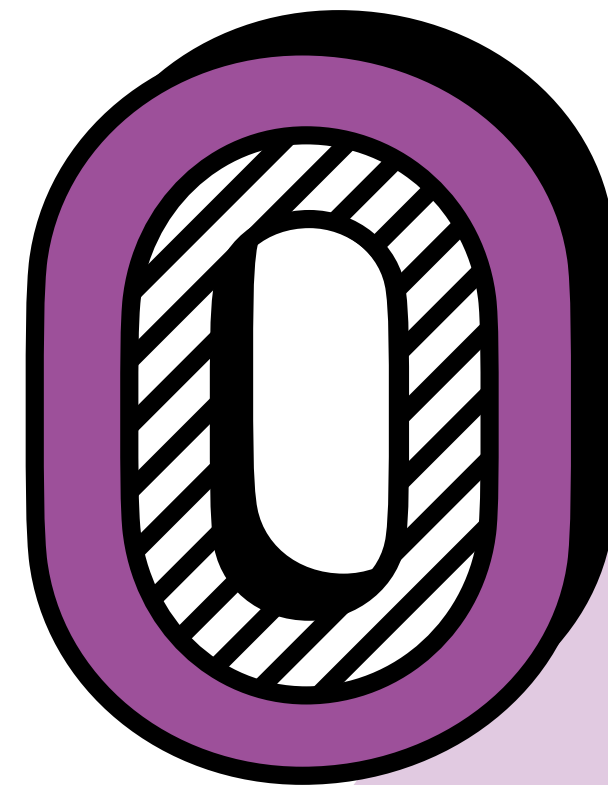
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INSTAGRAM BACKLASH

Will 2019 mark peak Instagram? It's looking that way, as brands and consumers start to push back on what has become a cynical culture of visually novel experiences designed expressly to inspire sharing; of influencers who buy their followers; and of curated lives that create FOMO and anxiety.

Signs of the times: August 2018 saw the launch by New York-based Village Marketing of the first Instagram-centric apartment. The 2,400-square-foot SoHo space, which is decked out with plush sofas in millennial pink, gold and cream leather stools and cushion-strewn four-poster beds, was conceived as a place for influencers to stage photoshoots. The rental fee is \$15,000 per month. The launch was greeted with parody and bemusement on social platforms.

Increasingly food, hospitality, hotels and bars are having Instagrammability written into the design brief for creators. Branded "experiences" have reached fever pitch, from the Museum of Ice Cream's never-ending tour of duty to Rosé Mansion—a Fifth Avenue temple of wine-drinking moms and selfie ops—to Refinery29's touring 29Rooms exhibit of interactive artworks.



Commentators in media and social networks are starting to push back. The *New York Times* poked fun at the recent string of cynical, shallow Instagram “experiences” in a widely shared piece “The Existential Void of the Pop-Up Experience.”

Bon Appétit even poked fun at the trend for intense food-picture sharing with a guide to mindful selfie-free eating. As of November 2018, the hashtag #basic on Instagram had been used on over 4.5 million images to signal something over-saturated or ordinary.

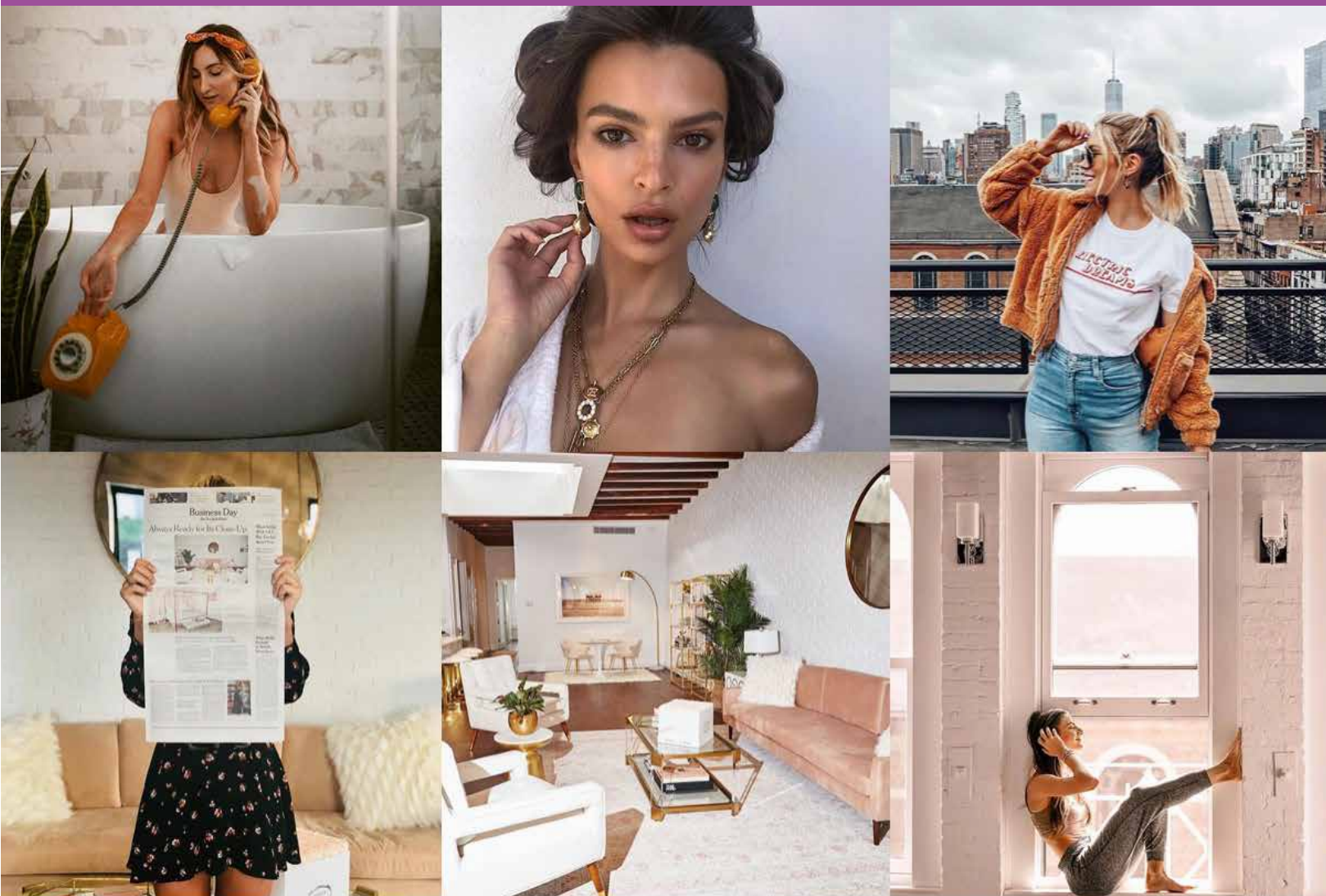
Brands are also pushing back. Early in 2018, the *New York Times* blew the whistle, publishing “The Follower Factor,” an influential investigative report exposing the grey market of paid-for followings. Its introduction to the practice of paid-for influence was punchy: “Everyone wants to be popular online. Some even pay for it. Inside social media’s black market.”

Fake influence was also a hot topic at the international Cannes Lions advertising festival. “Celebrities are less trusted now. Influencers are. But nobody really knows what they’re getting,” said Edelman CEO Richard Edelman. Keith Weed, CMO of Unilever took this further, calling for “urgent action now, to rebuild trust before it’s gone forever.” Weed said he wants take action to clear up bad practice in the space, from bots to fake followers in what he called “dishonest business models.” The FMCG giant announced that it will now not work with influencers who buy followers.

“I think for people to get out of their homes and pay money to go somewhere—and deal with lines and crowds—there needs to be more in it than a photo. Ideally they need to learn something, make a connection with someone, or get a real value.”

Jessica Matlin, beauty director, *Harper’s Bazaar*





Instagram has been a hub for beauty influencers in recent years, with lavish selfie-focused events such as BeautyCon, and pop-up immersive beauty experiences such as Glossier's theatrical fragrance launch. But Jessica Matlin, beauty director at *Harper's Bazaar*, thinks this too is on the wane. "I think people will demand more than getting their picture taken next to props. I think for people to get out of their homes and pay money to go somewhere—and deal with lines and crowds—there needs to be more in it than a photo. Ideally they need to learn something, make a connection with someone, or get a real value," she says. "As for aesthetics, we see it happening in beauty right now. The heavily madeup look is already waning, and we see more of a desire for a fresher, more natural-looking glow. That sort of artificial Instagram look is starting to look dated and inauthentic. People know it takes hours, is often filtered, and it just feels out of step with the moment we're in."

You heard it here first.

WHY IT'S INTERESTING:

With the explosion of each new platform there are periods of enthusiasm, saturation, then backlash. Consumer behaviors also increasingly follow this pattern, from enthusiasm, to creativity, to self-awareness. In a mature social-media landscape, where consumers are more sophisticated than ever, this path has been steeply accelerated. And the brand path is likely to follow suit. Still, brands have IGTV to leap into, and YouTube has hired Derek Blasberg to ramp up beauty and fashion entertainment.

06

MOVIE-PASS WARS

MoviePass, the film streaming subscription company that at one point offered unlimited film screenings to subscribers for \$9.95 a month, has arguably proved that business model is unsustainable. The Motley Fool says that MoviePass's reputation as a viable business is "in tatters," as its parent company, Helios and Matheson, looks to distance itself from the brand.

But the model has ushered in change, prompting several theater chains to launch their own versions of streaming passes. AMC Theatres in the United States has launched a service which allows customers to see three movies a week for \$19.95 a month, and several UK cinema chains have followed suit. Odeon has its Limitless pass, while Cineworld offers an unlimited cinema ticket starting at just under £18 a month.

"While MoviePass as we knew it is effectively gone, it successfully shook up movie-going enough to push rivals into providing their own versions that have been popular," says Bloomberg's Anousha Sakoui.

And, as the *Washington Post*'s Megan McArdle points out, "the folks with the good idea may not be the ones who profit from it." McArdle writes that AMC,

an established movie theater chain, "is simply in a better position than MoviePass to sell movie tickets," noting that "AMC has the data to manage demand; it has a built-in customer base with its loyalty program, and it can keep MoviePass at bay simply by refusing to sell discounted tickets."

WHY IT'S INTERESTING:

Bloomberg reports that movie theater attendance in the United States in 2017 was at its lowest point since 1992. What's certain is that the industry will continue to experiment with its pricing model as it bids to lure audiences back to theaters, with unlimited passes one way to revive viewers' interest in movie-going.



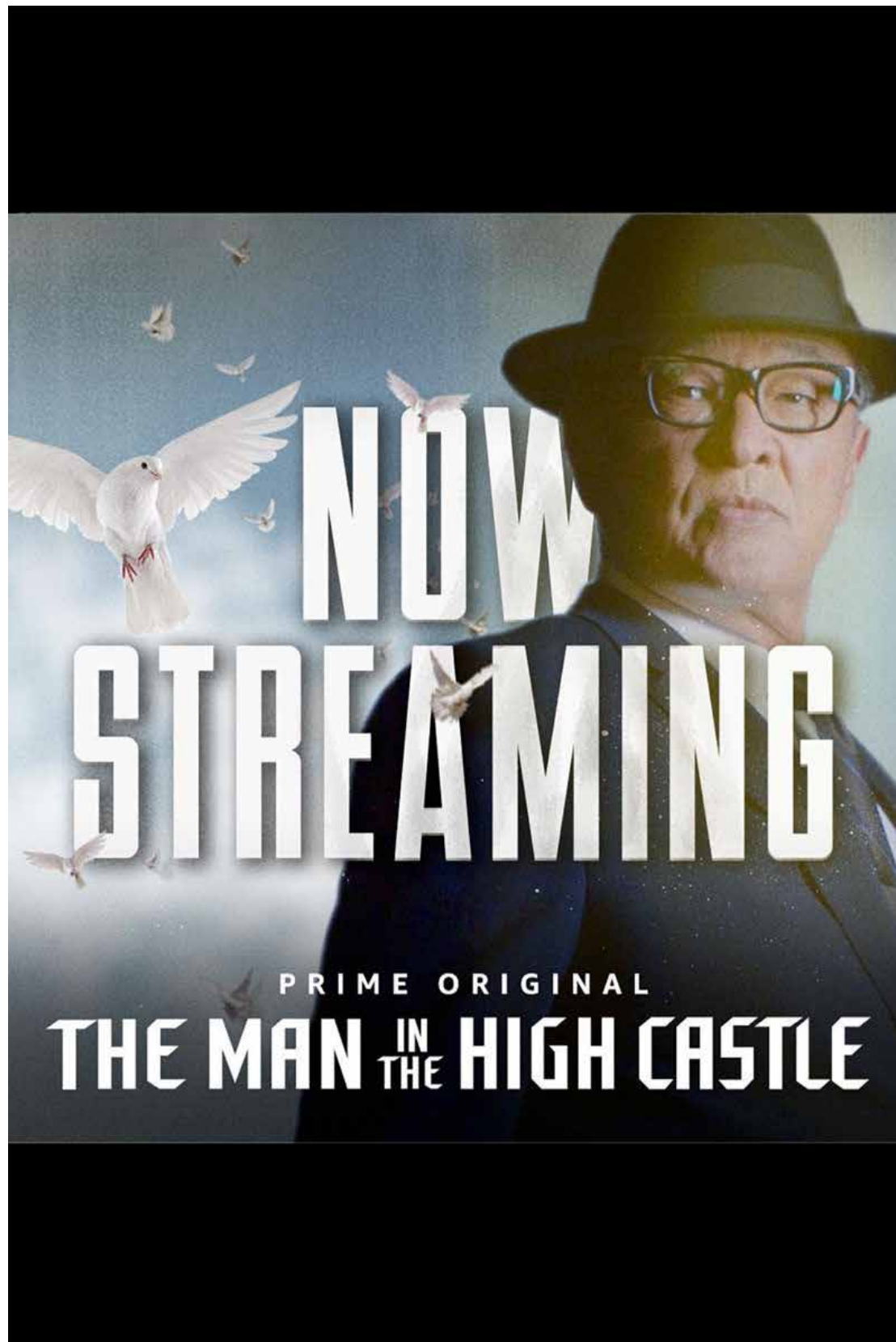
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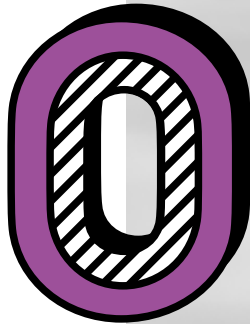
SILICON VALLEYWOOD

Netflix, Amazon, and Apple aren't satisfied with merely playing a volume game in terms of original film content. Instead, these tech giants are zeroing in on creating drama, animation, and documentaries that have serious cultural clout—potentially disrupting the Hollywood studio system.

Alfonso Cuarón's *Roma*, inspired by his 1970s childhood in Mexico City, has been tipped to win Netflix its first Best Picture Oscar nomination in 2019, after the streaming giant acquired the distribution rights to the film in 2018.

Amazon has also made waves with its original content, developed through its Amazon Studios arm. *Manchester by the Sea*, which the tech giant acquired at 2016's Sundance Film Festival for \$10 million, was nominated for a Best Picture Academy Award in 2017, and scooped up that year's Best Actor and Best Original Screenplay awards.





“The question is whether the encroachment of tech companies onto Hollywood territory marks ‘an inflection point that will force exhibitors [cinema operators] to accept further erosion of their windows with exclusive movies.’”

Anousha Sakoui, film and entertainment correspondent, Bloomberg News

Amazon's head of film and television Jennifer Salke underlined the company's ongoing cultural ambitions in an October 2018 interview with Screen Daily, declaring that Amazon Studios wants to create “the best home for talent.” Amazon's budget for content was reported to be \$4.5 billion in 2017 and that increased in 2018.

Apple, too, is making its mark in highbrow film-making. In September 2018 the company acquired the rights to *Wolfwalkers*, a forthcoming animated film from the Cartoon Saloon, based in Kilkenny, Ireland. Cartoon Saloon has produced several captivating animated features that have been nominated or shortlisted for Oscars, among them *The Breadwinner*, *The Secret of Kells*, and *Song of the Sea*. In the same month, Apple also acquired the rights to documentary film *The Elephant Queen*.

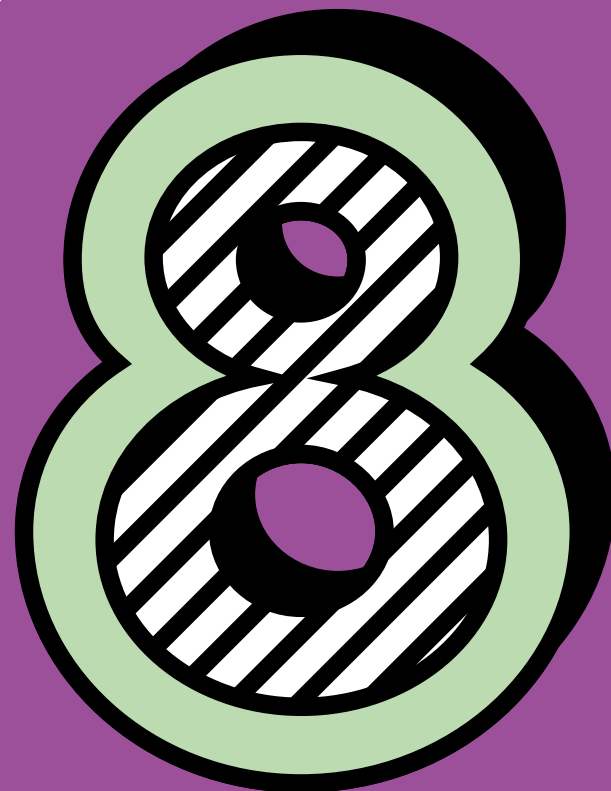
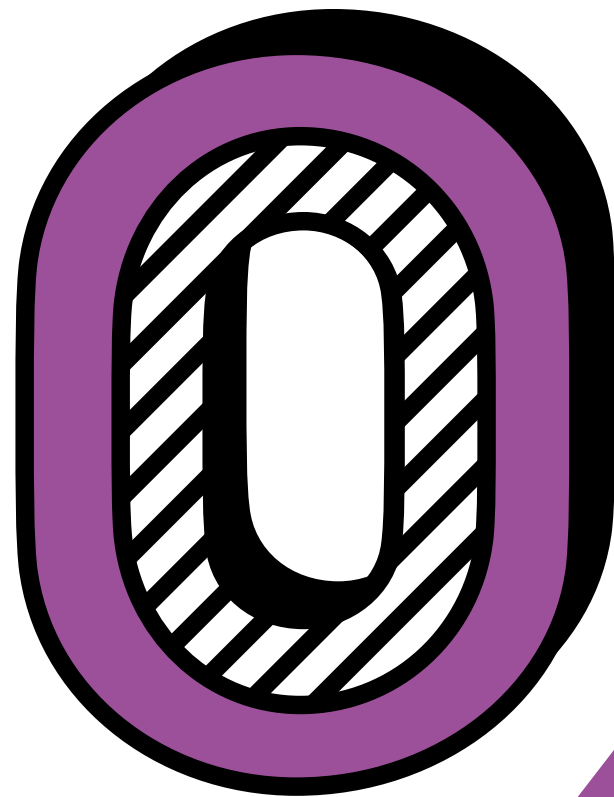
Anousha Sakoui, who writes about the film and entertainment industries for Bloomberg News, notes that Netflix “has been investing heavily in original movies and trying to attract top film-makers for years.” And in light of *Roma*'s Oscar buzz, Netflix announced that the film would have a movie-theater run of around three weeks towards the end of 2018, ahead of Netflix streaming. This is a first; the company had previously only shown its film releases in theaters

from the day they were released on Netflix's streaming service. Sakoui describes this move as “a significant concession, not only to attract filmmakers who want to see their movies on the big screen, but also to Oscar voters who are supportive of theaters.”

The question now, Sakoui says, is whether the encroachment of tech companies onto Hollywood territory marks “an inflection point that will force exhibitors [cinema operators] to accept further erosion of their windows with exclusive movies,” noting that “there has been increasing pressure on theaters as the number of streaming options multiply.” Indeed, in 2019 Disney, AT&T and Apple are all expected to start new streaming services.

WHY IT'S INTERESTING:

Tech giants want to cement their role as Hollywood players by creating content that packs a punch. They're in a position to plough investment into serious film-making, potentially impacting the established studio model. And given that their distribution model naturally favors their own streaming services over movie theaters, this could mean yet more customers will turn away from cinema visits, at a time when chains are already finding times tough.



08

FUNERALS ON DEMAND

It had to happen eventually. Digital disruption and new on-demand and direct-to-consumer businesses have transformed every segment from cleaners to the massage business. The latest foray? Funerals.

Amid rising funeral costs, a clutch of pioneering companies around the world is turning funeral services —usually local, often opaque and almost always shrouded in taboos—into something shoppable with clear prices and options.

Beyond, a UK funeral services company, made waves in 2018 with a series of provocative ads, including one showing a happy couple running on a beach, carrying what look like surfboards. Look closer and the surfboards are actually wooden coffins. The ad is for a “one-way,” “once-in-a-lifetime” trip with “roasting temperatures” for an all-inclusive price of £1,195—namely, cremation. The ad was rejected by London transport authorities but ran online and elsewhere around the city. Some saw the humor, others found it disrespectful.

Once in a lifetime!

*One Way
£1,195

ALL INCLUSIVE

ROASTING TEMPERATURES

DEPART FROM ANYWHERE

COMPARE FUNERAL DIRECTORS - FREE WILL WRITING - FUNERAL PLANS - ESTATE ADMINISTRATION

870°

LOW COST, NO FUSS CREMATION
visit www.beyond.life

Beyond...
For everything after life

Only 6% of people shop around for funerals.
That's why they cost so much.

Compare funeral director prices online.

www.beyond.life

Compare funeral directors | Bespoke funeral plans | Free will writing | Estate administration



"We're chipping away at the taboo which exists around shopping around for death services," Beyond's CEO Ian Strang tells the Innovation Group. "We have to change behavior, which is often difficult and embedded in generational attitudes."

Beyond is not alone in innovating the death business. In February 2018, Nirvana Asia, the biggest funeral services company in Southeast Asia, received funding from Baird Capital to expand its slate of services, which includes embalming, burying and cremating, as well as operating cemeteries—with Chinese pavilions and koi ponds—and organizing Buddhist and Daoist prayers.

In China, a growing number of people are starting to arrange and pay for their own funerals ahead of time, including picking their choice of caskets, urns and flowers. Thousands have signed up for such pre-funeral contracts since they were rolled out in different cities starting in 2015, funeral services company Fu Shou Yuan told *China Daily*.

WHY IT'S INTERESTING:

These new funeral services are not just reshaping long-held cultural norms and taboos surrounding death but are also bringing transparency to the businesses around it.

09

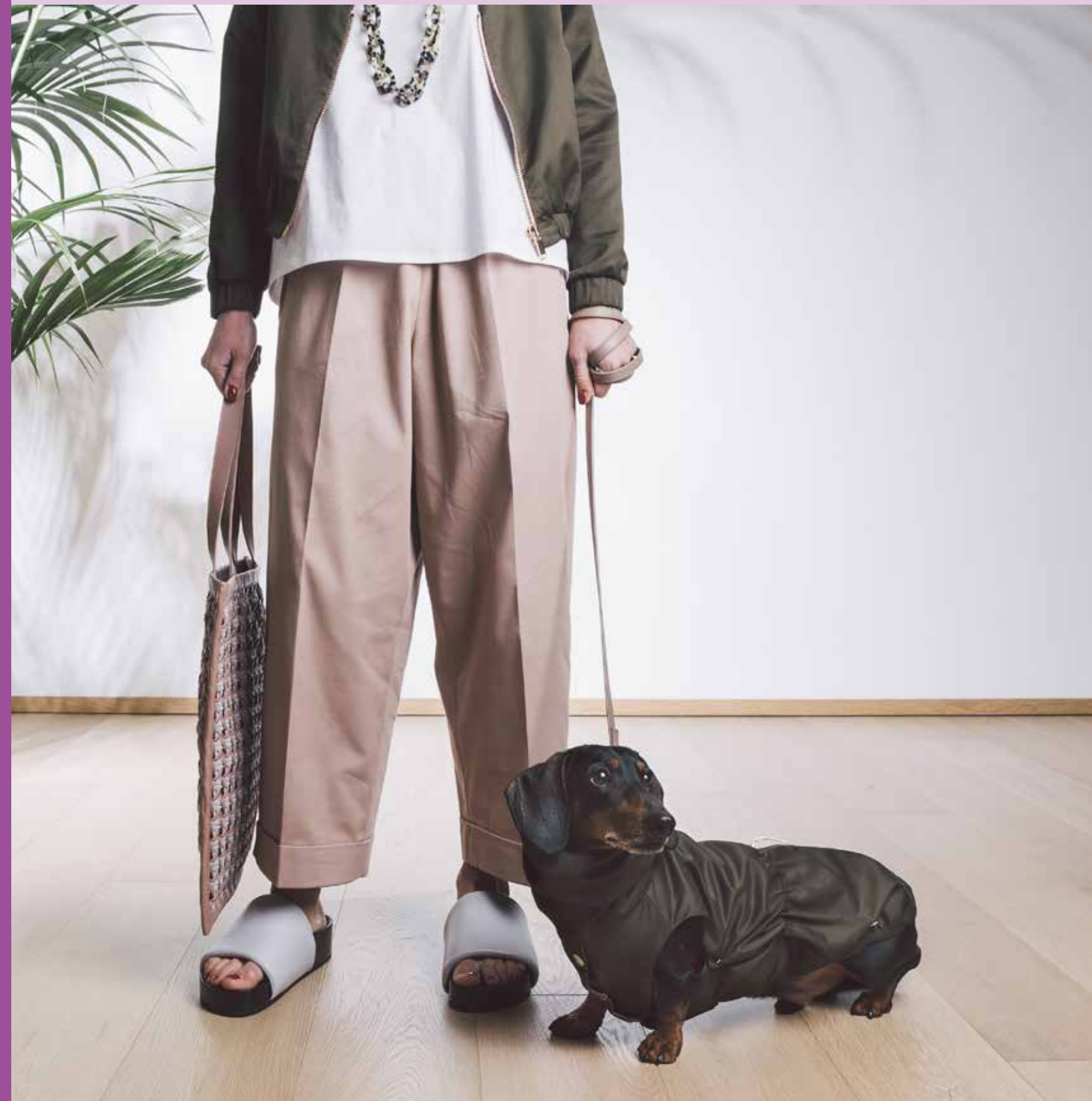
ELEVATED PETCARE

Blame those selfish urban millennials and generation Xers who are staying single and child-free for longer, and investing instead in furry companions—the pet economy is booming and extending into a host of new verticals.

Kylie Jenner set the tone for today's new devotion to pets. In summer 2018, she treated her Instagram followers to a tour of a luxury pet mansion she commissioned for her dogs, complete with air conditioning, a picket fence and a porch.

Jenner's not unique in spoiling her furry friends: Euromonitor puts the world pet product market at a whopping \$125 billion, with countries like China, Brazil and Mexico showing strong growth in pet ownership. "Pets are becoming much more than just pets to us," says Brandon Zavala, founder of Colorado-based pet beverage company Apollo Peak. "They're family now and that is driving demand for a large array of products designed to 'humanize' pets. I really don't see an end to this—in fact, there's a whole world of possibilities in terms of fun and unique products that can be developed for our furry family members."

Accommodation is a case in point. Pet stays have long since evolved beyond basic kennels and doggy daycare. At the Little Lord Barkley dog hotel in





“Pets are becoming much more than just pets to us. They’re family now and that is driving demand for a large array of products designed to ‘humanize’ pets.”

Brandon Zavala, founder, Apollo Peak

Surrey, England, dogs can enjoy Evian water fountains, classical music recitals and even the services of a dog nanny if required. Similar venues offering upscale facilities can be found across the globe, from India and China to the United States.

Style-conscious owners can now ensure their pets are as fashionably dressed as themselves. Italian designer Temellini Milano launched the canine couture brand Dog-à-Porter in 2017, offering made-to-measure coats and accessories; 2018 saw the opening of a store in Milan’s Brera neighborhood selling human and canine fashions side-by-side. This follows Italian apparel brand Moncler’s successful collaboration with the dog couturier Poldo on the sellout Mondog puffer coat in 2017.

Then there’s the Smith & Whistle bar in London’s Sheraton Grand hotel, which offers canine-friendly tipples. Devised with the help of a canine nutritionist, the “dogtail” list includes the Poochy Colada, a blend of coconut water, kale and broccoli.

Specially created beers and wines for pets are also on the rise. Apollo Peak has devised a selection of “wines” for cats and dogs. Felines can enjoy a



selection of vintages including Catbernet, MosCATo and White Kittendel, while dogs can choose from Zinfantail, Malbark or Chardognay.

Wellness services are also springing up as pets live longer, CBD oil for cats being one addition to the market. California-based AnimalBiome offers personalized testing kits along with restoration supplements to tackle gut issues.

WHY IT’S INTERESTING:

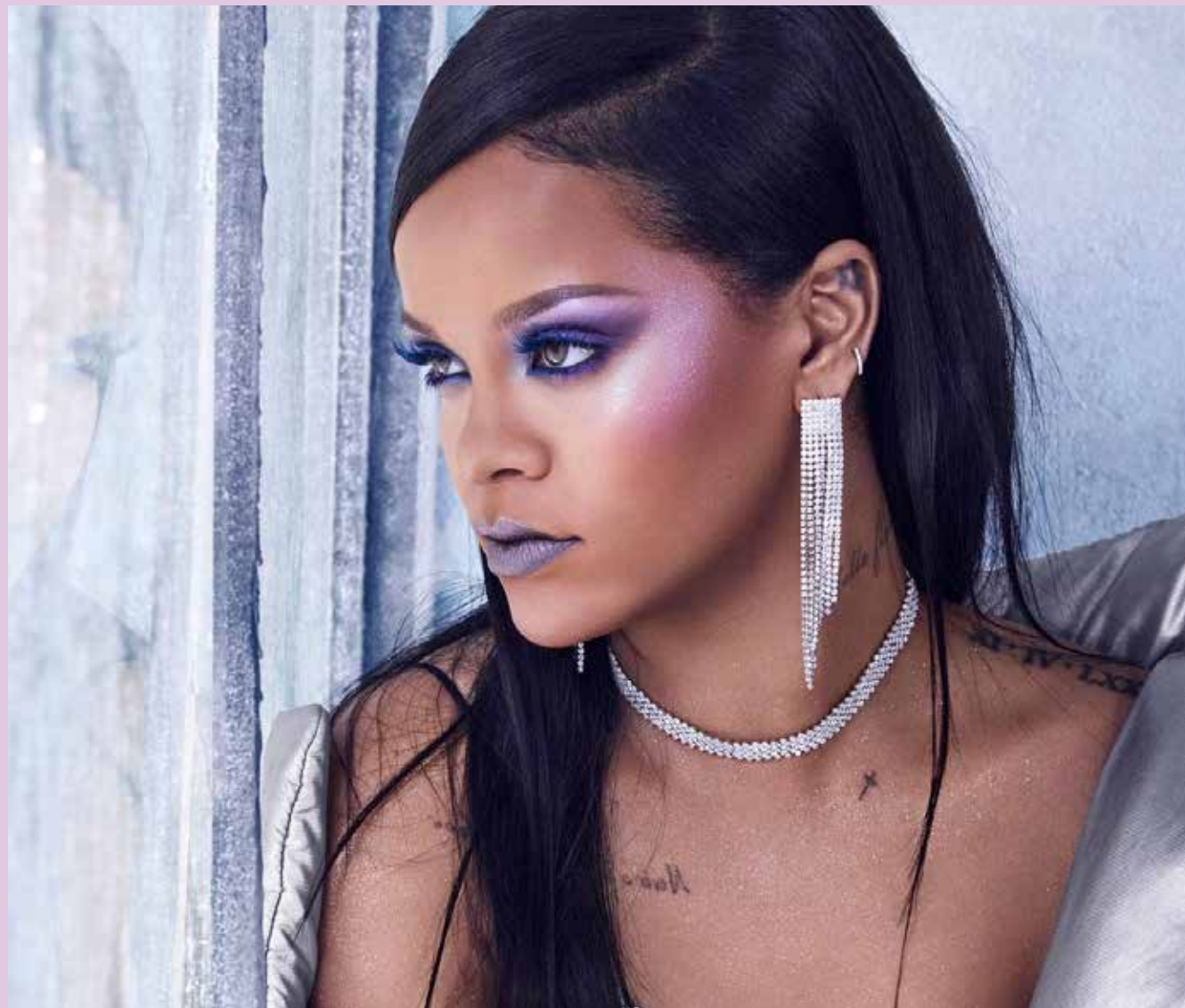
As consumer lifestyle and life-stage choices change, pets are coming into focus as a supplementary symbol of adulthood and also of status—and an expense that consumers are willing to spend as much on as on themselves.

10

2019 ZEITGEIST SHADES

**Noir neverland**

A desire for mysticism sees designers exploring different shades of black, in search of the strength, wisdom, elegance, sophistication and magic this hue embodies. The deepest depth of darkness was explored in many fall/winter 2018 collections, including Alexander Wang, Hermès and Tom Ford. Moncler 6 Noir Kei Ninomiya is an all-black collection with intricate quilting embedded onto the garments. “Black is just the word, but it really has a meaning, very strong and very beautiful, and very deep. It has such a feeling,” designer Kei Ninomiya told *AnOther* magazine. Black was not only explored in the fashion world, but also by product designers. During Design Week Mexico in October 2018, Dezeen noted the domination of “curious, dark black furniture.” Designs included Memoria, a collection of chairs and stools by EWE, and Mutable, a set of cracked and blackened wood vases by Urban Wood.



Meta metallics

The iridescent unicorn-related aesthetic grows up and metallics are taking over. Apple leads with the introduction of the hotly anticipated gold iPhone XS, following the highly successful rose gold unveiled in 2015. In beauty, makeup artists continue to add more shimmer; examples include Pat McGrath's Metamorphosis line and, more recently, the Chill Owt collection launched October 2018 by Fenty Beauty, offering "fiery chromes and polar-pastel pops for eyes, cheeks and lips."





Aquatic garden

Consumers are increasingly concerned for the environment, especially as sea and pollution levels both continue to rise. Embracing ocean and garden aesthetics brings together greens and blues for a positive and radiating aquatic shade. Tadashi Shoji used aqua-tinted eye shadows for the models on the 2018 runway show. Google released a new aqua color for its Home Mini speaker in October 2018, giving technology a softer look and suggesting an attempt to connect with nature.

WHY IT'S INTERESTING:

Cultural shifts are dictating the colors of tomorrow to connect with the consumer on a deeper level.



11-20

TECH & INNOVATION

11

HUMANIZING TECH

Tech brands are increasingly trying to blend in, carving out space in our homes and on our bodies to integrate into everyday life. Now they are shifting the dialogue away from the idea of giving up part of ourselves to a machine—data, images and even bodily fluids—and towards services that are made to smoothly and reassuringly reconcile themselves to the user. Information is presented in playful, non-threatening ways, complete with carefully constructed imperfections and idiosyncrasies.

A kinder rebrand

Brands which leverage tech are rebranding, vying for an identity that is approachable, friendly and contemporary. In September 2018, Uber launched a refreshed logo and a bespoke set of fonts which embrace a rounded sans serif.

Dating app Grindr created a new initiative called Kindr for fall 2018, in an effort to “foster a more inclusive and welcoming environment on Grindr and elsewhere within the queer community,” according to its press release. The branding leads with a soft pink palette that is reminiscent of lifestyle brands like Goop.



Kindr



Tactile tech

The premise of what a tech brand should look and feel like is being reconsidered. At a panel discussion for Google's Softwear exhibition at Milan's 2018 Salone del Mobile design week, Ivy Ross, the brand's vice president of hardware design, asked, "When you hold Google in your hands, what do you want it to look like, feel like, and how do you want to interact with it?" This is the question addressed to her design team, which officially formed in 2016 and has already launched a family of consumer hardware products in 2017. The word "human" is integral to Softwear and Google's approach to designing hardware.

The speaker industry is going through a redesign, using color and curved designs for products that blend in with home décor. Ikea entered the tech market in 2018 with its Eneby Bluetooth speaker, which can be hung up or carried by the handle, and comes with a gray-flecked fabric cover. Audio expert Sonos teamed up with Danish design brand Hay to launch in September 2018. "These speakers deserve to be treated like furniture: strong, independent objects that fit different needs and spaces," says Mette Hay, cofounder and creative director at Hay, in a release. The brightly colored speakers resonate with Hay's colorful homeware palette made for contemporary living.







“Big Tech brands are increasingly favoring an impeccably designed visual language that celebrates imperfection and tactility.”

Curvy bodies

Brands are increasingly opting for comforting curved and rounded forms. Google’s Pixel Buds and pebble-shaped Home Mini speaker have comforting rounded shapes, and woven textile covers and cables.

When it comes to automobiles a similar aesthetic is being adopted. Honda presented its 3E robotics concept at the 2018 Consumer Electronics Show (CES). The name stands for Empower, Experience and, unsurprisingly, Empathy, and the latter is a curvaceous cartoon-like robot on wheels (3E-A18), with a

skin-like exterior and anthropomorphic interface that “communicates with rich facial expressions.”

WHY IT’S INTERESTING:

Big Tech brands are increasingly favoring an impeccably designed visual language that celebrates imperfection and tactility. The overall aesthetic is human, soft, fun and refined. Rather than using primary colors, it relies on a more muted digital palette.

12

SOCIAL MEDIA WELLBEING

The conversation around social media's negative impact on mental health has been public speculation over the past few years as high-profile names including Taylor Swift, Justin Bieber and, more recently, the Duchess of Sussex speak out about the growing pressures caused by using social media.

Is social media stressing us out? According to research, it appears that the mental strain social media can have on consumers can encompass unhappiness, anxiety and even depression. Facebook's own research team admitted in a December 2017 release that "when people spend a lot of time passively consuming information—reading but not interacting with people—they report feeling worse afterward." In addition, an Origin study released in March 2018 revealed that 34% of generation Z were quitting social media permanently, with 35% saying there's too much negativity and 29% stating that it "tears apart their self-esteem."

Companies are attempting to regain trust by putting consumer wellbeing first. Facebook has an "online wellbeing" section on its site which includes a Youth Portal, helping young people use the platform in moderation and appropriately. Instagram debuted a Wellbeing division in April 2018, a team



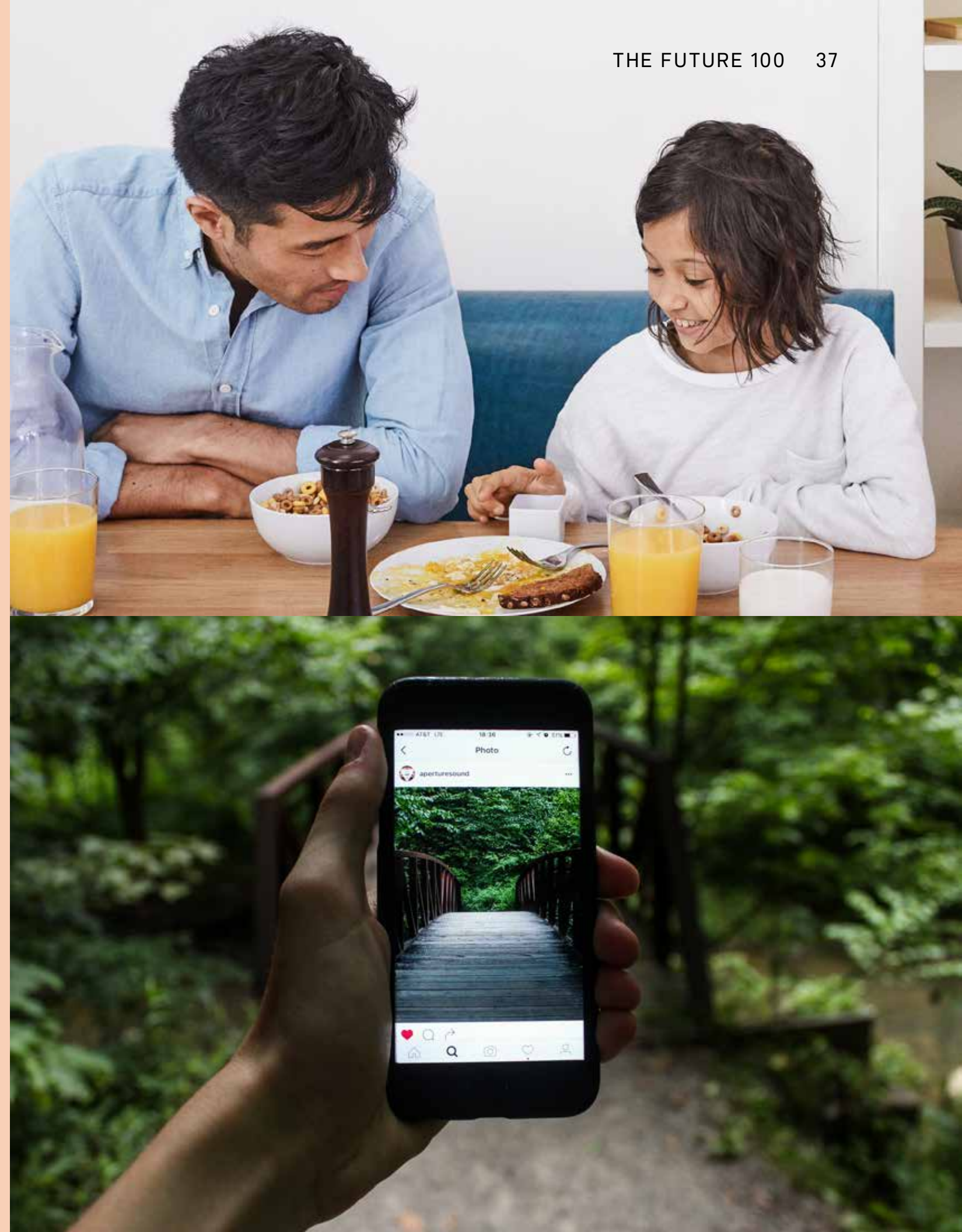
“When people spend a lot of time passively consuming information—reading but not interacting with people—they report feeling worse afterward.”

dedicated to making the social media platform a healthier space to visit. One of the first tasks was to filter bullying comments to “foster kindness within the community.”

Google launched a new Digital Wellbeing initiative in May 2018 aiming to help users find the “right balance” by monitoring habits. As part of the program, YouTube introduced its Take a Break feature, which allows viewers to install custom reminders to take a breather from any online bingeing. Similarly, Facebook and Instagram have introduced time management features to prevent overusage.

WHY IT'S INTERESTING:

There are over 3 billion social media users, according to statistics from Hootsuite and We Are Social. Companies offering a social platform are well aware that social media can stress users and are taking responsibility by cracking down on heavy consumption and antisocial behavior, and by educating users with new research. But is this enough? Probably not, but it's the start of finding a measured way to use social media before the next generation bails on it.



13

SOUND EMPIRES

"A Silicon Valley exec once told me that if you can own the ear you can own the mind. Apple has taken a step towards that objective," relates Rowland Manthorpe, Sky News's tech correspondent, describing Apple's increased innovation in earbuds as a core strategy. Indeed, from the explosion of audible entertainment to the rapid expansion of key brand formats, from companies including Pandora and Spotify, to a wave of new luxury earphone products and the rise of devices like Amazon Echo, Google Home, and Apple HomePod, the ears are becoming a key gateway to audiences.



“Sound is becoming a key channel alongside watching or streaming TV. It is also being cross-pollinated with other channels creating media ecosystems.”

Apple AirPods were introduced in 2017 and marked a step towards the normalization of “always-in” earbuds, says Manthorpe. “Once features such as auto-translate and sound filtering are added in (not today, but one day in the future), they could become as unmissable as the phone itself.”

Audio entertainment is also expanding quickly as the demand for podcasts, audio books and plays, and branded audiotainment grows. Spotify has begun moving beyond music by introducing video content and original podcasts. In 2018, the company announced Spotify Spotlight, which integrates video content into podcasts alongside audio. Courtney Holt, the brand’s head of studios and video, explains that Spotlight provides “a new format that merges great storytelling, news, information and opinion with visual elements.”

Alongside experimentation with video content, Spotify is introducing original podcasts, most notably Amy Schumer’s *3 Girls, 1 Keith*, which launched at the end of June 2018. With 75 million Premium subscribers, Spotify leads the market for paid on-demand music streaming. However, Apple currently dominates the growing podcast market, which is estimated at 73 million monthly users—a 5% increase from 2016, according to a 2018 study by Edison Research.

Meanwhile, the tidal wave of audiobooks and podcast empires has carved out the smartphone and audio content as new primary channels. Amazon-owned

Audible has released 77 original audio works between 2017 and 2018, according to the *New York Times*. With nearly 150 more in various stages of production, the brand is also commissioning one and two-person plays, as well as developing audio originals with actress Reese Witherspoon.

These platforms also represent a shift toward increasingly mobile-first entertainment, particularly among young smartphone users. According to Ericsson’s “TV and Media 2017” report, 70% of consumers now watch television and video on mobile devices, a figure that has doubled since 2012. The pattern is expected to continue, with Ericsson estimating that by 2020, 50% of all viewing will be done on a mobile screen. The number of US podcast listeners has also tripled since 2008. Now 25% of the US population listens to at least one podcast per month.

WHY IT’S INTERESTING:

Sound is becoming a key channel alongside watching or streaming TV. It is also being cross-pollinated with other channels creating media ecosystems. New launches span original podcasts, brand-curated playlists, audio plays and audiobooks, along with live, programmed and user-generated video content, and a multitude of other tie-ups, reflecting the increasingly blurred lines between editorial, branded, original entertainment, and consumer-generated content.

14

ETHICAL INTERNET

“Who Will Teach Silicon Valley to be Ethical?” asked veteran tech journalist and Recode founder Kara Swisher in an October 2018 *New York Times* column, calling for tech brands to take a more proactive approach to exploring ethical implications of their platforms and wares.

She’s the latest in a growing tide of think tanks, prominent critics, brands, and even tech leaders calling for a rethink of today’s Big Tech behavior and a more proactive approach to scenario planning the calamitous, or damaging impact of new innovations.

“We are seeing initiatives like the Omidyar Network proposing a digital code of ethics, and more and more tech companies are realizing the order of magnitude that their products have on societal issues like mental health, isolation, cyber-bullying and suicide. It’s like the Hippocratic oath for doctors—‘first do no harm’—manifesting itself in technology,” says Afdhel Aziz, author of *Good is the New Cool: Market like you Give a Damn*.

In May 2018, Amnesty International, Access Now and a number of partner organizations launched the Toronto Declaration, protecting the right to

equality and non-discrimination in machine learning systems. Amnesty International’s director of tech, Sherif Elsayed-Ali, recently joined the World Economic Forum’s global council on human rights and tech.

Tim Berners-Lee, the inventor of the World Wide Web, has proposed a new vision for an alternative decentralized, fairer internet. “For all the good we’ve achieved, the web has evolved into an engine of inequity and division; swayed by powerful forces who use it for their own agendas,” he wrote in a blog post on Medium. “Today, I believe we’ve reached a critical tipping point, and that powerful change for the better is possible—and necessary.”

There are increasing numbers of new startups and think tanks that focus on inclusivity and ethics in tech. Charlotte Webb, founder of the Feminist Internet creative think tank, examines inequalities and ethical quandaries in everything from racial biases in data collection to the way in which virtual personal assistants such as Siri, Amazon Alexa, and Google Home (which all feature female voices) reinforce everyday sexism.

Even tech leaders are jumping in: Salesforce CEO Marc Benioff has attacked many fellow San Francisco billionaires for not giving back to the city that made them rich by avoiding tax, claiming they are “hoarding” money and aren’t doing enough to help the homeless. Salesforce is also looking to hire a chief ethical and humane use officer.

Perhaps the loudest voice in this is Apple. CEO Tim Cook made headlines at a conference of European privacy commissioners in Brussels in October 2018 by calling for stricter privacy protections and calling for a bill of US digital rights. “This crisis is real. It is not imagined, or exaggerated, or ‘crazy,’” he said. “And those of us who believe in technology’s potential for good must not shrink



"Apple's move is significant. It's important because it is at scale, and could also in itself—because of Apple's influence—create mainstream demands for privacy among consumers."

Rowland Manthorpe,
tech correspondent, Sky News

from this moment. Now, more than ever—as leaders of governments, as decision makers in business, and as citizens—we must ask ourselves a fundamental question: what kind of world do we want to live in?"

WHY IT'S INTERESTING:

In an era when pervasive tech affects every aspect of people's lives, with weekly scandals involving the behavior and failings of tech brands to behave ethically, there are signs of a tipping point. What started as media discourse is now being taken on by more powerful corporations and governments as a call

to action—and the message is also reaching mass consciousness among consumers. What's clear is that, at least optically, tech brands will need to respond to maintain good favor. As Rowland Manthorpe, Sky News's tech correspondent, comments: "I think a lot of this is meaningless, a new tokenistic CSR to show they are putting in place changes, though Apple's move is significant. It's important because it is at scale, and could also in itself—because of Apple's influence—create mainstream demands for privacy among consumers, or cascade down to cheaper tech products. The first thing it says when you open an iPhone now is that privacy is a human right. That's huge."

15

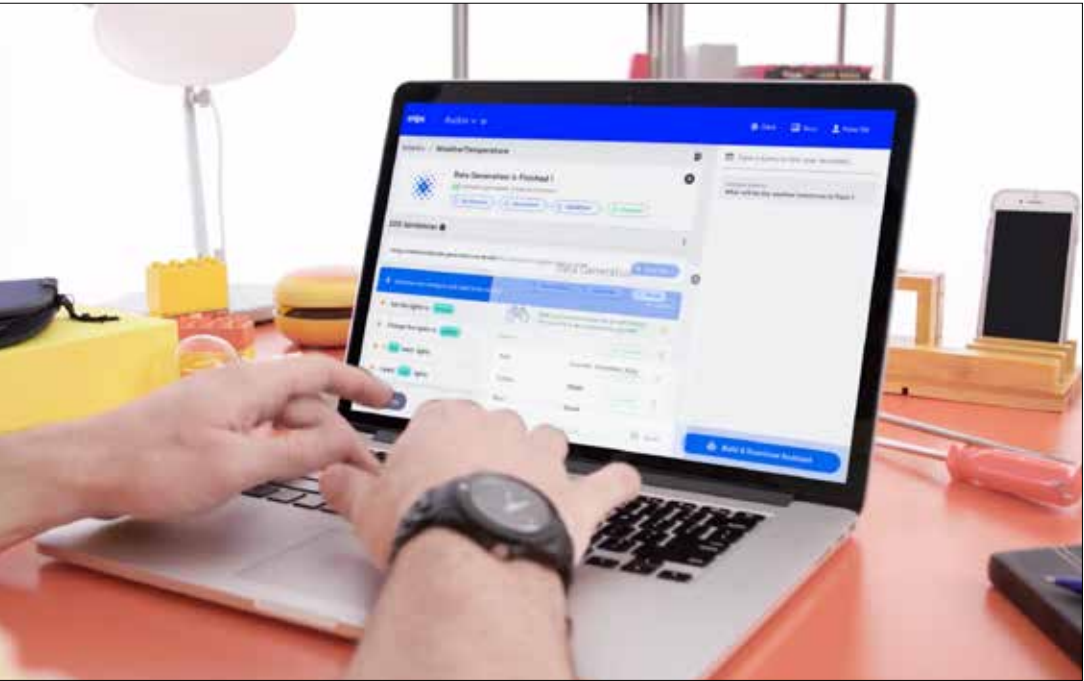
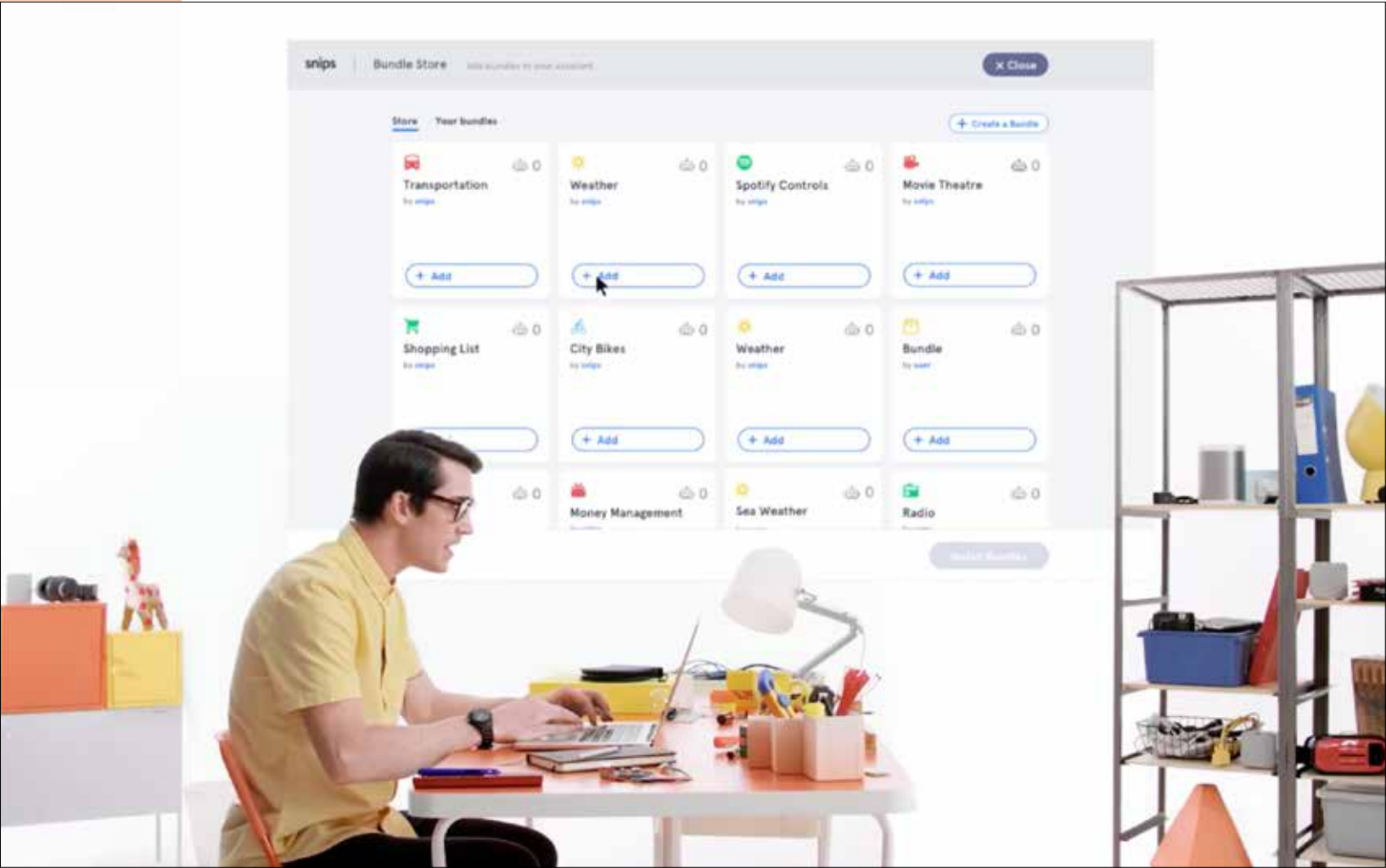
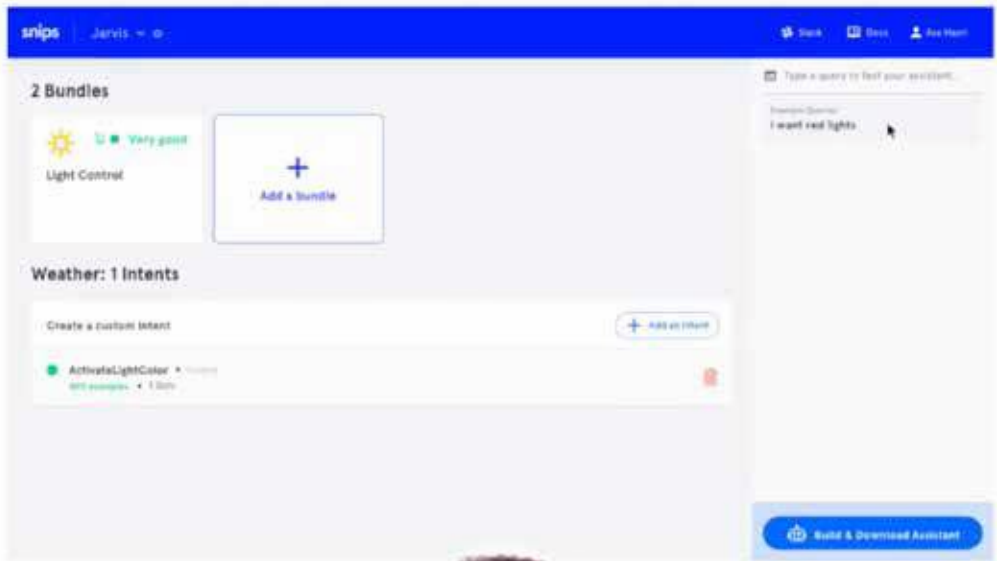
CONSUMER-CHAMPION TECH

With consumers calling for protection and ownership of their personal data, tech brands are starting to put control into users' hands.

Loomia is taking a first step towards privatization of data, with a platform that puts consumers in complete charge of their personal data, which they can choose to keep or sell securely. The Loomia Tile gathers and stores information from clothing, such as frequency and length of use, which the wearer can then choose to share with manufacturers in exchange for blockchain rewards. “The Loomia platform would shift the consumer data paradigm so that individuals, not corporations, own their personal data and profit from it if they choose,” says Loomia CEO Janett Liriano.

Snips is working to keep data private with a decentralized voice assistant that runs on blockchain, so personal information isn't sent to the cloud. “Consumers are increasingly aware of the privacy concerns with voice assistants that rely on cloud storage—and that these concerns will actually impact their usage,” says Rand Hindi, cofounder and CEO at Snips. “However, emerging technologies like blockchain are helping us to create safer and fairer alternatives for voice assistants.” So, rather than automatically sending users' personal data to the cloud to train the artificial intelligence (AI) and make it





smarter—as other voice assistants do—the Snips system offers to reimburse consumers in exchange for contributing their encrypted data to its blockchain network.

Dermot Horgan has designed a conceptual future city called Data Municipality, built around a personal data bank. The city is built around the central idea that individuals rather than companies should control their data, how it is used and who has access to it.

WHY IT'S INTERESTING:

Tech brands are differentiating by presenting a positive alternative to the commercial internet- and cloud-based services, aiming to protect personal information and letting consumers decide how and when their data is used.



16

REAL-TIME TECH

Technology is becoming more intuitive than ever, with new products and devices that can instantly adapt to their surroundings.

Livio AI is elevating the hearing aid with integrated sensors and artificial intelligence (AI) for real-time feedback. Most notably, the device provides live language translation for 27 languages. It can also be used as an activity tracker, an Alexa voice controller, to alert emergency personnel in the event of a fall, or to stream music or TV audio.

Reebok released a shape-shifting sports bra in August 2018 that adapts to wearers' movement. The material incorporates a thickening fluid which changes texture in response to movement and is also used in NASA spacesuits and bulletproof vests. The substance allows the bra to adapt support for different levels of activity, stiffening to provide more support while moving, and softening while the wearer is at rest.

Puma partnered with the MIT Design Lab to create adaptive shoes that respond to the wearer's fatigue, which were revealed at the 2018 Milan Salone del Mobile design week. The Deep Learning Insoles use bacteria that responds to sweat to collect biological information about the wearer. A layer of

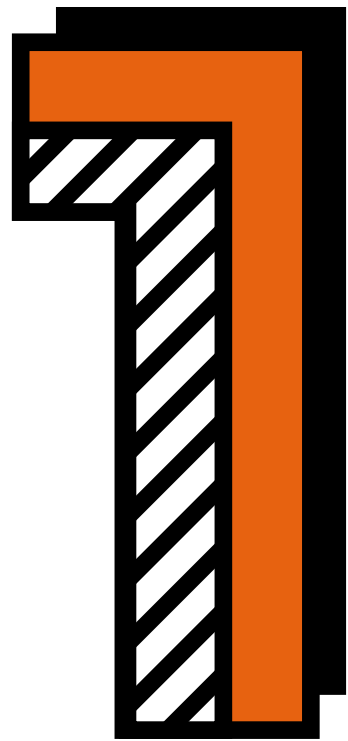


electronic circuits then detects any changes in this biological information and transmits that data, to help prevent fatigue and improve performance.

“We are imagining products that can adapt to users and the environment in real time, without the user having to do anything, to optimize their movement, body and their performance,” says MIT Design Lab director Yihyun Lim.

WHY IT'S INTERESTING:

Advances in technology are imbuing devices and materials with biological capabilities, turning them into an extension of the wearer's body.



17

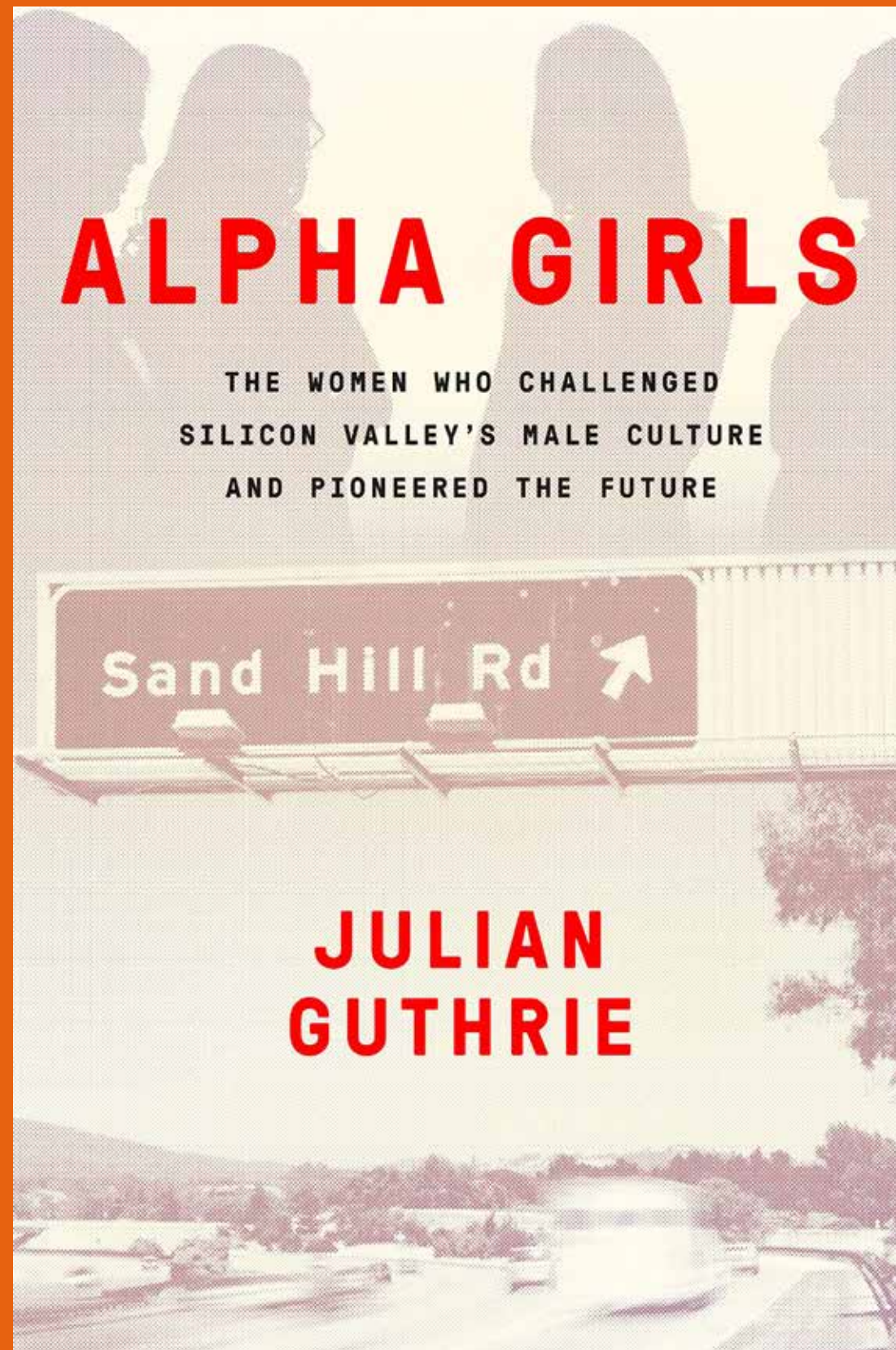
TECH'S HIDDEN FIGURES

Hollywood is zeroing in on a little-heard perspective when it comes to the rise of Big Tech: the perspective of women.

A wave of new books and movies is set to explore the female experience of Silicon Valley, from unearthing women's little-publicized (but critical) contributions to the growth of tech to exploring the experience of key whistleblowers on treatment of women in the industry. Former Uber employee Susan Fowler, for example, shot to fame with a sensational account of her time, and experiences of sexism and harassment, at the ride-sharing platform. The article was titled "Reflecting on One Very, Very Strange Year at Uber."

The film rights have already been snapped up for Fowler's story and *Disruptors* is described as *The Social Network* meets *Erin Brockovich*. Allison Schroeder, screenwriter for hit 2016 movie *Hidden Figures*, about three African-American women who worked at NASA, has been tapped to pen the script. There is also a book about her life in the works.

TV maven Shonda Rhimes and Netflix have acquired the TV rights to former venture capitalist Ellen Pao's memoir, charting the former tech executive's experience of suing her company Kleiner Perkins for sexual discrimination.



Following the *Hidden Figures* theme, Julian Guthrie's book *Alpha Girls* has been signed for movie development. *Alpha Girls* is about the invisible female heroes of Silicon Valley (the ones not charted in Aaron Sorkin's 2012 biopic of Steve Jobs, among others). The book is described by Deadline as showcasing "the women who identified, dressed down, moved up and built the companies that changed the world" and is due for release in 2019.

Then there's Elizabeth Banks—actor, producer and director of the *Pitch Perfect* franchise—who is producing the forthcoming film adaptation of *Uncanny Valley* for Universal Pictures, based on the book by Anna Wiener, unpublished as yet. Wiener wrote a blog post of the same name in 2016 about her life as a woman at the heart of Silicon Valley's startup-to-IPO culture. The novel is slated for publication in early 2019.

Finally, perhaps the highest profile story focuses on more of an anti-hero: Jennifer Lawrence is set to take a star turn as infamous tech founder Elizabeth Holmes in a movie charting the rise and fall of the blood testing biotech company Theranos.

WHY IT'S INTERESTING:

As with every aspect of culture and popular discourse, the #MeToo movement, fourth-wave feminism and widespread vocal discourse about white male patriarchal power are starting to have wider ripple effects on all industries. In entertainment, diversity is increasingly becoming a mandate, with movies produced by diverse directors and with diverse casts seeing sensational box office results. We charted this in the 2018 Future 100 trend "Diverse Hollywood." As it becomes clear that diverse perspectives are not only important, but are also unlocking new audiences, more will likely follow.

18

FUTURE TECH CITIES

Tech brands are turning their attention to every aspect of life from healthcare to education to transportation, reimagining or “fixing” these areas with tech solutions.

Next? Cities. Urban design is the newest subject to grab the attention of Silicon Valley and China tech, as they rethink neighborhoods and civic life for a hyper-connected future.

From Alibaba’s City Brain to Alphabet’s Sidewalk Labs, technology companies are rushing to show us how technology could be used to make cities less congested, more livable and safer.

Sidewalk Labs—owned by Google parent Alphabet—is building a new neighborhood from scratch by the waterfront southeast of downtown Toronto, in the largest experiment to fuse technology with urban planning in North America.



“I imagined us creating a Smart City of Privacy, as opposed to a Smart City of Surveillance.”

Ann Cavoukian, privacy consultant

According to Sidewalk Lab’s proposal to development partner Waterfront Toronto, the vision looks something like this: lots of bike and pedestrian lanes, and affordable, mixed-use buildings—rather than cars and condos. A thermal grid that would heat and cool buildings without fossil fuels. A network of sensors that would continuously gather real-time data on the physical environment. A personalized portal or account for residents to access public and private services. And home financing that might include rental subsidies or partial home ownership.

The development’s goal is to build a sustainable, affordable city that would nurture both its residents and its businesses. Waterfront Toronto “will be an example to the rest of the world on how to build cities that have the greatest impact on our future,” says Meg Davis, the project’s chief development officer.

China tech is also inching in. Tech giant Alibaba is developing a City Brain artificial intelligence layer for a new special economic zone 60 miles southwest of Beijing. The company is already testing elements in its hometown of Hangzhou, where thousands of street cameras are used to collect data to control traffic lights and optimize traffic flow, detect accidents and deploy respondents.

Alibaba is also actively marketing its City Brain around the world. Kuala Lumpur, where traffic gridlock is a daily affair, is set to be the first city outside of China to implement the program.

Of course, what looks utopian to some is dystopian to others. Privacy advocates are ringing alarm bells over the potential abuse of ongoing surveillance. In October 2018, privacy expert Ann Cavoukian quit her consulting role on the Toronto project to “send a strong statement” about its data privacy challenges.

“I imagined us creating a Smart City of Privacy, as opposed to a Smart City of Surveillance,” she wrote in her resignation letter cited by the *Guardian*. She was initially told the data collected would be unidentifiable, but Cavoukian told reporters she had learned that third parties could potentially get identifiable information.

WHY IT’S INTERESTING:

Omnipresent surveillance and the data it generates continues to provoke extreme reactions—because of its capacity for both the greater good and personal invasion of privacy. As technology companies roll out their solutions to urban problems, these debates will only grow louder.

19

UBER ECOSYSTEMS

From electric scooters to food-delivery bicycles and drones (scheduled for 2021), on-demand ambulances to electric self-driving and even flying rental cars, Uber is rapidly positioning itself as the ultimate macro-to-micro transport architect. UberEats aims to be available to 70% of the US population by the end of 2018, up from 50% as of October 2018. Lime, the electric scooter company, has been backed by both Uber Technologies and Alphabet, and, in April 2018, Uber bought electric bike company Jump.



"We're committed to bringing together multiple modes of transportation within the Uber app—so that you can choose the fastest or most affordable way to get where you're going, whether that's in an Uber, on a bike, on the subway, or more."

Dara Khosrowshahi, chief executive, Uber

“We’re committed to bringing together multiple modes of transportation within the Uber app—so that you can choose the fastest or most affordable way to get where you’re going, whether that’s in an Uber, on a bike, on the subway, or more,” says Uber chief executive Dara Khosrowshahi.

Uber’s ambitions extend beyond street level. In 2018, it shared designs for electric vertical take-off and landing vehicles (eVTOL) at its Elevate Summit, with a view to creating the world’s first urban aviation rideshare network. The proposal was launched with a lavishly rendered series of utopic transport hub scenes, and has been accompanied by a white paper about the future of urban transport.

The brand’s website states that “Uber’s Elevate team is developing an urban aviation ridesharing product called UberAir. A network of small, electric aircraft which take off and land vertically, will enable rapid, reliable transportation between suburbs and cities and, ultimately, within cities. Starting in 2023, Uber customers will be able to push a button and get a flight on-demand with UberAir in Dallas, Los Angeles, and a third international city. Over the next few years, Uber will be continuing to work closely with city and country stakeholders to ensure that we create an urban aviation rideshare network that is safe, quiet, environmentally conscious and supports multimodal transportation options.”



WHY IT'S INTERESTING:

“Uber is trying to become the ultimate service to meet all your transport needs. And in theory that makes sense and is great—you want to have all those options. It’s a monopoly play. Once they control everything, they will raise the prices,” says Rowland Manthorpe, Sky News’s tech correspondent. It’s also an example of brands using thought leadership and renderings imagining the future as a means to make it seem more tangible, inspiring and—importantly—possible. But that might have a shelf life, too, says Manthorpe: “We’re coming to a fuller understanding of what’s going on in this area. Tech brands are not playing in green open fields any more. People are really watching. You’re seeing highly critical reporting of these initiatives, which even 10 years ago would have been seen as great.”

20

UNEXPECTED FORMATS

From albums released as DNA to 3D gamescapes of 19th-century paintings to apps that make music you can “see,” brands and cultural creators are playing with unexpected formats to generate buzz around their new launches.

Fashion brand Kenzo has translated the work of Henri Rousseau for its third film promoting La Collection Memento line, combining the artist’s famous renderings of jungles in the 1900s with the aesthetic of early 21st-century video games. The film is based on Rousseau’s painting *Le Rêve* and features two avatar models inspired by characters from the picture.

For the 2018 launch of its H&M x Moschino collection, H&M embraced generation Z digital glitch culture to create an augmented reality immersive fashion show in collaboration with Magic Leap (the mysterious mixed reality and special computing company backed by brands including Alibaba, Google and Warner Bros). The experience, unveiled at the collection’s debut in New York, was a walk-in box, evoking the inside of a television, with clothing on display. As users navigated the surreal space, clothing and visual elements responded to their movement.





“We’re trying to understand the future of fashion retailing,” Anna Tillberg Pantzar from H&M’s Laboratory told WWD ahead of the launch. She added that technology will play an increasingly important role at the brand in the future, explaining that “H&M is committed to the future of fashion and to being at the forefront of technology.”

It’s not just fashion brands, either. British band Massive Attack marked the 20th anniversary of its iconic album *Mezzanine* by encoding it in strands of synthetic DNA, with one spray can able to contain around one million copies

of the album. Artist and band member Robert Del Naja also created a print using ink containing the same DNA.

WHY IT’S INTERESTING:

As experience culture continues to explode, creators and innovators are getting more experimental with the experiences they create—pushing the boundaries of art and science to excite consumers and generate attention. Digital formats, artificial intelligence, new technologies and games are also creating rich new creative canvases for experimentation.

21-30

TRAVEL & HOSPITALITY

21

IMMERSIVE PUBLIC LANDMARKS

Crowds already gather and it's not even complete yet. Spring 2019 will see the grand unveiling of the honeycomb centerpiece to New York's hotly anticipated Hudson Yards development.

Created by Thomas Heatherwick and Heatherwick Studio, the structure is described as the New York staircase. It will be a “uniquely interactive experience, a monument meant to be climbed and explored.” The hive-like structure comprises 154 intricately interconnecting flights of stairs—with almost 2,500 individual steps and 80 landings—which people will be able to explore.

The New York staircase is the latest in a series of monuments that are designed on a larger scale as immersive interactive experiences, to be explored and Instagrammed. Artist Christo recently designed a large-scale installation in London's Hyde Park. On view until September 2018, it was constructed from 7,506 oil barrels and set in the middle of the Serpentine lake. Visitors to the park could swim and use pedalos around the striking red and purple structure that appeared to be beamed down from space. It follows Christo's 2016 floating orange bridge on Lake Iseo, Italy.

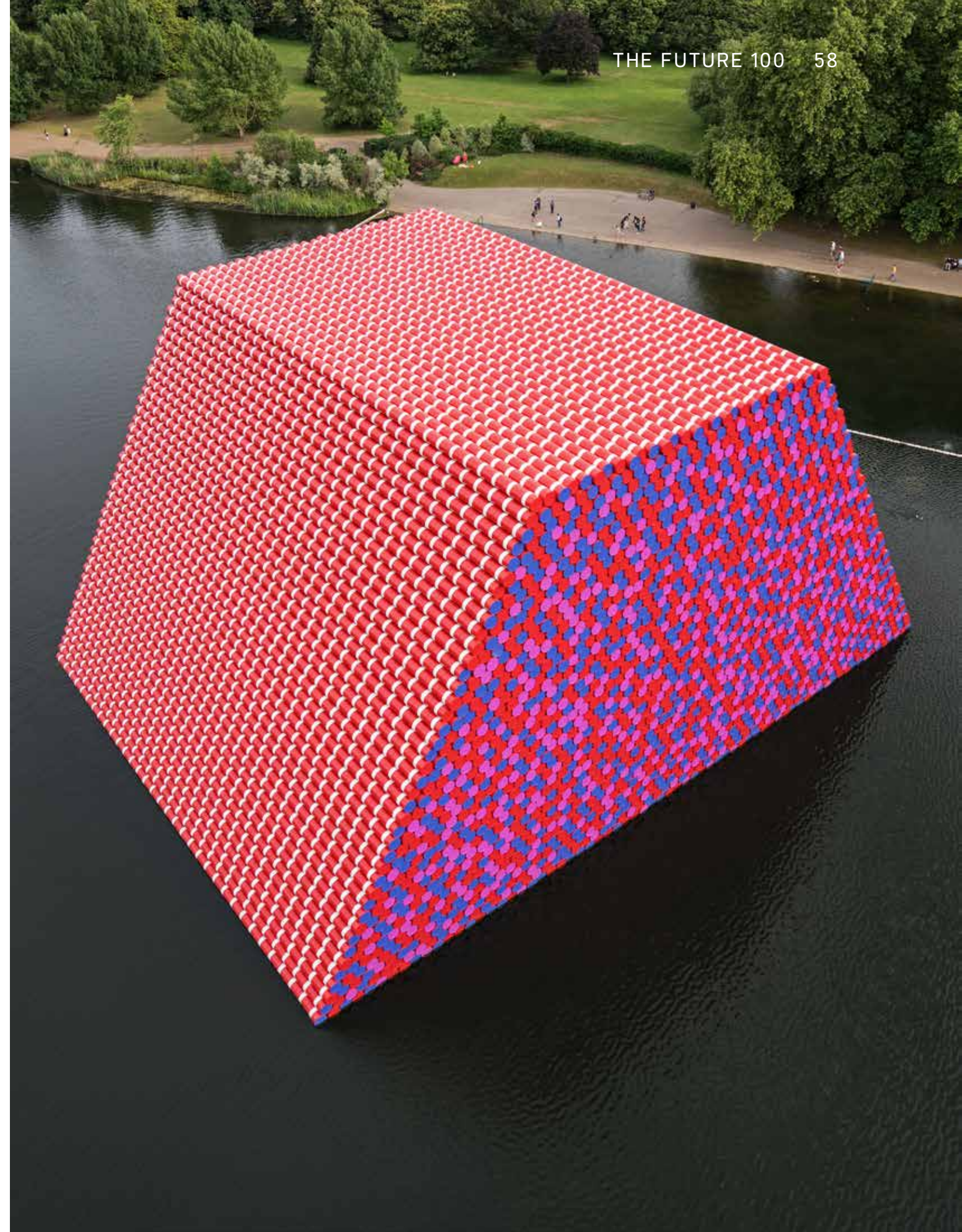
Top: View of Hudson Yards public square and gardens, looking south from 33rd Street
Bottom: Upper-level view through the Vessel centerpiece structure. Images courtesy of Forbes Massie-Heatherwick Studio

“Large-scale monuments—even if they are temporary—are being made on an ambitious scale and are both interactive and playful.”

Also in 2018, Trafalgar Square was taken over by a gigantic red lion monument as part of the London Design Festival. Members of the public were able to type a word on to a screen next to it, which was then translated into a broadcast poem spoken from the screen inside the lion’s mouth, using an algorithm. At night a stream of poetry was projected on to Nelson’s Column. Set designer Es Devlin was behind the creation, dubbed Please Feed the Lions, which was made as part of a collaboration with Google Arts & Culture. Other installations as part of the same festival included an alphabet of 26 chairs in Finsbury Avenue Square in Broadgate, east London.

WHY IT’S INTERESTING:

Large-scale monuments—even if they are temporary—are being made on an ambitious scale and are both interactive and playful. They are designed to be more engaging and therefore more democratic than previous monuments. New York’s Hudson Yards centerpiece (which follows the soaring white structure Oculus at the World Trade Center), is a good example of how monuments at new commercial developments are being strikingly designed to become architectural icons.



22

EDITORIAL TRAVEL AGENTS

As tourists increasingly seek out curated experiences, publications are turning an editorial eye to travel for a hyper-focalized trip.

The *New York Times* launched City Tours in September 2018, running themed tours designed to provide a new lens on featured cities. The itineraries offer day-long tours with a focus on art and artisans, local cuisine and history. Travelers can enjoy a home-cooked meal with a local family in Morocco, make a cheesesteak in Philadelphia, or chat with a robot in Tokyo.

The tours are created “to show readers a world that locals know and love,” says Tony Carne, managing director of Urban Adventures, the *New York Times*’ travel partner. “Travel has always been something of an antidote to everyday life, but it’s increasingly important to get outside to get a fresh perspective. There’s nothing like exploring a new neighborhood to understand the real stories of a people and a place.”

Architectural Digest is also branching into travel, with new proprietary tours centered around design. The publication has begun offering design-oriented

travel guides, such as “The Top 6 Coffee Bars in Paris for Beautiful Design,” “7 Art Deco Hotels in Miami” and “9 Must-Visit Bars in Stockholm for Design Aficionados.”

In January 2018, *Travel & Leisure* magazine announced a new series of bookable trips with itineraries designed by its editors. These include a cycling tour of vineyards and off-the-beaten-path hiking adventures in Tanzania.

WHY IT’S INTERESTING:

With print sources on the decline, publications are diversifying their editorialized offerings to engage readership and share content in new ways.



23

GEN Z TRAVELERS

With generation Z set to outnumber millennials in 2019, travel brands are gearing up for a new generation of tourists.

In October 2018, UK tour operator the Holiday Place released the Generation Z Travel Index, a list of factors gen Zers find motivating when they travel. Unsurprisingly for these digital natives, Instagrammability and good internet connectivity scored high on the list of must-haves, as well as a destination that is socially conscious, off the beaten track and relatively inexpensive.

Now a slew of travel brands is looking to tap the gen Z traveler's desire for affordable yet authentic experiences, by helping them to find smart deals. In 2017, self-styled flight hacker Jack Sheldon created Jack's Flights Club, which helps British consumers find cheap airfares. There is a two-tier service; you can join at no cost and receive information, or pay £35 annually for premium membership and get even more flight deals and other benefits. The platform boasts 200,000 members and in its first 12 months claimed to have saved British travelers £10 million on airfares. "I see Jack's Flight Club as a way for young people to get out and see the world," says Sheldon, "especially if they haven't yet got a massive amount of savings." He adds that often they go to places they previously thought might be out of reach.





In 2018, Thrillist, the popular US lifestyle website, launched its first channel in Snapchat's Discover section, to help young travelers find deals and content quickly. The channel publishes interactive travel-focused games as well as advice on the latest travel hotspots and will be Snapchat's first always-on travel channel in the United States. The channel will appeal to the 90% of gen Zers polled by Expedia in the United States who said their inspiration and planning choices were influenced by social media during initial travel planning phases.

TripAdvisor is also hoping to up its appeal to younger travelers. In 2018 the company debuted its updated app and website, which allows users to follow brands, social media influencers, publishers and friends rather than simply the travelers who review the experiences. Users can create personalized "trips," where they can save travel guides, itineraries and wish lists, choosing either to keep them private or sharing them with the TripAdvisor community. By making the platform more personalized, TripAdvisor can better compete with the likes of Instagram and Pinterest to reach the gen Z audience.



With "travel bragging" rife among gen Z travelers, according to accommodation booking site Hotels.com, travel brands must offer enviable experiences. In 2018 Contiki, a New Zealand travel corporation, launched Iconic Essentials, a series of group trips in Europe that are low-spend but experience-heavy. Travelers share accommodation, with striking options ranging from a 16th-century French chateau and a Swiss chalet to a Tyrolean *gasthof*. With gen Z already making up more than 20% of the tour operator's current customers, Contiki is looking to make deeper inroads into this audience by combining affordability with Instagram appeal.

WHY IT'S INTERESTING:

To hit the right note with gen Z travelers, brands must offer authentic, Instagrammable experiences on a tight budget. Those that succeed will capture the attention and wallets of these increasingly important travelers.

24

ADVENTURE ARCHITECTURAL HOTELS

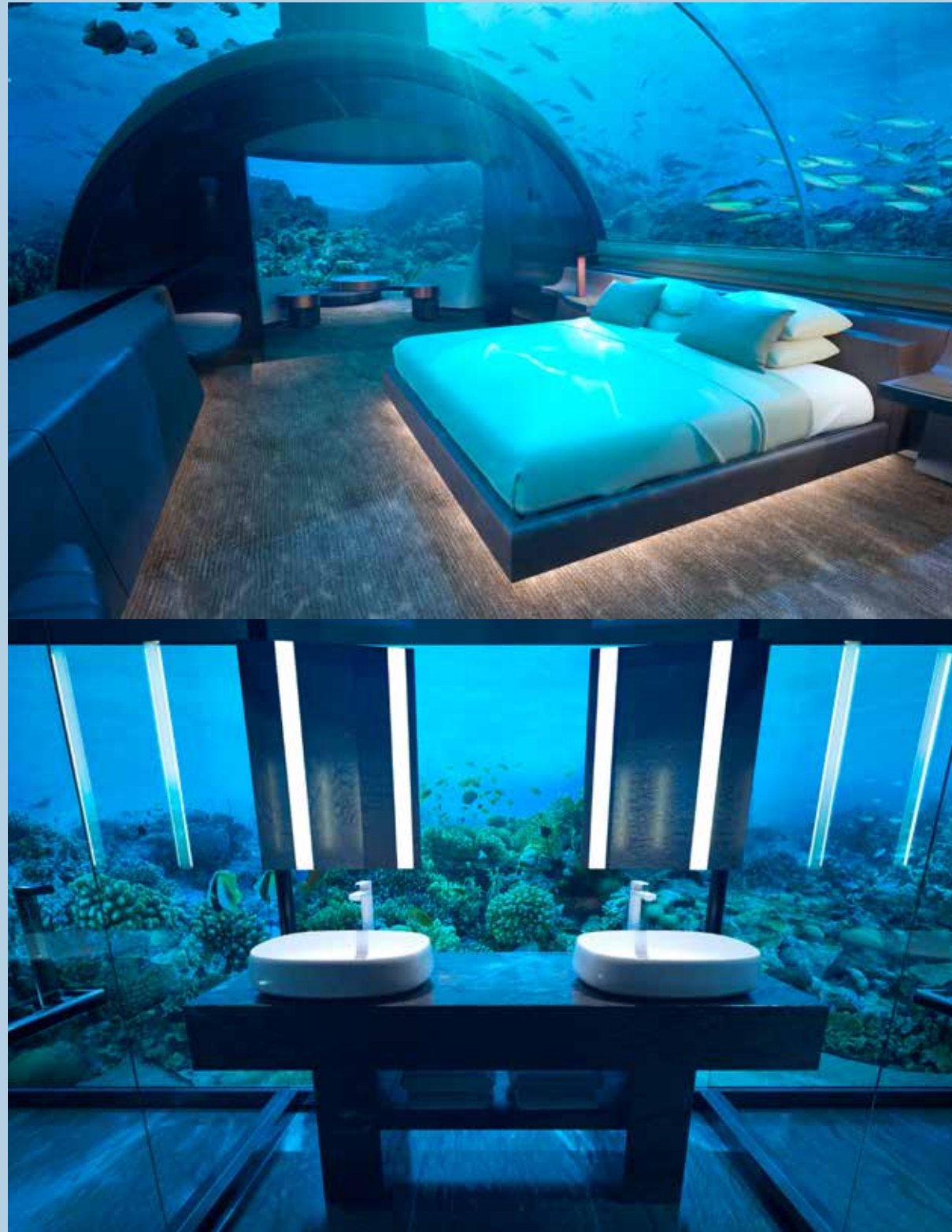
A hotel proposal by luxury watch brand Audemars Piguet will send guests skiing off the rooftop—literally.

Danish architecture practice Bjarke Ingels Group, well-known for innovative architectural typography, is reimagining the purpose of buildings with its latest project, Hôtel des Horlogers. The 7,000-square-meter hotel in Switzerland's Vallée de Joux has five zig-zagging rooftop slopes for adventurous guests to ski down and ultimately arrive at Audemars Piguet's museum at the foot of the ski path. The 50-room luxury hotel should be completed in 2020.

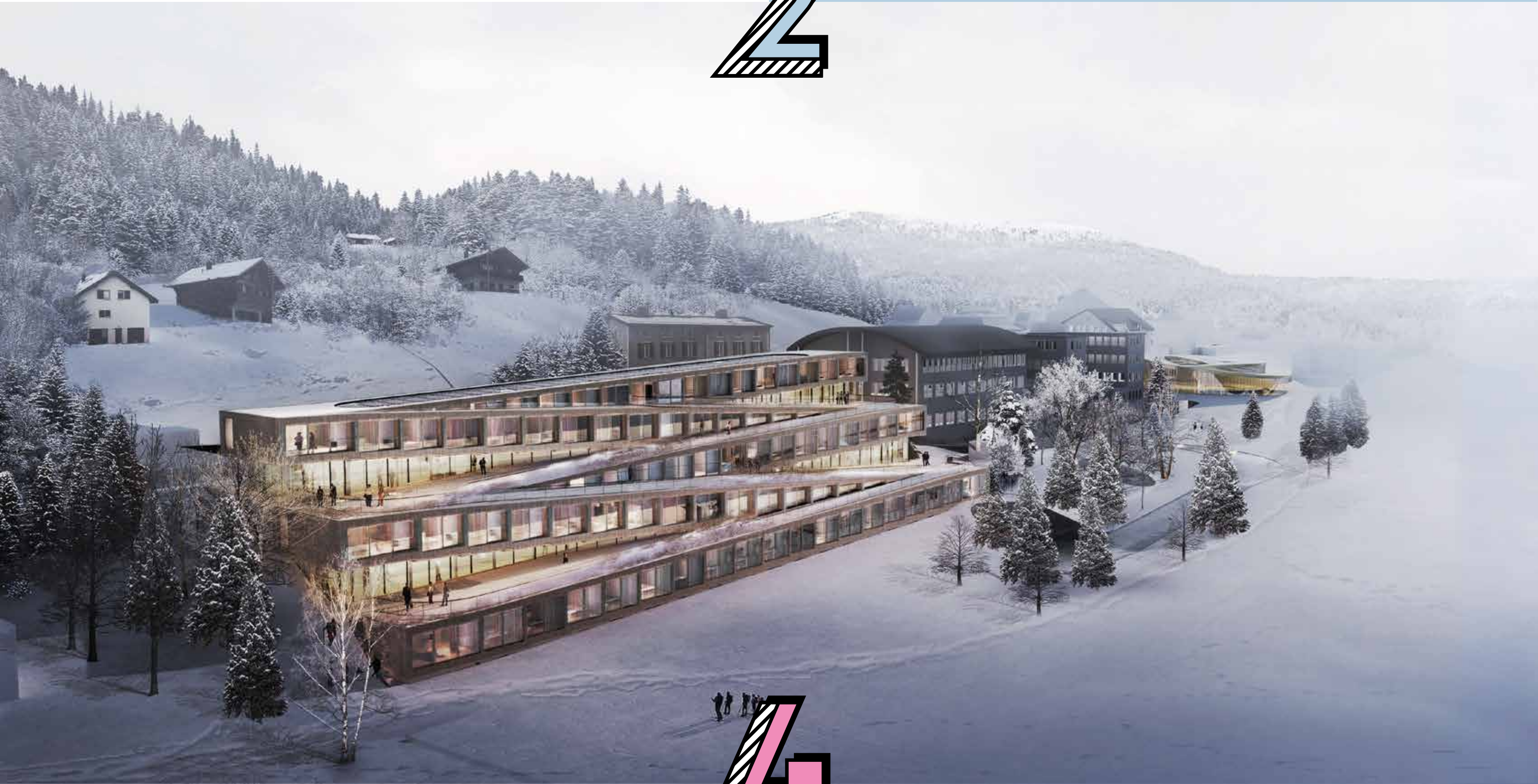
In the Maldives, the first underwater villa opened in October 2018. The Muraka at Conrad Maldives Rangali Island is an all-glass, two-tier hotel room situated 16.4 feet under sea level, where guests sleep surrounded by tropical sea life. This one-off experience is set at \$50,000 a night and comes with around-the-clock dedicated butlers and chef.

WHY IT'S INTERESTING:

Architects are raising the idea of uniqueness in travel by rethinking the hotel. Guests are immersed in an adventurous and exclusive experience thanks to imaginative new architecture, set seamlessly in scenic surroundings.



2



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25

RENAISSANCE NEIGHBORHOODS

Millennials are flocking to distinctive, off-the-map neighborhoods for the cultural scene and rewarding opportunities on offer.

“In cities across the planet, once gritty, off-the-map areas are smartening up their act and muscling in on the limelight,” proclaimed UK *Condé Nast Traveller*, identifying the following as new creative hotspots: Pangrati, Athens; Soi Nana, Bangkok; Barracas, Buenos Aires; Culver City, Los Angeles, and Sint-Jorispoort, Antwerp.

Sint-Jorispoort is proving a draw for savvy creatives thanks to its contemporary art scene and authentic vintage stores and to the way it offers the latest in innovative art and design. Pilsen, in Chicago's lower west side, is also fast gaining appeal for its performance venues, art studios and cool bars brought in by an influx of Eastern European and Mexican immigrants, as well as local artists and students.

Other areas include the neighborhood of Kadıköy-Moda, on the Asian side of Istanbul. It has become a hit with switched on, liberal millennials who are flocking there for cutting-edge bars, art and culture hubs, cafés and music venues. Plekhanov in Tbilisi, Georgia, is gaining a reputation for its balance

between old and new, combining rich cultural heritage with fashionable new bars, cafés and shops. It is perfect for young creatives.

Lisbon's Beato district is another neighborhood luring young tech entrepreneurs. With its huge investment in startup infrastructure and its cheap living costs, Lisbon is already home to the global technology conference Web Summit, and since 2016 it has been offering support to entrepreneurs through its StartUp Voucher—successful applicants get a one-year fellowship to pursue their ventures. This year, the world's largest incubator will open its doors in Beato, cementing the city's status as a go-to for tech-savvy entrepreneurs.

“Millennials want to celebrate differences; differences in individuals, cultures, neighborhoods and cities,” says Deb Ryan, architecture professor at the University of North Carolina at Charlotte. “You'll hear this generation of 20- and 30-somethings describe their ideal places as connected, lively, inclusive, healthy and unique.”

WHY IT'S INTERESTING:

As a generation that increasingly puts a premium on an authentic sense of place, millennials are driving a third-wave migration to neighborhoods awash with cultural offerings. Due to sky-high real estate costs in capital cities—and even in recently reinvented second-tier cities and nomad hubs—previously under-rated neighborhoods are coming into their own.

26

SUPERSONIC TRAVEL REVIVAL

Concorde's final flight was in 2003. Today a supersonic travel revival is getting closer, spurred on by advances in technology.

The aviation industry is confident it will soon be able to eliminate the sonic boom associated with breaking the sound barrier, and so persuade regulators to allow overland flights. Aviation giants and startups alike are working to bring supersonic travel back to our skies. In April 2018, the space agency NASA awarded a \$247.5 million contract to Lockheed Martin, the global aerospace and defence technology company, to develop the X50 QueSST, its name a play on "quiet supersonic technology."

Aerion is bidding to launch the world's first supersonic business jet. Offering a maximum speed of Mach 1.4 (1.4 times the speed of sound), the AS2 should be airborne by mid-2023. Hot on its heels, competitor Spike Aerospace is developing a luxury jet capable of Mach 1.6. Boom Supersonic has attracted attention from Virgin Airlines and Japan Airlines with its promise of a 55-seat airliner capable of speeds of Mach 2.2 yet with a sonic boom "30 times quieter than Concorde's." It's due for testing in 2019 and there are hopes that it will be in service by 2025. All three companies say that prices will be in line with current business class flights.



"Supersonic flight could slash journey times, opening up all corners of the world and changing the game in the travel industry."

WHY IT'S INTERESTING:

Supersonic flight could slash journey times, opening up all corners of the world and changing the game in the travel industry. The enthusiasm also marks a wider interest in travel innovation, driven by companies like Hyperloop and Uber. But, while compressed journey times are undoubtedly alluring, supersonic travel's biggest challenge may lie in managing its environmental impact in a more mindful era.

27

XENNIAL CAMPING

Xennials experienced the transition to digital culture, social media and the highly saturated connected world we have now. Which is why, perhaps, they're embracing camping in the outdoors as a hot pursuit. After all, what better way to disconnect?

According to the 2018 North American Camping Report, more people are camping than ever before in the United States and Canada. In 2017 alone, it said, there was an increase of 2.6 million camper households, and millennials make up 40% of these. New campers are also more diverse than the overall population, with a nearly even split between white and non-white campers.

Australia's Camplify, the Airbnb of camping, says that its core audience is 25-34-year-olds. RV sales are on the rise, driven by millennial buyers. Volkswagen recently introduced a sleek new \$84,000 version of its iconic campervan, dubbed the California, for the model's 30th anniversary. New hip camping brands are emerging for this audience. Merci, the cool French



"In this digitally connected world, xennials are looking for more ways to disconnect. Nature immersion is becoming recognized for its key benefits to mental health."



concept store, dedicated its entire store to a summer camp-themed pop-up with tents, camping chairs and chic accessories set against a dramatic double-height photo backdrop of a forest. Outdoor apparel is on the rise. In 2017, Walmart acquired Moosejaw, the outdoor gear brand, and Gap has launched Hill City, an outdoors and athleisure brand. REI, the outdoor equipment and apparel brand, has even added a feature to its site allowing users to book campsites.

WHY IT'S INTERESTING:

In this digitally connected world, xennials are looking for more ways to disconnect. Nature immersion is becoming recognized for its key benefits to mental health. As xennial adults become parents, this gap-year generation is also looking for more adventurous approaches to travel than package holidays. Camping represents an accessibly priced and flexible way to travel with children.



Volvo 360c self-driving concept car

28

TRANSPORTALITY

New travel concepts are set to radically transform how we get from point A to point B.

The race to the self-driving car is on. From tech companies such as Uber and Google to auto manufacturers like Volvo, Toyota and Audi, 2018 saw a flurry of activity in autonomous vehicle development and testing. Some have even made it to the streets, delivering groceries from Kroger and pizzas from Domino's. Amid this activity, brands are looking ahead to rethink the concept of travel.

Aprilli Design Studio proposed a driverless vehicle concept that could double as a hotel room, equipped with a bed, bathroom and mini kitchen, to take guests from house to hotel in comfort. "Acting as both a personal rental car and hotel room, the Autonomous Travel Suite provides both a new way of traveling and an extension of the conventional hotel experience," the designers explain.

Space10, Ikea's innovation lab, has designed mobile community centers. The seven Spaces on Wheels vehicles include a healthcare space, a mobile hotel, an office, an entertainment unit, a café, a farm produce delivery unit, and a pop-up shop – for a checkup during your daily commute, for example.





In a similar way to ridesharing, passengers would request pick-up and drop-off locations.

“The day fully autonomous vehicles hit our streets is the day cars are not cars anymore. They can be anything,” Space10’s cofounder Simon Caspersen told Dezeen. “The primary function of transportation disappears to give rise to other functions. It could be an extension of our homes or our offices or our local café, so we want to trigger a broader conversation on what we would like it to be.”

Volvo has also released a self-driving concept car, with reclining seats for sleeping, desks for working, and tables and mini bars for socializing.

WHY IT’S INTERESTING:

The future of travel is being reimagined and could make the dreaded commute a thing of the past. “We are on the verge of what could be the most significant period of change in the automobile industry,” says Space10 cofounder Kaave Pour. “One day, in the not so distant future, fully autonomous vehicles could be a common occurrence on our everyday streets. This would not only redefine how people and goods move around our cities, but also redefine the very fabric of our daily lives.”



29

CHINA'S GLOBE TRAVELER NATION

Gone are the days when Chinese tourists only traveled abroad in large package tours, dutifully following a flag-waving tour leader and boarding a bus to luxury outlets.

A raft of new globetrotting Chinese traveler tribes is making waves and prompting cities, tourism boards, and travel, retail and hospitality brands alike to meet their new needs and travel desires. The new cohorts—there are 12—were charted in the Innovation Group APAC's 2018 study "China Outbound: The New Face of Chinese Global Travel," launched in 2018.

According to new original data generated for the study in partnership with SONAR™, J. Walter Thompson's proprietary research unit, one in three Chinese international travelers say they now prefer to travel as part of a structured group tour, while others prefer to make their own itineraries.

New traveler tribes are also emerging. The needs and wants of these groups are very different from the Chinese who traveled before them. Meet wander women (solo women travelers or women who travel in groups); foodie travelers; adventure seekers; wedding parties (those who travel for bachelor and bachelorette parties as well as destination weddings); those looking for love (whether in the form of a fling or a life partner) and filial travelers,





multigenerational groups with aged parents as well as children. More are to follow as these connected, cosmopolitan groups travel to destinations near and far.

There are even geopolitical travelers, who are influenced by Chinese foreign policy. For example, China's Belt and Road infrastructure initiative through some 60 countries is spurring Chinese tourism to non-traditional destinations such as Morocco and Turkey.

Though many are keen to explore, the study found Chinese travelers still see trips as a way to bond with the family. They continue to be concerned about terrorism, crime and natural disasters when making travel choices. They are also aware of their dominance as a travel group: 27% of those surveyed say they worry about being discriminated against, in particular of being assumed to fit the stereotype of the rude Chinese tourist.

WHY IT'S INTERESTING:

Chinese nationals made 130 million journeys abroad in 2017, and they've long surpassed Germany and the United States as the world's largest outbound travel market. With less than 10% of Chinese holding passports today there's lots of room to grow. Travel, retail and hospitality brands that understand the changing desires of Chinese travelers will be most successful in tapping into this exploding market. For younger Chinese travelers, particularly millennials, foreign travel is also increasingly proactive and immersive, and a means to self-expression.



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THREE 'HOT TO TROT' DESTINATIONS

Influencer culture, fear of missing out (FOMO), and work demands are not only making us travel more and more, but also accelerating the speed of trends in travel, not least when it comes to new destinations which are hot, then not, in a heartbeat. The musts for 2019? Here are our picks.

Bhutan

This Himalayan kingdom is a pioneer of carefully controlled tourism, which has turned it into a luxury Eden. A hefty tourist tax acts as a filter, keeping traveler numbers relatively low and ensuring that only the sufficiently well-heeled can visit.

Known as much for its mountains, rivers and monasteries as for having a Gross National Happiness index, Bhutan requires visitors to spend a minimum of \$250 a day per person. This includes accommodation, food, transport, a guide and a government fee of \$65 a day. Those who opt for five-star resorts can quickly end up spending much more.



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Bhutan has been seeing a wave of sleek ultra-high-net-worth-friendly resorts arrive. Aman Resorts has opened Amankora lodges across five scenic valleys, combining its usual minimalist decor with local touches such as herbal hot stone baths and meditation. In fall 2018 Six Senses opened three lodges, and two more are slated to open in March 2019. Top experiences include mushroom foraging and the chance to don traditional Bhutanese attire while dining among the stone ruins.

Hobart

In south Australia, the island of Tasmania has seen its capital transformed from something of a rural backwater into one of the world's most remote and unexpected cultural hubs. In the last few years Hobart has become a place with buzzy arts, music and food festivals.

The city sits on the River Derwent, with Mount Wellington as a backdrop. Its very remoteness made it a notorious outpost for prisoners during the British Empire. Today, cafés and galleries have sprung up in the old sandstone warehouses by the water, selling local wine, tea, fruits and cheeses. Recently expanded wharves welcome large cruise ships.

Much of the fresh impetus has come from the Museum of Old and New Art (Mona), established in 2011 and reachable by a short ferry ride from central Hobart. Mona is housed in a sandstone bunker by a winery and it is filled with the eccentric sex- and death-themed collection of philanthropist David Walsh, who called his private museum a “subversive adult Disneyland.”

Mona is also a host of Dark Mofo, a winter solstice festival that features a nude swim in the River Derwent and includes international musicians and artists performing around the city.

Tel Aviv

Amid a tech boom and a wave of culinary and entrepreneurial activity, Tel Aviv is having a moment as a vibrant luxury and cultural hub. It's also attracting the design crowd for its wealth of Bauhaus architecture and new luxury hotels set in restored historic architectural landmarks.

The Vera Hotel, housed in a century-old former maternity hospital, was opened in March 2018 by Israeli hotelier Danny Tamari. Tamari bought the formerly abandoned property and restored it with the help of local artists, designers and textile makers to create a 39-room boutique dwelling in what the New York Times called a “homage to industrial Tel Aviv.”

“Food innovation, entrepreneurial activity and design are becoming primary motivators for travelers, and the factors driving which hubs become hotspots.”

In the same vein is Fabric Hotel, opened in an old textile factory in June 2018. Part of the Israeli Atlas boutique hotel chain, it boasts interiors by contemporary Tel Aviv artists Gidi Gilam and Jennifer Absira, as well as a hydroponic rooftop garden.

Tel Aviv's seafront Jaffa neighborhood has recently seen the opening of not one, but three new luxury hotels. The Setai Tel Aviv, an offshoot of the Miami hotel, opened in May 2018 in a converted seaside fortress dating back to the era of the Crusaders. Restoration of the building, now with 120 rooms and suites, was spearheaded by the Israel Antiquities Authority among others. Nearby, the Drisco opened in June in what was the former Jerusalem Hotel, that in its heyday welcomed Mark Twain and Thomas Cook as guests. The Jaffa opened in August 2018, designed by John Pawson and housed in a 19th-century convent with soaring vaulted ceilings.

WHY IT'S INTERESTING:

Food innovation, entrepreneurial activity and design are becoming primary motivators for travelers, and the factors driving which hubs become hotspots. In an Instagram-saturated world, scarcity and exclusivity are also becoming bragging points for globetrotting luxury travelers



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BRANDS & MARKETING

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BRAND THERAPISTS

In an effort to promote wellness and deepen relationships with consumers, brands are moving beyond their products to offer services and experiences that encourage self-reflection.

Women's wellness company Lola is working to destigmatize sexual health with its "Let's Talk About It" campaign. Launched in July 2018, the campaign features a public hotline with prerecorded messages about common sex questions and concerns. The hotline received more than 1,600 calls—from men and women—within the first week alone.

The German supermarket chain Lidl hosted a series of 2018 summer pop-ups in Ireland, encouraging young people to speak openly about mental health issues. In addition to open discussions, the program included events designed to promote mental wellbeing, such as laughter yoga, meditation and sing-along socials.

Dutch fashion designer Schueller de Waal presented a wellness center with massages and a hypnotherapy film in place of a new collection during Paris Fashion Week in October 2018.

Tuxe—one of Meghan Markle's brands of choice—offers free performance coaching in an effort to help customers feel more confident. With each purchase, customers gain access to one of 10 prerecorded sessions from women's business coach Ianna Raim. The sessions, on topics which range from how to deal with setbacks to how to set life goals, are designed to help women tackle professional and life challenges.

WHY IT'S INTERESTING:

As the retail landscape changes, brands are finding new ways to engage with consumers.



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MEDIAVOLUTION

Revolution just doesn't stop in a media climate that's in a constant state of flux. From magazines evolving into entertainment brands to print titles turning digital to celebrities writing their own cover stories, the only constant seems to be change.

Forbes has called the decline in newsstand sales over the past decade “epic.” Citing data from magazine wholesaler the News Group, *Forbes* reports that magazine newsstand sales volume stood at \$2 billion in 2017, an almost 60% fall from the \$4.9 billion in sales volume that the industry recorded at its peak in 2007.

Magazines have been shutting down, turning digital, or decreasing their frequency. Among some of the high-profile examples are Teen Vogue and Self, which have shifted to digital-only editions, a fate shared by the UK edition of Glamour, which became digital-only in 2017 (though it still produces two print editions a year). UK InStyle did the same in 2016, before its UK digital edition closed entirely in 2018. *Condé Nast Traveler's* US and UK editions are set to merge into one edition, while it's been rumored that the US edition of *Glamour* may shift to digital-only.

Paradoxically, niche print titles—which often appear more akin to coffee table books—are enjoying something of a renaissance, with standout examples including *Cherry Bombe*, a lavishly put together title about women and food, and *Gossamer*, a stylish magazine designed for “people who also smoke weed.” While they might not boast huge sales—sustaining their production is a challenge—they're making an impact. “The new democracy in media is that if you have a flagship product and grow a following around that, you're able to leverage it into more ambitious, larger projects,” Stephen Satterfield, who founded the quarterly food magazine *Whetstone*, told the *New York Times* in March 2018.

Legacy publishers are evolving into more all-encompassing entertainment brands in this landscape. Condé Nast Entertainment produces original film, television and digital content; its latest move is the launch of a women's video network with *Glamour* as the “anchor brand.” That follows the announcement in 2018 of dedicated channels (OTT, or over the top channels, which bypass traditional video networks) for *Bon Appétit*, *Wired* and *GQ*. Refinery29 is launching Channel29, an OTT service, to stream its original video content.

Samantha Barry, editor-in-chief of US *Glamour*, says that the aim with *Glamour's* video push is “being able to understand what compels our audience in each medium.” She adds that in 2018 “we had an overwhelmingly positive reaction to our print redesign, while seeing incredible growth in our video and engagement metrics, proof that *Glamour* is continuing its evolution towards a multiplatform storytelling juggernaut for women.”

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“Celebrity magazines lost power when famous people became able to easily conduct their own image making, unfiltered, on social media.”

Even when it comes to traditional print titles, publishers and editors are experimenting with new approaches. Take the September 2018 issue of *US Vogue*, the title's highest-profile edition. For this issue, notoriously hands-on editor Anna Wintour allowed Beyoncé to take over her profile when she appeared on its cover, with the star choosing the relatively little-known young, black photographer Tyler Mitchell to shoot her cover, and writing long-form captions herself to accompany the portraits, rather than being subjected to the traditional celebrity grilling.

The Atlantic calls the September *Vogue* issue “the culmination of a long trend: the waning dominance of old-media institutions in relation to new-media stars,” adding that “celebrity magazines lost power when famous people became able to easily conduct their own image making, unfiltered, on social media.”

WHY IT'S INTERESTING:

The concept of staying in one's lane is being upended in today's media climate. In the face of plummeting print sales, magazines recognize that younger consumers are engaging with content entirely online, and are rushing to morph what were once print brands into multimedia entities. To maintain their currency, magazines are also rolling out the red carpet for celebrities to take over issues, which raises inevitable questions over their independent editorial point of view. The only certainty is that there are more seismic shifts ahead.



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FUTURE OF MONEY: VISUAL SHIFT

Gone are the days when banking was complicated and corporate. Millennials' attention spans are getting shorter and their digitally savvy, hyper-connected lifestyles demand services that are intuitive and user friendly.

Traditional banks and newcomers are prioritizing modern design and branding in their strategies, making finance look appealing and easy to understand. UK bank NatWest announced in 2017 that it was hiring an 80-strong team of software engineers, designers and analysts to rebrand its website for its millennial consumer, opting for easier navigation, more relevant content creation and modern graphics. This comes after it rebranded in 2016 with a 3D logo, a bespoke typeface, and colorful illustrations to capture the NatWest identity and resonate with younger consumers. Austrian bank Addiko also rebranded in 2016 and opted for a friendly, curved and chubby typeface, and a bright red reminiscent of the color of the Airbnb logo.

Fintech startups know it is images that resonate with mobile-savvy users, and they're also leveraging social media. The Acorns micro-investment app produced short videos and a song that made the rounds on Snapchat and YouTube, and it markets itself to users through Pinterest. Revolut, "the only banking alternative designed for your global lifestyle," uses social media to





show the adventures of the well-traveled consumer, which resonates with today’s global millennials.

Banking is also becoming more accessible not just through the changing tactics of the financial providers themselves but also via media companies catering to a largely millennial audience. Lifestyle-focused digital publication Refinery29 launched Money Diaries in January 2016, inviting young female professionals to post detailed, week-long diaries tracking their daily spending. It aims to give readers a realistic sense of how people like them from across the United States and United Kingdom, from a diverse range of financial

backgrounds, manage their money, with challenges like student loans to pay off and a Netflix bill to boot—insight that millennials will be hard pressed to find at a branch of their local bank.

WHY IT’S INTERESTING:

Banking and financial management need to be simple in their interfaces and also approachable and appealing in both their visual aesthetics, and in the way they communicate with users. This will enable them to resonate with young consumers who are willing to turn away from traditional banking styles for new, easy-to-understand fintech offerings.



Left: Revolut
Right: Refinery29 Money Diaries

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BIOPHILIA FUTURES

Wellness architects are reinvigorating consumer wellbeing by creatively bringing the healing powers of nature into the great indoors.

On average, people spend 90% of their time indoors, according to a May 2018 study by marketing research company YouGov for Velux. Companies are well aware of the stressors of everyday life and are increasingly creating spaces that can make a difference to their consumers' and employees' overall wellbeing.

Retail giant Amazon has a dedicated 4,000-square-foot space of glass domes at its Seattle headquarters where employees can “think and work differently surrounded by plants.” Opened early 2018, the space houses more than 40,000 plants and offers employees an alternative to traditional office setups, with treehouse meeting rooms, floating staircases and walkways by waterfalls. “Studies suggest that spaces that embrace biophilic design can inspire creativity and even improve brain function,” says Amazon’s blog.

Amazon is not the first corporation rethinking the workspace. At the end of 2017, Microsoft created outdoor treehouse conference rooms for its Redmond campus, and Facebook has a rooftop park for employees at its Menlo Park headquarters in California.

The inclusion of green spaces is also extending to retail spaces. In July 2018, Apple opened a new flagship store in Macau, China, which offers “a new oasis of calm” according to the architects Foster & Partners. The retail space is set in a bamboo grove and the indoor atrium features tall bamboo planters. “The design creates two distinct spaces, one inside and one outside, imbued with a sense of authentic beauty arising from the innovative use of natural materials,” says Stefan Behling, head of studio at Foster & Partners.

WHY IT’S INTERESTING:

According to a study by the University of Exeter, offices with plants “could increase productivity by 15%” as well as “lower physiological stress, increase attention span and improve wellbeing.” Architects are reconnecting people with nature beyond green walls and potted plants, offering interior greenery on a grander scale. The future retail store, hospital and office will be a breath of fresh air for those spending long hours indoors.



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INCLUSIVE DESIGN

Inclusive design is going mainstream in fashion and houseware, with a host of big brands and innovators designing tools for a more accepting and compassionate future. Now, as daily life becomes more and more connected, technology needs to keep pace.

The Access & Ability exhibition, which ran from December 2017 to September 2018 at the Cooper Hewitt museum in New York City, explored the importance of design for people with disabilities. It featured more than 70 works designed to help people with disabilities better navigate the world, including jewelry which functions as a wearable navigation system for people who are blind, and a shirt that translates music into a physical, sensory experience for people who are deaf.

Ikea is working to make living with disabilities easier through considerate design. In October 2018, the furniture retailer hosted a three-day event in New York City to foster awareness and discussion around designing for disabilities. The event, which included talks and panels featuring individuals living with

disabilities and experts in ergonomic design, coincided with an expansion of Ikea's inclusive Omtänksam line. This includes furniture and kitchen items that were designed by researchers, physiologists and ergonomists to make the home more accessible for people with limited mobility.

Fashion labels and retailers are also expanding their designs to include people with disabilities. Since 2016, ASOS, Tommy Hilfiger and Target have released adaptive fashion lines designed to make getting dressed easier, featuring magnetic buttons, adjustable hems and Velcro closures.

As the objects around us gradually become more inclusive, so too should our technology. Hannah Rozenberg is working to bring inclusivity into the digital realm with her project Building without Bias. In an attempt to reveal the inherent gender bias prevalent in the internet and technology, Rozenberg created a website that quantifies the association of any given word with "masculinity" or "femininity." She tells the JWT Innovation Group that machines learn "that a man is to a computer programmer what a woman is to a homemaker. Google translates non-gendered language to a gendered one by assigning male pronouns to words such as intelligent, successful and ambitious but female pronouns to the words emotional, vulnerable and sweet."

WHY IT'S INTERESTING:

As mass-market brands continue to design intentionally for inclusivity, technology needs to follow suit. "We are at an extremely important moment in time where automation is increasingly taking over our devices, spaces and buildings," Rozenberg tells JWT. "As the world becomes more reliant on artificially intelligent machines, it is essential that they be designed without insidious bias."



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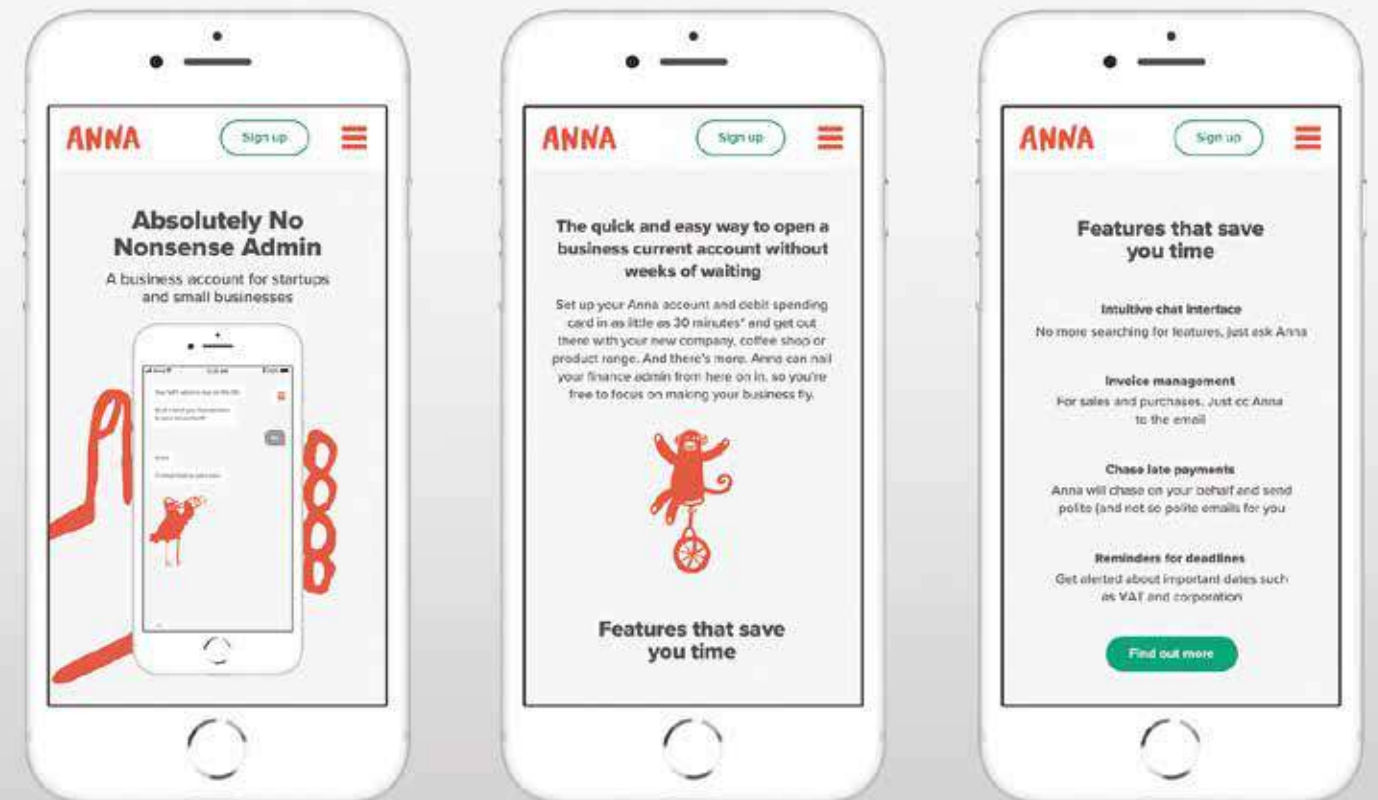
FREELANCER-FIRST SERVICES

The writing is on the wall (including the acres of exposed brickwork of rapidly mushrooming WeWork co-working spaces). As self-employment continues to explode, a wave of freelancer-first networks and platforms is emerging, offering help and advice to self-employed workers.

The Freelance Circle, the first community platform aimed specifically at freelancers, was founded in 2017 by creative Casey Bird. It allows creatives to anonymously review agencies they work for, and it is also an advice and information portal for workers.

"It is now estimated that 40% of the UK's freelance population are in design and media. And with many agencies taking on one-off projects, it works in everyone's favor to have a workforce that works well. So why are we not talking about what freelancers want from a workplace and vice versa?"

Bird asks, adding that she founded the Freelance Circle "with the mission to improve business on both sides when it comes to freelance. Not just because it makes life easier, but because it makes business sense. Knowing what freelancers think of your agency helps you do more of the good stuff, or improve on the bits that aren't quite right, so you can attract the best freelancers in town."





“I am hearing more and more that the women who are asking for more money... are losing their assignments just for asking.”

Taffy Brodesser-Akner, journalist, *New York Times*

Entrepreneurs are spotting opportunities to cater to freelance financial needs and lifestyles: ANNA, launched in 2018, is an app designed to help freelancers stay on top of their finances. The name is an acronym for Absolutely No-Nonsense Admin and the app uses artificial intelligence to help freelancers and small companies with admin tasks such as invoicing.

These new launches come as high-profile writers, creatives and influencers are starting to highlight freelance treatment and practices by big companies. In 2018, *New York Times* journalist Taffy Brodesser-Akner tweeted about women freelancers negotiating higher pay: “I am hearing more and more that the women who are asking for more money (not 90s money, just like \$1-\$2-\$3 a word for big print cover stories) are losing their assignments just for asking ... I hear about this at women’s mags, particularly ones that have rebranded themselves as feminist titles, and who are doing coverline stories on wage gap issues. It’s shameful.”

During 2018 others, many with large followings, became increasingly outspoken about bad practices by media companies and brands. Algorithmically powered invoice-chasing bots may not be far behind.

WHY IT’S INTERESTING:

Self-employment and contract work are on the rise. The number of self-

employed workers has been rising in the United Kingdom since 2001 and they now account for around 15% of the working population, according to the Office for National Statistics. It’s estimated that 27 million Americans will leave full-time jobs between 2018 through 2020, bringing the total number of self-employed in the United States to 42 million, according to FreshBooks, a cloud-based accounting firm. (Bureau of Labor Statistics show that 126 million Americans were working in full-time jobs in 2017.)

Coworker brands have been quick to identify the opportunity. Shared workspaces have grown at a rate of 200% over the past five years. In major cities such as London, New York and Chicago they are expanding at an annual rate of 20%. WeWork, valued at \$20 billion, has become the largest corporate office occupier in London and is diversifying into wellness-oriented clubs such as Rise By We. It also led the \$32 million investment made in women’s coworking club the Wing.

Judging from protests by gig economy workers to new surveys by freelance networks (such as HoneyBook examining rising examples of harassment experienced by freelancers), it’s clear that brand practices and perhaps legislation need to catch up. Either way, as self-employment becomes the norm, new platforms and networks that empower contract workers are likely to become more common.



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WOMEN AND MONEY

With the #MeToo movement and the gender pay gap making headlines, new projects are leveraging financial literacy to help empower young women.

In the United Kingdom, details of the gender pay gap submitted by more than 10,000 companies in April 2018 have revealed that 78% pay men more than women. In 2017, American women earned 82 cents for every dollar men earned, according to a Pew Research Center study. Men also have a financial advantage when starting a new company: figures from PitchBook, a venture capital (VC) database, found that in 2017 all-female teams only received 2.2% of VC investment compared to 79% received by all-male teams.

Dolla Dolla World is a new platform working to change this by offering financial literacy and professional development resources to women and girls. The initiative is currently in the fundraising stages and the plan is to offer courses, lectures and coaching on all things money-related, from savings, credit and loans to investing and entrepreneurship.

“Giving young people the necessary skills for independence, economic or otherwise, is our responsibility as a society,” Molly Logan, founder of Dolla



“When I asked about 200 girls what they wished was taught in high school the answers were financial literacy and self-defense. Of course, I would argue that financial literacy is self-defense.”

Molly Logan, founder, Dolla Dolla World and Irregular Labs

Dolla World, tells the Innovation Group. “When I asked about 200 girls what they wished was taught in high school the answers were financial literacy and self-defense. Of course, I would argue that financial literacy is self-defense.”

Betsy Kelder, executive director of the nonprofit Invest in Girls, has similar thoughts. “Financial empowerment is a really strong source of self-confidence, independence and self-reliance,” Kelder tells the Innovation Group. Invest in Girls is working to usher in the first generation of financially literate girls. The organization provides finance classes to empower women

and girls in all aspects of life by educating them on the financial implications of their decisions.

WHY IT’S INTERESTING:

These initiatives are crucial not only for women and girls but also for national and global economic stability. “With US women set to control over two thirds of the nation’s wealth by 2020, but only 12% of girls feeling confident in their financial skills, we can no longer afford to not actively and aggressively support young women in their pursuit of financial knowledge and professional opportunities,” cautions Logan.

38

BUMBLE EMPIRE

Launched in 2014, Bumble is already changing the way people connect. The social networking app, which now has 41 million customers worldwide, is moving beyond dating to empower women in all areas of their lives—professional and personal.

In August 2018, the app launched Bumble Fund, an initiative that invests in female-founded and female-led startups. “We launched Bumble Fund to help those women largely ignored by the venture capital establishment,” the company explains. “Bumble Fund will focus on early-stage investments, primarily in businesses founded and led by women of color and those from underrepresented groups.”

This follows Bumble Bizz, a professional networking and mentoring service launched in October 2017, and Bumble BFF, a platonic networking platform launched the year before.

“From the outset, Bumble has always been about rewriting the antiquated rules of society that disempowered women,” Alex Williamson, Bumble’s chief brand officer, tells the Innovation Group. “Dating was a natural first step for us,

considering the ridiculous gender norms that have created a huge imbalance between men and women for generations. Like dating, the worlds of friend-finding and professional networking have also been fraught with misogyny and an imbalance in gender roles. That’s precisely why women always have been and always will be in control on Bumble.”

The company is also taking public, political stands to empower women beyond the reach of their platforms. The day after Dr Christine Blasey Ford testified about her alleged sexual assault at the hands of Supreme Court Justice Brett Kavanaugh, Bumble took out a full-page ad in the *New York Times* that read “Believe women.” The company also announced a donation of \$25,000 to Rape, Assault and Incest National Network (RAINN) in honor of sexual assault survivors. “It’s at the core of our company’s DNA to take a stand in things that we believe in and always fight to end misogyny,” Williamson explains.

WHY IT’S INTERESTING:

You’ll be seeing many more opportunities for female-first impact from Bumble. “More than just connections, [users] want Bumble to be a part of other areas of their life as well,” Williamson tells the Innovation Group. “You can certainly expect to see Bumble expanding into other categories.”



Bumble app



39

GRASS ROOT BRANDS

Southeast Asia, among many markets, is seeing a surge of new brands promoting local pride, marking a shift from a decades-long obsession with foreign brands. From mid-century rubber-string chairs to furnishings inspired by local poetry, a wave of new hip offerings is being introduced for local audiences and beyond.

In Malaysia, Kedai Bikin (*kedai* means store and *bikin* is slang for make) has made a name for itself by taking a common circular-frame chair design, popular in the 1960s and still sold cheaply in night markets, and reimagining it to be “less tippy.” The brand has renamed it the Merdeka (meaning independence), with various versions costing less than \$150.

The store, located in a Kuala Lumpur suburb, also sells designs by emerging brands such as BendangStudio, which creates handmade ceramic tableware in muted tones. The goal is to fill the gap between Ikea at one end and imported designer furniture at the other.





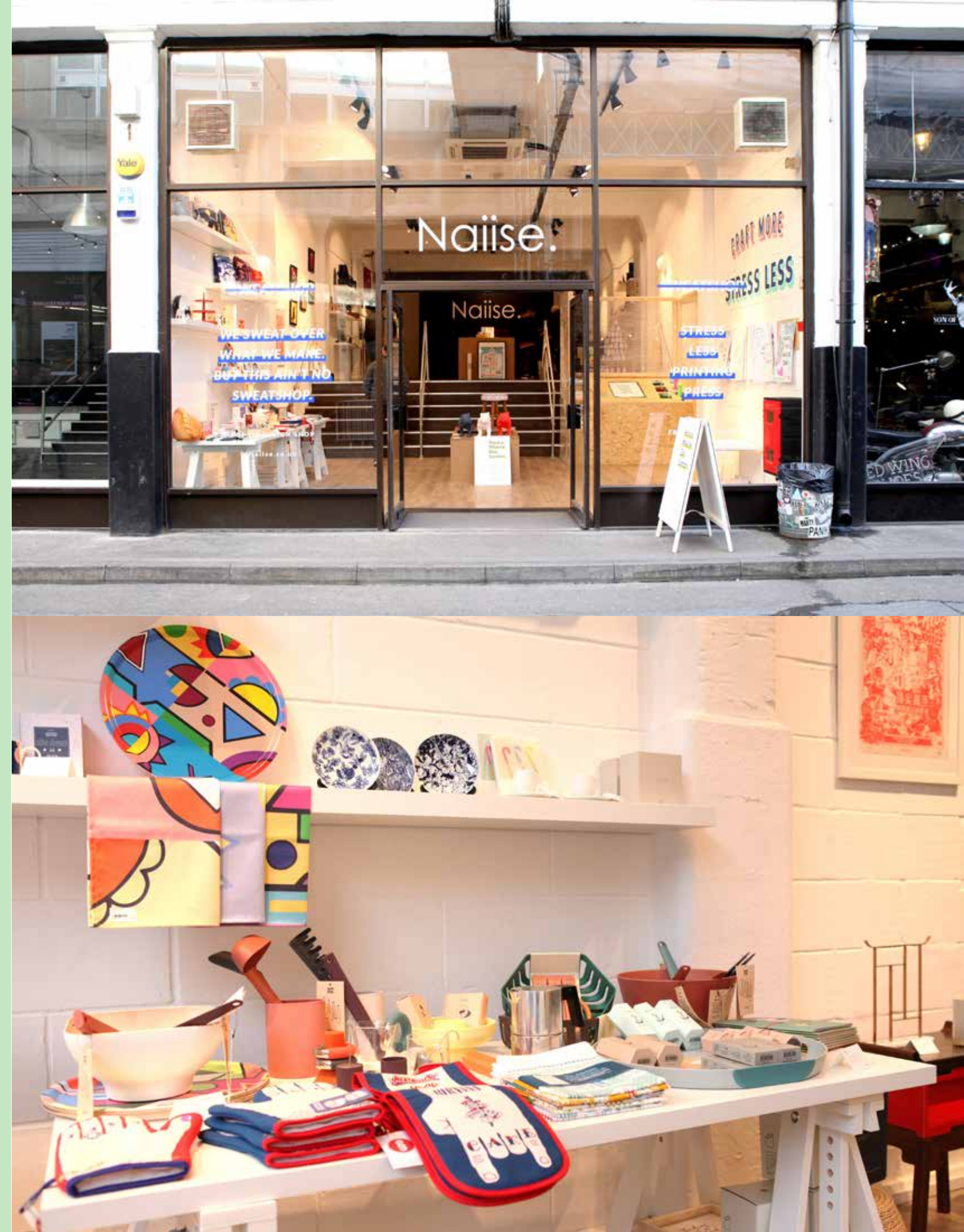
“This is the complete opposite of nostalgia,” says Farah Azizan, who cofounded Kedai Bikin as an offshoot of her architectural practice, Studio Bikin. “We are trying to remake and give it a modern take. The process is traditional but the product is new.”

In Indonesia, cult brand Tulisan (which means handwriting) offers home furnishings, bags, aprons and cushion covers designed by founder Melissa Sunjaya and made in small batches in Jakarta. Sunjaya is inspired by local poets, rainforest environmental themes and traditional Indonesian folk tales, but the fabric colors have a contemporary, almost Marimekko-like feel. Tulisan has opened four stores and is also available at other retailers.

The trend is also evident in Singapore, where lifestyle retailer Naiise (a popular spelling of the word nice in Singapore) now has six outlets. Located in malls, the stores sell furniture, decor, clothing and accessories, with many of the locally sourced items emphasizing local culture and heritage. They include cushions by Nom Nom Plush in the shape of local snacks such as curry puffs (S\$29.90) and pineapple tarts (S\$32.90).

WHY IT'S INTERESTING:

The trend is a counterpoint to globalization and the dominance of global trends and brands. It also speaks to a hankering for a simpler, bygone era in societies that have gone through rapid industrialization and societal change in the past two or three decades. These hip new local iterations are popular in their respective regions, but also will likely garner international audiences as consumers seek unique products.



40

THE AGE OF THE HYPER-INFLUENCER

The Chinese equivalents of Chiara Ferragni and Kylie Jenner are expanding their influence on an unprecedented scale. Leveraging rapidly transforming social media platforms and payment technologies, they're molding the lifestyles and shopping habits of China's internet users, who number more than 800 million.

Today, brands seeking to reach the China market won't get very far without working with its hyper-influencers. Called key opinion leaders (KOLs), these digital superstars not only have massive reach, they also have major marketing and sales potential thanks to mobile-first fans and social platforms with intuitive, integrated e-commerce channels.

Mr Bags and Becky Li are among some of the best-known KOLs and bloggers in fashion on WeChat, China's leading social media platform and super app. With millions of followers, they turn brand collaborations into remarkable sales opportunities. In June 2018, Tod's worked with Mr Bags on a limited-edition capsule collection of 300 mini backpacks, all of which sold out in six minutes on his new WeChat "mini program" dedicated to designer collaborations. The mini program is one of many social commerce models harnessed by WeChat KOLs thanks to its frictionless shopping experience and mobile payment integration.





Even though a KOL's authority and online engagement is usually stronger than that of the brand itself, Chinese consumers love to research before they shop—they generally need eight touch points before they make a purchase, which is four more than Western shoppers, according to McKinsey China. KOLs in China serve this curious and discerning market by providing detailed content or snappy video as China's online ecosystem constantly expands to new channels, with short video platform Douyin and beauty-focused social media app Meitu among the most recent to rise to the top.

Alibaba-backed Xiaohongshu started out as a digital space to post overseas shopping wishlists and product reviews. It has become a cross-border social commerce haven where KOLs and celebrities primarily target female millennials, posting daily video, photos and comments about brands and products, with a heavy emphasis on the beauty category. With the help of Xiaohongshu's following, KOLs can make millions of impressions, and, most importantly, they're informing the lifestyles of some of the most powerful consumers in the world.

WHY IT'S INTERESTING:

Brands may think they have influencer marketing in the West figured out, but China has nearly three times as many internet users as the United States, and nearly all of them are getting online on their smartphones. Combine an integrated online ecosystem with the fact that China has incubators for KOLs, and it becomes clear that the influencer marketing environment can make or break a brand. This is relevant globally as Chinese tech behaviors become the global norm.

41-50

FOOD & DRINK

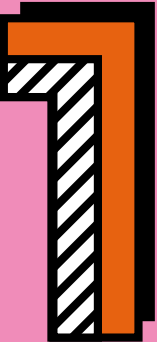
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CLEAN COMFORT FOOD

Soul food, coconut milk-laden curries and deep-fried bhajis are comforting to eat, but increasingly for today's wellbeing-minded consumers they are an indulgent treat, not a staple. However, a wave of new restaurants is upturning regional comfort food with vegan recipes and cleaner takes on old classics, aiming to attract the next generation of diners concerned about health, climate change and animal welfare.

This comes amid the unstoppable rise of veganism. A 2016 Ipsos Mori survey for the Vegan Society found that Britain's vegan population had increased from 150,000 to 542,000 in just 10 years. In the United States, sales of plant-based food rose by 8.1% in 2017, topping \$3.1 billion, according to Nielsen research for the Plant Based Foods Association and the Good Food Institute. The US Department of Agriculture claims that if the United States went vegan, the nation's 327 million population could be fed—plus roughly 350 million more.





Convincing an entire nation to give up eating meat may not be realistic in the short term, but more restaurants in the United States and globally are getting in on the plant-based revolution and launching comforting fast-casual vegan concepts with a clean conscience.

In London, vegan fast-food restaurant Temple of Seitan offers fried “chicken” sandwiches with a twist—the “chicken” is vegan, made from wheat gluten, herbs, spices and tofu. It also serves gluten-free nuggets, and “mac ‘n’ cheese” made with mustard, paprika, soy milk and oil, topped with sour “cream.”

For those wanting an end-of-night kebab—minus the guilt—London-based What the Pitta has the answer. Its vegan “doner” kebab is wrapped in freshly made bread and includes spiced soya chunks, soya tzatziki, homemade hummus, chilli sauce and salad. The chain has outlets in Croydon, Shoreditch and Camden, with a fourth opening in Brighton in November 2018.

Despite its name, Wulf & Lamb’s “fiercely kind” menu is 100% plant-based and “crafted to satisfy your craving for comfort food.” The London restaurant offers American-style pancakes with vanilla cashew cream alongside open burritos, Tex-Mex salad and Chilli “Non” Carne.

“People are fed up of eating unhealthy foods, which companies have laden with artificial flavors, sweeteners or chemicals.”

Alex Santoro, cofounder, Genesis

New York’s fast-casual chain Inday makes Indian food lighter, cleaner and healthier, with grain bowls and wraps. Its Ayurveda-inspired menu, which has several vegan options as well as sustainably raised and antibiotic-free meat options, is free from gluten, raw dairy, soy and refined sugar.

Counter-service vegan street-food restaurant Genesis, which opened in London’s Shoreditch in September 2018, has “a 100% plant-based alchemy restaurant concept.” It specializes in fast-casual dining and organic comfort food, and its global dishes include fried avocado tacos, “burgers” in brioche buns, *bánh mì* “hot dogs” and tandoori broccoli—a spin on the Indian classic.

WHY IT’S INTERESTING:

“People are fed up of eating unhealthy foods, which companies have laden with artificial flavors, sweeteners or chemicals,” explains Alex Santoro, cofounder of Genesis. “Also, the conventional factory farming model is shocking—even the biggest meat eater would probably agree.” Beyond ethics, consumers are also starting to correlate diet with long-term healthiness and with protecting themselves against chronic disease. “Recent studies have suggested that eating more plant-based food can reduce the risk of certain cancers and heart disease, currently our two biggest killers,” says Santoro.

42

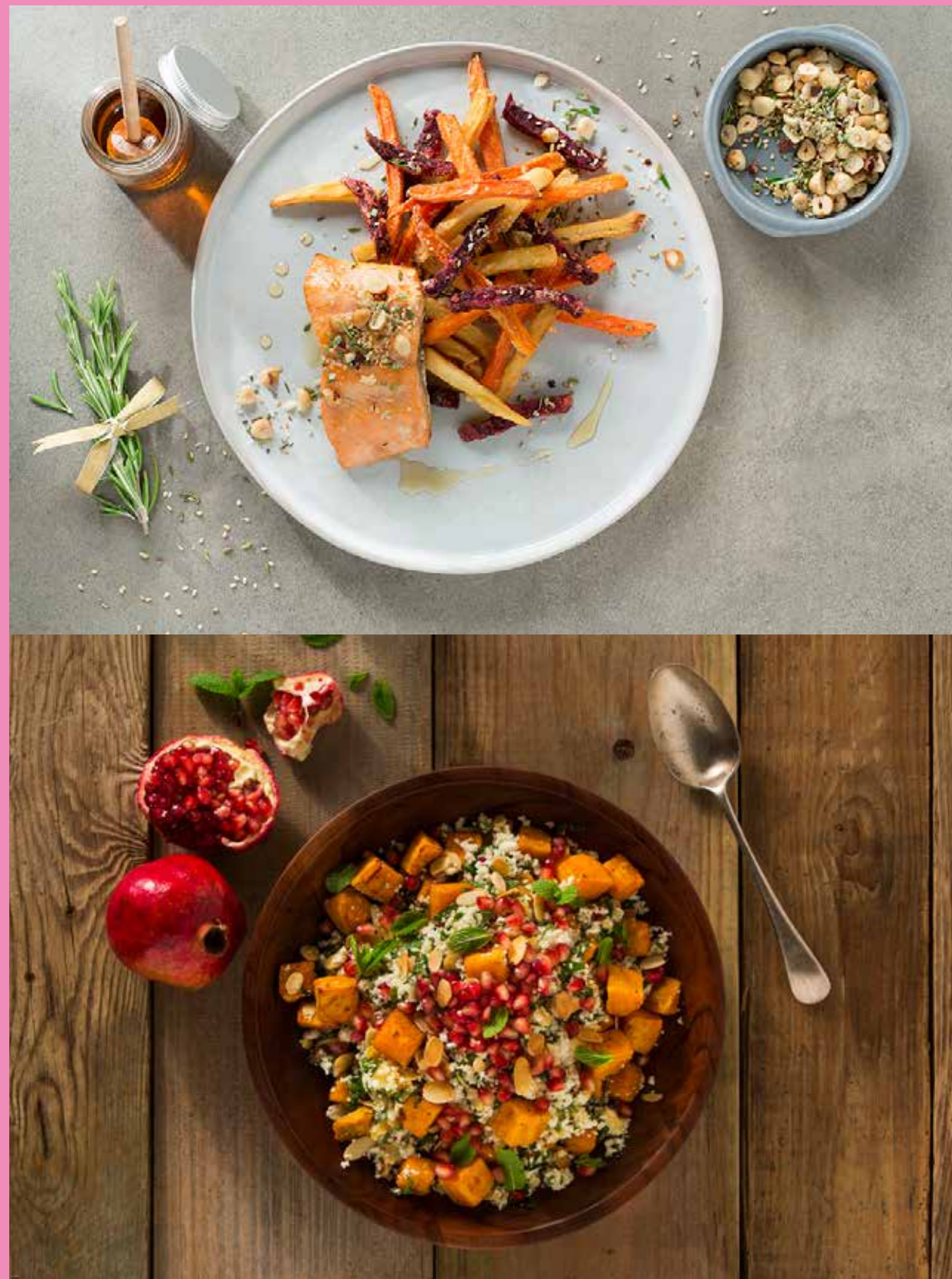
FROZEN FOOD REBRANDED

The frozen-food category heats up as a wave of startups go on a mission to debunk the unhealthy stereotype and reimagine this sector for health-conscious consumers.

“It’s a shame that frozen has the misconception that it does,” Rachel Drori, founder of Daily Harvest, tells the Innovation Group. “It’s how ancient civilizations used to preserve food without having to use any chemicals or refinement.” Drori founded Daily Harvest in 2015, initially offering a subscription-based smoothie service in New York City. The brand has since received million-dollar investments from A-listers including Gwyneth Paltrow and Bobby Flay, broadened its frozen offerings to include soups and harvest bowls, and it is now available nationwide.

Another company aiming to revive the frozen-food category is Strong Roots. “We’re a new startup food company from Dublin in Ireland bringing frozen food back from the dead,” says founder Samuel Dennigan. Founded in 2015, the company has reported approximately 1,200% year-on-year growth thanks to healthy offerings which include vegan-friendly kale and quinoa burgers, and gluten-free garlic roasted sweet potatoes.





"It's a shame that frozen has the misconception that it does."

Rachel Drori, founder, Daily Harvest

Frozen foods for babies are also getting a rebrand. San Francisco-based Raised Real received \$5 million in series A funding from food delivery company Schwan's in 2017, enabling it to make its organically sourced meals available nationwide.

Big brands are also attempting to turn convenient frozen food healthy as consumers today care more about the food they are consuming. Among US millennials, 60% say they try to only eat foods with natural ingredients and 45% say they try to eat only organic foods, according to SONAR™, J. Walter Thompson's proprietary research unit. In 2017, Danone invested in frozen organic baby food startup Yooji, distributed in 600 stores around France. Nestlé acquired plant-based frozen food company Sweet Earth in September 2017 and recently launched a line of plant-based pizzas. "Historically it's been about comfort food; now it's about modern American cuisine," Jeff Hamilton, head of Nestlé's US foods division, told the *Wall Street Journal*.

WHY IT'S INTERESTING:

The global frozen-food market is expected to reach \$311.9 billion by 2021, with a steady CAGR of more than 6%, according to a study by Technavio. As consumers continue to seek out natural and nutritious foods without compromising convenience, frozen food brands are rebranding this sector into one that is healthy and delicious.

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WATER CONNOISSEURSHIP

The health and wellness craze shows no signs of slowing down any time soon. Everything from celery juice to vinegar to activated charcoal is being touted as a miracle drink. Now, as consumers look for the next beverage promising glowing skin or improved mental acuity, water brands are upping their offerings to capture a share of the market.

Launched in October 2018, Szent incorporates the benefits of essential oils into its bottled water. The water itself is unflavored, but a small ring located under the cap releases scents such as tangerine, which has mood-boosting properties, and mint, which can improve focus.

For anti-anxiety properties, pick up a can of seltzer infused with cannabidiol (CBD). Recess, which also launched in October 2018, offers seltzers in three flavors, all infused with CBD, adaptogens and l-theanine which promise to help you destress and regulate mood.

Oxygen claims to encourage faster recovery, increase stamina and improve focus by harnessing O4, a proprietary molecule that delivers a concentrated dose of oxygen. Essentia offers supercharged ionized alkaline water with added electrolytes, which promises to rehydrate better than tap water.

WHY IT'S INTERESTING:

It's no secret that water is essential to human survival. But as wellness and beauty-minded consumers demand more from their drinks, the water category is getting a rebrand to keep up.



44

BREAD 2.0

“Carb” was a dirty term in the health and wellness world for a long time. But even with the gluten-free mania that’s sweeping the scene, a new generation of bakers is repopularizing bread, taking it in a healthier—and more inventive—direction.



Modern Baker

Modern Baker is a British bakery paving the way in healthier bread. The company specializes in “slow carb baking,” which results in bread with a lower glycemic (GI) index, making it more digestible and less likely to trigger food intolerances. The process also increases nutrients and bioavailability (how easily we access the benefits).

In December 2017, Modern Baker secured funds from the British government’s Innovate UK agency to research the health benefits of bread. The research, says cofounder Leo Campbell, is “all about understanding the science, making our bread healthier, and making it scalable, so that it’s available to a wider audience.” In July 2018, the company secured its fourth consecutive funding award from Innovate UK to investigate the impact of freezing bread on glucose response, fiber levels and nutrition.

At London café Coco di Mama, a vegan croissant with activated charcoal recently popped up on the menu. The croissant is made without butter, instead containing sunflower margarine as well as soy, barley flower, activated charcoal, sugar and lemon. The charcoal, the café claims, helps to “detoxify any poisons in the body by neutralizing excess stomach acids,” and Coco di Mama says that it “can even reduce bloating.”

WHY IT’S INTERESTING:

Despite gluten-free notations now adorning every menu, wellness-focused consumers are expressing an appetite for getting baked goods back on the menu. Call it having your cake and eating it, too.



4



5

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DNA DINNERS

Personalized nutrition is moving up a gear as food and drink brands tap into artificial intelligence (AI), big data and social media trends to create healthier, ultra-tailored choices for consumers, from test to table.

Nestlé Japan is using AI, social media, and home-testing DNA kits to create personalized diets for consumers, according to Bloomberg. Users of the Nestlé Wellness Ambassador program send pictures of their food via the Line app and receive lifestyle change recommendations and specially formulated supplements in return. The program reportedly costs \$600 annually for capsules that make nutrient-rich teas, smoothies and other products such as vitamin-fortified snacks. A home kit to provide samples for blood and DNA analysis also helps identify susceptibility to high cholesterol or diabetes, with tests handled externally.

Oakland startup Habit is inviting diners to collect biosamples at home—with over 60 nutrition-related blood, metabolic and genetic biomarkers—which it then uses to generate a personalized nutrition plan, replete with targets to support customers along their health and wellness journeys.

The company has teamed up with a range of partners, including wearable brand Fitbit, allowing customers to incorporate their Fitbit data into the recommendation program, and Amazon, enabling users to order personalized recipe ingredients direct from AmazonFresh.

Habit founder Neil Grimmer—the man behind successful baby food brand Plum Organics—claims it is the only company on the market to provide personal nutrition products and services from “test to table,” and to take a whole-body nutrition approach in this holistic way.

“Customers are looking for functional products, and to rise above the noise of fad dieting,” commented Grimmer. “Thanks to a growing number of businesses like ours, nutrigenomics is becoming trendy and many consumers are looking inward for answers about their nutritional needs.”

It’s a view echoed by Peter Jones, a nutritional scientist at the University of Manitoba in Canada, in Bloomberg. “We’re getting consumer buy-in because we live in a hedonistic, me-first kind of world,” he says. “This is going to be the manifestation of the future. The one-size-fits-all platform is a thing of the past.”

WHY IT’S INTERESTING:

The lines between professional healthcare and lifestyle-oriented healthcare are blurring as the costs of DNA analysis and testing become much lower—supported by advances in AI. With the rise of self-quant and wellbeing movements, consumers are also actively looking for new ways to manage health and seeking hyper-personalized recommendations.



46

THREE HOT INGREDIENTS

Another year, another wave of “It” ingredients hits the endlessly evolving world of food trends. What’s next?

Lichen

What would we eat if a global food crisis struck? Lichen, according to designer Julia Schwarz, who has developed a range of food products blended with the fungus-like organism, including bread and butter, cornflakes, pesto and pasta. According to Schwarz, who showcased the products at this year’s Vienna Design Week, lichen could provide a source of nutrition in the event of a future food shortage as it can survive harsh climates and environments.

It’s not the first time lichen has found its way onto plates; chefs have increasingly been adding it to high-end menus, tapping the continuing trend for modern foraging and indigenous ingredients. Chef Fredrik Berselius, from Brooklyn’s Michelin-starred restaurant Aska, relocated temporarily to Lyle’s in London to host two dinners in May 2018. Here, he served dishes inspired by nature, including a lichen, cream and mushroom broth. A month later, world leaders and dignitaries assembled for the G7 summit in the Canadian town of La Malbaie and feasted on local specialties including caribou moss—also known as reindeer lichen.

"We're a lemonade upgrade. The calamansi is more nutrient-rich than a lot of the citrus here in the United States and has a unique tart and sweet combination that is hard to find elsewhere."

Charles Medenilla, founder and CEO, Mansi

Dulse seaweed

It's been hailed as a health food due to its rich vitamin A content, as an aphrodisiac, and even as a hangover cure. However you use it, dulse seaweed is on the up.

Irish brand This is Seaweed says sales of dulse—its best-selling seaweed—have doubled year-on-year and food ingredient companies are buying more of it to add to breads, burgers and beer for a unique flavor twist. "Consumers of a slightly older generation comment that they used to buy it at the beach when they were younger, whereas the younger generation are coming to it where it is available in supermarkets and health food stores," explains This is Seaweed founder Paul O'Connor. "They are bigger fans of the flaked dulse as this is easier to add to salads or to sprinkle onto eggs or avocados."

Calamansi

This Filipino citrus fruit is appearing on more supermarket shelves and bar menus due to increased interest in the country's cuisine, the fruit's perceived

health benefits and a tart-sweet flavor profile that is finding favor with mixologists.

UK supermarket Waitrose added calamansi juice to its Cooks' Ingredients own-label range in August 2018. The citrus fruit is already popular in Korea and Singapore, and is gaining traction in the West as its uses expand from a cooking ingredient to encompass beverages, including cocktails and craft beer, says Charles Medenilla, founder and CEO of Mansi, the premium calamansi juice drink. "We're a lemonade upgrade," he explains. "The calamansi is more nutrient-rich than a lot of the citrus here in the United States and has a unique tart and sweet combination that is hard to find elsewhere."

WHY IT'S INTERESTING:

Food trends continue to move at lightning pace, driven by social media and ever more sophisticated and daring audiences. The wellbeing movement is also driving the continual quest for ingredients with added health benefits.

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WINE WATERS

Turning water into wine is one thing. Turning wine into water is quite another. However, it's a trend that appears to be gathering pace in the drinks category, as the rise of Trendy Teetotalism prompts more producers and consumers to toast sophisticated alcohol-free alternatives.

The opportunity for brands is sizable: about one in five adults in the United Kingdom is now teetotal, according to the Office for National Statistics. That figure rises to just over one in four among 16-24-year-olds, about 8% more than a decade ago. The same trend has been noted in several other European countries, the United States and Australia. According to the Monitoring the Future study, an annual national survey of 50,000 adolescents and young adults in the United States, alcohol use has declined sharply since the 1990s.

Napa Hills is one brand looking to capitalize on the shift, with wine waters. Its vineyard-enriched water—a mix of fruit-flavored water and VitaRes (an antioxidant blend with extracts of resveratrol, red grape skin and red wine extract)—is said to offer the same antioxidants as a glass of red wine. The wine waters are calorie free, almost sugar free (at less than one gram) and flavors include Cherry Rosé, Lemon Chardonnay and Peach Grigio, with a Pinot Berry variant on the way.







O.Vine wine water

OVine is another non-alcoholic wine grape-infused water. Created by Israeli startup Wine Water, it combines natural spring water with an infusion of wine grape skins and seeds from the winemaking process. The makers say it contains the natural ingredients of wine—including its aroma and benefits—but no alcohol. The drink is available in red or white variants, still or sparkling.

Alcohol-free beverages are on the rise, period. London-based Seedlip continues to inject growth and excitement into the non-alcoholic spirits sector—its zeal attracted drinks giant Diageo, which took a minority stake in the business in 2016. Seedlip crafts distilled non-alcoholic spirits free from sugar and additives. The brand expanded its range with a new flavour in 2018: Grove 42, a citrus blend of oranges, lemon peel, ginger and lemongrass. Seedlip's November 2018 cocktail book offers “a new way to drink when you're not drinking.”

Bars are increasingly switching on to this opportunity. New York's Existing Conditions, which opened in summer 2018, has dedicated the first page of its menu to four alcohol-free cocktails. London's vegan, sugar-free, wheat-free and alcohol-free Redemption Bar exceeded its £300,000 crowdfunding target in 2018 to finance two more sites across the city. Also in London, September 2018 saw the launch of pop-up bar the Ministry of International Specialty Concoctions (MISC), which served globally inspired non-alcoholic drinks.

WHY IT'S INTERESTING:

“Alcohol-free lifestyle is on the up, and people are frustrated because there's limited options in bars,” MISC's website notes. “That is why we rolled our sleeves up and introduced Londoners to new and exciting drinks, free of empty calories and hangovers. These are not mocktails, organic juices or craft soda, but a completely different category of beverage.”

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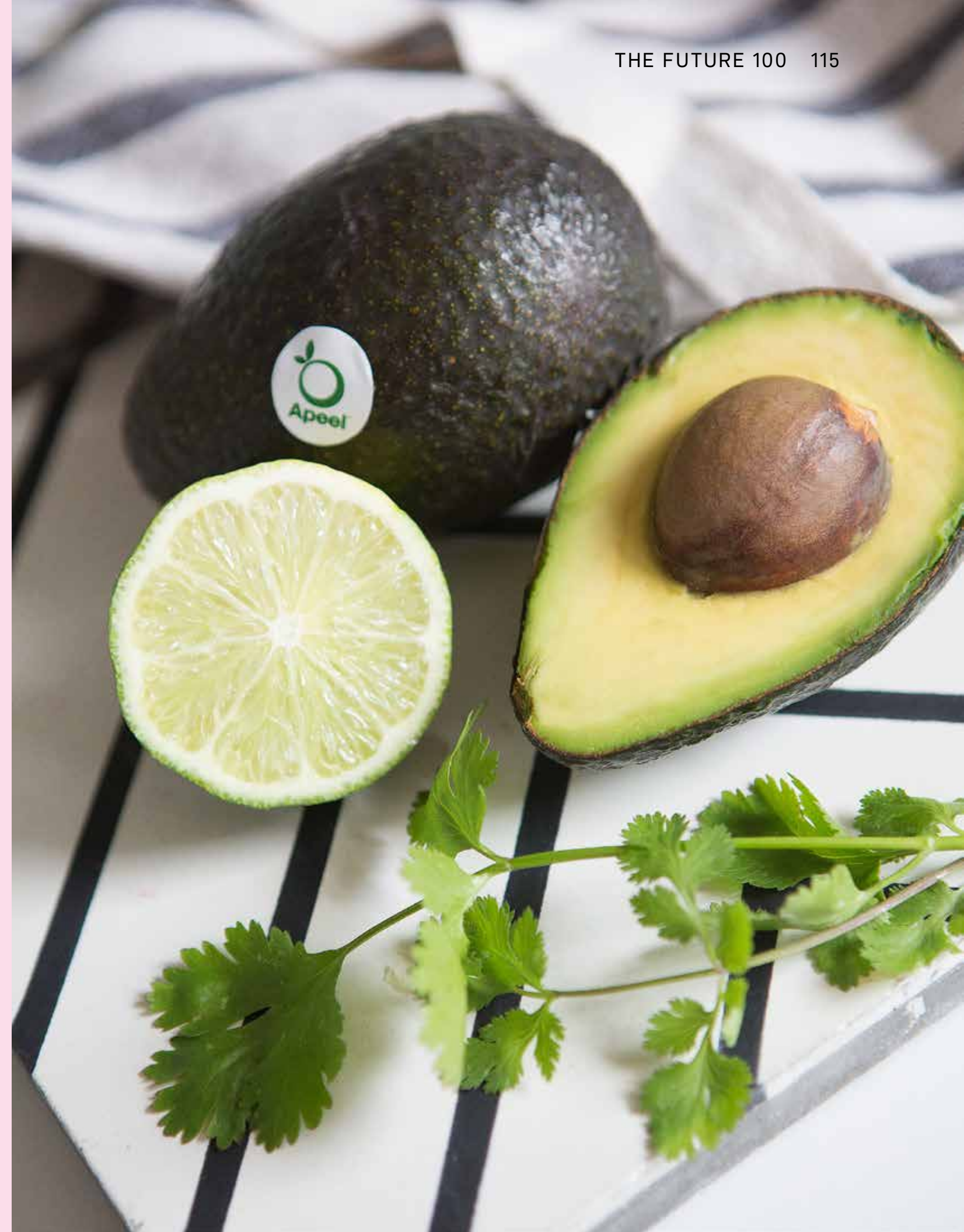
SHAPE-SHIFTER FOODS

As environmental and health challenges heighten for the food and drink industry, manufacturers, researchers and designers are altering the inherent properties of products to find solutions—and also for pure entertainment.

Apeel Sciences has pioneered a new coating that can reportedly double, triple and, in certain cases, quadruple how long a fruit or vegetable can last on the shelf. Its first application has been avocados for US grocery chain Harps, where stores have discarded as much as 60% fewer of the fruits, according to *Forbes*, which also notes that the move boosted sales by 10% and margin by 65%.

“My thought was, if people are going hungry because of perishability—and perishability is caused by water evaporating, and steel is perishable without its oxide barrier—could we solve the food perishability problem by creating a thin barrier for produce?” Apeel founder James Rogers told the publication.

LinYee Yuan, the founder and editor of *Mold* magazine, whose fall/winter 2018 issue centers on food waste as a valuable resource, expects to see more of such innovation in food surplus, food recovery and food preservation. “Food waste is a particularly egregious blemish in our food system,” she says. “As



those technologies become more accessible, affordable and open to entrepreneurs like the founder of Apeel, I think we're going to see more and more development in this space."

Science is also morphing food and drink products in the name of health. Researchers in Brazil are harnessing the power of ultrasound to transform the nutritional properties of processed foods for the better. The Brazilian Report online media outlet reports that a research group from the University of São Paulo is using ultrasound to enhance fruit juice, creating better quality coconut water by deactivating proteins which can cause undesirable changes to the color and transparency of the liquid.

London food design studio Bompas & Parr has invented what it claims is the world's first non-melting popsicle, inspired by pykrete, a frozen composite material made of sawdust and wood pulp, developed for the armed forces during the Second World War. These unappetizing elements are replaced by edible fruit fibers in the ice lollies, which were showcased in summer 2018 at Scoop: A Wonderful Ice Cream World, an exhibition hosted by the British Museum of Food. Though they did eventually melt, the ice lollies outlasted conventional products exposed to the same temperatures, according to Bompas & Parr.

Since the launch, the studio has received a host of inquiries about commercializing the innovation, says the studio's cofounder Sam Bompas. "Food can address many challenges beyond nutrition alone," he explains. "While some food futures are characterized by the ongoing drive for authenticity, others embrace an emboldened scientific approach. We are interested in the creative potential of going beyond nature for our food."



WHY IT'S INTERESTING:

As concern for the environment gathers pace, consumers are becoming more open to scientific solutions for food waste. Science and "natural" are being viewed less and less as mutually exclusive, as the Impossible Burger's engineered, meat-free "natural" burger shows. Products offering optimized nutrition, such as Soylent meal replacements, and biohacked foods like Bulletproof coffee have also gained mass popularity, creating more acceptance of engineered foods—provided there are evident health benefits and no scary side effects.

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BREAKFAST BOOZE

Order up! From avocado toast to everything bagels, cocktail bars are turning to breakfast classics for flavor inspiration.

The Aviary experimental cocktail bar opened its second location in New York City at the end of 2017. The bar, which originated in Chicago, is renowned for its unconventional flavors and innovative presentations. The Wake and Bake cocktail is the perfect example of this; the coffee-spiked Manhattan is served alongside a balloon filled with the scent of an everything bagel, which is sliced open for visitors to inhale when the drink is served. The cocktail is “riffing off that quintessential New York bagel, and a quintessentially New York cocktail, the Manhattan,” Aviary chef Grant Achatz told WWD. “So we combine the aroma of freshly brewed coffee and a toasted everything bagel. It seemed like a very New York morning thing to do.”

Boston's Bar Mezzana has reimagined the buzzy avocado toast in cocktail form. The drink features a base of vodka blended with avocados, which is combined with kale syrup and lime juice, then finished with a spicy breadcrumb rim. At the Ever Bar in Los Angeles, the Night Market Sweats is the cocktail version of sausage and eggs. Chorizo fat-washed whiskey and chicharrón (Spanish fried pork) are combined with egg white for a hearty breakfast-inspired take on the classic New York Sour cocktail.

WHY IT'S INTERESTING:

JOMO—the joy of missing out—sees millennials opting to stay in more than ever before. These inventive cocktails, however, offer drinkers an experience they would be hard-pressed to recreate on their own.



50

MODERN RENAISSANCE INTERIORS

A new resurgence of understated opulence makes masterpieces of café and restaurant interiors.

Felix Roasting Co is unlike any other coffee shop. Its stone floors, brass dome ceiling, and modern renaissance palette combine into a cross between an art gallery, luxury bar and a Wes Anderson set. The New York City café opened late September 2018 and is by interior designer Ken Fulk. “Getting Ken to do a café is like getting Michelangelo to do your bathroom,” owner Matthew Moinian jokingly told *Vogue*. The vision for Felix Roasting Co was a new “coffee concept” that offers a sense of mastery. Even the beverages are served like a work of art—the hickory-smoked s’mores latte is delivered to guests beneath a bell jar which is then removed, unleashing a smoky hickory-wood scent.

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“Interiors for eateries are moving on from minimalist and stark aesthetics to styles reminiscent of plentiful days that evoke artistry and grandeur, presenting a feast for guests’ eyes as well as their stomachs.”

In Milan, Ristorante Cracco was opened in February 2018 by former *MasterChef* judge Carlo Cracco. The interior is by design firm Studio Peregalli, known for its attention to detail. The fine-dining experience comes in atmospheric surroundings which include marble floors, vintage decor and an iron elevator. The sphere-shaped wall lamps were inspired by the work of 19th-century architect Giuseppe Mengoni and the ceramic artworks are by 20th-century artist Lucio Fontana. In addition, “all the walls are hand-painted

by our craftsmen under our supervision,” the architects told *Departures* magazine. “It’s haute couture for interiors.”

WHY IT’S INTERESTING:

Interiors for eateries are moving on from minimalist and stark aesthetics to styles reminiscent of plentiful days that evoke artistry and grandeur, presenting a feast for guests’ eyes as well as their stomachs.

51-60

BEAUTY

51

GROTESQUE BEAUTY

"There's an anti-beauty movement going on," Bunny Kinney, editorial director at Dazed Media, tells the Innovation Group. "Beauty is not synonymous with looking good. People recognize beauty as a way of transformation—being scary or ugly is part of that."

In a backlash against the traditional notions of conventional, pristine beauty, artists and influencers are exploring a darker side by hacking the human form. Dazed Media launched Dazed Beauty in September 2018, aiming to "redefine the language and communication of beauty." Coverage has since included how artist Arca finds beauty in the grotesque and an interview with "makeup artist freak queen" Malina Stearns, who transforms people into gory monsters. In addition, the Dazed team, which is under the creative direction of makeup artist Isamaya Ffrench, is creating its own beauty experiments using a series of 10 animated heads.

Moscow-based makeup artist Sam Schavlev injects an element of "mutant beauty" into his works. "I want people to feel uncomfortable when they see my art," Schavlev told Dazed Beauty. "The more you look, the more all the things you thought to be right about it start to feel wrong, and all that should be wrong start to feel right."





Los Angeles-based artist Sarah Sitkin distorts, reassembles and melts the human body through her sculptures. “Human leftovers” and “infection” are among the terms she uses to label her works on Instagram. Sitkin’s recent work was featured in “A Love Story,” a 2018 short film starring Selena Gomez; exhibitions are scheduled for early 2019 in Los Angeles and New York City.

“Men and women are starting to step totally outside the prescribed ideal aesthetic into something much more about self-expression,” Alexia Inge, cofounder of online beauty store Cult Beauty, tells the Innovation Group. “They’ve been through three years of digital makeup education, from the basics to layering and detail, and now they’re starting to experiment.”

WHY IT’S INTERESTING:

Beauty is not looking its normal self as bold new forms of self-expression transform it into something daring, unusual, grotesque—and beautiful. What beauty represents is being redefined and brands need to take note of the “imperfect” aesthetic highlighted by a subculture of experimental artists.



Left: Work by By Sam Schavlev, @sam__makeup__art
Right: Arca. Image credit 3D Artist: Sevi Iko Dømochevsky

52

VIRTUAL INFLUENCERS

An army of virtual models was summoned by luxury fashion house Balmain in summer 2018 as brands turn to computer-generated (CG) personalities for inspiration. In collaboration with British artist Cameron-James Wilson, Balmain has introduced three new CG members to front runways and campaigns. The Balmain Virtual Army includes Shudu, aka “the world’s first digital supermodel,” Margot and Zhi.

“The idea of computer-generated models or celebrities we have seen in the last five years or so,” Bunny Kinney, editorial director at Dazed Media, tells the Innovation Group. “Now it’s more prominent and it’s an exciting development in culture.”

Dazed Beauty recruited popular virtual artist Lil Miquela as its contributing arts editor in October 2018. “Lil Miquela is someone who, through her Instagram, has an interesting point of view and represents a new definition of what a model can be,” explains Kinney. “We’re inviting her into our world more formally because we think she represents the future of beauty.”



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"Over the next generation we're going to see huge amounts of progress and development in the space of AI that will have real-world effects and impact, not least on beauty."

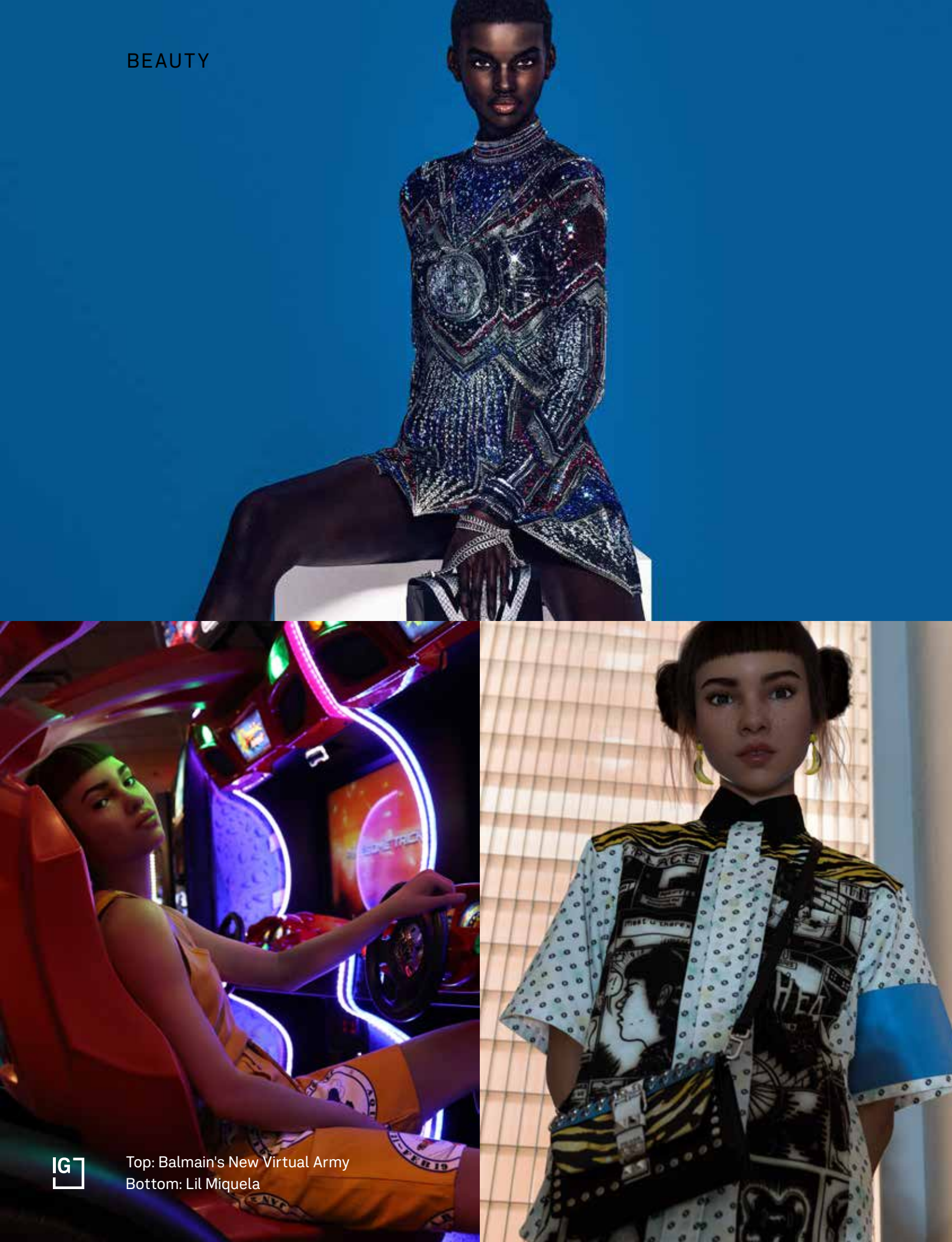
Bunny Kinney, editorial director, Dazed Media

Lil Miquela has established her presence in the fashion and beauty world since she was created in 2016. She has collaborated with Prada and Chanel, among other brands, had garnered over 1.5 million Instagram followers as of November 2018, and was named makeup artist Pat McGrath's muse in spring 2018.

CG model Perl is moving from fronting campaigns to creating. She launched the first artificial intelligence (AI) beauty line in October 2018, responding to "a world where beauty isn't exclusive to humans anymore." The collection includes the Pixel Injection, which fills in dead pixels, and the Pixel Lipstick. AI makeup is "an interesting space to watch," says Kinney. "Over the next generation we're going to see huge amounts of progress and development in the space of AI that will have real-world effects and impact, not least on beauty."

WHY IT'S INTERESTING:

The world of beauty moves beyond the human form. A virtual presence is being established in the forms of social media influencer, fashion model, arts editor and even makeup entrepreneur, carving out a completely new space that consumers are readily accepting and finding inspirational.



53

HAIR FOOD

Superfood ingredients have migrated into skincare products, and now they're making their way into haircare, too. Andrew McDougall, a global haircare analyst at Mintel, comments that "as consumers become more aware of the ingredients they eat, drink, or use for beauty purposes, interest in natural and food-based ingredients is rising," adding that food ingredients rich in antioxidants can position hair products as protecting against the effects of pollution—a pressing beauty concern among global city-dwellers.

One food-inspired haircare launch that created a splash in 2018 was Briogeo's Be Gentle, Be Kind range, formulated with "superfood-infused cleansers." Products in the range include the Matcha & Apple Replenishing Superfood Shampoo, which promises to replenish dry hair, alongside the Kale & Apple Replenishing Superfood Conditioner and the Avocado & Quinoa Co-Wash. Nancy Twine is the entrepreneur behind the Briogeo collection, having launched the line—which is intended to appeal to people with diverse hair types—after taking inspiration from the natural haircare products she and her grandmother would conjure up in the kitchen. Briogeo compares its Superfood range to "a big green smoothie for your hair."



Sauce Beauty is a food-inspired haircare brand that launched in October 2018 with the tagline “haircare products inspired by recipes you love.” Among its delectable-sounding products are Intense Repair Conditioner Coconut Cream, a treatment that’s blended with coconut oil, banana, and jarrah honey, and Deep Moisture Mask Guacamole Whip, made with avocado, jarrah honey, argan oil, and monoi oil. “We care more than ever about what we put into our bodies, why should we not feel the same about what we put in our hair?” asks Andy Rah, Sauce Beauty’s founder.

Elsewhere, the much-touted benefits of apple cider vinegar are blended into DP Hue’s ACV line for colored hair, with the brand’s Apple Cider Vinegar Hair Rinse designed to remove impurities from colored hair without stripping its protective oils.

Even mass haircare lines are getting in on the act, with Procter & Gamble’s Herbal Essences brand launching its BioRenew collection in 2017, formulated with ingredients such as coconut milk, cucumber, green tea, and white grapefruit. Allure reports that the line is also formulated with histidine, an antioxidant and amino acid that acts in a similar way to how a superfood works in the body, “by trapping, neutralizing and removing the build-up of free radicals that wreak havoc on hair.”



WHY IT'S INTERESTING:

Consumers' interest in natural ingredients shows no signs of abating, and as they question what they ingest, they're equally demanding about the nature of what they put on their body and hair. The rise in haircare products formulated with superfood ingredients indicates that consumers are convinced of the benefits of these natural actives, and believe that they can be just as health-giving when used on the hair as when whipped up into a recipe.



54

THE 'IT' LIP

It was, perhaps, the most buzzed-about fashion magazine cover of 2018—in beauty circles, at least. Rihanna's British *Vogue* September issue shoot featured the singer bedecked in an elaborate floral headdress, staring out, geisha-like, with reed-thin penciled eyebrows. The most striking aspect of the image, besides the botanic fashion fantasy, was her dramatically graduated, purple-painted lips, styled by London makeup luminary Isamaya Ffrench.

Lips are increasingly becoming a new creative canvas for makeup influencers. MAC and Korean *Vogue* have partnered on lip features, exploring elaborately graduated candy pinks laden with gloss. Makeup artist Kanako Takase has also been experimenting with various lip embellishments. During New York Fashion Week she created punkish, marbled lips with blue flecks atop high clear gloss for the Eckhaus Latta spring/summer 2019 show; for a shoot in September 2018's *V Magazine* she used metal rings and other trinkets to create dramatic lips. London-based Lucy Bridge created a lip with three distinct vertical stripe shades. Beauty influencer Florence Rose has started using contrast gold lip lining.

“Social media has made everyone an expert at applying makeup, so artists are also having to really step up their game to demonstrate artistry and skill.”

Alexia Inge, cofounder, Cult Beauty



“Social media has made everyone an expert at applying makeup, so artists are also having to really step up their game to demonstrate artistry and skill,” explains Alexia Inge, cofounder of online beauty retailer Cult Beauty. “Beauty in general is also moving into a more intellectual cerebral space, so experimentation is becoming more important.”

Lips generally are becoming a key beauty category. “Lips have always been a major focus for the beauty industry, but it’s really revved up in the last few years, thanks to major lip launches like Pat McGrath Lip Fetish lipsticks and Kylie Lip Kits, both of which had a lot of anticipation and quick sellout rates,” adds Jessica Matlin, beauty director at *Harper’s Bazaar*. “They also dropped Beyoncé-style, without much warning and to a lot of fanfare. At the same time, a lot of millennials are also very much dipping their toes into the luxury universe, so we’re seeing a real surge in classic designer luxury lipstick. It’s something that’s glamorous, performative—who doesn’t want to take

out their Tom Ford or Chanel lipstick out of their bag?—and almost acts like an accessory.”

Why now? “You could say that Kylie Jenner really brought full lips into fashion,” says Matlin. “At the same time, lip filler has become one of the most popular non-surgical procedures, and increasingly common with those under 30—something that was unheard of not too long ago.”

WHY IT’S INTERESTING:

It’s a testament to Instagram culture’s role in propelling everything from packaging to cosmetics trends—and therefore a drive to the more theatrical and visually novel. It also speaks to the role of makeup artists as influencers in cosmetics. Their experiments and daring looks are part of their cultural cachet and they are increasingly expected to break new ground—especially with so many amateur beauty enthusiasts nipping at their heels.

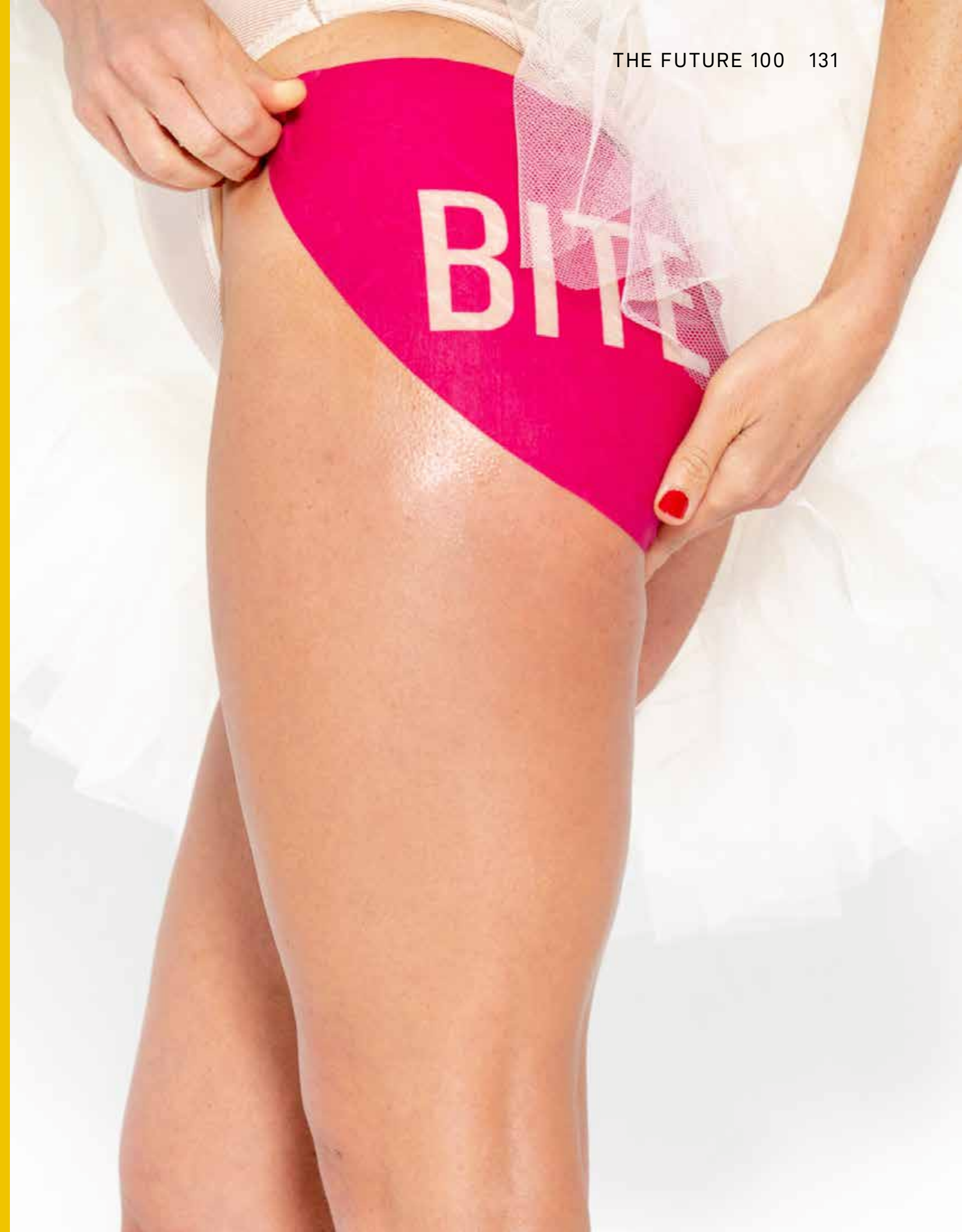
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UN-TABOOING THE LAST FRONTIERS

Another day, another taboo broken. In the beauty industry, a new light is being shone on previously little-examined problems. We saw it with leak-proof underwear. We saw it with periods. Now brands are breaking the silence on vaginal grooming and erectile dysfunction.

The intimate skincare market is exploding, with indie brands like Fur, Lady Suite, Bawdy and Anese normalizing the nether regions. “We’re seeing so many different areas being reinterpreted, particularly blurring intimate care and skincare,” Jenny B Fine, executive beauty director at WWD, tells the JWT Innovation Group. According to WGSN, the intimate-health industry is set to grow 7.2% by 2024, reaching \$35.3 billion.

Fur and Lady Suite are bringing attention to vaginal health with oils formulated specifically to moisturize and soothe sensitive pubic skin, especially after hair removal, and to prevent ingrown hairs and soften pubic hair. “I like seeing education around vaginas and vulvas that doesn’t feel like ‘I have a problem’ and is more positive and communal,” says Therese Clark, founder of Lady Suite. “I think education in a way that’s not cold or sterile and more conversational can help undo the taboos around vaginas.”



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Bawdy and Anese are leaning into this conversational approach, using humor to bring a sense of playfulness and levity to intimate skin care. Both brands offer butt-grooming products with irreverent names: Bawdy's butt masks have names like Bite It, Slap It, Squeeze It and Shake It; and Anese offers a butt scrub called That Booty Tho and an oil called Have You Seen My Underwear?

This frank approach is being adopted in the men's grooming arena as well, with brands such as Hims and Roman embracing an open discussion around erectile dysfunction.

"We hope to enable a conversation that's currently closeted. Men aren't supposed to care for themselves. We call bullshit," proclaims the Hims website. Hims launched in November 2017 with men's hair loss products and has since introduced skin care and an erectile dysfunction treatment. The brand uses playful visual references of cacti and eggplants in its marketing, with the slogans such as "it's erectile, minus the dysfunction."



Left: Anese
Right: Fur

Roman also launched in November 2017 with a suite of sexual wellness products. "We wanted to use humor since it's a serious and personally felt issue," says Ryan Kutscher, cofounder and executive creative director of Circus Maximus, the ad agency behind Roman's campaign. "It ties in a lot of really deeply felt emotions about self-image, masculinity, and virility. But we wanted guys to hear from a brand that treats them like real people."

WHY IT'S INTERESTING:

Beauty is expanding to encompass topics that, traditionally, were relegated to the sterile medical realm. The beauty industry is reappropriating topics such as vaginal health and erectile dysfunction, working to destigmatize discussion of these topics as the latest effort to make the beauty industry more accepting and diverse.



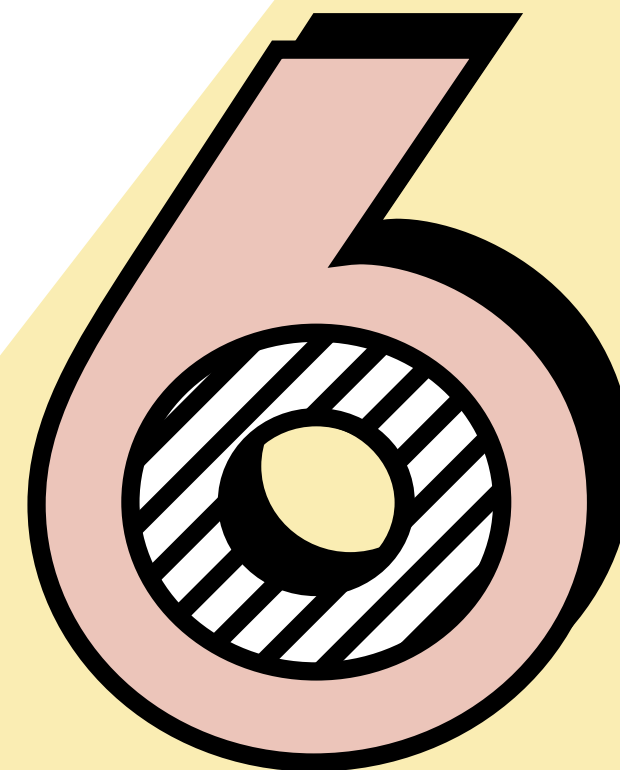
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GESTURE-BASED PACKAGING

How to bring genuine newness to beauty packaging? For plenty of brands, the answer lies in taking their cues from tech, employing swiping and scrolling gestures to make their products stand out.

Glossier—second to none at creating buzz for its sleek beauty products—has incorporated a swipe gesture into the packaging for Glossier You Perfume Solid. This fragrance balm version of the Glossier You fragrance is housed in a pale pink, weighted metal compact, which the brand says is designed to “fit the curve of your palm and thumb” and open and close “with an addictively flippable hinged swivel.” This swiping motion echoes the way in which consumers are used to flipping through their smartphone content.

Similarly, many of California brand Lilah B’s products come in pebble-shaped compacts that slide open. While their function nods to tech, there’s also a natural element to the brand’s packaging—the stone-shaped metal compacts are designed to have an organic, tactile air, inspired by the pebbles that founder Cheryl Yannotti Foland would pick up from Italian beaches during



summer vacations. Foland says her aim in launching Lilah B was to help women “declutter, minimize and simplify” their beauty routine with products packaged to provide a “luxé, sensory experience”—much like the sleekest tech products.

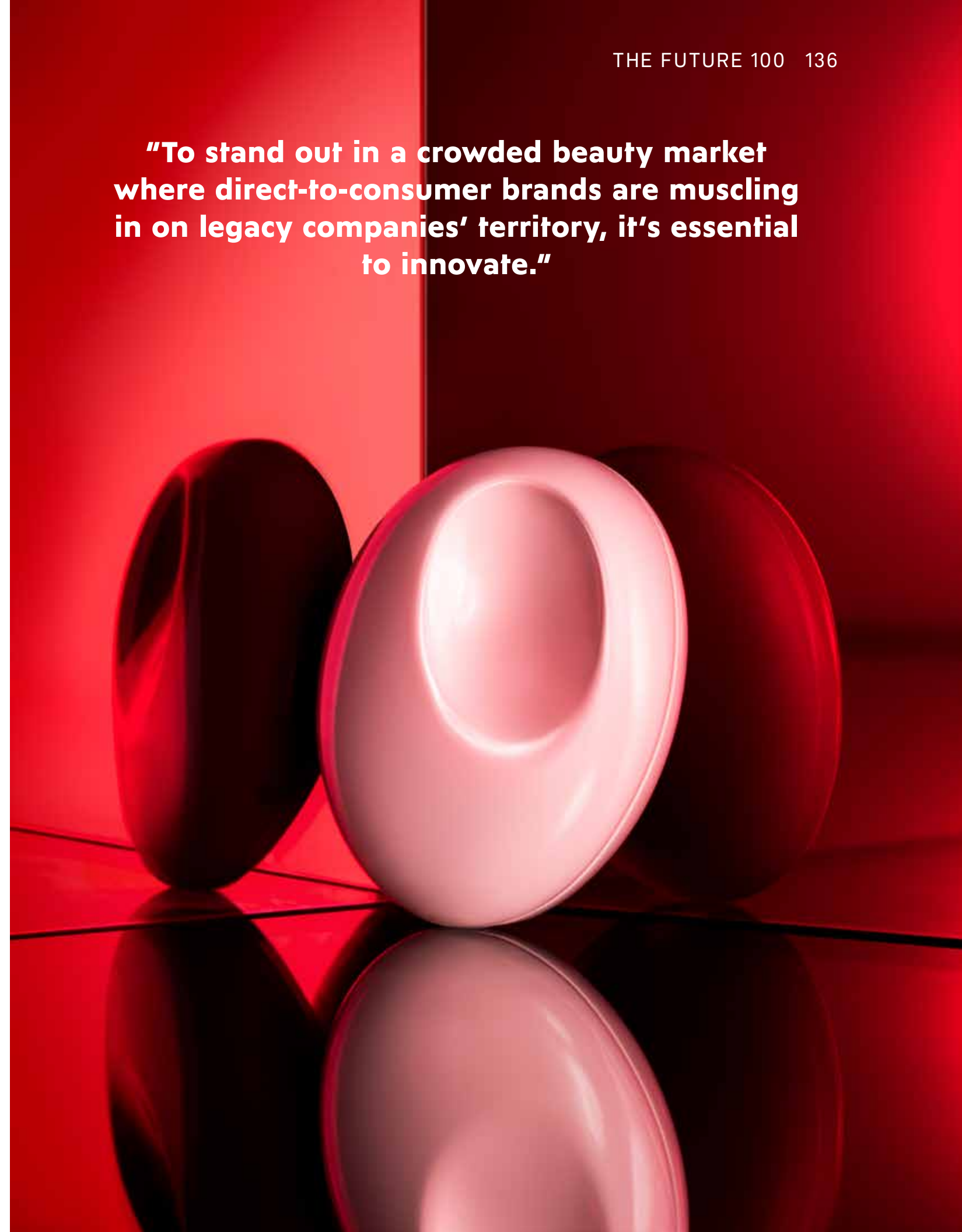
Beauty packaging companies are also tapping into these gestures in creating their offer. EmpireEmco, a US packaging brand, took inspiration from the smartphone to create Roxanne, a stick formulation packaging solution designed to hold a lipstick or concealer. The stick can be scrolled up or down, rather than twisted, so it’s operated with one hand, with the brand noting that the product’s development was influenced by the iPhone.

Albéa, a Spanish packaging company, has introduced the Quartz Slide compact. The compact’s slide mechanism is accessible via an ergonomic finger indent, so the user can lock or unlock the compact with a seamless swipe that pushes the lid back and up. This mechanism also ensures the lid is more secure when the compact is toted in a handbag.

WHY IT’S INTERESTING:

To stand out in a crowded beauty market where direct-to-consumer brands are muscling in on legacy companies’ territory, it’s essential to innovate. By looking to tech to offer packaging newness, these brands are illustrating to young consumers that they understand their clients are constantly connected to smartphones—and that a packaging gesture can contribute to a product’s covetability.

“To stand out in a crowded beauty market where direct-to-consumer brands are muscling in on legacy companies’ territory, it’s essential to innovate.”



57

TRANSFORMER MAKEUP

As a new beauty product can live or die by its success on Instagram, brands are creating makeup and cosmetics that have a fun-to-use, exhibitionist element. Lately, they've been zeroing in on formulations that have a transformative, color-changing effect, whether that's achieved through layering with other products or in reaction to the skin's pH.

Lipstick Queen, a company founded by beauty industry veteran Poppy King, counts transformative lip colors among its bestselling products. Since launching Frog Prince in 2015 —a lipstick that's green in the tube, then transforms into a sheer rose—the brand has unveiled a rainbow of color-changing formulations. Among them are Mornin' Sunshine, a yellow lipstick that changes to a peachy coral shade, and Blue By You, which is indigo in the tube and turns into a raspberry pink. All the shades alter in response to the pH levels of individual skin.

Various brands have followed suit with color-changing products of their own, including Winky Lux's Watermelon Jelly Balm, which goes on clear but turns pink on the lips, with the exact tone depending on the wearer's pH levels, while MAC's Tendertalk Lip Balm is described as a "smart lip conditioner" that

similarly responds to the body's individual chemistry to create a different color for each wearer.

The idea is moving beyond lips, with contract cosmetic manufacturers developing a wider selection of makeup products that employ color-changing elements. At the 2017 MakeUp in Paris trade show, Italian manufacturer Crystal Moda showcased Color Perfection Pigment, drops that are designed to be blended with foundation to make its undertones more beige or more pink, to suit different wearers' complexions. At the same show, US manufacturer Englewood Lab showed skincare products that change color, such as a mask that shifts from blue to yellow when it's ready to be removed. GlamGlow's masks, already on the market, have set Instagram alight with treatments such as Gravity mud, a formulation that turns from white to chrome as its firming and lifting effects on the skin are activated.

WHY IT'S INTERESTING:

As young consumers love to share their beauty experiences on social media, brands are formulating products that have visual appeal alongside skincare benefits. From color-changing cosmetics to mercurial masks, it's increasingly important for cosmetics to provide an element of entertainment in tandem with their beautifying qualities.



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PROPRIETARY PACKAGING

In the age of Instagram, product visuals are becoming just as enticing—and important—as the products themselves.

Social media has a huge impact on beauty purchases: 72% of Instagram users have made a beauty or style-related purchase after seeing an item featured on the platform, according to a 2017 survey by Dana Rebecca Designs. To stay relevant in this visually driven environment, brands are prioritizing package design and developing original, attention-grabbing packaging as a central part of their marketing strategy, creating unique package interactions.

Take direct-to-consumer brand Glossier. The Instagram darling's G logo and simple graphics make it eye-catching, but the real strategy lies in the empty space that dominates the packaging of each product. Glossier includes stickers with each purchase that can be used to decorate and personalize the packaging—which then, of course, can be shared on Instagram. Glossier has garnered a devoted cult following, while the stickers have reached collector status and are sold on consignment platforms like Depop, Poshmark and eBay.

Fenty Beauty, named one of *Time*'s 25 best inventions of 2017, is hailed by beauty lovers for its diverse range of shades. "I never could have anticipated



“Packaging design is becoming a key aspect of beauty branding and a central part of both the consumer experience and brand identity.”

the emotional connection that women are having with the products and the brand as a whole,” founder Rihanna told *Time* magazine. The brand, which launched last year, quickly became known for its unique honeycomb-shaped packaging. The design makes it instantly recognizable in the absence of any overt branding. The company is leaning into this with its latest release, the Stunna Lip Paint in Uninvited, which features glow-in-the-dark packaging.

Kylie Cosmetics, the viral beauty brand from the youngest member of the Kardashian-Jenner clan, has also focused its brand experience heavily on packaging design. The reality star is no stranger to the importance of visuals and social media, and takes to Instagram regularly to promote her products. Her 2018 Halloween-themed release featured 3D packaging for a novel interaction.

WHY IT’S INTERESTING:

Packaging design is becoming a key aspect of beauty branding and a central part of both the consumer experience and brand identity. “We are seeing the death of the classic black packaging associated with traditional cosmetic brands” Jenny B Fine, executive beauty director of WWD, tells the JWT Innovation Group. As digitally native and DTC brands inundate the beauty market, pushing product discovery to visually driven platforms like Instagram, brands are putting as much creativity into packaging aesthetics as they are into the product.



59

C-BEAUTY

Consumers have traded in the glittery serums and cute packaging popularized by K-Beauty for a more refined, centuries-old approach to holistic skincare that defines J-Beauty. But in China, a powerful, emerging beauty market is beginning to rewrite the rulebook for cosmetics brands altogether.





Little more than a few decades ago, beauty and skincare were reserved for China's elite few. But today, the market is one of the fastest growing in the world, with makeup sales soaring in value by 30% in 2017, according to Kantar Worldpanel. Fueled by digital-first commerce, influential social media platforms, and mainstream mobile payment habits, Chinese consumer behaviors are shaping how beauty brands innovate their products and interact with their increasingly sophisticated and experimental customers.

Technological innovations are changing the way Chinese shoppers become exposed to new trends in beauty. At 17Beauty's "beauty boxes" at malls and

offices, facial recognition and big data guide consumers with product recommendations for on-the-go touchups, helping working professionals look their best. Augmented reality beauty giant Meitu takes China's uninhibited selfie culture to the beauty counter at Sephora's first Asian concept store, which also merges offline and online with a new social-commerce powered WeChat mini program store.

China's diversified cosmetics needs mean the country is a breeding ground for new formulations, packaging, and limited-edition products—in 2017, about 6.5% of all new launches globally were color cosmetics innovations in China, up from 1.2% in 2015, according to a Mintel report. While mass market and luxury companies account for a portion of this, online influencers are also taking a page from Kylie Jenner's book and developing their own brands. Except these key opinion leaders (KOLs) are not always selling based solely on their status—they're harnessing China's massive e-commerce platforms and resources to learn about their fans' demands and build an educated following through vlogs and livestreaming.

Local beauty brands are redefining lifestyles through creative collaborations. Shanghai-based skincare label Pechoin is nearly a century old, but it's finding a younger following thanks to millennial-friendly design and storytelling through its partnerships with HeyTea, a hip beverage company with major social media clout.

WHY IT'S INTERESTING:

As both domestic and international beauty brands cater to the needs of a huge new generation of open-minded, digitally savvy Chinese generation Zers and millennials, it likely won't be long before these consumers are setting global trends themselves.

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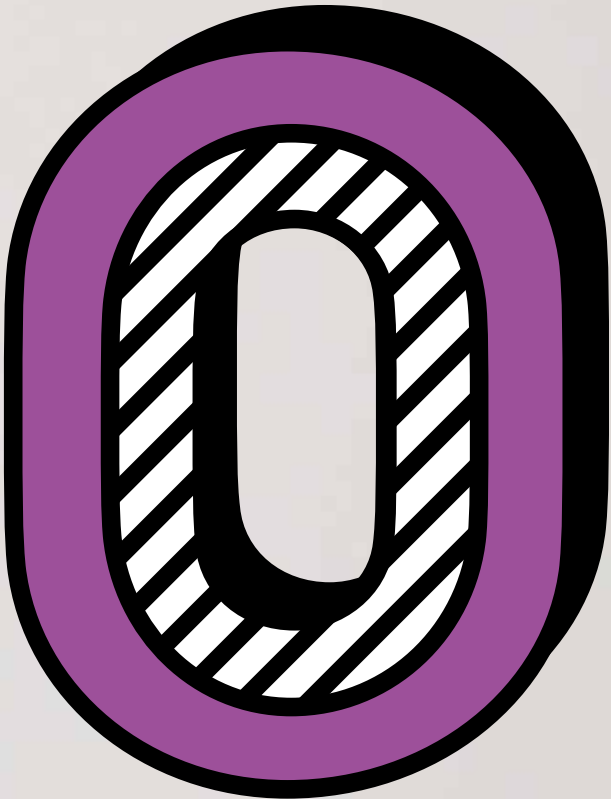
WATERLESS FUTURE

Consumers continue to scrutinize every ingredient in beauty, as the demand for natural and concentrated products becomes even more refined. The latest ingredient to be questioned is water—it appears clean and harmless, but is it necessary?

Driven by sustainability concerns, brands are looking to reduce and even eliminate water from their products and production processes. L'Oréal has committed to reducing 60% of water consumption per finished product by 2020, compared to the amount used in 2005, and Unilever has launched a water-smart initiative which aims to develop products across its brands that reduce its water footprint.

While larger companies are introducing long-term plans to reassess their use of water, one US-based startup is making waterless beauty its entire mission. Pinch of Colour, launched in 2016 by Linda Treska, started with lipsticks, and has since expanded to balms, tints and face oils. Treska was born and raised in Albania and has experienced first-hand the difficulty of living with water





“Squeezing water out of beauty products and salons not only provides environmental benefits, it also promotes hygiene and means products can be formulated without preservatives and parabens.”

scarcity and contamination. “One third of the world, if not more, is touched by this problem,” explains Treska, who has combined philanthropic values with her beauty experience to create the first waterless beauty brand.

Beauty parlors are also embracing going waterless. New York-based nail salon chain Glosslab makes a point of “going dry” and offers waterless pedicures, explaining that water is a breeding ground for bacteria.

There is no need for the beauty industry to use water, claims Treska. “It does become challenging because water is in a lot of products, but it’s not impossible.”

WHY IT’S INTERESTING:

Squeezing water out of beauty products and salons not only provides environmental benefits, it also promotes hygiene and means products can be formulated without preservatives and parabens.



61-70

RETAIL

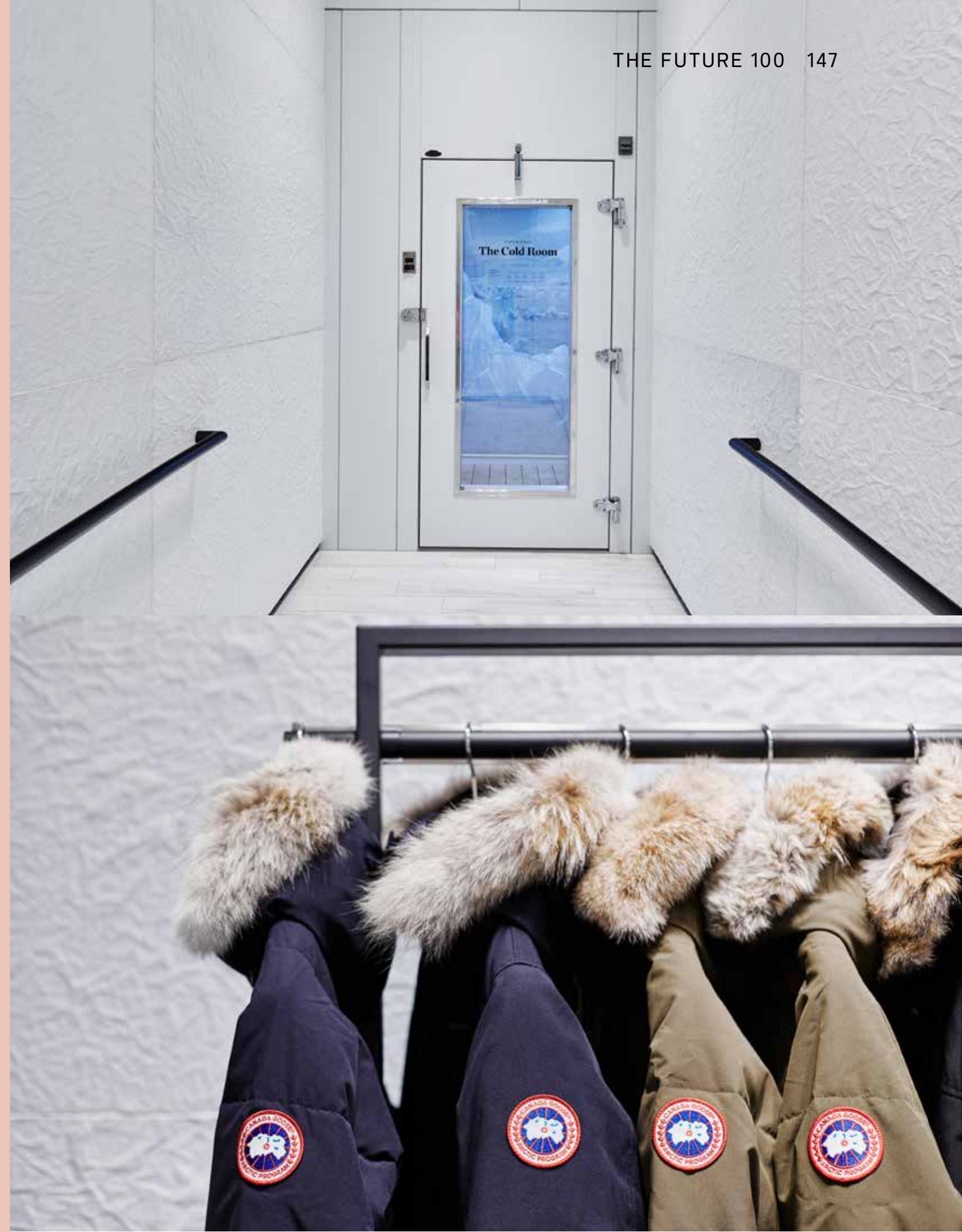
61

OUTDOOR IMMERSION STORES

What can a bricks-and-mortar store do that online retail can't? Create an immersive environment, for one. And outdoor brands whose goods are designed for use in very specific climates are capitalizing on that opportunity, recreating the cold, wind and rain where their designs come into their own.

When Canada Goose opened a new store in Short Hills, New Jersey, in September 2018, the brand debuted its Cold Room concept, where shoppers step into a refrigerator-like room to test how the brand's jackets can keep them warm in temperatures as low as -25 Celsius, or -13 Fahrenheit. "The Cold Room simulates how we test our product—now our customers will have the same opportunity," Dani Reiss, president and CEO of Canada Goose, told Forbes. The brand will also introduce the concept in its stores in Montreal and Boston.

When Hunter Boots wanted to establish its brand in the United States beyond its well-known rain boots, the brand set up a greenhouse in New York's Grand Central Terminal to emphasize its rainwear and heritage, and bring "the Scottish Highlands to the heart of Manhattan." During the experience in October 2018, visitors got to wear Hunter's rainwear and interact with its



“The Cold Room simulates how we test our product—now our customers will have the same opportunity.”

Dani Reiss, president and CEO, Canada Goose

products in a greenhouse carpeted with real moss, where rain fell and a layer of mist hung. Hunter said the experience resulted in an 85% sales lift in its core product offering.

Timberland, too, has caught on to the appeal of bringing the outdoors into stores. In October 2018, the brand opened a pop-up store on Fifth Avenue in New York that housed a rain room and a snow room, so customers could test how Timberland's boots stood up to rough conditions. “Digital is incredibly important, but bricks and mortar is not going away,” Kate Kibler, VP of direct-to-consumer and Americas marketing at Timberland, told *Footwear News*. “People still want to come in and touch and feel the product—that human element and physical, three-dimensional tactile piece of it becomes really important. It’s about connecting with the consumer and having them connect with the brand.”

Fitness brands have also created immersive experiences, with Asics launching a Blackout Track at an east London venue in the summer of 2018 to promote its Gel-Kayano 25 sneakers. The darkened running track was intended to underline the meditative element of running, while the stunt also promoted Asics’ running communities, which are active across its social media platforms.



WHY IT'S INTERESTING:

As retailers look for new ways to draw consumers into stores, outdoor and active brands can offer a real point of difference in the experiences they put on, especially given that their products have a practical purpose. And of course, these Instagrammable environments generate plenty of engagement on social media too, killing two marketing birds with one stone.

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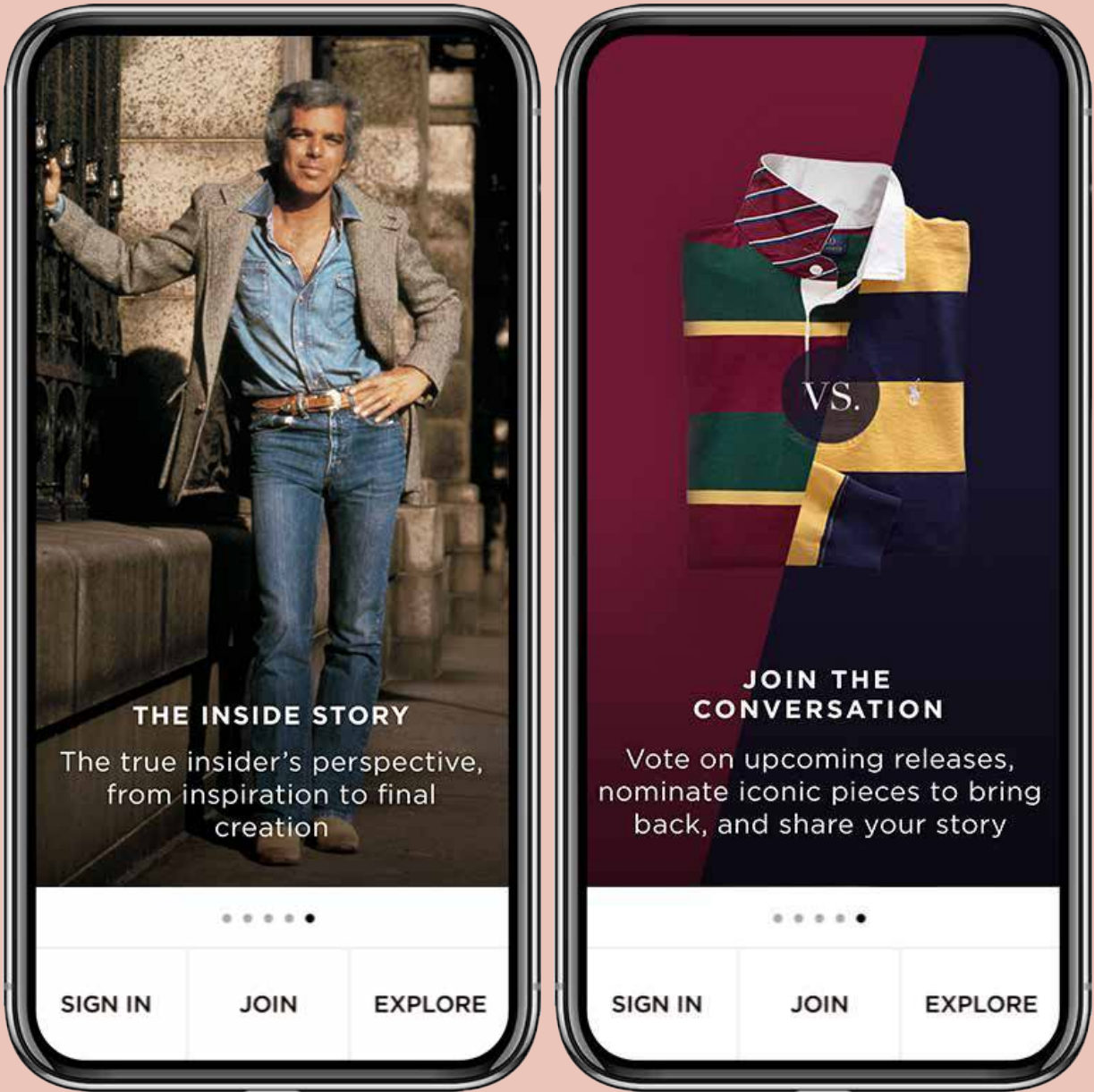
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Mindful that consumers are growing weary of traditional advertising, brands are using apps—some only available to a select few—both to generate a sense of insider excitement about new launches, and to involve consumers in the creative process.

Target's Studio Connect is an invitation-only app which, Fast Company reports, has a super-selective base of 600 members whom Target's designers can consult when developing products. The app has resulted in Target clothing lines featuring prints designed by members' kids, through to consumers submitting ideas for Mother's Day slogan tees. Target has also used the app to inform the development of clothes for people who have disabilities, or who are on the autism spectrum.

"Studio Connect enables our designers to interact with guests at any point while developing products," Julie Guggemos, senior vice president of product design and development at Target, told Fast Company.

Lilly Pulitzer also took an invitation-only approach when it launched its mobile shopping platform. When the resortwear company's progressive web app—which allows an app-like experience from the brand's mobile site—launched



in late 2017, it temporarily made its Instagram account private in order to give loyal fans the news first.

Zyper, launched by British entrepreneur Amber Atherton, is a startup that allows brands to tap into the yen among millennials and generation Z to create their own content. Zyper’s software helps brands to identify their top followers—as well as how engaged their followers are—so they can offer them the chance to be brand ambassadors. That could involve sending the followers product samples for them to photograph artistically and post on their feed. “Millennials and gen Z want to be marketed with, not to,” Atherton told *Forbes*. “We all use ad blockers.”

Adidas, too, has harnessed the desire among young consumers to create a brand around themselves with the launch of its Tango soccer app. Launched in the United Kingdom in September 2018, it’s the platform for the Tango League, which allows users to take part in soccer events. Users can also upload videos of themselves taking part in soccer challenges to win prizes and, as they do so, they can build player cards, with the most skilled rising up the visibility ranks. In addition, the app allows early access to Adidas’s soccer news.

WHY IT’S INTERESTING:

Brands are moving away from a blanket approach in how they market to consumers and are instead aiming to make their audience feel special by engaging with them in a hyper-targeted way. This approach not only makes a customer feel more loyal to a brand, it can also provide intelligence for companies, too, as they tap their audience to crowdsource ideas. In the case of Target’s Studio Connect app, there’s even the chance for a consumer’s idea to end up in production, completing the feel-good cycle.



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SHOPTAINMENT'S LATEST WAVE

How to encourage customers to see shopping as an inspiring way to pass the time, rather than merely a transactional experience? The answer could be tapping into that age-old concept of retail theater. And today, that could mean anything from animation and experiences in stores to creating broadcast entertainment around your covetable goods.

At Neiman Marcus, Ed Burstell—the executive who turned London's Liberty into a must-visit destination —was appointed as senior vice president of product innovation at the beginning of 2018. One of Burstell's first initiatives has been to launch the Idea Factory at Neiman Marcus, which he calls “a seasonal template around which exclusive product and experiences can be created.”

That has meant events with body piercers, graffiti artists, acupuncturists, and personalization experts appearing in Neiman Marcus stores, with Burstell noting that the customer reaction has been “outstanding, both in terms of surprising our current customer but also attracting a new one.” But, Burstell says, any entertainment concept must start with the right merchandise: “At the end of the day, that’s your only true competitive differentiator.





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To entertain around the same merchandise as the store down the mall is useless.”

Added to that, he continues, retailers should “acknowledge that consumer spending patterns have changed.” Indeed, in light of consumers spending more on travel, Neiman Marcus’s spring 2019 campaign is “The Art of Travel,” which Burstell describes as “everything you need and everything you need to know to get you where you want to go.”

In terms of activities in the store, this will see Neiman Marcus work with its brand partners to create exclusive merchandise, then “layer on the experiences,” says Burstell.

And the concept of retail and entertainment is coming to screens, too. NTWRK is reinventing the QVC concept for generations Y and Z by creating online shows about its exclusive product launches, inspiring a sense of rarity and excitement around the drops. Since its launch in October 2018, NTWRK, based on an app, has featured interviews with artists such as DJ Khaled and Jonah Hill to launch products created in collaboration with the artists—for Khaled, Beats by Dre headphones, and for Hill, a Champion hoodie to mark the release of *Mid90s*, his debut feature as a director. “Rappers are now selling more shoes than basketball stars. It’s our job as curators, editors, and retailers to find the people who can do this,” NTWRK’s founder Aaron Levant told Forbes.

In terms of mass retail, in the summer of 2018, UK online retailer Missguided partnered with the hit reality show *Love Island* to fuse retail and entertainment, allowing viewers to shop the looks that contestants wore in the dating show via a *Love Island* app.



Meanwhile, erstwhile J Crew executive creative director and president Jenna Lyons has teamed up with Turner to create an unscripted television series that will be, according to brand, “the center of an integrated lifestyle space, comprised of daily online content and direct-to-consumer commerce, that will evolve into a full-fledged digital platform in 2020.”

“We want to try something new,” says Lyons. “I want to build a story-driven, comprehensive resource for anyone to satisfy their personal style and help them make aesthetic choices. And we will bring that together with real time entertainment.”

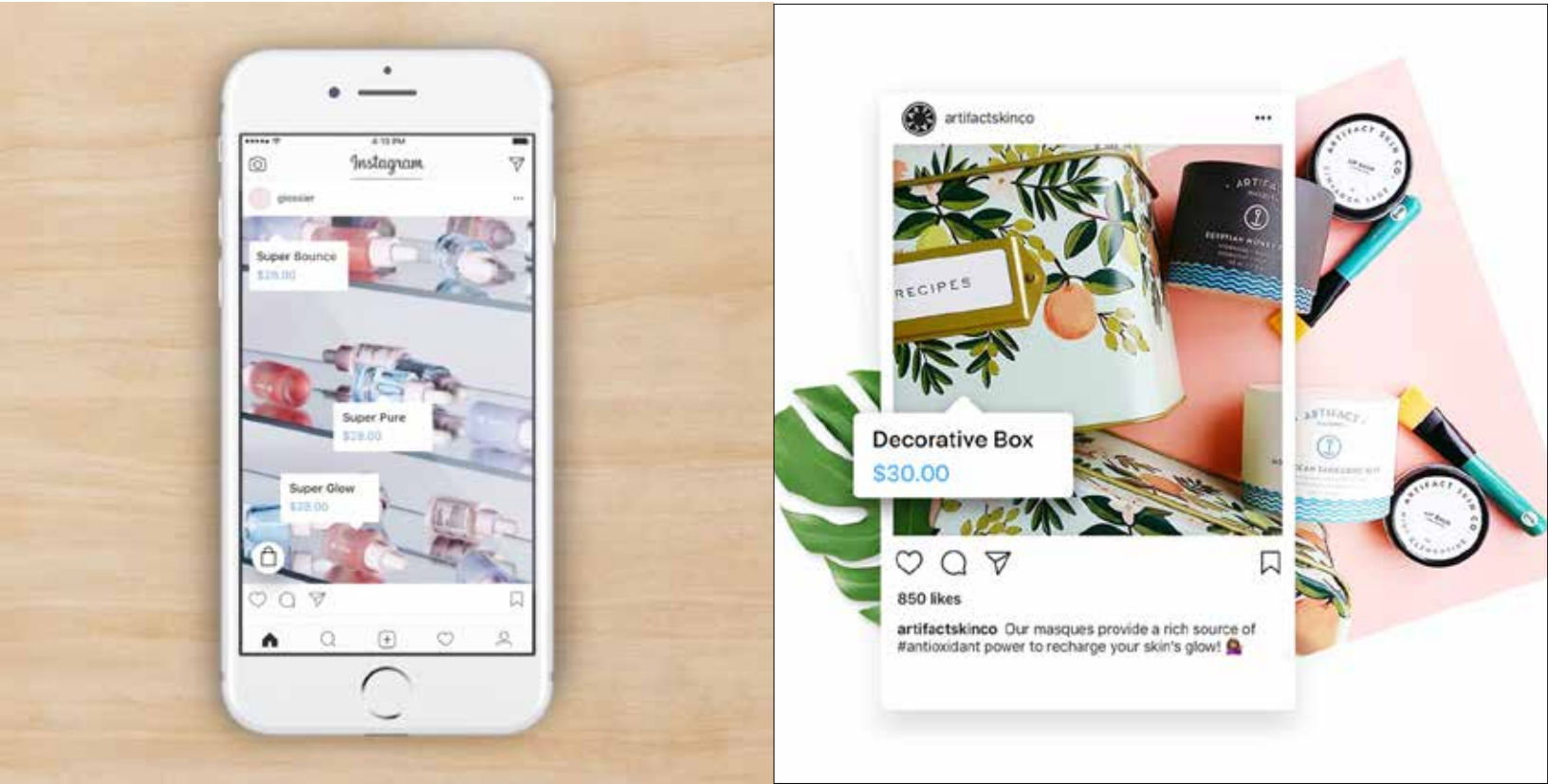
WHY IT’S INTERESTING:

Retailers are clear that today’s consumers need to be inspired to part with their cash. But they’re no longer relying on traditional editorial channels to dream up a story around their products. Instead, in the latest evolution of retailers creating content, they’re orchestrating spectacles—both in terms of video content online and in real life—to entertain and fuel consumers’ desire to make that purchase.

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S-COMMERCE

As consumers turn to social media for inspiration, these platforms are adapting their offerings in the hopes of monetizing this engagement and becoming veritable s-commerce (social commerce) shopping destinations.



As the platform of choice for influencers, Instagram has been making a big push to integrate shopping. In June 2018, Instagram unveiled a shoppable version of its popular Stories, featuring a tag that users can tap to navigate directly to the brand's website for in-app purchases. Easing the path to purchase, Instagram also announced an in-app payment option in May 2018. While this option is still in beta testing, its potential could ultimately turn Instagram into a fully-fledged ecommerce platform.

Snapchat is making a play for social commerce as well, with several new features. Most notably, Snapchat announced a partnership with Amazon in September 2018 that allows users to snap a picture of a product to buy on the e-commerce giant's site. The app also introduced a shoppable stories feature in June 2018, similar to Instagram's, featuring a catalogue of items at the bottom of the screen.

Snapchat and Facebook both announced augmented reality (AR) ads in the summer of 2018, which allow users to virtually try on products like sunglasses or makeup. "With this move, Snap is now providing brands with the opportunity to not just drive engagement with AR lenses, but also seamlessly drive them to commerce with a new tap-to-visit.com feature," says Chris Murphy, head of digital experience at Adidas US.

WHY IT'S INTERESTING:

As product discovery and inspiration move into the digital realm, social platforms are hoping to turn e-commerce—which has revolutionized retail—into s-commerce.

65

THE INFLUENCER ECONOMY EVOLVES

As the art of influencing becomes ever more of a business, platforms are springing up that allow social media stars to cement their brand status and monetize their followings.

Village Marketing drew social media buzz (or cries of “peak influence”) in October 2018 for creating a rentable apartment where Instagram influencers can stage shoots. And more examples are emerging.

Beautonomy is a beauty brand that allows users to create their own makeup palettes that can be sold through its marketplace, with influencers earning 10% commission on each of their designs sold. Both individuals and influencers alike can design a palette, curate the makeup, and share with their followers (or an individual’s friends).

RevCascade, a New York company that facilitates drop-shipping—whereby retailers don’t have to carry inventory, but can order from a third party as products are bought by consumers—is launching an e-commerce platform for influencers called Souler. Set to launch in late 2018, Souler will allow influencers and publishers to “share and sell products they love directly to their followers.”

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THE
FUTURE
IS
FEMALE

“The business of being an influencer is becoming more professionalized, with content creators increasingly looking for third parties to help them build a holistic business model.”

These Western companies are picking up on a concept that's already well established in China. Among the country's latest social commerce launches is Kuaishou, a Chinese social video sharing platform backed by the conglomerate Tencent. It allows select, approved users to open “little shops,” where influencers can link to products they recommend on marketplaces such as Alibaba's Taobao and WeChat's Youzan.

ByteDance, which runs content platforms powered by artificial intelligence, has also launched the social commerce app Xinciao in beta mode; Xinciao allows users to link inspirational content to products that followers can buy. This comes on the heels of social commerce sites such as Xiaohongshu, which has built an ardent following by combining trusted review and recommendation content—from individuals, influencers and celebrities—that links with fashion and beauty purchases.

WHY IT'S INTERESTING:

Influencers are getting serious about monetizing their followings and, in turn, platforms are springing up that help social influencers of every stripe—from those with microfollowings to those who have established themselves as brands—to capitalize on the appeal of their content. It's also an indication of how the business of being an influencer is becoming more professionalized, with content creators increasingly looking for third parties to help them build a holistic business model.

66

TEXT COMMERCE

Retailers are paring down shopping to the basics, harnessing the ease and familiarity of SMS to deliver simple, personalized purchasing experiences to consumers on the move.

There is now an app for just about everything, but a number of disruptors in retail are favoring the intimacy of a text message to make a sale. Many brands are already using text chatbots for mobile marketing or customer service, but now stores are taking the communication tool to new levels of engagement, using a more “human” connection and the lure of convenience to fuel transactions.

Direct-to-consumer beverage company Dirty Lemon is one of the pioneers of this model, relying solely on text messaging to sell its Instagram-famous drinks. After acquiring conversational weather service Poncho to strengthen its platform in spring 2017, Dirty Lemon expanded into offline territory in September 2018, opening a convenience store in Manhattan where consumers are encouraged to grab a \$10 tonic and pay later—all by sending a text message.



The messaging interface, peppered with emojis and conversational language, is designed so that its target market of generation Z and millennial consumers feel like they're talking to a real person. "Our order system allows us to talk to customers all day long; we literally answer tens of thousands of messages a month, a habit that has allowed the brand to grow into one that represents the people who purchase, instead of filtering a traditional top-down approach to marketing focused on extreme performance, or quick-fix results," cofounder Sommer Carroll told Forbes.com.

Jetblack lets shoppers send text messages for delivery, in a move that targets primarily affluent mothers whose lives are too hectic for browsing its online store. The members-only service was launched in 2018 by Walmart's incubator Store No 8. Jetblack stores data on users' favorite household products, along



"Our order system allows us to talk to customers all day long; we literally answer tens of thousands of messages a month,"

Sommer Carroll, cofounder, Dirty Lemon

with their preferred shipping and payment information, and lets consumers make a purchase simply by texting a keyword. It also helps customers tweak their shopping cart with the help of artificial intelligence.

For Jetblack, text messaging is just the first step. At *MIT Technology Review's* EmTech Next event, Store No 8's founder Katie Finnegan said the company is exploring how to evolve this service into one powered by an Alexa-like voice assistant. But at the moment, texting provides an easier way to give product recommendations and has a lower barrier to entry.

In September 2018, Rent the Runway also began testing a text-based VIP Concierge service run by human staff. The intent is to create a more efficient in-store experience by letting customers send styling questions over text ahead of their appointment.

WHY IT'S INTERESTING:

With texting capabilities expanding to easily send everything from gifts to music, text commerce appeals to the consumer's comfort and shortens the path to purchase. Could this twist on a decades-old method of communication threaten Amazon's modern e-commerce model?

67

LAYAWAY REBRANDED

Buying goods with layaway and buy now, pay later agreements might not have had the most glamorous image in the past, but a clutch of new players is reviving the concept as a way for credit-averse millennials to shop.

Australian company Afterpay, founded in 2015, partners with retailers to offer customers interest-free, buy now, pay later agreements. In May 2018, following a \$15 million investment from VC firm Matrix Partners in its Afterpay Touch Group parent company, Afterpay launched in the United States, with Urban Outfitters among its first retail partners. In October 2018 the brand had reached 1,000 US retail partners, including Rebecca Minkoff, Revolve, and Cynthia Rowley. Afterpay plans to expand into the United Kingdom, announcing in August 2018 that it would acquire a majority stake in ClearPay Finance Limited, a UK buy now, pay later operator.

Nick Molnar, founder and CEO of Afterpay, commented at the service's US launch that Afterpay "helps shoppers get over that initial price hurdle by offering a platform to help budget for things that they want without needing to take out a loan or open a credit card. This is particularly relevant for millennials who are reluctant to use credit cards and other forms of

traditional finance," he said. Molnar added that the service helps retailers to increase conversion rates and incremental sales by "20-30%."

Klarna is a buy now, pay later service that was founded in Sweden in 2005. The company partners with retailers, including ASOS, Topshop, Arket, and Beauty Bay, to allow customers to either try goods and pay later, or to divide their payments into interest-free installments. Additionally, Klarna manages retailers' online payments by offering a "pay now" service.

Even legacy retailers are offering layaway, a service that allows consumers to pay for items in installments before picking them up. Since 2011, Walmart has offered a holiday season layaway plan, which runs from late August to December for purchases made in stores, as a way to help consumers manage their holiday spending.

WHY IT'S INTERESTING:

Afterpay and Klarna are removing the barriers to purchasing discretionary items for millennial consumers, who are reluctant to live beyond their means and get into credit card debt. As Molnar commented to Forbes, "no one wants to take out a loan to buy a dress... there has been a shift in how people spend money, and that's what we're focused on solving." Additionally, the success of these payment systems arguably marks a move away from the idea of spending as a status symbol, and makes sensible budgeting aspirational for young consumers.



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STUDIO THEATRE

Visit the Line DC hotel, one of the hippest new hotels on the Washington DC scene, and you'll spot an unusual addition in the lobby. A radio studio is set within a glass box, central to the entrance, with live recordings taking place. The content—discussions, music and more—is broadcast to every room via the hotel's TVs.

The initiative, dubbed Full Service Radio, is a “community podcast network and internet radio station” which features over 30 local hosts and shows with “dynamic programming that spans across art and culture, food and drink, and music. The talk-radio-style programs include interviews and round tables with local leaders and influencers within the DC community, as well as touring artists, musicians and tastemakers.”



"The concept of Full Service Radio was born out of the desire to build community and help amplify the voices of the people that make DC what it is."

Jack Inslee, founder and executive producer, Full Service Radio

"The concept of Full Service Radio was born out of the desire to build community and help amplify the voices of the people that make DC what it is. The hope is that guests and listeners can get a better sense of place by engaging with the sounds, stories and voices of this city," explains Jack Inslee, Full Service Radio's founder and executive producer.

The Line Hotel group isn't alone in using live recordings of entertainment as a form of theatre and a way to bring cultural experiences to venues. Matchesfashion.com, the UK-based luxury retailer, has introduced a new concept store in London; 5 Carlos Place includes a cultural and lifestyle event program and a creative broadcasting hub within the central space. Events in store will be live-streamed via the brand's podcast series.

"We wanted an environment where we could initiate conversations with our customers and create a global sense of community enabled through the power of technology," CEO Ulric Jerome said at the launch. "Our vision of retail offers inclusive events that customers can sign up to attend or watch through live streaming and discover content generated to inspire them. The events at 5 Carlos Place cover all elements of luxury and culture."

WHY IT'S INTERESTING:

Brands, retailers and hospitality giants are increasingly not only trying to add new experiences to their spaces, but also connecting to culture in new ways. As such, they're becoming active cultural curators, sponsors and programmers.



69

TECH-ENHANCED SHOPPING

Technological applications in retail are advancing at lightning speed and are poised to revolutionize the future of how we shop.

Augmented at-home shopping is taking the guesswork out of online ordering. Japanese e-commerce giant Zozo is creating digital avatars of shoppers to revolutionize custom-fit clothing. “It’s 2018 and there’s so much technology that enables us to truly make custom clothes for people and bring an entire new experience to market,” Masahiro Ito, who oversees the brand’s engineering, research and development efforts, told Racked.

In July 2018, Zozo announced it would be selling custom-fit basics including T-shirts and jeans. The brand sends shoppers a bodysuit with embedded sensors that measure the wearer to create a personalized, digital avatar. Algorithms then process your specific measurements and compare them to a database to create bespoke items tailored to the individual. “The time where people adapt to clothing is over,” says Yusaku Maezawa, Zozo’s founder and CEO. “This is the new era where clothes adapt to people.”

Augmented reality startup Vyking is also leveraging imaging technology to advance the e-commerce market. The company’s newest offering, announced

**“The time where people adapt to clothing is over.
This is the new era where clothes adapt to people.”**

Yusaku Maezawa, founder and CEO, Zozo

in May 2018 and still in development at the time of writing, uses digital imaging to estimate a customer's shoe size and virtually try on the shoes. Users point their phone's camera at their foot and an interactive hologram of the shoe will appear as if it's being worn, moving with the foot for different angles.

In Asia, retailer Alibaba is driving innovation with new tech-enhanced shopping approaches featuring interactive interfaces, experiences and payments. Guess partnered with Alibaba in July 2018 to test out a new smart-store model. The store was outfitted with Alibaba's FashionAI technology, which uses computer imaging to help shoppers assemble an entire outfit. Smart mirrors can recognize the color, style and traits of an item in a shopper's hand to suggest other pieces and styles. Shoppers can also select other items to try via the smart mirror, and can track the items they tried on, purchased, or saved for later via an accompanying app.

Alibaba also partnered with Tmall and Innisfree to create an augmented beauty shopping experience that offers virtual makeup application, digital skin analysis for personalized product recommendations, and smart shelves with touchscreens displaying additional product information.

WHY IT'S INTERESTING:

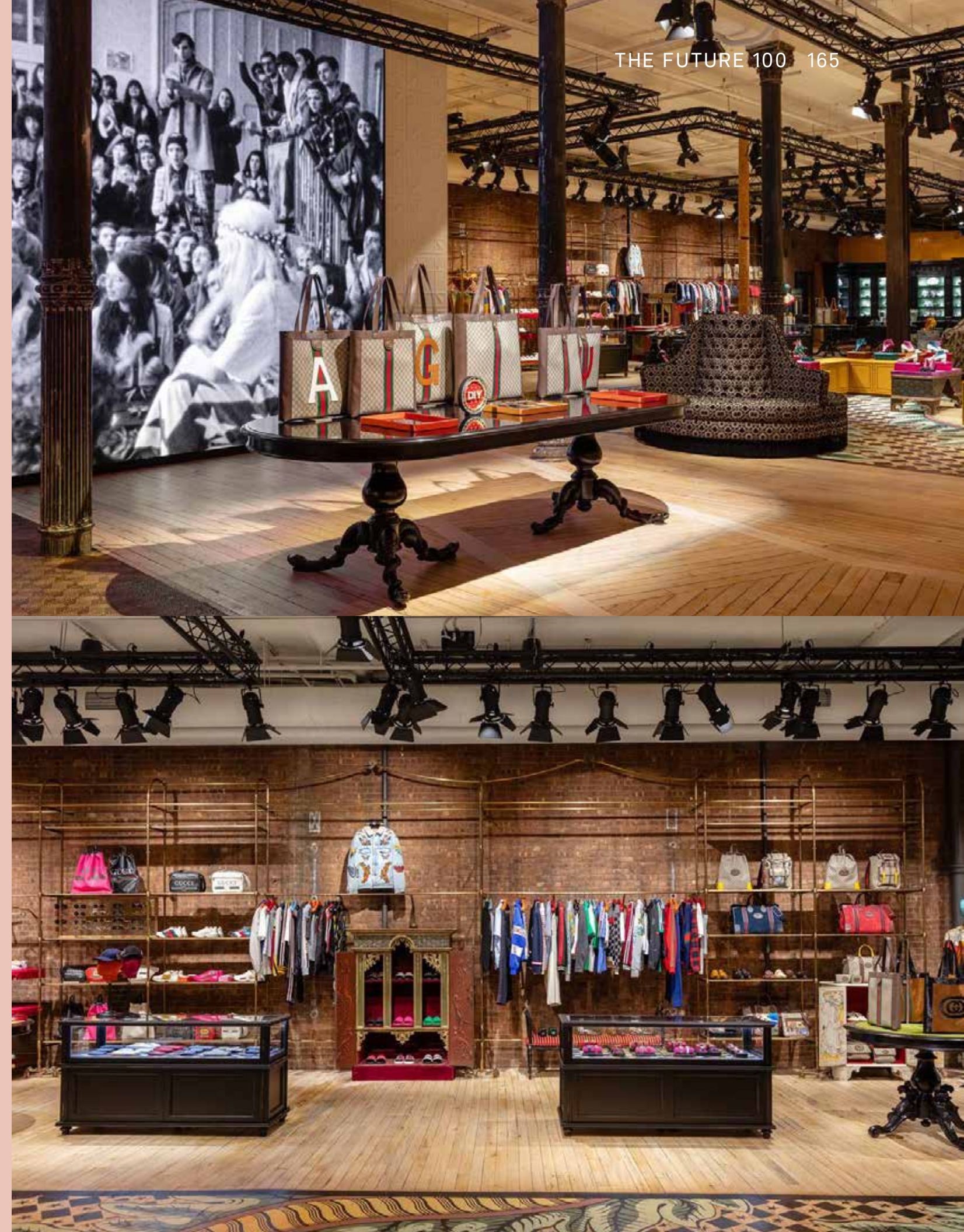
The future of retail will be imbued with technology for a friction-free, personalized and connected shopping experience.



70

HIP EXPERIENTIAL STORES

When Gucci opened its cavernous New York flagship in 2018, the brand's CEO, Marco Bizzarri, told the Business of Fashion he wanted to do away with the idea of "snobbish" luxury retail, explaining that there needed to be a new style to appeal to a digitally savvy audience. The 10,000-square-foot store features exposed brick walls, mood lighting, comfy sofas and reprints of *Interview* magazine's December 1985 edition featuring Madonna. Customers are encouraged to "hang out" and listen to music and documentaries on headphones, or use augmented reality to virtually design their own sneakers. There's also a quirky movie theatre with velvet chairs where customers can engage with video installations.







“What constitutes an aspirational experience to a younger audience is radically different to the expectations of older generations, who looked for serenity and formality.”

It's a world away from the museum-like temples created by other blue-chip luxury brands and that is perhaps the point. These are stores designed for lovers of all things millennial and generation Z—for whom sneakers and sportswear are the new must-have icons, with concerts, coworking spaces, and hipster haunts their chosen hangouts.

Tiffany & Co's Covent Garden pop-up store in London channels a similar mood. The edgy white and blue space is replete with irreverent details that are a far cry from its iconic, lofty, pillared flagship on New York's Fifth Avenue. A neon Tiffany & Co sign is fixed against a backdrop of ripped blue paper. Accessories are housed on wooden industrial benches. Hashtags are emblazoned on pillars. Shoppers are invited to customize their jewelry at the #MakeltTiffany personalization bar and can play with the Tiffany fragrance vending machine. The space is also used to host a variety of performances, installations, style sessions and animations.

WHY IT'S INTERESTING:

The concept of experiential stores is nothing new to luxury, with its wave of luxury temples from Burberry's lavish Regent Street store to Chanel's countless silent, cream-carpeted, museum-like boutiques. What constitutes an aspirational experience to a younger audience, however, is radically different to the expectations of older generations, who looked for serenity and formality. These stores are designed to channel the coworking spaces and cafés frequented by digital natives. They're also designed for digital sharing—with curated, Instagrammable moments at their core.

71-80

LUXURY

71

NEXT-GENERATION AUCTIONS

In a bid to draw a new cohort of digitally savvy wealthy consumers, the traditional auction experience is being reinvented with hip new tie-ups, crypto-sales, and more.

Sotheby's has collaborated with social media and K-Pop megastar TOP on a special auction of Western and Asian contemporary art. #TTTOP, which was guest-curated by the pop star in 2016, realized a total of \$17.4 million. The sale appealed to a host of young Asian collectors, drawn to the artistic choices made by TOP, who boasts 9 million Instagram followers.

The auction house followed up with another foray into contemporary cultural relevance in 2017, when it worked with Nina Garcia, creative director at *Marie Claire* and *Project Runway* judge, on the Contemporary Curated auction. This auction featured work from fashion designers and artists, bridging the gap between the two disciplines.





"The Cream auction is a major milestone for us, not just in terms of the type of clients we have attracted with it, but also in terms of what it says about changing perceptions of valuable art and design in the current market."

Fabien Naudan, vice president, Artcurial

In May 2018, Artcurial, a prestigious French auction house, hosted Cream, the world's first street culture sale. The auction featured sculptures by street artist Kaws, photographs by graffiti artist Barry McGee and a host of rare items from New York skate brand Supreme. A departure from the company's traditional fare of fine art, furniture and design, the auction was a huge success, with 94% of the lots sold, and final totals doubling the global pre-sale estimate and reaching \$1 million.

"The Cream auction is a major milestone for us, not just in terms of the type of clients we have attracted with it, but also in terms of what it says about changing perceptions of valuable art and design in the current market," Fabien Naudan, vice president of Artcurial, told the *New York Times*.

Changing perceptions of value are increasingly blurring the line between art and luxury for a new generation of collectors. Aptly named "art-lennials," this cohort wants to purchase high-value items in the same way they shop for everything else: online. Traditional auction houses Sotheby's and Christie's are rising to this challenge by utilizing digital channels and influencers and reaping the rewards. At Christie's, online-only auctions have contributed to a 2018

sell-through rate of 84%, and an Instagram revamp has seen Sotheby's following on the site grow by 102% in a year.

Despite exposing art, design and luxury to a new generation of buyers, online auctions can be risky. Every year, people fall victim to non-payment or non-delivery from online purchases, including auctions, costing the 81,000 affected in 2016 an estimated \$138 million, according to the FBI's Internet Crime Complaint Center. Portion, a blockchain-based global auction house, is hoping to combat this by ensuring high-value goods are certified and that secure payments are made. By only accepting cryptocurrency, Portion can validate payment in real time, only allowing people to bid when they have the appropriate funds. These funds are then held in a smart contract until the winning bidder has received the goods.

WHY IT'S INTERESTING:

Auction houses are undergoing a contemporary makeover to respond to different product tastes and appeal to buyers demanding a different experience. For traditional auction houses it's adapt or die, with many choosing to go online in a bid to survive.



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WANDERLUXE

Forget the Ritz; experience is the new luxury for high-end travelers. Unique destinations and bespoke experiences rather than luxe accommodation are becoming the ultimate extravagance.

“Luxury used to be about gold, marble and chandeliers, big lobbies and glitzy hotels. It’s now about the experience. It’s about the destination. It’s about what I, as a guest, am getting out of this from an educational point of view and an emotive point of view,” explains Guy Heywood, chief operating officer at Alila Hotels and Resorts. As high-end travelers seek out one-of-a-kind experiences, secret locations are quickly becoming the newest indulgence in luxury travel.

Wix Squared offers high-end mystery trips which can be tailored so you’re as in the know or in the dark as you like, from being unaware of the destination to not knowing daily activities in advance. The company will select the ideal destination and itinerary based on personal likes, dislikes and practical requirements. If the traveler opts for a surprise, they’ll receive nothing more than a packing list with necessities. Trips can encompass anything from Morocco, with puzzles and clues to lead guests to their next destination, to treasure hunts in Jaipur’s bazaars.



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Hot air ballooning over Bagan, Myanmar. Wix Squared

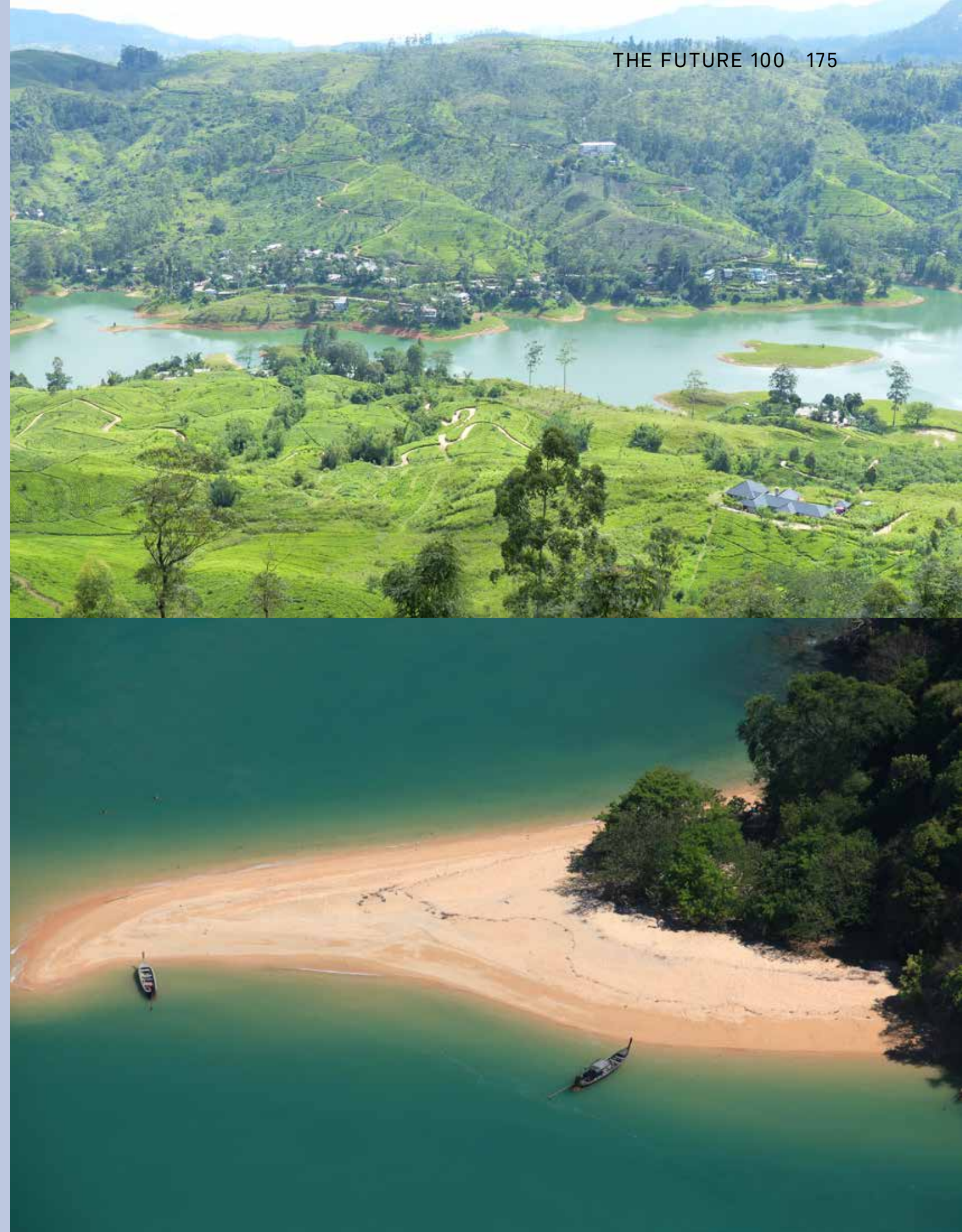
700,000 Hours is a unique membership-based travel company that offers a new destination biannually. The ultra-private wandering hotel sets out to create “exceptional moments exclusively for you to enjoy, tailored to your desires and preferences.” Guests stay at sumptuous private homes that are inaccessible to the public, with privileged access to elite locales and lavish surprises.

The Extraordinary Adventure Club (EAC) takes mystery travel one step further, offering trips that are designed to inspire personal growth. The organization uses travel as a transformational tool for clients “who have sold businesses perhaps for millions and don’t know what to do next, or want to take a sabbatical to explore themselves or have lost their way a bit,” Calum Morrison, EAC founder and former Royal Marine and logistics specialist, told the *Telegraph*. “They never know where they’re going or what they’re going to do,” Morrison explained. “They’ll get an envelope on their desk at home or at work containing a kit list and telling them to be somewhere at a certain time.”

EAC trips are a serious commitment, lasting months at a time and starting at £175,000. To determine location and itinerary, travelers undergo fitness and psychological assessment, with ongoing evaluations throughout the trip. The programs encourage travelers “to focus on becoming the best versions of themselves, fulfilling their potential, recalibrating and resetting the way they think about themselves,” said Morrison.

WHY IT’S INTERESTING:

In a world where limitless information is at your fingertips and it’s increasingly difficult to disconnect, this opportunity to hand over control and invoke a sense of genuine mystique is a true indulgence.



73

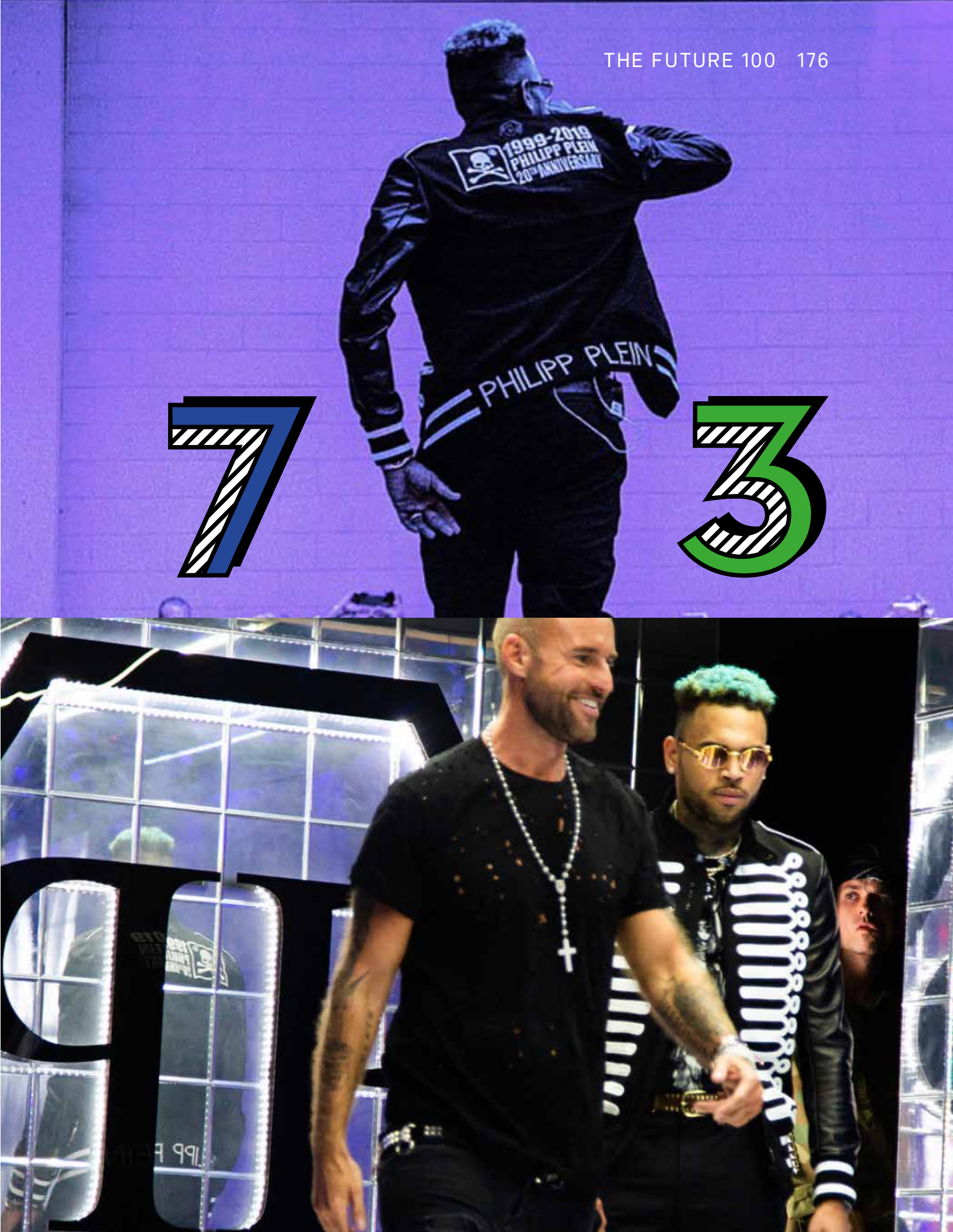
WOKE LUXURY

What once might have been perceived as independent events were very much interconnected in a wider cultural discourse that unapologetically infuses politics into industries and culture.

It did not go unnoticed that Hedi Slimane showed his first collection since taking the reins at Celine on the same day that Brett Kavanaugh denied allegations of sexual assault in front of the judiciary committee—and the nation. “The day of the Kavanaugh hearings in Washington arguably not being the patriarchy’s finest hour, it was an uncomfortable moment for Slimane to raze to the ground the female design philosophy of a house which, for a decade under [Phoebe] Philo, was notable for not equating a woman’s power with her sexuality,” observed Jess Cartner-Morley in the Guardian.



Chris Brown at Philipp Plein's Milan Fashion Week 2018. Image courtesy of Instagram



“Consumers expect to see a genuine commitment to the political issues of the day, from gender equality to sustainability and diversity. Call-out culture is not afraid to take on major players and will shop accordingly.”

The widespread backlash against Slimane’s collection is just one example of how the fashion industry is being held to account for its political and social stance. A *New York Times* journalist walked out of Philipp Plein’s Milan Fashion Week show after a Chris Brown and 6ix9ine performance. (Brown has faced numerous allegations of violence against women; 6ix9ine pleaded guilty to using a child in a sexual performance.) In October 2018, the first anniversary of the #MeToo movement, *GQ* faced criticism from women’s groups after featuring Johnny Depp on the cover of its November issue.

Yet luxury’s political engagement is also increasingly evident. In 2017, Lyst announced that “power,” “woke” and “statement” were the year’s three most-used words in fashion publications, a telling indication of the feminist journey fashion has embraced. In January 2018, the *Washington Post* asked “Is Prabal Gurung is the most woke man in fashion?” At Gurung’s February show, the #MeToo founder Tarana Burke sat in the front row (he’d had Gloria Steinem

the previous season) and models carried white roses in solidarity with the movement.

As across all industries, there’s not just call-out culture when brands get it wrong but also a demand for the whole system to re-evaluate and restructure, based on a more inclusive and diverse perspective. *New York Times* fashion critic Vanessa Friedman was quick to praise the diversity of the spring 2019 shows which, according to The Fashion Spot, a website tracking runway diversity, was the most diverse season ever. “This wasn’t Joan Smalls and Adwoa Aboah on every single runway; it wasn’t tokenism. There were multiple women of multiple shades on multiple runways,” wrote Friedman. “We had reached a point of genuine change.” Yet she called for more, observing that “what was true on the runway was not, necessarily, true behind it” and pointing out that “editors, retailers and decision makers” needed to undergo the same transformation.

WHY IT’S INTERESTING:

As in many sectors, consumers expect to see a genuine commitment to the political issues of the day, from gender equality to sustainability and diversity. Call-out culture is not afraid to take on major players and will shop accordingly (searches for Phoebe Philo-era Celine have dramatically increased since Slimane’s show). The luxury market can no longer ignore the issues important to the woke generation, nor can it merely nod to them. It now has a perceived responsibility to embody them, inserting these issues at the core of its power structures, work ethic and product, in order to stay relevant and modern.

74

VEGAN LUXURY

Luxury brands have long been devoted purveyors of fur, exotic skins and leather. Now they are in the midst of a dramatic turnaround, abolishing fur and embracing cruelty-free and vegan practices for a new, ethically conscious luxury consumer.

Luxury giants Versace and Burberry announced in 2018 that they would no longer use fur. London Fashion Week AW 18 also went totally fur-free for the first time. DKNY and Donna Karan promised to do the same in 2019.

Cruelty-free fashion across the board has been gaining momentum, following the lead of vocal early adopters of the policy Stella McCartney and Calvin Klein. Hugo Boss and Armani followed suit some years ago, and have more recently been joined by Michael Kors, Gucci and Yoox Net-A-Porter.

“Modern luxury means being socially and environmentally responsible,” says Burberry CEO Marco Gobetti.

“Today we don’t want a product, we want ethics, a firm that defends the values that we admire,” says John Galliano, creative director of Maison Margiela, likewise announcing he was going fur-free in 2018.

“Today we don’t want a product, we want ethics, a firm that defends the values that we admire.”

John Galliano, creative director, Maison Margiela





Technology and innovation are being applied to the space, creating faux furs and leathers that can compete with the real thing. “Think Anita Pallenberg in her heyday—without the cruelty,” Kym Canter of London ethical faux-fur company House of Fluff told the BBC, describing the appeal of vegan fur.

Vegan leather is finding its own credible space in the luxury market. According to a report from consulting firm Grand View Research, the global faux leather market is set to hit \$85 billion by 2025. Paris-based Veja, which makes what Wired called “the coolest sustainable sneakers we’ve ever seen,” watched its 2017 turnover increase 60% year on year—and that was before the Duchess of Sussex, aka Meghan Markle, wore a pair on her first royal tour in October 2018. Vegan leather pioneer Stella McCartney designed the first vegan pair of Stan Smiths in September 2018; Net-A-Porter is stocking the Nanushka quilted vegan leather jacket designed by Sandra Sandor (\$625 or £460). Helsinki Fashion Week, home of coveted labels such as Scandi brand Ganni, loved by the fashion crowd, has announced that animal leather will be banned as of 2019.

WHY IT’S INTERESTING:

Once seen as a lifestyle choice, vegan products become perceived not just as morally superior but also as luxurious. Political and social engagement is strong capital that consumers are willing to invest in, giving birth to a conscious, modern luxury defined as much by its ethics as by its finish.



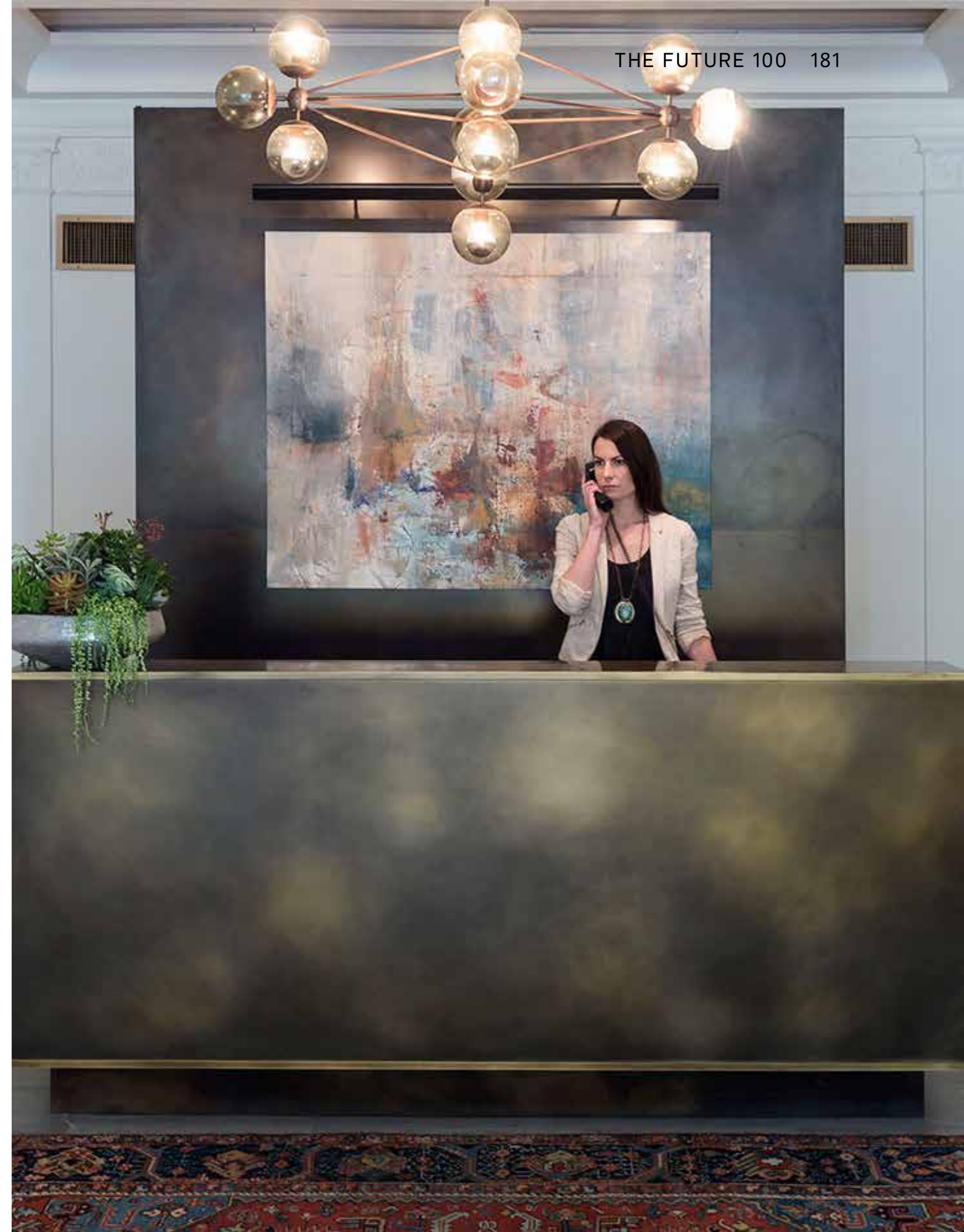
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TIME-SHARE LUXURY

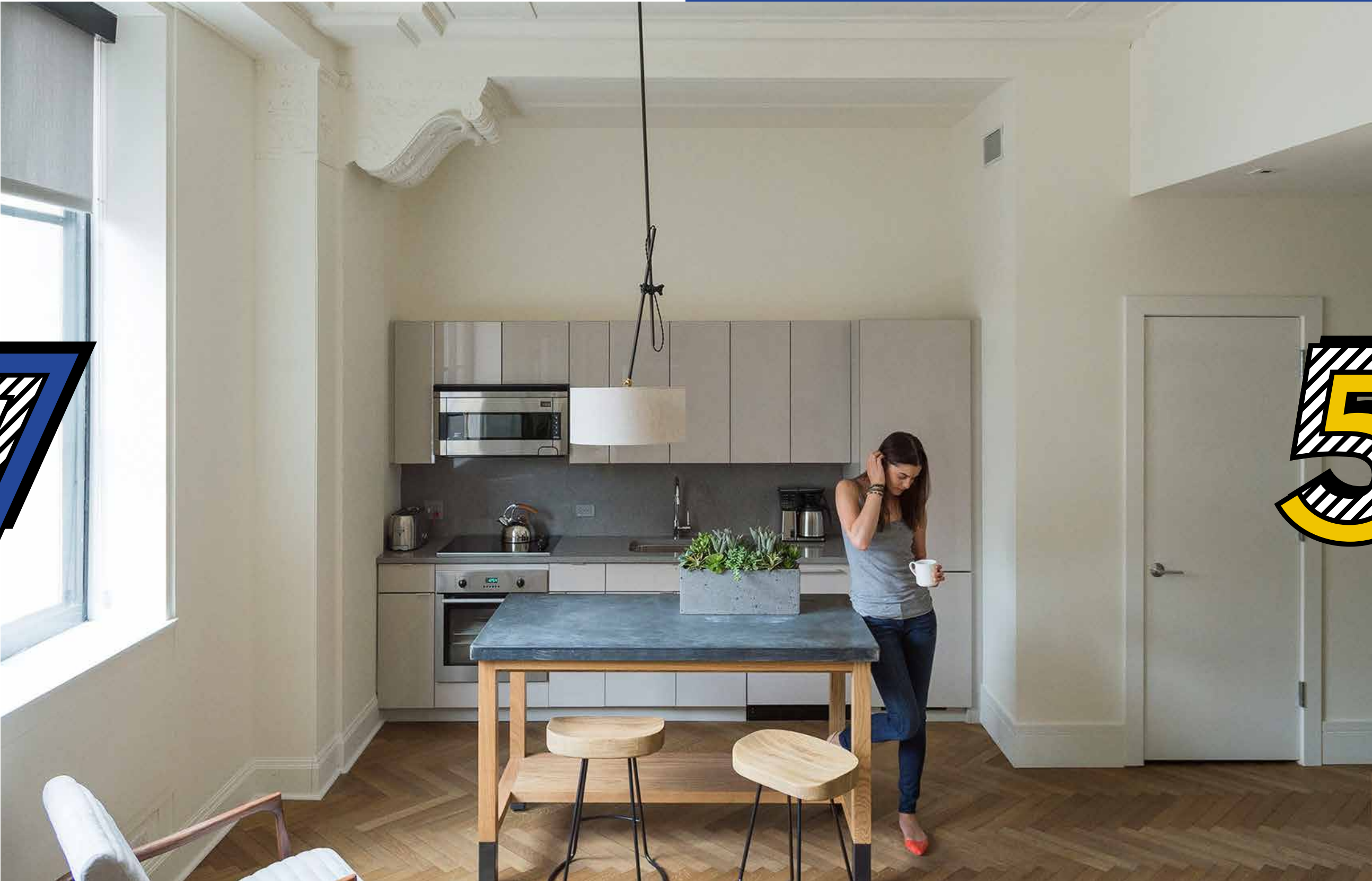
Business and political elites are turning to luxury extended-stay accommodations, seeking a happy medium between hotels, which lack the comfort of home, and Airbnbs, which lack the dependability and service of hotels.

Their rising popularity is evident; the number of extended-stay hotels has increased 34% over the five years to 2018, according to hotel industry data provider STR, and are beating out hotels with a 77% occupancy rate, compared to hotels' rate of around 70%.

Roost Apartment Hotels offers exactly what the name implies—fully furnished homes with all the services and amenities of a hotel. The suites include fully stocked kitchens, Apple TVs, washers and dryers and unique decor featuring antique rugs. “You feel you are in an apartment that could be your home,” Roost cofounder David Grasso told Forbes.com. “We designed these apartments to create a sense of comfort, a sense of place, a sense of enlightenment.” On top of that, guests have access to a concierge and a fitness center. Services include weekly cleaning, valeting and dog walking.



7



5



In October 2018, the Four Seasons luxury hospitality company announced its first residential project, to be constructed in Los Angeles. The standalone residences will fall somewhere between a resort and a private home, with on-site amenities including 24-hour concierge service, housekeeping, a fitness center and personal training, and a private kitchen and chef for in-house dining and catering.

Living Rooms offers impeccably designed rooms and apartments at four locations in London, where guests are welcome to stay for months or years. Each location is unique, with homey touches sourced from auctions, dealers

and local artists. “Every property has its own DNA; but they’ve all got a common thread,” Living Rooms founder Tracy Lowy told the *Mayfair Times*. “I want them all to feel like home and give people the privacy and space—but if they really want the service, it’s there.” Guests can bring their own possessions and hang their own art on the walls, reveals Lowy.

WHY IT’S INTERESTING:

Sharing services were traditionally geared to those on a budget, but these extended-stay apartments prove that the sharing economy is seeping into the world of luxury.

76

NEW TRENDS IN FIRST CLASS

First class is making a comeback and it's more luxurious than ever.

The past few years saw multiple first-class cabins removed from international airlines, as passenger demand dwindled. This led to speculation that the end of first class was fast approaching. However, selected airlines are reinforcing the first-class status by enhancing the luxury experience, introducing new technologies and rethinking the comfort factor by defying gravity.

VR entertainment

Virtual reality (VR) takes to the skies as airlines start offering first-class passengers VR headsets to ramp up the entertainment experience. In September 2018, Alaska Airlines began trialing VR on selected flights. The company compares the experience to “having a personal movie screen in front of you.”



Zero-gravity seats

Emirates is changing the meaning of kicking back and relaxing with the introduction of zero-gravity seats on its Boeing 777 fleet. Inspired by NASA technology, the first-class cabin seats can be placed in a zero-gravity position to give a “feeling of relaxation and weightlessness.”

Anti-airline food menus

The thought of airline food rarely makes anyone's mouth water, regardless how hard airlines try. Virgin Atlantic is attempting to redefine the onboard food experience by partnering with LA-based chef Donal Skehan for a sustainable, healthy and seasonal approach. “Together we're turning the industry upside down by creating stunning, delicious and healthy food at 38,000 feet,” says Skehan. Upper-class and Clubhouse passengers were the first to sample the new menu, which launched in October 2018 and includes charred cod with spicy mango salad and nam jim dressing.

WHY IT'S INTERESTING:

Airlines are rethinking the red-carpet treatment for first-class passengers by upgrading every element, from food to entertainment. Rather than scrapping first class, savvy airlines are offering fewer but better luxury experiences that really set first and business class apart.



77

DIAGNOSTIC TRAVEL

Instagram photos of the most idyllic places on the planet, thousands of travel blogs and endless trips on offer; it's 24/7 #travelinspo and it's overwhelming. Living in the information age means that consumers have never had more travel advice, tips and wisdom at, quite literally, their fingertips. To combat this, travel experts are focusing less on the "where," "when" and "how" of travel, and digging deeper into individual needs and the "why" to create more meaningful and unique trips—or travel "prescriptions."

Bespoke travel expert Brown and Hudson has just launched psychology-based trips. Clients have an in-depth interview, online or in person, and answer questions based on aspects of the Schwartz Value Survey and the Big Five personality traits. These explore topics such as attitudes to rule-breaking and emotional responses, helping to reveal values, inspirations and motivations. That deeper insight is then used to tailor a trip which resonates with the individual.

"Traditionally the value travel people have brought has been their knowledge of the 'stuff of travel': hotels, guides, logistics, activities, and occasionally

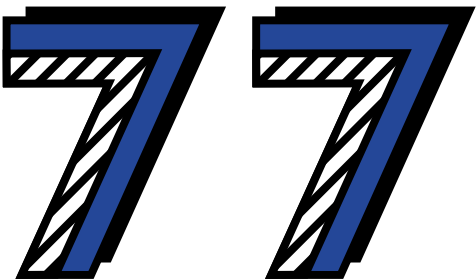
insight," says founder Philippe Brown. "Travel professionals need to evolve into trusted advisors who focus on their client. And the first step in this evolution is learning the skills of a therapist—knowing what questions to ask and how to ask them."

Brown and Hudson follows the "Panic Button" last-minute trip service of travel company Black Tomato. Clients respond to a list of questions, then receive a curated itinerary for a one-off journey which can be put into motion within 24 to 48 hours, from a last-minute honeymoon in Barcelona, with private *pintxos* tours and reservations at El Celler de Can Roca, to a cultural adventure in Cairo focused on the female music scene.

The emphasis isn't just on ease, either. Many travelers request life-changing trips that only experts could put together, such as a heli-skiing adventure in Iceland following a painful breakup, and volunteering experiences in Colombia.

WHY IT'S INTERESTING:

As the abundance of travel information, content, and new booking platforms reaches fever pitch, travelers are increasingly handing back control to experts. Meanwhile the holistic emphasis of the way trips are "diagnosed" hints that travel is increasingly being aligned with wellbeing. Having—and paying for—your own personal travel advisor could become as normal as having a therapist or personal trainer.



78

LUXURY LOYALTY

Starwood set the cat among the pigeons in 2018 with the launch of its much-hyped Starwood Preferred Guest American Express Luxury Card, which offers luxury lovers access to perks across not only the Starwood portfolio but also the Marriott group's hotel brands, including Ritz-Carlton, W, St Regis and more (Starwood merged with the Marriott hotel group in 2016). The new card initially offered a 100,000-point welcome bonus for users who spent \$5,000 in the first three months—worth a free weekend in one of the group's blue-chip properties. This is a luxury loyalty ecosystem and a playground for people in search of corner suites and Jacuzzis.

Loyalty programs are undergoing something of a revolution as hotel and hospitality giants vie for points-obsessed affluent millennial consumers. And innovators are moving beyond traditional systems and upgrades to exclusive access, experiences, personalized services and more. Increasingly they're moving from plastic cards to interactive service apps with payment built in. (See the Hilton Honors app, which allows guests to check in, unlock room doors, get local tips, choose rooms remotely and access the company's Conrad Concierge service.)



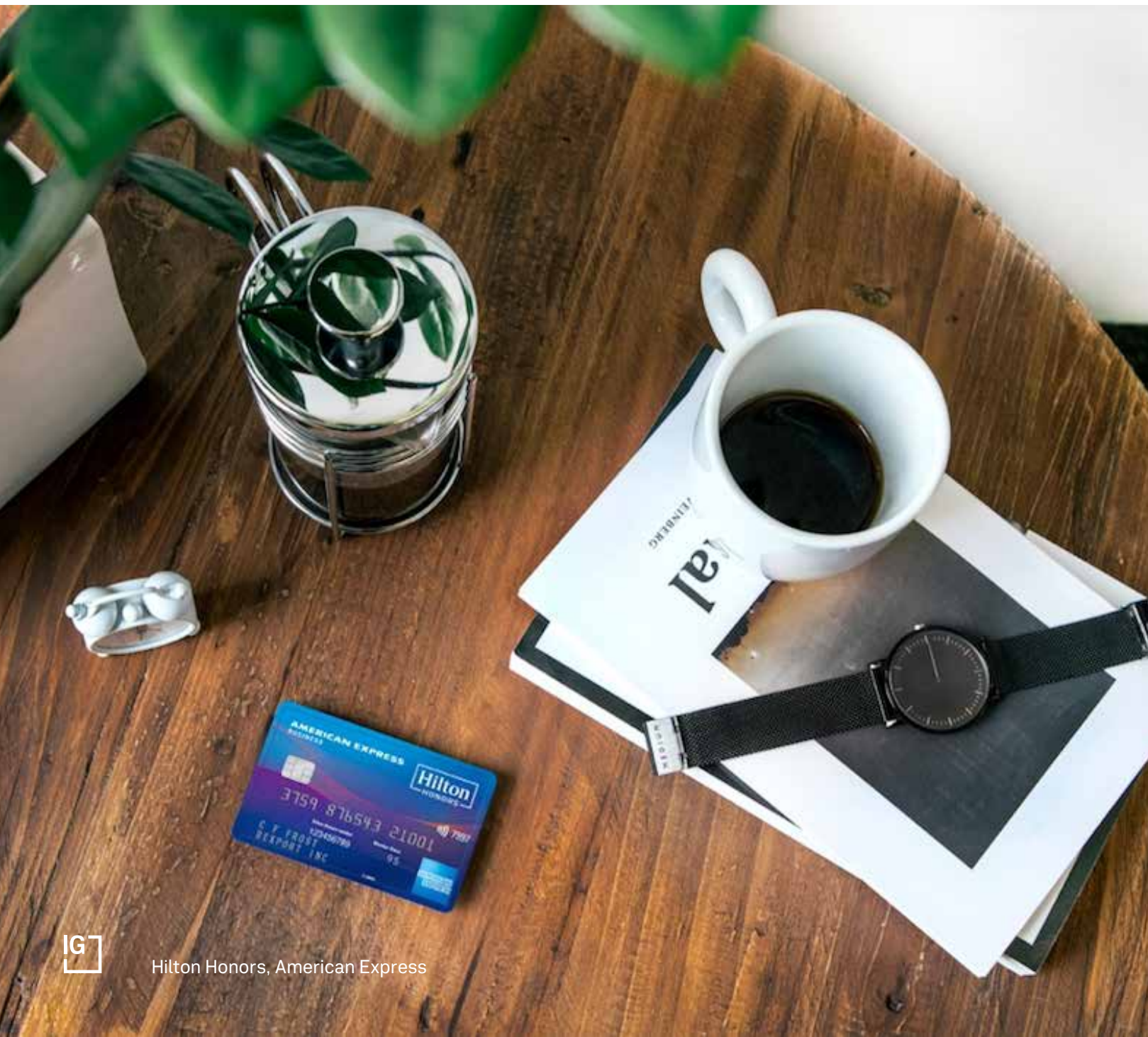
“Millennials are loyal to the brands that can offer interesting, inspired experiences as part of their reward schemes, and that take the time to treat customers as individuals.”

Marriott International continues to ramp up its rewards experiences with luxurious safari tents at Coachella, accessed by using points to bid. In 2018 the yurts had additional benefits, including morning yoga and access to the festival’s VIP amenities. The company is expanding this Moments experiential platform, which includes “once-in-a-lifetime events only available to members using points.” Experiences include VIP access to Keith Urban’s tour and VIP access to music and culinary events in Napa Valley.

Airlines are also getting in on the act. United Airlines, in a bid to win over customers (and refurbish its reputation), has started getting creative with rewards, offering exclusive experiences such as flight lessons in its \$20 million flight simulators to MileagePlus points collectors. Virgin Atlantic is allowing high points earners—those with 200,000 points kicking around—a 10% discount on Virgin Galactic suborbital flights. Delta and American Airlines are offering up chef experiences and tickets to red-carpet premieres.

WHY IT’S INTERESTING:

Millennials, according to a 2018 survey by Discover, are the biggest redeemers of travel rewards offered by credit card programs. As they start to dominate premium and business travel, hotels are serving up new incentives, reshaping rewards to offer this financially savvy generation the best deals. They are also switching up what they offer to suit this cohort’s needs. Millennials are loyal to the brands that can offer interesting, inspired experiences as part of their reward schemes, and that take the time to treat customers as individuals.



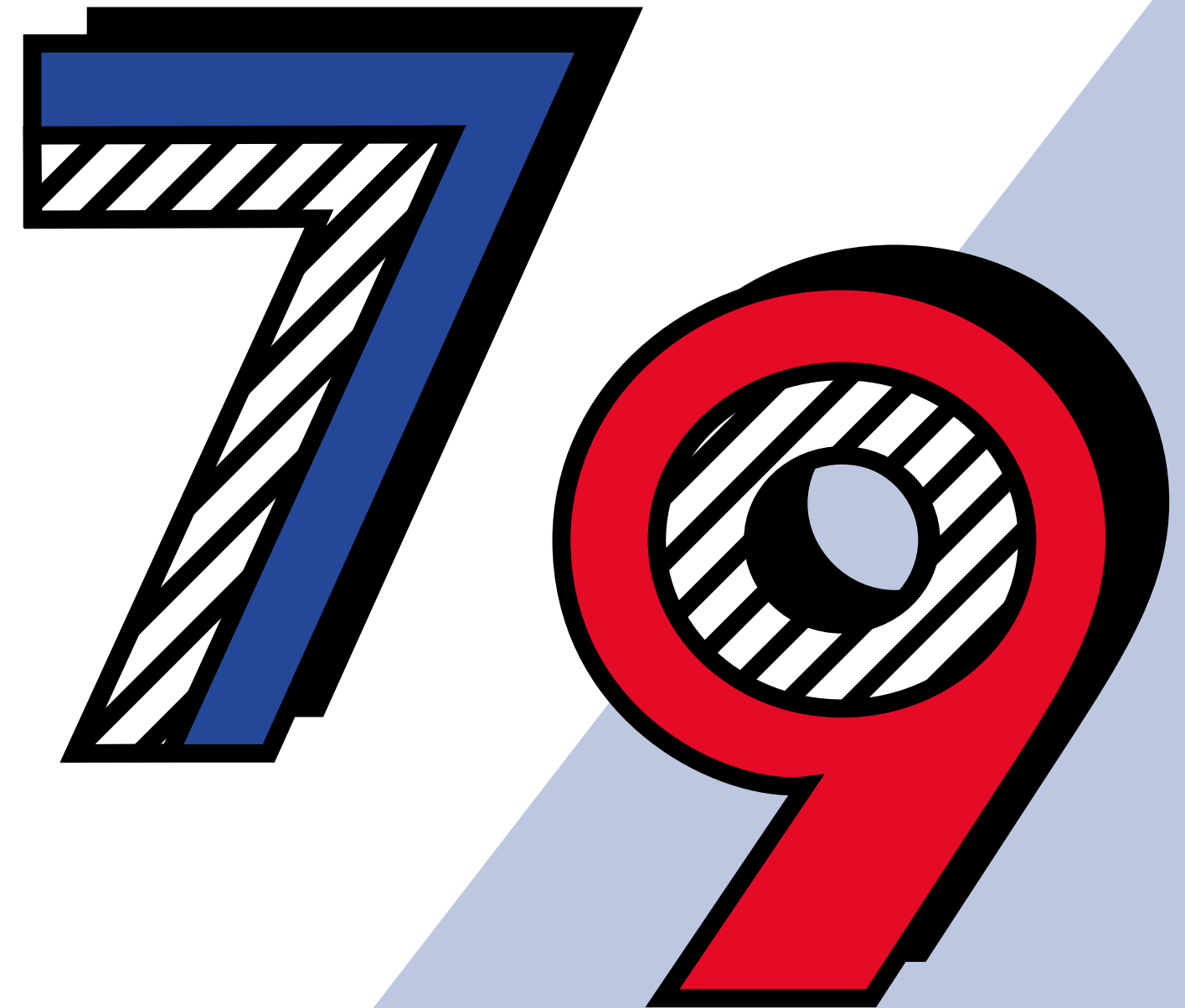
79

ELEMENTAL HEALTH EXPERIENCES

An escape will leave luxury travelers feeling better than ever with the launch of high-end tours by fitness chain Equinox.

In 2019 Equinox will open its first line of hotels for travelers who want to keep up their fitness regime. Coinciding with the hotel openings, a new service will offer travelers the opportunity to combine culture, adventure and wellbeing with Equinox's bespoke travel experiences. The first tour will launch in April 2019 and offers a "summit-chasing adventure" in Morocco, with plans to unroll eight to 15 more tours that year. Further experiences will include intense physical adventures in Ethiopia, tracking the birth of elite running, and regenerative excursions around India, promoting mindfulness.

"Equinox is already recognized globally for transforming the lives of our members with immersive experiences within the four walls of our clubs, so our move into travel is a natural—and almost inevitable—extension of our unmatched lifestyle proposition," says Harvey Spevak, executive chairman and managing partner at Equinox. "Equinox single-handedly invented the concept of fitness-as-lifestyle nearly 30 years ago, and now we are expanding our purview to include active, covetable experiences that empower our discerning members to connect with the world—and themselves."



WHY IT'S INTERESTING:

Providing opportunities for luxury consumers to immerse themselves in healing environments while traveling will become the norm as the wellness tourism market continues to boom. According to the Global Wellness Institute, the wellness tourism market was worth \$563.2 billion in 2015 and is expected to reach \$800 billion by 2020. Whether they choose high-intensity adventurism or a mindful escape, consumers are making travel decisions based on health and wellness.

80

ENERGY-POSITIVE HOSPITALITY

Luxury travelers are vying for unique experiences and setting their sights on untouched regions which promise nature, novelty and adventure. Hotels are preparing for this next wave of travelers by leading with a cool sustainability message and architectural innovation.

Svart, an energy-positive hotel located at the foot of the Svartisen glacier in northern Norway, is set to open to visitors in 2021. The ring-shaped hotel by Oslo-based architecture company Snøhetta is designed to preserve the surrounding glaciers and fjords. “As nature in the Arctic is fragile and pristine, we have to respect the natural beauty of the site and not ruin what makes Svartisen an attraction in the first place,” Zenul Khan, senior architect at Snøhetta, tells the Innovation Group. “By building such a sustainable building, we wish to encourage a more sustainable approach to tourism by making people conscious about the way we live, travel and experience exotic locations.”

In a similar vein, the WSP design studio has put forward plans for carbon-neutral modular pods that can be placed in remote locations. The concept, called Tetra Hotel, aims to take visitors to unique locations while causing minimal impact to the environment.



The luxury travel market is forecast to generate \$1,154 billion by 2022, with 6.4% CAGR growth between 2016 and 2022, according to a study by Allied Market Research. In order to preserve unique destinations, it's necessary to travel ethically.

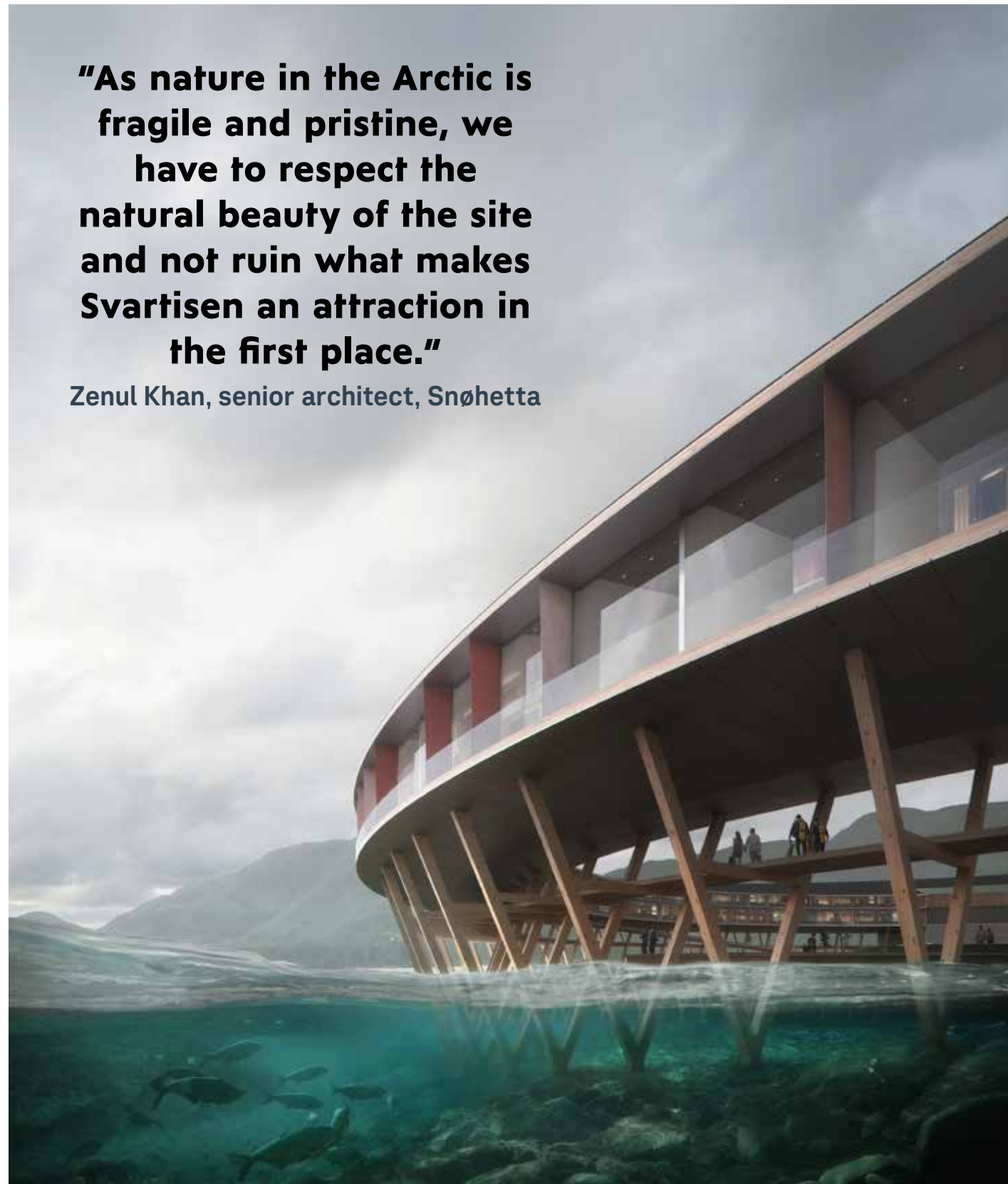
WHY IT'S INTERESTING:

It's time to clean up our carbon footprint when it comes to travel. “I think consumers around the world are increasingly aware of environmental issues and I think this will push architects, developers and operators to think differently and more sustainably,” says Khan. “We would be thrilled to see more architects and developers embark on projects similar to Svart.”



"As nature in the Arctic is fragile and pristine, we have to respect the natural beauty of the site and not ruin what makes Svartisen an attraction in the first place."

Zenul Khan, senior architect, Snøhetta



81-90

HEALTH

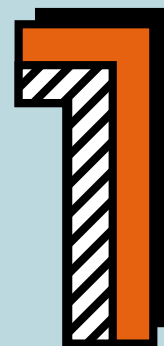
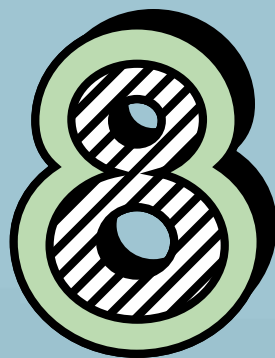
81

EMPOWERING ADOLESCENCE

Thanks to the rise of body positivity movements in the beauty and fashion industries, the physical changes girls undergo in puberty—from acne to periods—are being reclaimed and destigmatized.

Blume hopes that information and tailored products will empower teens to be more confident during puberty. The subscription-based service, which launched in June 2018, offers sustainable selfcare products created specifically for teens, from pads and tampons to natural skincare offerings such as PMS oil and face wash. The brand also offers an educational platform that addresses common concerns such as how to navigate your first visit to the gynecologist. Lola also launched a first period kit, which includes a free e-guide to navigating your first period.

According to Blume, 63% of girls felt embarrassed after getting their first period and 57% felt scared. “In our survey, we learned that 60% of women can pinpoint the exact moment when they felt their self-esteem drop, and that was at puberty,” says Blume cofounder Bunny Ghatrora.





Millennial celebrities are opening up to change the negative perceptions around acne. Justin Bieber posted a selfie on Instagram proclaiming that “pimples are in” and Kendall Jenner walked the 2018 Golden Globes carpet with visible acne, tweeting “never let that shit stop you.”

A host of generation Z influencers are taking to Instagram with makeup-free selfies and encouragement. Britain’s Next Top Model finalist Louisa Northcote started a #freethepimple movement on Instagram, which, she told i-D, she hopes “will empower others to embrace the skin they’re in.” Teenager Hailey Wait has garnered thousands of followers who appreciate her makeup-free selfies and encouragement like “acne doesn’t make you ugly... a heart full of hate does.”

Brands and retailers are taking note and are beginning to reflect a more realistic and open portrayal of beauty and puberty.

Drug store giant CVS announced in January 2018 that it will no longer edit photos in beauty advertisements, in an effort to stop perpetuating unrealistic beauty standards of “perfect” skin. “The connection between the propagation of unrealistic body images and negative health effects, especially in girls and young women, has been established,” comments Helena Foulkes, president of CVS Pharmacy and executive vice president of CVS Health. “We strive to do our best to assure all of the messages we are sending to our customers reflect our purpose of helping people on their path to better health.”

WHY IT’S INTERESTING:

Gen Z consumers are rejecting the notion that beauty is a homogenized, one-size-fits-all ideal. As gen Zers grow into their purchasing power, brands will need to adjust strategies to stay relevant.

82

NUTRITIONAL SNAPPING

Food pictures aren’t just for Instagram anymore. As consumers increasingly seek out personalized health benefits, new apps that analyze photos of meals or products to provide information on nutritional content are making it easier than ever to stick to a healthy diet.

The Pinto app, launched in August 2018, simplifies nutrition labels to highlight the relevant information for each user. The app positions itself as a personal nutrition guide, using artificial intelligence to assess how well a meal or product fulfills an individual’s specific nutritional plan. For example, a user can ask the app to flag foods that contain allergens, or specify that they want to follow a paleo, ketogenic or vegan diet, and the app will identify which foods or products comply.



Calorie Mama AI also analyzes images of food to identify nutritional value. The user can snap a photo of their plate, and the app will identify the food and provide a total calorie count alongside meal plans for specific diets such as ketogenic or paleo.

In Britain, the National Health Service's Change4Life Food Scanner—aimed at adults and children—scans product labels to assess sugar, salt and saturated fat levels.

WHY IT’S INTERESTING:

While society is quick to blame tech and smart phones for a host of health problems—from social media’s impact on mental health to the blue light from devices disrupting sleep—these apps illustrate the potential for tech to simplify consumers’ paths to optimal wellbeing.

83

HEALING CAFÉS

An increased awareness of mental health is giving rise to public spaces designed to recharge and rebalance in hectic cities.

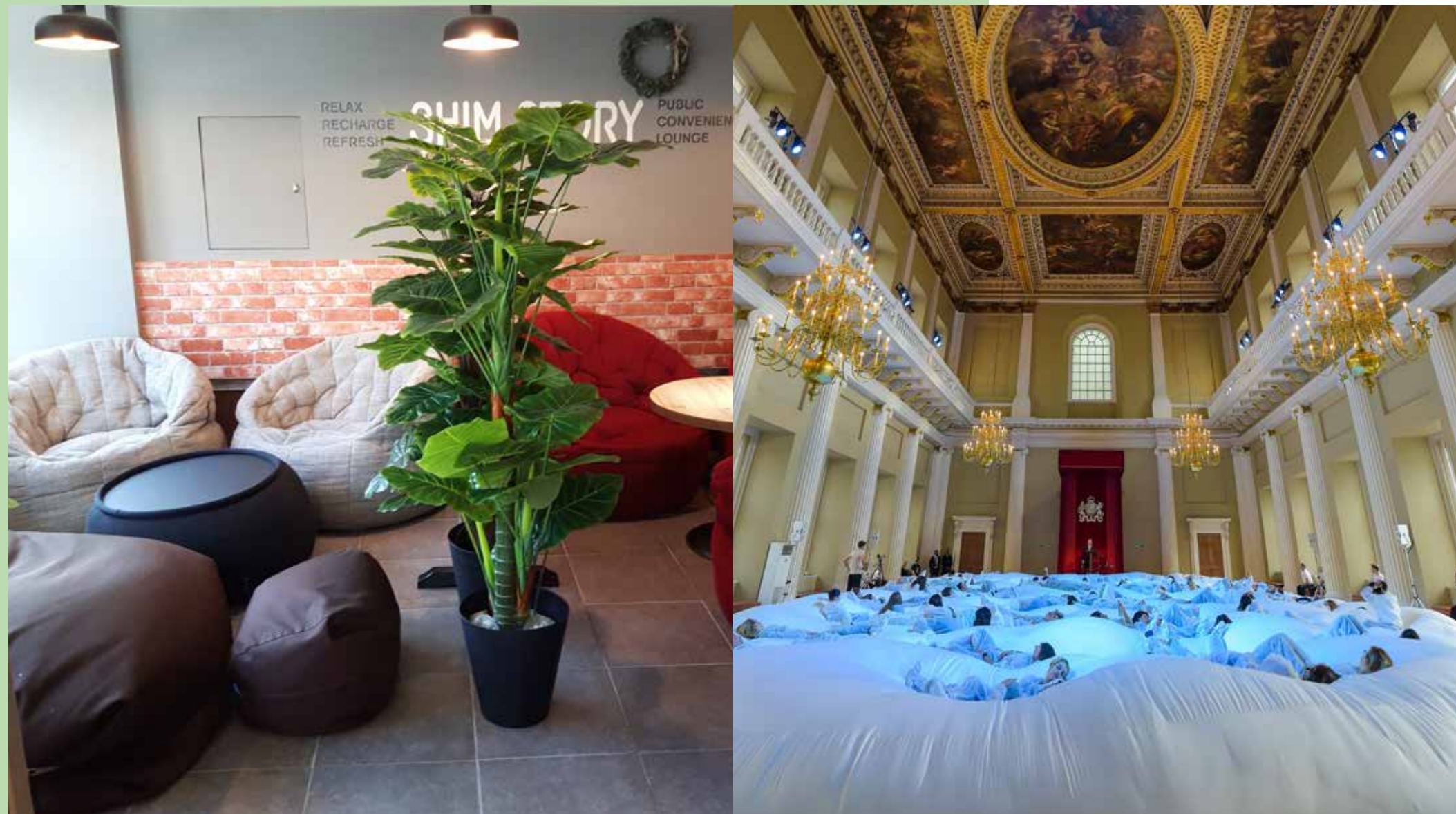
At the Chubby Cloud installation at London Fashion Week in September 2018 visitors could relax and recuperate on “the world’s largest beanbag.” The three-day relaxation event also included guided meditation, bedtime story readings and a lecture on sleep patterns.

HealHaus, a wellness studio and café in Brooklyn, New York, offers an inclusive healing space with mental health resources. The studio, which opened in May 2018, aims to dig deeper into mental wellness with sessions such as Breathwork for Grief. “When people talk about wellness, it’s presented in a pretty package, but sometimes selfcare and wellness is tough,” Darian Hall, cofounder of HealHaus, tells JWT Intelligence. “At HealHaus, we question how we work through the harder topics, not just the easy ones.”



8

3



“Nowadays, city life is causing high competition and life patterns are changing to reduce sleeping time, so most people are stressed and tired. Coffee shops don’t allow people to rest.”

Jung Oon-mo, founder, Shim Story

Such wellness spaces are especially popular in Asia, where overpopulation is becoming a serious problem—compounded by minuscule apartments. In Seoul, Korea, Shim Story is a “public convenience lounge” that offers massage chairs, heated beds and video games to help visitors to unwind and decompress.

“There is no place in Korea to stretch one’s legs before returning home, so I decided to open a relaxing lounge that is as comfortable as home,” Shim Story founder Jung Oon-mo explains to the Innovation Group. “Nowadays, city life is causing high competition and life patterns are changing to reduce sleeping time,

so most people are stressed and tired. Coffee shops don’t allow people to rest, so lounges can help them spend time well while away from home through four different themes: sleeping, relaxing, massage and talking.”

WHY IT’S INTERESTING:

New spaces are opening up to promote mental wellbeing, replacing traditional cafés as popular public hangouts while capitalizing on the buzzy self-care industry.

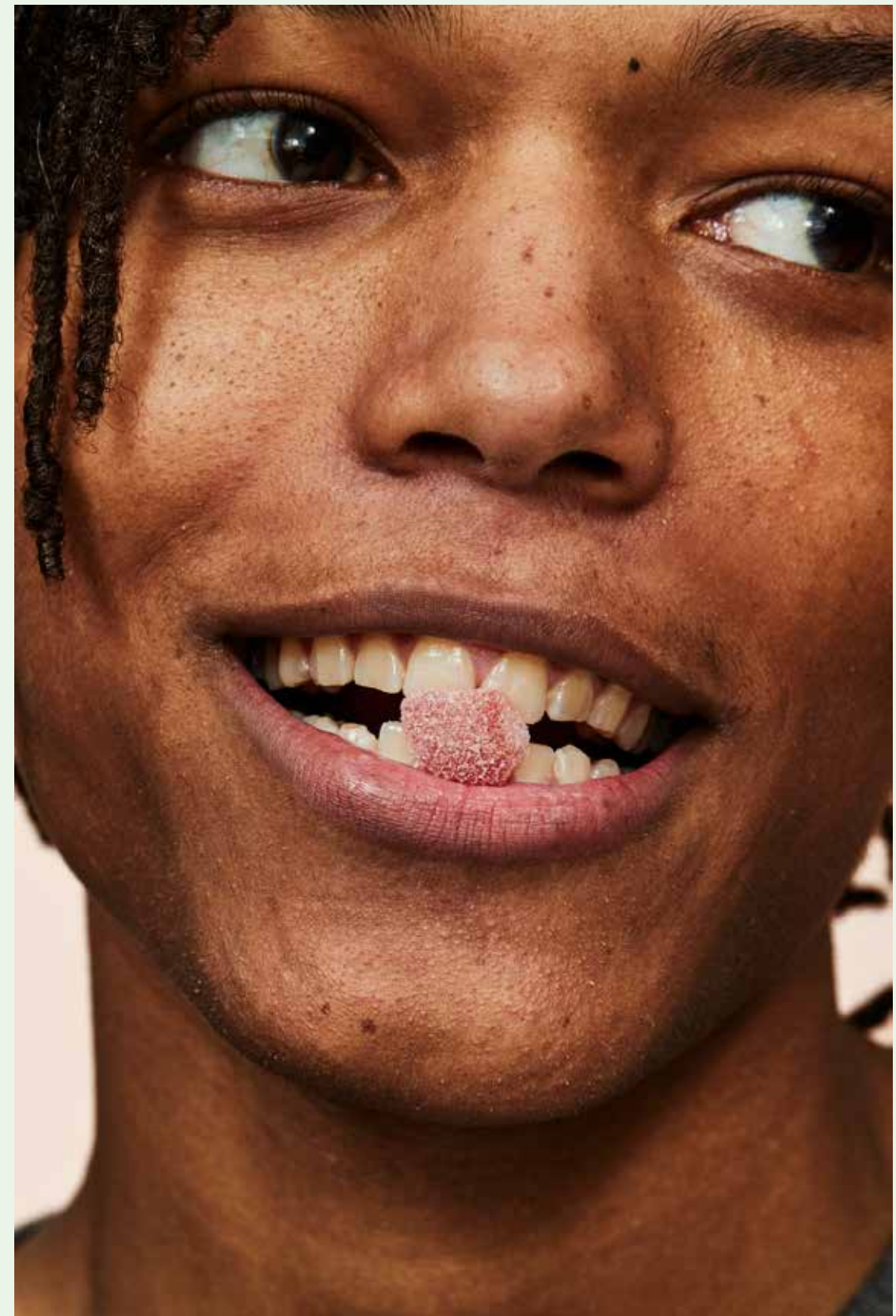
84

REBOOTING MEN'S WELLNESS

The focus shifts from untabooing womanhood to manhood. Hair loss preventatives and prescription penis pills have never looked cooler, thanks to a number of startups giving men's wellness a much needed makeover.

Californian-based Roman (Ro), a men's wellness brand launched in 2017, is on a mission to mend the "broken" relationship men have with their health. The company started by opening up the conversation around erectile dysfunction (ED) as studies show it is increasingly affecting the younger generation, with 50% of UK men in their 30s reporting to have experienced ED, according to a survey by Coop Pharmacy. In less than a year Ro has extended its offerings to help men tackle premature ejaculation, hair loss, herpes and more recently the company raised \$88 million in funding for a kit to help smokers quit the habit, offering a well-rounded health package for men fearing an embarrassing trip to the doctor.

Hims is another men's wellness brand that launched at the end of 2017. It is billed as "the one-stop shop for trusted self-care solutions that address hair





loss, skincare, sexual wellness, and more.” Following a similar direct-to-consumer model to Ro, the brand’s offers can be accessed online and any embarrassing questions can be resolved in the comfort of the consumer’s home, putting an end to those dreaded trips to the doctor.

Keeps is a newcomer that focuses solely on hair loss prevention. Launched in January 2018, the company capitalizes on a market that traditional brands have never fully embraced for millennial men: 66% of American men experience hair loss by the age of 35, according to the American Hair Loss Association.

WHY IT’S INTERESTING:

As the growth of these three young men’s health companies proves, successful, traditional men’s health companies will need to catch up with contemporary messaging and aesthetics to reach the modern millennial male consumer.



Left: Roman (Ro)
Right: Keeps



85

HEALTH HOMEKITS UPGRADED

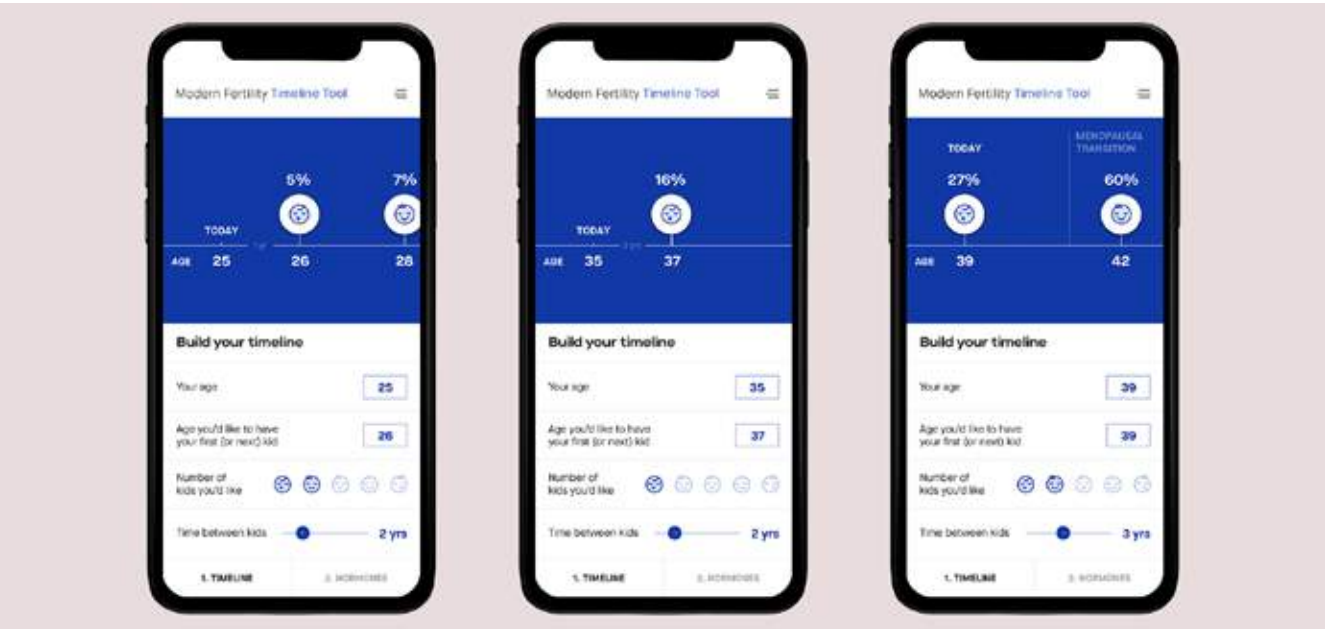
New DIY healthcare companies are bringing testing and treatments to your front door, making medical care more accessible than ever.

Advances in technology are giving rise to new consumer-based healthcare models. Thorne Research, Modern Fertility and Biem are revolutionizing medical testing with personalized programs and medical expertise delivered in the comfort of your own home.

Thorne Research, a personalized preventative healthcare platform, launched a suite of at-home health tests in early 2018. Thorne's new offering allows customers to test thyroid function, fertility, the presence of environmental toxins, and hormone imbalances impacting stress levels and sleep quality, all without leaving home. The tests are ordered online and mailed to the customer. Once completed, they are shipped back to be analyzed by both artificial intelligence machine learning and medical professionals. A week later, easy-to-understand results and a personalized treatment plan are presented via a thoughtfully designed dashboard.

Modern Fertility is also working to bring the doctor's office to consumers' front doors. The San Francisco-based health startup recently introduced test





kits to evaluate hormone and fertility levels. The company’s mission is to make information on fertility more accessible and affordable. “We believe that understanding your hormones and having that lens to what’s going on inside your body is information that women are entitled to have,” Modern Fertility cofounder Afton Vechery tells JWT Innovation.

The startup is filling an important void, as fertility testing is currently quite expensive—Vechery shares with JWT Innovation that she paid \$1,500—and the offerings can be limited. “There are only about 500 infertility clinics in the United States, so the number of these tests that can even be completed is fairly limited,” Vechery says. “We’re opening up this kind of testing to half the population, and then we’re also introducing this other layer on top, which follows the clinical recommendation of getting hormones tested or retested every nine to 12 months, depending on the woman’s age.”

With rates of sexually transmitted infections on the rise, Biem is hoping to encourage testing by removing the embarrassment of going to a clinic. The

“There are several barriers that often prevent people from getting medical attention in this area.”

Bryan Stacy, cofounder, Biem

sexual health platform offers a full suite of at-home tests for sexually transmitted diseases. “There are several barriers that often prevent people from getting medical attention in this area,” Biem cofounder Bryan Stacy explained to Forbes. “First, there are the practical barriers: the inconvenience of having to set up an appointment, possibly leave work or school, and actually go to doctor, which can be a challenge for many. Then there are emotional barriers, such as the paralyzing anxiety that people often feel, as I did, when they’re worried about their health, or dreading awkward conversations with doctors.” Biem is working to eliminate these barriers to improve and facilitate sexual health. “We want to empower people, make them proud of getting tested, and make that become the norm,” Stacy concluded.

WHY IT’S INTERESTING:

By offering testing in the comfort and privacy of home, these testing options are transforming healthcare and personalized wellness. Their streamlined touch points and ease of use are making healthcare more approachable and more accessible than ever.

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CIRCADIAN RHYTHMS

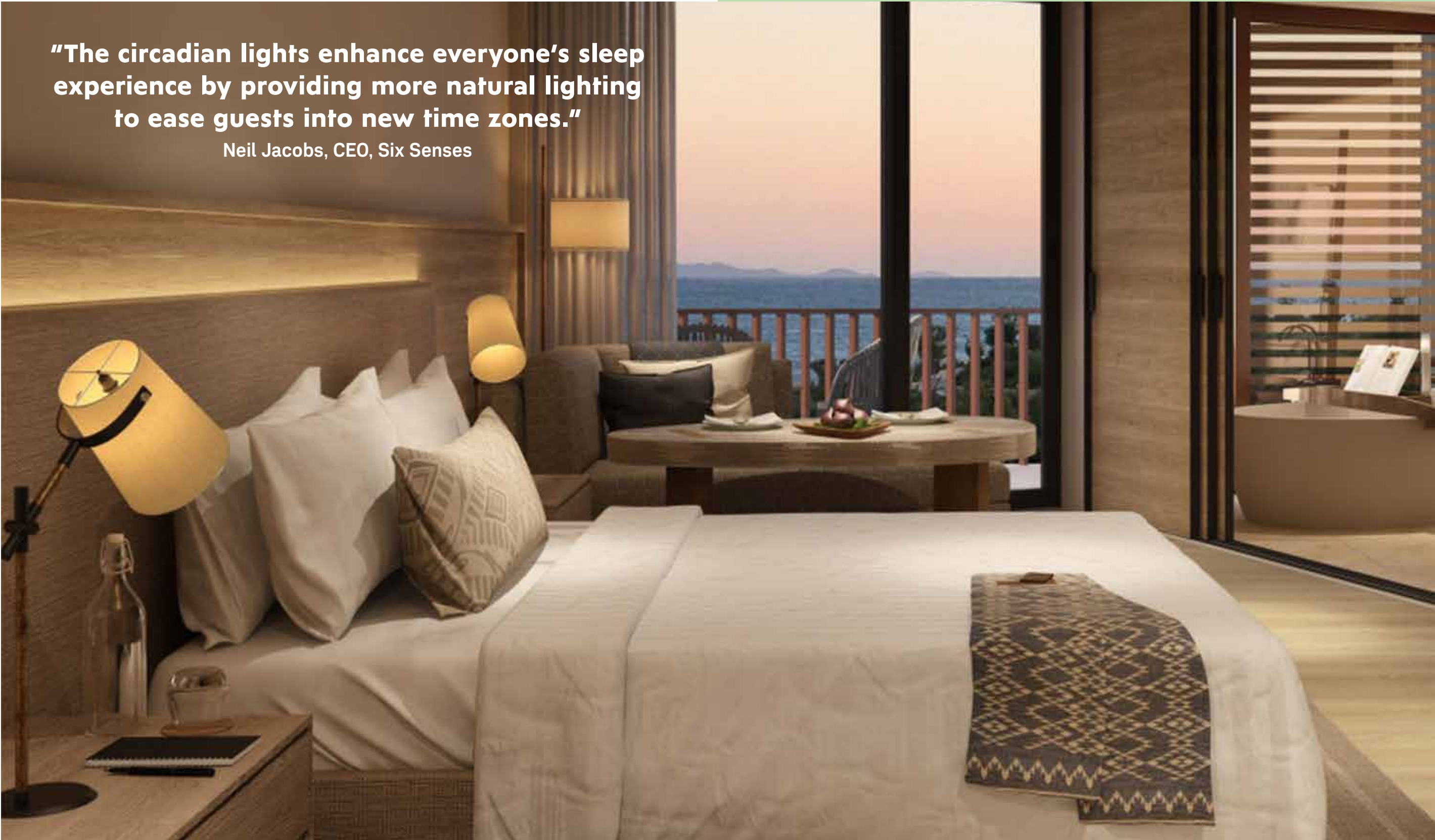
Luxury travel and hospitality are ramping up wellness offerings as more people travel for business and leisure.

One universal stressor that hits even the most seasoned traveler is jet lag, and according to Sleep Association 93% of people suffer from it. Prince Harry was spotted wearing an Oura ring during his fall 2018 Australasia tour. The high-tech metal accessory is essentially a health tracker which monitors movement and tracks sleep patterns, with the aim of improving sleep behavior whatever the time zone.

The International Air Transport Association (IATA) reports that approximately 4 billion passengers traveled on a commercial aircraft in 2017 and this number is projected to almost double by 2036. Airlines and hotels are using science, technology and more spiritual methods to help the weary traveler adjust to the new clock smoothly.

"The circadian lights enhance everyone's sleep experience by providing more natural lighting to ease guests into new time zones."

Neil Jacobs, CEO, Six Senses



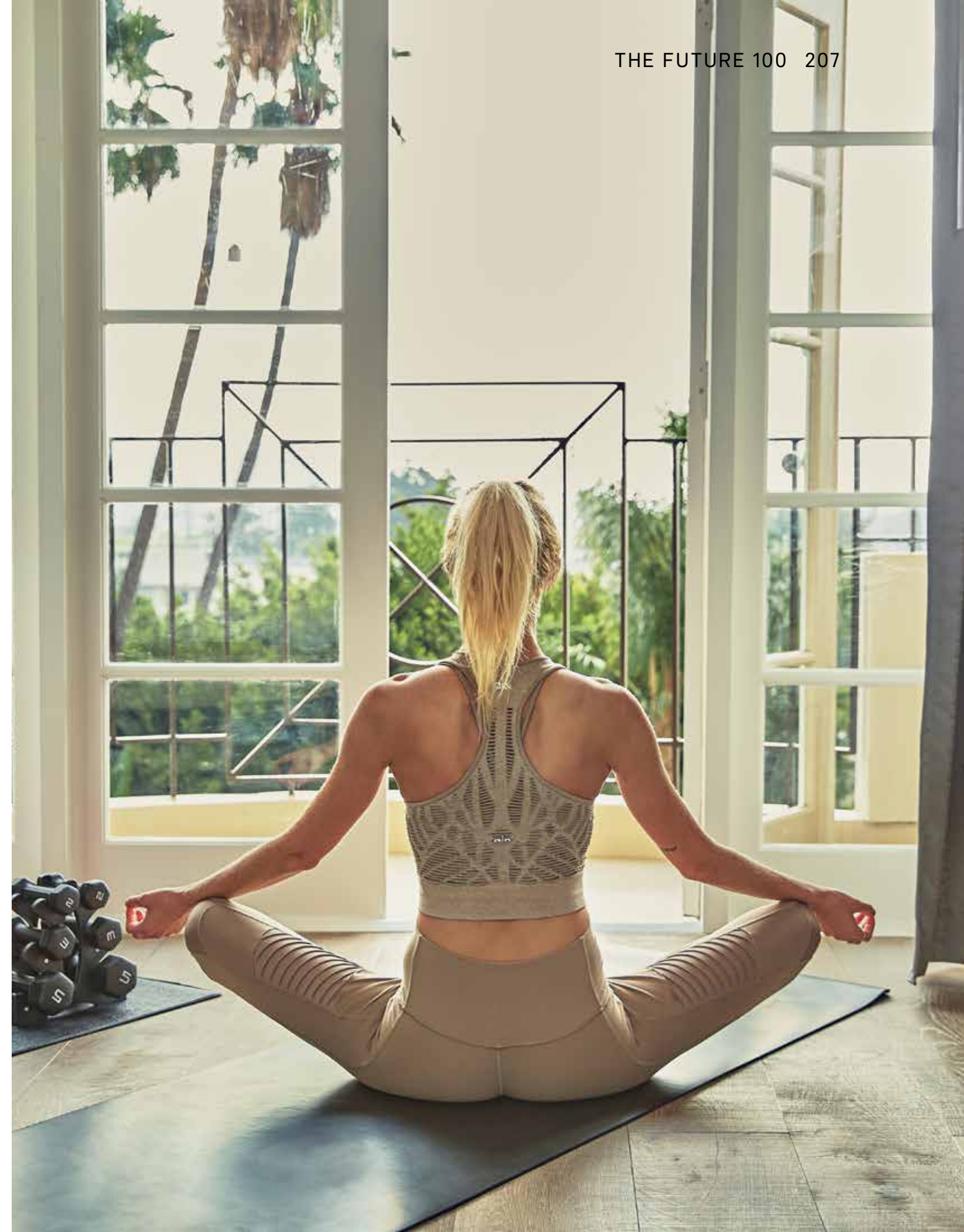
Qantas debuted a jet lag menu in spring 2018 onboard its 17-hour long-haul flight from Perth to London. The airline worked with the University of Sydney's Charles Perkins Centre to create a menu that combines science and food to reduce the impact of jet lag. From tisane herbal tea to tuna poke salad, the Qantas 787 Dreamliner Perth to London menu aims to put the passengers' circadian clocks on track.

In the hospitality sector, Lighting Science introduced GoodNight bulbs across selected Six Senses hotels in June 2018. "The circadian lights enhance everyone's sleep experience by providing more natural lighting to ease guests into new time zones," says Neil Jacobs, Six Senses CEO. The GoodNight bulbs are featured in the hotel rooms and spa, using light to enhance wellbeing.

The Four Seasons Hotel Los Angeles at Beverly Hills has partnered with real-estate wellness consultancy Delos to create a holistic approach to hotel living. The new wellness rooms and suites are fitted with meditation videos by new age wellness guru Deepak Chopra, circadian lighting and a state-of-the-art air purification system, all designed to help guests adjust their circadian rhythm.

WHY IT'S INTERESTING:

"The circadian clock is the master mechanism, or timer, to make sure that everything runs smoothly and according to plan," Jake Chen, assistant professor at the University of Texas Health Science Center, explained to the Observer. Health-conscious travelers are looking for brands that can help alleviate any psychological confusion and keep the clock ticking smoothly as they transition from one time zone to the next without affecting overall wellbeing.



87

COMMUNITY SPAS

Public spas and baths are staging a contemporary comeback around the world, making old-school wellness accessible and affordable to local communities.

In 2018, multisensory experience design studio Bompas & Parr created Paradise Now, London's first "wellbeing playground." Hosted by Belgravia's Eccleston Yards for two weeks in September, the outdoor, urban spa offered visitors a pink mist waterfall enriched with energizing minerals, an immersive meditation zone with anxiety-reducing aromatherapy pebbles, and a light installation emitting a warm, soothing glow.

The spa even featured an electrolyte aqua bar, where visitors could sample "water cocktails" from around the world, served by a water sommelier. Harry Parr, cofounder of Bompas & Parr, describes the experience as an attempt to integrate spa culture into the everyday. Parr says the installation "not only showcases some of the leading trends in wellness but also offers access to them in a ground-breaking way, not as a special occasion or as a destination in itself but as part of a normal daily life."

Hoping to emulate this low-key feel is Studio Puisto, which has designed a "neighborhood sauna" in Tampere, Finland. The design of the sauna is based on



the traditional *korttelisauna*, made famous in the late 19th century as a space where the community would come to wash, gather and share ideas. “Above all, we wanted Tullin Sauna to act as a neighborhood sauna, a space that everyone in the local community could equally enjoy together,” Tuula Vitie, interior architect at Studio Puisto, tells JWT Intelligence. Studio Puisto hopes the complex will serve as a “communal living room” and has applied this social aspect to every part of the building, from the bistro serving local delicacies to the specially designed coworking space.

Also in Finland, architectural studio OOPEAA has been commissioned to create floating sea pools for public use in coastal cities and towns around the world. The first development will be in Oulu, in the north of the country, with plans to build a spa and sauna alongside informal gathering areas and other public spaces. OOPEAA says the project brings together Nordic sensibility for contemplation of nature “with a healthy orientation towards physical activity and an urban inclination towards the social aspects of life.”

In the United Kingdom, a £1.4 million geothermal project is taking place at the Jubilee Pool in Penzance, Cornwall. At this celebrated art deco lido a geothermal well will provide energy to heat a section of the water all year round.

WHY IT'S INTERESTING:

Urban spas are the perfect remedy for those seeking to escape the stress of everyday life. A new wave of providers is bringing such services back to the neighborhood, seeking to revive the role of the spa as a community gathering spot. The providers are also approaching their projects with a spirit of inclusivity and high design principles, creating new-wave, thoughtfully executed facilities for local residents.



88

SILENCE

With global populations skyrocketing, the health implications of city living are being re-examined.

Urban dwelling is on the rise. Currently about 4.2 billion people live in cities worldwide, up from 751 million in 1950. The UN projects that by 2050, 68% of the world's population will live in urban areas.

With so many people flocking to major urban centers, health implications are being investigated. Air pollution, from smog to free-radicals, has been a major focus in the past. But what about noise pollution?

In her project the Silent Room, Nathalie Harb explores the effect of noise pollution on our emotional state. "Above a certain decibel, noise is proved to affect your ability to concentrate, your level of stress and your sleep," Harb tells the JWT Innovation Group. Featured at the London Design Biennale 2018, the project offers a structure insulated from noise.

Harb created the Silent Room as a space "to reconnect to your own thoughts, desires, space and self," she explains, "where you parcel yourself from the invasive information, stimuli and representation we're subjected to every day in the city."

**WHY IT'S INTERESTING:**

Silence is the new luxury for urban dwellers. "Consumption society has produced so much noise that it even transformed silence into a commodity," Harb tells the Innovation Group. "Silence is becoming a luxury feature because of the technology that enables it, but also because of all the wellbeing culture that promotes it."

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ASIA WELLBEING WAVE

Aging societies, a rising incidence of lifestyle diseases and a growing middle class are fueling fresh interest in health and wellness around the Asia-Pacific region. We are seeing the growth of multinational hospital chains, health apps to connect patients with doctors, and a booming athleisurewear industry. Gyms are popping up in malls, in workplaces and—in Chinese cities—even as booths on street corners.

In a survey of 2,500 consumers in five APAC countries, 72% of respondents say they live a healthier lifestyle now than they did in the past; 79% say they pay attention to food labels, and 74% agree that making healthy choices is trendy. The survey is part of our “Well Economy: Asia Edition” report and it was conducted in September 2018 by SONAR™, J. Walter Thompson’s proprietary research unit.

Patients are acting more and more like consumers. In tandem, the medical world is borrowing from the lifestyle sectors. New players—particularly tech companies—are disrupting healthcare in the same way they did with retail and logistics, by exploiting inefficiencies.



Long-held cultural beliefs around health are also evolving. Among the Asians we surveyed, 71% associate mental health with health, even more than the 68% who associate overall physical condition with health. The majority of respondents say stress is the top risk factor related to becoming unwell, with personal finances emerging as the most common source of stress.

Taboos are falling away. Singapore hosted Spark Fest, Asia’s first sexual wellness festival, in May 2018, featuring 20 speakers, workshops, a marketplace for “love and play” products, food, art and music. Spark Fest organizer Erin Chen, a sex and relationships counselor based in Singapore, says she plans to take the festival to other parts of Asia.

Finally, health is no longer limited by geography. An increasing number of patients with passports are fueling medical tourism as they travel abroad to seek services such as cancer screening, aesthetic surgery and treatment for life-threatening diseases.

Chinese women are also fueling the growing sector of fertility tourism, heading abroad as far as California for in-vitro fertilization, egg-freezing and other services that are not available at home either because of restrictive laws or a doctor shortage.



WHY IT'S INTERESTING:

There is a significant gap between the expectations of Asian consumers today and what the existing healthcare infrastructure in many countries can provide. New players are stepping into this space and creating alliances that will significantly reshape how healthcare and wellness services are delivered and paid for. They include app creators, insurers, private specialty centers, medical tourism companies, and even ride-hailing companies, all looking to cater to an expanded view of health.

90

CHINA HEALTH TECH

Public hospitals in China are severely overstretched. China’s tech giants are not only picking up the slack, they’re aiming to reinvent the system.

Tencent and Alibaba have built their reputations on social media, e-commerce and fintech, but these industries now represent the building blocks of a massive undertaking in public healthcare. The internet giants, along with China’s leading insurance group Ping An, are building digitally based healthcare ecosystems for their users that include everything from diagnosis powered by artificial intelligence (AI) to online pharmacies. With the help of big data from up to 1.4 billion people, these innovations are designed to make medical services more efficient, cut down on clinic wait times, and eliminate late diagnoses or misdiagnoses in a country with just a little more than two registered physicians per 1,000 people.

Minor fevers can send Chinese consumers running straight to already overcrowded hospitals, thanks to the lack of a primary care system. To help address these bottlenecks, Tencent recently announced a licensing deal with WebMD that would allow the company to bring its WeChat users seamless access to health education. But that’s only the start. In August 2018, Ping An’s healthcare platform Good Doctor partnered with pharmacies to deliver



“Chinese consumers are generally much more mobile-savvy and comfortable with the sharing of data needed to bolster an intelligent, digital health network.”

healthcare products, over-the-counter drugs and nutritional supplements to users' homes in just one hour after they fill out a short, AI-powered questionnaire.

Alibaba's healthcare arm AliHealth is tackling China's enduring online counterfeit medicine problem by cooperating with overseas companies such as Merck to build a drug tracking system and help patients make informed dosage decisions. AliHealth leverages Alibaba's massive e-commerce user base to create profiles on its patients to better understand their healthcare needs.

Tencent Doctorwork takes the mobile health experience offline, with dozens of new private clinics that rely on a sharing economy for licensed physicians and medical equipment. Members have access to 24/7 remote care, and the tech company is working with hospitals to improve diagnosis by supplementing medical imaging techniques with AI capabilities.

WHY IT'S INTERESTING:

Silicon Valley has also been experimenting in the healthcare space, as described in our “2018 Future 100” report, but China may be at a considerable advantage. Its government is backing an internet-led solution to a nationwide healthcare burden, plus consumers are generally much more mobile-savvy and comfortable with the sharing of data needed to bolster an intelligent, digital health network.



91-100

LIFESTYLE

91

NEW SUSTAINABILITY

Sustainability among brands is undergoing a renaissance as eco-conscious consumers demand ethical practices, responsible behavior and innovation to cut excess. In response, brands are creating products, services, packaging, and new systems that are as desirable and functional as they are eco-friendly. Make way for the New Sustainability.

Late in 2018, the UN Intergovernmental Panel on Climate Change reported that the world has just over a decade to bring climate change under control, and that unprecedented efforts to tackle emissions will be needed. This came after a year of heatwaves across four continents when even the Arctic Circle saw wildfires.

Sustainability as we knew it is over. And brands and consumers are starting to respond in a more proactive and scaled way than ever before.

The Innovation Group UK charted this shift towards normalized “radical” sustainability in its 2018 report “The New Sustainability: Regeneration.” It finds that, in order for the planet to thrive, brands and consumers need to look beyond just “doing less harm.” The future of sustainability lies in regeneration;

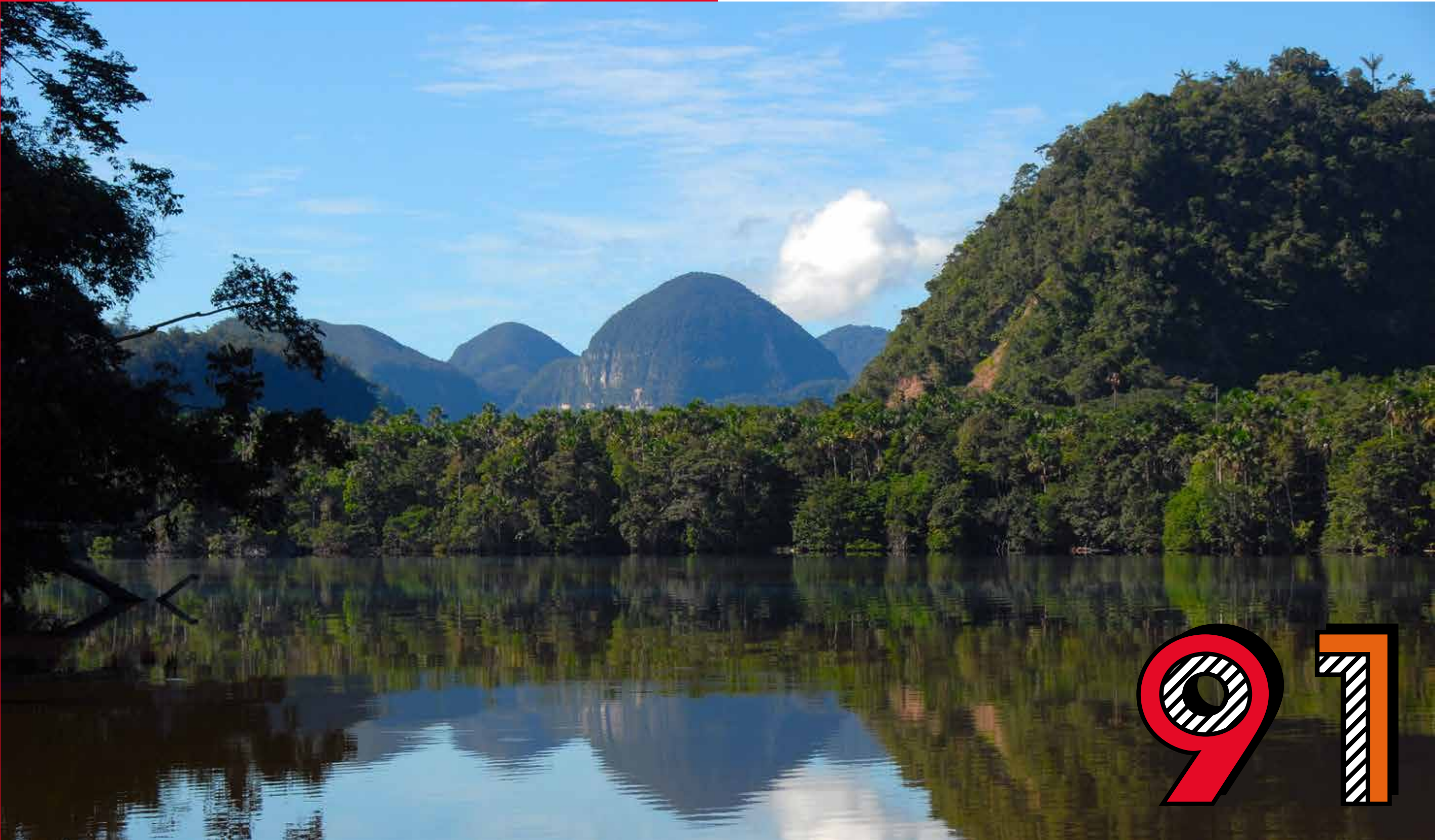
restoring ecosystems, rebalancing our climate, and building economies that thrive, while allowing people and the planet to thrive, too.

Brands are playing a decisive role in this regeneration by wielding their resources, influence and innovation expertise to effect change on a global scale. While much of the effort has an operational focus, pioneering brands are finding innovative ways to build regenerative sustainability into their products and services.

At its simplest, this means giving consumers more positive choices. Outdoor retailer North Face's Cali Wool collection offers a negative net carbon impact. The brand's Climate Beneficial™ wool is sourced from Bare Ranch, which uses regenerative agricultural methods to sequester more carbon dioxide than is emitted.

The landscape from major brands to startups is full of new innovation. Malta-based NGO Poseidon is planning a different approach, leveraging the retail sector to introduce blockchain-powered carbon credit trading to the high street. Poseidon's technology allows shoppers to add microdonations to a





"Global consumers are now operating with a sustainability mindset, even if they struggle to make it a lifestyle."



purchase, which are then routed to environmental projects. In May 2018, it conducted a pilot with Ben & Jerry's Scoop Shop ice-cream store in London's Soho. Shoppers were invited to add a penny to their purchase, matched by the store, to fund forestry projects in Peru.

Luxury—traditionally at odds with sustainability—is also increasingly being reinvented with a newly responsible lens, from sleek energy-positive hotels to packaging.

In beauty, packaging and design made from recycled materials are bidding farewell to coarse textures and dull browns and grays, instead blending in with any other premium packaging on the market. Spotting recycled packaging is becoming harder. "Sustainability is no longer visible," Nathalie Grosdidier,

general manager of the Luxe Pack packaging trade show, tells the Innovation Group. "You cannot see it, you just do it." California-based Golden Arrow is a packaging manufacturer with a green vision, using bespoke technology to produce high-end packaging for a zero-waste process. Even its print method is sustainable, using soy ink that is environmentally friendly.

WHY IT'S INTERESTING:

As our recent report "The New Sustainability: Regeneration" reveals, global consumers are now operating with a sustainability mindset, even if they struggle to make it a lifestyle. The "right" options are not always convenient, affordable, or accessible. Products and services like these, that provide convenient, effortless ways to contribute to regeneration efforts, will find favor with the mindful consumer.

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MATERIAL INNOVATION

A creative and scientific renaissance in material science is under way as designers rethink materials, fusing them with dynamic new functionality and seeking to minimize environmental harm.

Scientists at Cornell University, the University of Pennsylvania and the Marine Biological Laboratory at Woods Hole, Massachusetts, have developed a method of transforming 2D materials into textured 3D structures. The shapeshifting material is inspired by the skin of an octopus, which can switch from bumps to ridges to horn-like shapes, depending on the environment. This clever material could inspire a new generation of products that can adapt in different contexts or according to user need. Mooted applications include military camouflage or robotics.

A team of research scientists at the University of Central Florida (UFC) is exploring the intuitive potential of materials with a new color-adaptive fabric. ChroMorphous is made from threads that incorporate a metal wire, surrounded by others containing color pigments that change based on temperature. The fabric is connected to a battery and heated using electrical resistance. Users can control both the color and pattern of their clothing using an accompanying app. "I want to be able to communicate with my clothing,"

"I want to be able to communicate with my clothing."

Ayman Abouraddy, professor of optics and photonics, UFC

says Ayman Abouraddy, professor of optics and photonics at UFC. “I want to tell it how to look, and nothing like that has happened yet.”

Hoping to offer a feasible solution to the plastic problem is Nuatan, a compostable bioplastic made of corn starch, sugar and used cooking oil. The material, which was created by Crafting Plastics Studio, has a lifespan of up to 15 years but degrades harmlessly if consumed by humans or animals. The aim is to use Nuatan as an alternative to plastic packaging. Discussing the problem of plastic waste, designer Vlasta Kubušová told Dezeen that “there is more than one solution. But this is one of the solutions we know can work within circular design.”

Another sustainable solution to disposable plastic comes from Swedish student Pontus Törnvist, who has created a biodegradable material from potato starch. Potato Plastic can be used to make everything from cutlery to straws and will decompose after disposal in just two months. The material was shortlisted for the 2018 James Dyson Award, a prestigious accolade which gives a platform to a new generation of design engineers.

WHY IT'S INTERESTING:

As brands are increasingly held to account for the choices they make with materials, it's important they consider the innovative solutions available to them. A material revolution is taking place—will brands join in?



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SINGLE REBRANDED

With the numbers of single people of all ages rising globally, outdated stereotypes about singledom are being overhauled.

In Japan in 2018, more than 70% of single people aged 40 and above not only reject the idea of eventually tying the knot but claim they are satisfied with solitude. People who are single are healthier, have more sex and potentially have higher self-esteem, according to scientists at University College London. Charlize Theron, Mindy Kaling, Chelsea Handler and Tracee Ellis-Ross are among the rising number of outspoken single-and-proud cultural icons.

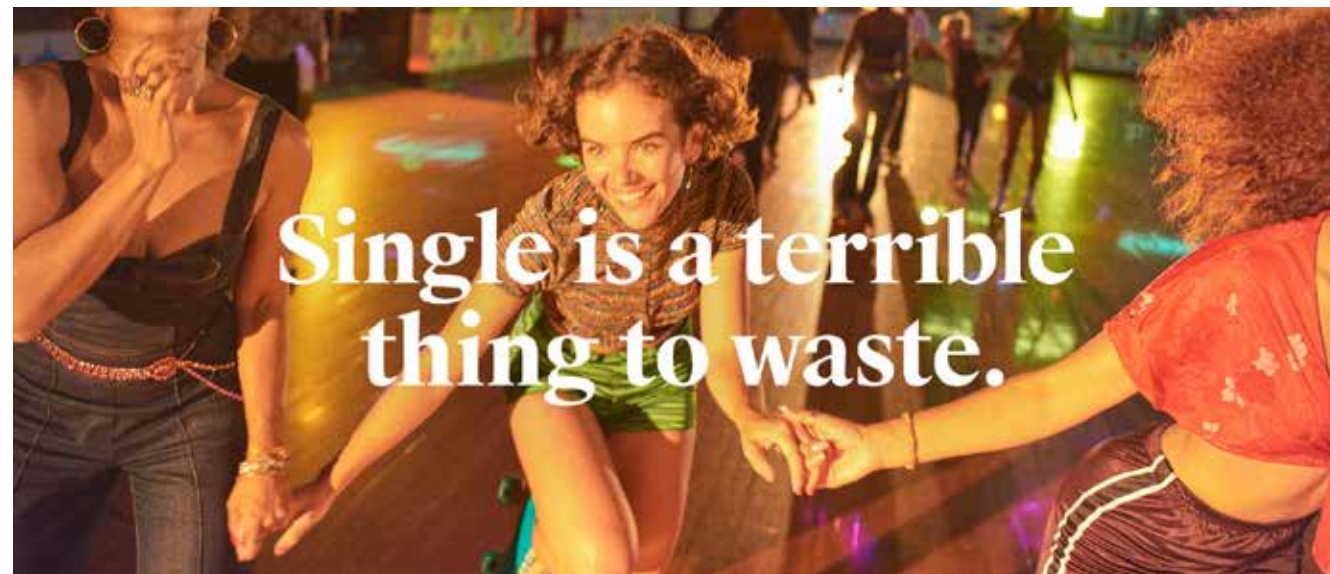
Marketers and brands are starting to recognize (albeit belatedly) that singles today represent an affluent, empowered, pan-generational opportunity—and one that will not be patronized.



Single does what
Single wants.



Single never has
to go home early.



In 2018, the *Sunday Times Style* magazine conducted a survey of over 1,000 UK divorced adults, and found that rather than disliking single life the respondents actually preferred it. Running under the headline “Meet the new breed of happy divorcée: women who are empowered, positive and thrilled to be single,” the report described a new generation of women who have been married and come out the other side, now living a fulfilled single life. Of the women surveyed, 53% reported that they are “much happier” post-divorce, while only 32% of men said the same. Women were more likely than men to put themselves in the category of single and not looking for a relationship (61% versus 47%), with an overall figure of 54% across the sexes.

Tinder, the global dating app, is also reshaping the view of singledom as not something to be escaped, but rather to be celebrated. Its “Single, Not Sorry” campaign tapped into a “bold, unapologetic celebration of single culture and the important role being single plays in people's lives.” The campaign featured images of singles living fancy-free urban lives, with slogans including “Single Does What Single Wants,” “Single Never Has To Go Home Early,” and “Single Is A Terrible Thing To Waste.”

WHY IT'S INTERESTING:

The number of single adults is growing rapidly across the globe. The percentage of under 35s who are married with children has fallen steadily since 1970, hitting just 20% in 2015. Singledom is an increasingly attractive choice, particularly as unattached women experience more financial and sexual freedom. In 2012, one in five adults (21%) had never been married, compared to just 9% of adults in 1960, according to US Census analysis. With this shift, singles are starting to reject outmoded negative stereotypes about single living. Adulthood, and the way people experience it, is shifting to become something much more individual as people choose different paths. Marketers need to catch up. “The Martha Stewart lifestyle, Gap as the uniform of success, and the traditional family with a 4x4 in the drive is just not reality anymore in determining success. There's too much diversity,” explains single consultant Claire Hobson in the Innovation Group's “New Adult” study. “I do feel that some part of adulthood was about putting yourself on the map—achieving something noteworthy. Before, this was about the accumulation of a husband, kids, and a mortgage. But my commitments are more fluid.”

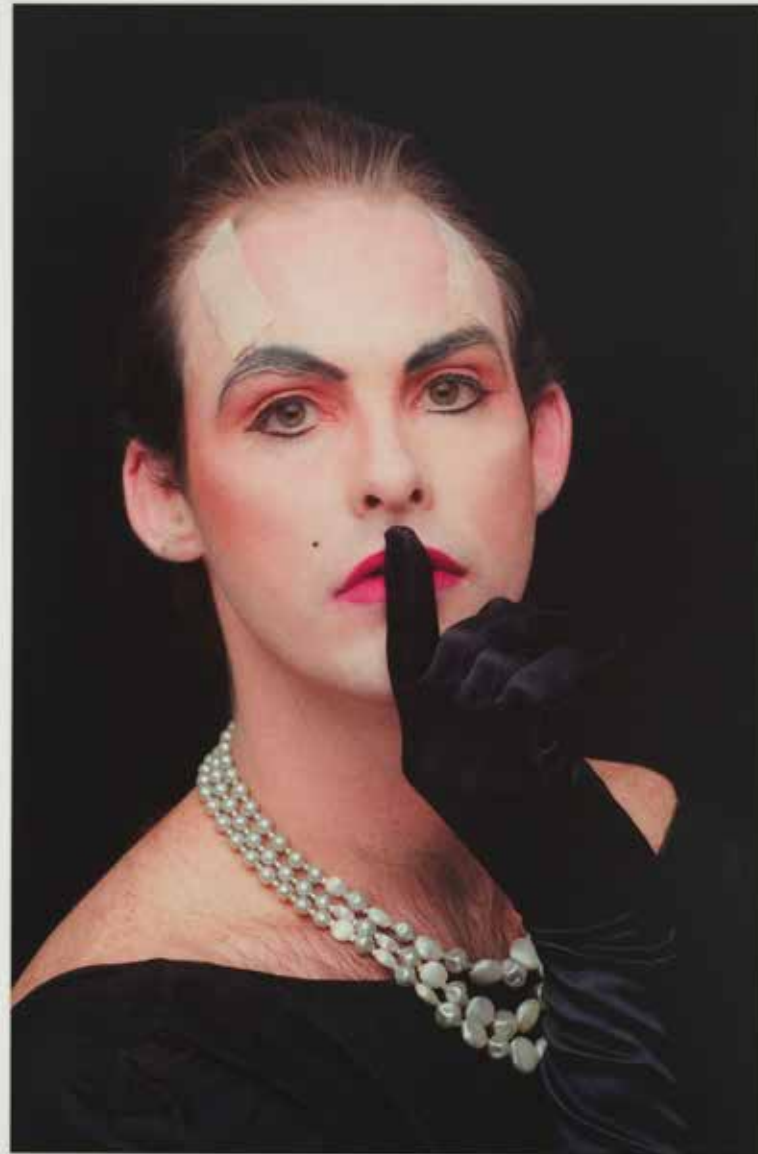
94

CAMP'S NEW EXHIBITIONISM

Camp is rapidly moving from subculture status into the mainstream. From the Metropolitan Museum Costume Institute's *Camp: Notes on Fashion* exhibition, which opens in May 2019, to Rei Kawakubo's *Comme des Garçons* spring 2019 collection, to male beauty influencers and the popularity of *RuPaul's Drag Race*, camp is getting its moment in the spotlight.

The Costume Institute exhibition will examine how camp “has evolved from a place of marginality to become an important influence on mainstream culture,” says the online overview. The exhibition takes as its framework Susan Sontag’s 1964 essay “Notes on ‘Camp,’” a piece that sees Sontag endeavor to “snare [the camp] sensibility in words.” The writer describes camp variously as a “love of the unnatural: of artifice and exaggeration,” and “the love of the exaggerated, the ‘off,’ of things-being-what-they-are-not.”

Max Hollein, director of the Met, notes that the exhibition will “embody the ironic sensibilities of this audacious style, challenge conventional understandings of beauty and taste, and establish the critical role this important genre has played in the history of art and fashion.”



Shhh (from *Patina du Prey Drag His Majesty the Queen*, 1973 Pose Series), 1990/2012 Collage, photograph, watercolor digital c-print mounted on centra 90 x 66 cm (framed) 30 x 22 3/4 in (76.2 x 57.79 cm). Courtesy Christophe Gaillard, Paris. Photography by Michael Wakefeld. Courtesy of the artist, PPOW and Hales Gallery



“Drag is also able to reveal and undermine other systems of oppression.”

Vincent Honoré, senior curator, Hayward Gallery

Clearly, there's something of the zeitgeist about Sontag's essay, as it served as the inspiration behind the spring 2019 Comme des Garçons collection. “I can really relate to this vision,” designer Rei Kawakubo told *Vogue*. “Camp is not something horribly exaggerated, out of the ordinary, or in bad taste. This collection came out of the feeling that, on the contrary, camp is really and truly something deep and new, and represents a value that we need... I think camp can express something deeper, and give birth to progress.”

The idea resulted in a collection filled with mille-feuille-like dresses crafted from tulle, Lurex, and chiffon, which *Vogue* described as an “uplifting shot in the arm for fashion in general.”

The Met's show comes on the heels of a fall 2018 exhibition at London's Hayward Gallery that examined that high camp art form—drag. *Drag: Self-portraits and Body Politics* was a largely photographic exhibition that included representations of drag by Robert Mapplethorpe and Cindy Sherman, alongside young, contemporary drag artists' self-portraits. “As well as parodying and unsettling the very idea of gender, drag is also able to reveal and undermine other systems of oppression,” notes Vincent Honoré, the Hayward Gallery's senior curator, citing the work of photographer Ming Wong, who uses drag to “critique the depiction of cultural and racial stereotypes.”



In January 2018, the *New York Times* ran a lengthy article exploring whether *RuPaul's Drag Race* has heralded in a “golden age of drag.” And added to that, storytime events hosted by drag queens are taking place for children in libraries in both the United Kingdom and the United States. According to the UK-based Drag Queen Story Time organization, the events provide spaces “in which kids are able to see people who defy rigid gender restrictions,” thus allowing children to “imagine the world in which people can present as they wish. Where dress up is real.”

WHY IT'S INTERESTING:

As the concept of gender fluidity becomes the norm for generation Z—witness male beauty influencers such as James Charles and Patrick Starr—it's no surprise that the notion of camp is undergoing a cultural re-examination. From Alessandro Michele's collections for Gucci to startup makeup labels, fashion and beauty brands are blurring gender lines.

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UNIVERSAL REVIEW CULTURE

Is *Black Mirror*—a satirical TV series rife with unease about the modern world—really our future? Online review culture is moving past the screen into the real world, impacting everything from what we buy to employment opportunities.

Amazon is realizing online reviews IRL (in real life) with a retail concept of bricks-and-mortar stores that only sell products with an online rating of four stars or above. This marks a noteworthy crossover between digital review culture and in-person shopping. “We’ve used customer ratings, reviews and sales data from the hundred millions of products online to curate our store, with features like Most-Wished For and Frequently Bought Together,” Amazon explains. The first store opened in New York City in September 2018, with additional locations in Colorado and California opened in November 2018.

Uber, too, is reinforcing this review culture, punishing or rewarding drivers and riders based on their rating. On the app, drivers and riders can rate each other on a five-point scale, docking points for things like driving past the pickup point or not being outside, poor routing or canceling. Uber announced a new incentive plan in November 2018 that will reward drivers with a rating of 4.85

or above with better earnings and free college tuition. Drivers can also be deactivated—fired, in other words—if they have a low rating. This applies to passengers, too—many Uber drivers won’t pick up passengers with low ratings, and the company announced in September 2018 that it would ban passengers in Australia and New Zealand with ratings below four stars. Passengers with high ratings receive frequent discounts and are assigned drivers with nicer cars.

In China, this is extending beyond shopping and ride sharing—the government has begun enforcing social reviews of its citizens. The Social Credit System, piloted in 2018, will be fully rolled-out by 2020 and calculates a score for each citizen based on financial transactions and daily behavior. Citizens can be penalized for things like not picking up after their dog, spending frivolously, or smoking in non-smoking areas.

Social scores will impact everything from employment and education to bills; a low score could result in losing your job or educational opportunities, and high scores would be rewarded with lower electricity bills and expedited processing of travel documents. Citizens can already be banned from school or public transportation due to low scores. The government explains that the system is meant to “ensure that sincerity and trustworthiness become conscious norms of action among all the people.”

WHY IT’S INTERESTING:

The age of anonymity is over. Reputation is being commoditized—crowd-sourced opinions are no longer just for helping pick what restaurant to eat at, and could have grave implications for employment and social status.

96

NEW WORKANOMICS

Is nine to five still the best way to work? Increasingly, many businesses and employees are looking at alternatives to the traditional full-time work week, using artificial intelligence (AI), automation and new employee rewards.

In 2018, Perpetual Guardian, a New Zealand-based trust and estate planning firm, conducted a breakthrough trial to test the efficacy and benefits of a shorter working week; 250 staff members could switch to a four-day work week with no commensurate loss of salary. Employees were involved in creating initiatives to automate manual processes to work more efficiently in less time.

After the experiment, staff were shown to have lower stress levels, higher job satisfaction, and reported feeling more focused and productive in the office. The trial was deemed so successful that it will now be implemented permanently. Founder Andrew Barnes explains: “For us, this is about our company getting improved productivity from greater workplace efficiencies. There’s no downside for us.”





Berlin-based online project management company Planio is also transitioning to a four-day work week. Key steps being implemented include reducing and optimizing communication, and using project management tools to get rid of inefficiencies.

In the United Kingdom, the National Health Service (NHS) is trialing the use of AI to improve the speed of processing administrative work at the East Suffolk and North Essex NHS Foundation Trust. Administrators claim that the AI assistants are eight times more productive than human staff, allowing them to dramatically decrease the man hours required for paperwork. The new system will enable frontline workers to tackle harder, more complex work, utilizing their skills more fully and decreasing the number of hours they need to work to get things done.

WHY IT'S INTERESTING:

Reduced working hours, even down to a four-day work week, could become the reality for most workers this century. Findings from new research conducted by the UK-based thinktank Social Market Foundation show that automation and AI could lead to sufficient increases in workplace efficiencies to allow workers to accomplish the same tasks in less time. With benefits to employees and productivity increases clearly being demonstrated around the world, companies are beginning to take advantage. This shift comes as people start to embrace flexible or alternative working practices, and employee rewards expand beyond financial incentives to time, wellness, and side hustles.

97

THE CULTURAL PROGRAMMER

Gone are the days when a lobby pianist in a hotel would suffice as entertainment. Today's hotels, stores and co-working spaces are ramping up "cultural programming" as a way to entice people into their communal spaces, while also providing another way to make money. With this comes the demand for curators and events planners.

Events at the Hoxton hotels run from mood-enhancing dance classes to yoga to salons hosted by Refinery29 on the future of finance. The Ace Hotel chain stages trivia nights, live jazz and comedy, bingo and Sunday Stretch sessions. The Line Hotel group hosts sessions on everything from DIY PR for creatives to contemporary embroidery, organizes running clubs and also offers tai chi classes. Events run the gamut from wellness to experience, opportunities to learn and network, and culture, which are all pillars of millennial aspiration today.

"Disenfranchised with big corporations and self-identifying as global citizens, millennials were seeking socialization and community—we want to feel part of something bigger and feel connected to our tribe—and brands began responding," says Michaela Solar-March, managing director of marketing and





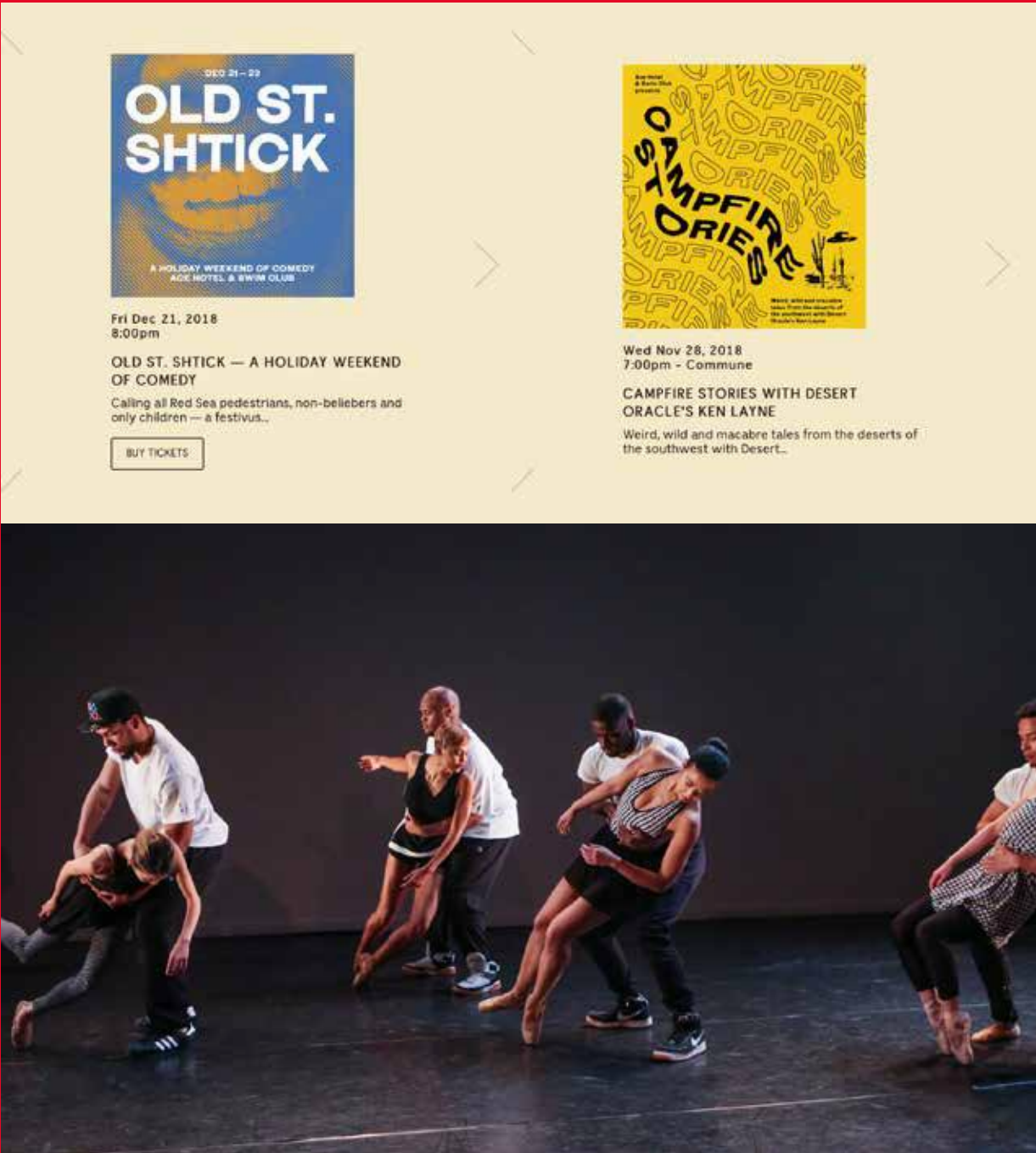
experience at Rockefeller Center, and former global director of member and events planning at Soho House, adding that the trend is partly driven by the experience economy, and desire for connections in an isolated social media age. “These major cultural shifts have led to ride of cultural programming.”

So, why now? “It’s another thing that originated from members’ clubs, which would put on talks, presentations, activities and parties for the clientele to participate in, to make the high fees seem worthwhile,” explains Dan Howarth, US editor of design platform Dezeen. “Now hotels are doing the same.”

It’s also partly, Howarth says, to do with the way we travel and work now—which is in a continuous blur of leisure time, networking and work. “Hotel lobbies and lounge areas, like cafés before them, are becoming hybrids of living rooms and office spaces as more people work remotely,” he says. They’re also becoming social and cultural hubs, and are using events to create a sense of community, not just among guests but also with local residents in a combination of altruism and brand building.

WHY IT’S INTERESTING:

Experiences (such as travel and food), self-improvement (including networking and spirituality), and wellness are the three obsessions of young millennials—and, therefore, the focus of their disposable income. The way to attract not only incumbent travelers, but also local audiences to spaces is through a connection to local culture and entrepreneurs.



98

COLLEGE-FIRST SERVICES

Social media apps are harkening back to the original days of Facebook, developing services tailored specifically for college students.

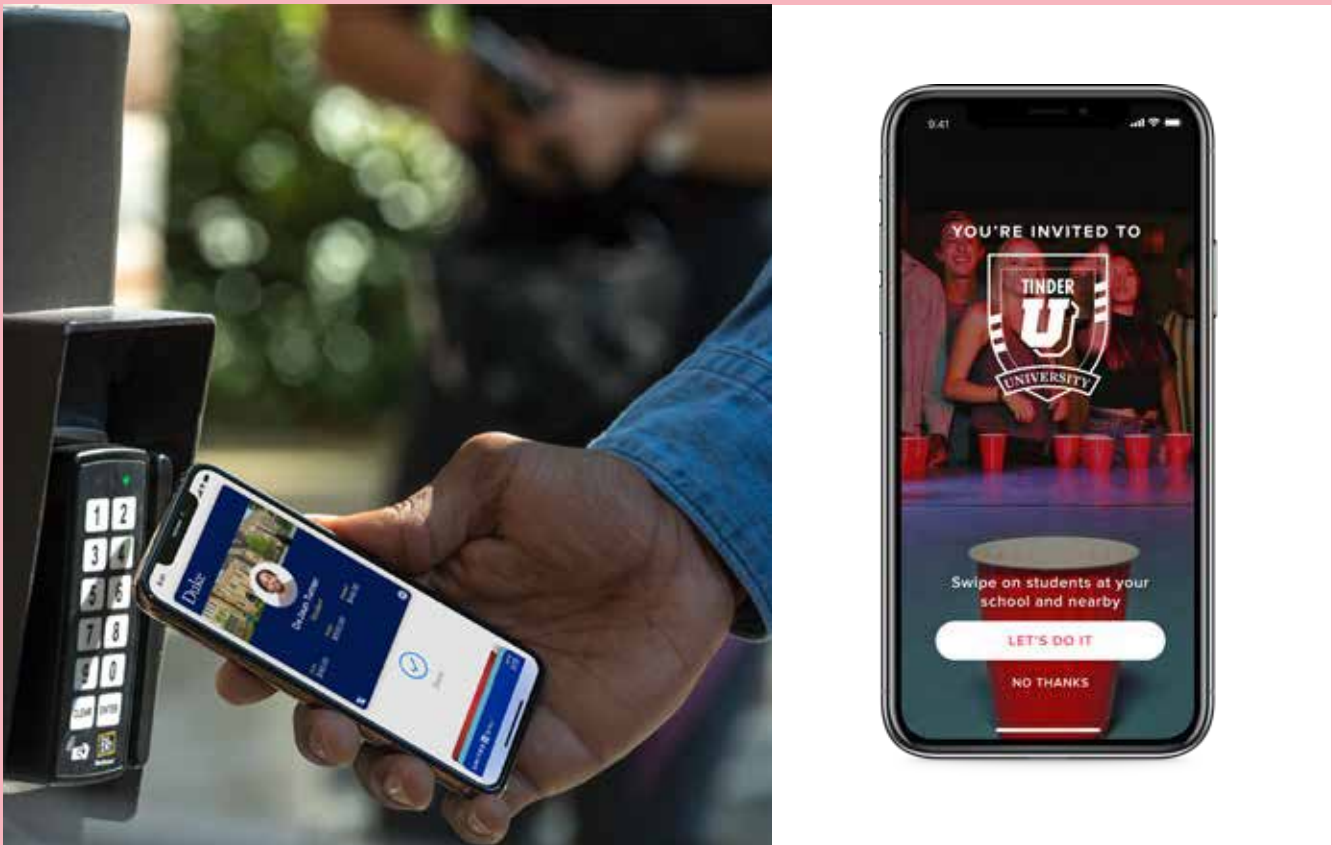
In August 2018, Tinder introduced Tinder U, a new service available only to college students. Tinder U will connect users with other college students to find coffee dates, study buddies, or simply meet other students in the area. In order to register for Tinder U, users must log in with an .edu email address and be geolocated on campus.

“We believe it is critical that Tinder maintains a strong foothold at universities around the globe, especially given that every 18-year-old who starts college is building a social life from scratch, making new friends and starting new relationships,” says Mandy Ginsberg, CEO of Tinder’s parent company Match Group. The college-aged group makes up the largest demographic base for the app, with 35% of users aged 18-24, so this dedicated space will allow for more targeted offerings for collegiate swipers.

Not to be left behind, three days later Instagram also announced its plan to launch community groups for college students. The service is intended to help students find other students, leveraging class-based lists. Students can opt into the communities to direct-message or to watch users’ stories from the list.

WHY IT’S INTERESTING:

Social media has grown exponentially since Facebook was founded in 2004, exploding past the site’s original intent to connect college students. Now, amid allegations of mental health implications and political turmoil, social media platforms are going back to basics. These apps are working to personalize and localize the user experience for college students in the hopes of creating hyper-focused communities.





99

FITNESS INTERFACES

From fitness to fashion, mirrors are getting high-tech makeovers.

Mirror is a new workout interface that serves as an at-home personal trainer. When it's off, the device looks and functions like any other reflective glass, blending in seamlessly with home decor. But switch it on and it becomes a portal into a world of virtual fitness. Mirror allows users to stream live classes from the company's NYC studio or access a library of on-demand workouts. The interactive display is equipped with a camera and speakers to connect the user to instructors and classmates for guidance and motivation in real time. The tool also incorporates heart rate monitors for biometric feedback and performance tracking.

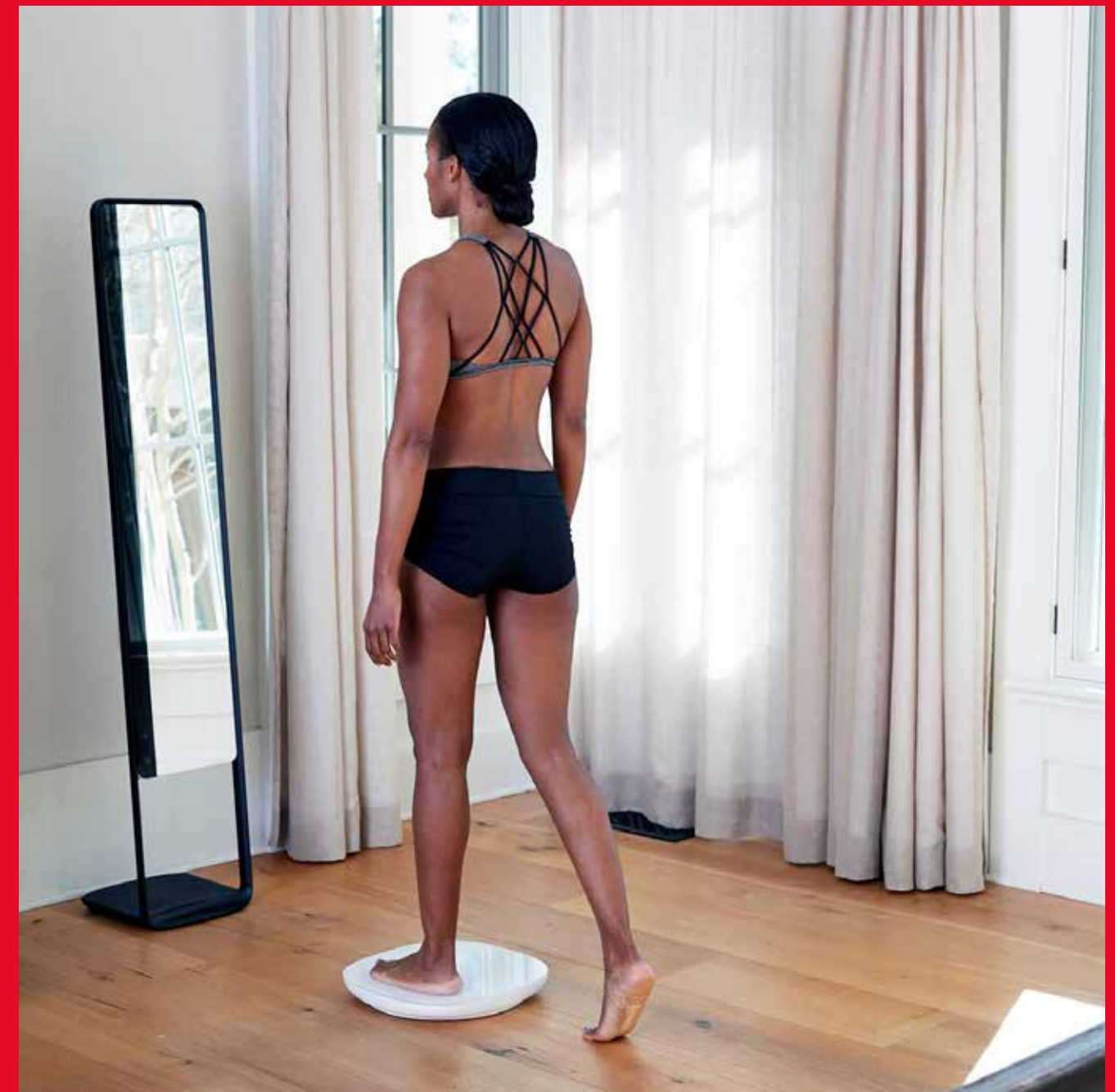
The company, which announced its product in September 2018, was started by a former professional dancer who understands the importance of visual feedback in fitness. "I realized that, as a dancer, I had kind of taken for granted that I'd always practiced in front of mirrors, and how integral that was to a great experience," says Brynn Putnam, founder and CEO of Mirror. "So, we took the tech we were building for the phone and decided to put that into the mirror."

“We took the tech we were building for the phone and decided to put that into the mirror.”

Brynn Putnam, founder and CEO, Mirror

Naked Labs is taking connected mirrors one step further, using 3D body scanning technology to bring enhanced health and fitness tracking tools into the home. “People are searching for evidence-based methods to track health and fitness that aren’t solely focused on weight,” says Naked Labs cofounder and CEO Farhad Farahbakhshian. “We are excited to get Naked into people’s homes to give them better insight into exactly what’s going on in their body and help them work towards their goals.”

Introduced in August 2018, the mirror and accompanying app capture and analyze 3D body scans to provide personal health data including weight, body fat percentage, lean mass and fat mass, measurements, side-by-side comparisons, and graphs of historical data. The product is being positioned as an advanced fitness tool to encourage daily activity and health monitoring. While Mirror and Naked Labs are currently health-focused, it’s only a matter of time before this technology is integrated into retail. In October 2017 Amazon acquired Body Labs, a New York startup that creates 3D body scans. The tech giant then began taking body scans as part of a survey in May 2018, reportedly building out a database for clothing sizing. 3D body scanning technology could allow shoppers to create an avatar with their specific measurements, taking the guesswork out of online shopping and reducing returns.



WHY IT'S INTERESTING:

No interface is safe from techification. Connected mirrors are poised to transform not only how we exercise and manage our health, but also how we shop.

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LINGUISTIC REVIVAL

Technology is being used to help preserve traditional and indigenous languages at risk from extinction.

There are more than 7,000 languages spoken globally, but UNESCO estimates that one becomes extinct every two weeks. As language is intertwined with culture, heritage and identity, this means a loss of more than just words. Now, with the help of technology platforms and tools, conservationists are bidding to halt the decline.

Wikitongues is one initiative that aims to document rare languages by collecting and publishing oral histories online. In 2017, it launched Poly, an open-source app tool that allows people to document their own language with the goal of teaching it in the future.

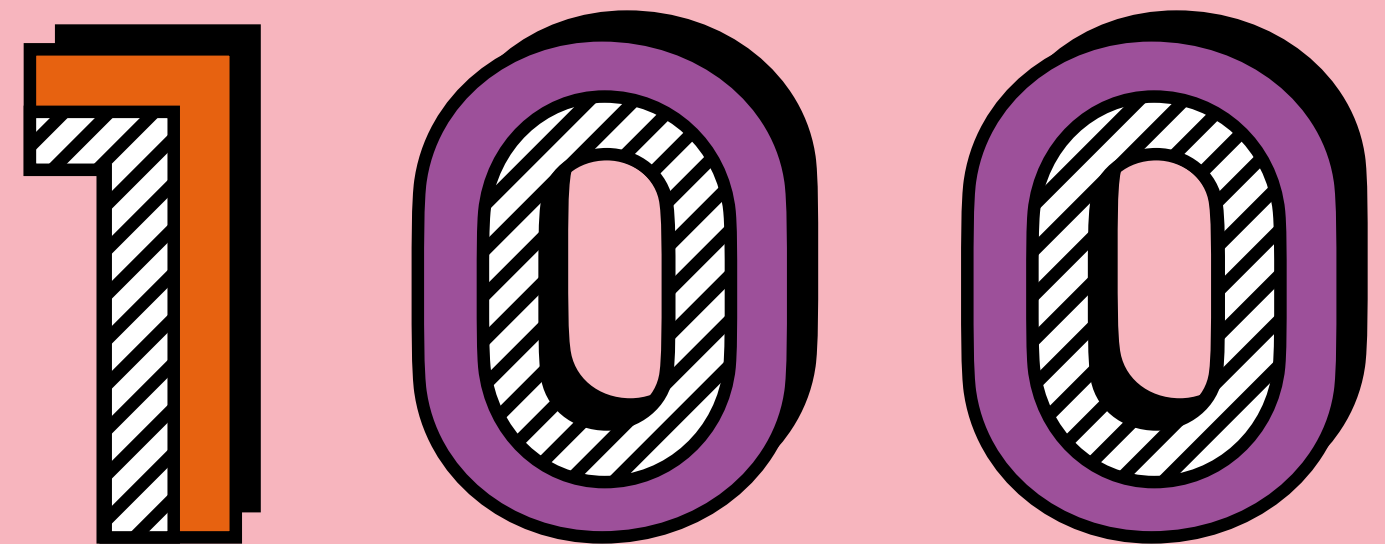
Mobile apps have also seen some success in reviving languages. Duolingo has now been used by more than 4 million people to study Irish—there were just 100,00 native speakers when the course launched in 2014. On Indigenous Peoples' Day 2018, the app launched new courses in Navajo and Hawaiian, both of which are under threat of extinction. The Hawaiian language, which has just 300 native speakers, is also getting a boost from mobile app Drops, which launched its course in September 2018.

Artificial intelligence is the latest weapon in the fight. Google has collaborated with the ARC Centre of Excellence for the Dynamics of Language, using machine learning to tackle the extinction of some of the 300 indigenous languages in Australia. Machine learning dramatically speeds up transcription of audio recordings, enabling the creation of language models. The team has also developed a social robot named Opie, which will help teach the endangered languages to children in remote communities.

Visual recognition technology is also proving to be a handy tool. As part of 2018's Te Wiki o Te Reo Māori (Māori Language Week), Spark, Te Aka Māori Dictionary and Google launched Kupu, an app which uses image recognition software to teach te reo Māori, the language of the indigenous people of New Zealand.

WHY IT'S INTERESTING:

The world is becoming ever more connected. While technology has been a homogenizing force, at the same time it's allowing diversity to flourish in digital language archives and tech-powered learning tools.



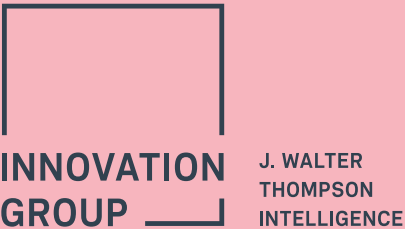
About the Innovation Group

The Innovation Group is J. Walter Thompson's futurism, research and innovation unit. It charts emerging and future global trends, consumer change, and innovation patterns—translating these into insight for brands. It offers a suite of consultancy services, including bespoke research, presentations, co-branded reports and workshops. It is also active in innovation, partnering with brands to activate future trends within their framework and execute new products and concepts. It is led by Lucie Greene, Worldwide Director of the Innovation Group.

About J. Walter Thompson Intelligence

The Innovation Group is part of J. Walter Thompson Intelligence, a platform for global research, innovation and data analytics at J. Walter Thompson Company, housing three key in-house practices: SONAR™, Analytics and the Innovation Group. SONAR™ is J. Walter Thompson's research unit that develops and explores new quantitative and qualitative research techniques to understand cultures, brands and consumer motivation around the world. It is led by Mark Truss, Worldwide Director of Brand Intelligence. Analytics focuses on the innovative application of data and technology to inform and inspire new marketing solutions. It offers a suite of bespoke analytics tools and is led by Will Sandwick, Head of Data & Analytics.

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For more information visit: jwtintelligence.com



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