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Futurescape

A vision of the high-momentum shifts
shaping the world around us



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Who is it for? Futurescape is intended as a reference point for decision makers as they look to the future of their organization. It is for leaders tasked with adapting business practices to new market landscapes and for established companies looking to stay ahead of the curve. It is for anyone curious about where these winds of change are taking us and interested to learn how new forces are shaping us all.

SEISMIC SHIFTS ARE SHAKING THINGS UP

It's difficult to put into words the disruptive effect of living in a near-constant state of pandemic, climate crisis, political, cultural and economic upheaval. We are just beginning to understand how recent societal shifts, unprecedented events and changing behaviors are actively reconfiguring our lives.

These events exposed structural cracks and weaknesses that threatened entire businesses and industries: from unforeseen supply chain issues and the practical imperatives of social justice, to the challenges of rapid adaptation to a grievous global pandemic. But it also broke new and fertile ground. 2021 saw the rise of entire business sectors that had struggled to reach mass adoption for years: predictive technologies, whole economies shifting to eCommerce and digital payments and virtual ecosystems that foster borderless collaboration and value creation.

In other words, industries were forced to break with the past, creating the opportunity and the material to build the social and economic pillars of tomorrow.

Scanning the Futurescape

In this report, we identify and define the six key pillars of Organization, Identity, Influence, Connection, Fulfillment and Home—under which to organize new opportunities and movements.

Within each of these six pillars, there are two powerful tailwinds—macro trends—that companies can ready their sails for. These macro trends may push or pull specific industries and organizations in different directions, but they are critical for all businesses to consider due to the depth and scale of their impact on consumers, culture and spending habits.

Today is about envisioning potential. Our goal with this report is not to predict the future, but to understand the underlying forces shaping it in order to identify where the best opportunities lie. These are the movements defining the promise of today and beyond.

PILLAR 1. ORGANIZATION

From central command to decentralized everything

The structure of tomorrow's world is being built with decentralization at its core.



Hive Mind: Decentralized business models will restructure the relationship between consumer and brand. The relationship will evolve into one of collaboration and co-creation.

Fishbowl Brands: As transparency becomes a standard brand promise, it will no longer be able to stand on its own. Consumers will seek 24/7 access to tools that provide on-demand information about products and services, as well as the means to monitor, manage and predict their experiences.

Hive Mind

WHAT IT IS

Value creation and ownership will become increasingly decentralized; energizing the dynamic between brand and consumer. This will mean more creativity and synergy from both sides. The rise of NFTs and fan-made products represent the first wave of this shift. Brands and consumers will make decisions together—a synchronized, buzzing hive but without a queen bee. Regardless of the degree of decentralization realized in specific industries or businesses, collaboration with communities and consumers in defining brand narratives and value will become undeniable.



93%

of marketers agree that content created by consumers performed better than branded content.

State of UCG 2021 Report, Tint

Consumers are the most valuable asset for any company to tap into.

- The Metaverse, a largely community-driven market, may reach \$783.3 billion in 2024 vs. \$478.7 billion in 2020. Bloomberg (2021)
- 88% of brands agree that collaborating with consumers drives revenue, and 81% of consumers said brands who collaborate are more authentic. Bulbshare (2018)



THEN AND NOW

Then: Products and brands, designed from the inside-out. Brands have too often been slow to react to consumer trends and shifting behaviors. Outside of customer service, there was a lack of direct feedback loops between brands and customers.

Now: Products and brands, designed from the outside-in. Spurred on by the boom of the creator economy and increasingly popular digital devices like NFTs, value creation stems from the everyday consumer, we've entered a new era of consumer empowerment and earnings. With no need to wait for lengthy market research cycles, consumers are making money while having a more direct impact on product and brand decisions than ever before. The companies on top are leaning into these communities.

ANALOGS

Bored Ape Yacht Club | Shared status that retains exclusivity

Digital ownership will create its own rules, demonstrated most prominently with Bored Ape Yacht Club, a community defined by ownership of the iconic Bored Ape character NFTs. Owners are assigned the rights to a unique ape character and allowed to commercialize their character as they wish, adding to the wheel of co-creation and building on existing assets. Total all-time sales to date surpass \$2B with more than 10,000 members. BeInCrypto (2022)

- \$22B is the total amount spent on NFTs in 2021—up from \$100M in 2020. ARTnews (2021)

Mirror.xyz | Redistributing creativity and profits in publishing

Mirror is the first decentralized publishing platform that revolutionizes the way writers fund, share and monetize their projects, leveraging cryptocurrency and blockchain rather than typical transactions for greater transparency. Claiming to be the next big DAO (decentralized autonomous organization), writers are considered co-owners of the platform, where users can crowdfund a story idea. When it's published, the author and funders—rather than a publisher—share the profits. In short: “writing as usual, publishing as never before.”

- After just one year, the startup was valued at \$100M, with investments from Andreessen Horowitz and Union Square Ventures. The Information (2021)

CO-CREATED GROWTH

- There are currently 2,771 crowdsourced product ideas on the Lego Ideas website, 38 of which are on shelves today. [Lego Ideas \(2022\)](#)
- MetaFactory is a marketplace for 'phygital' apparel by community-owned brands. [Forbes \(2022\)](#)
- Nike Cryptokicks allow NFT holders to co-create new shoe styles. [Vogue Business \(2022\)](#)
- McDonald's released their first exclusively fan-made menu. [Yahoo! News \(2022\)](#)
- The number of people owning cryptocurrency worldwide has jumped from 15.2 million people in July 2017 to 82 million crypto owners in July 2022. [Forbes \(2022\)](#)
- Reddit, a decentralized discussion platform, reported a 44% growth of daily active users in just one year. [WSJ \(2020\)](#)

PROVOCATIONS

The power of the collective is on the rise. Putting collaboration center stage and moving away from traditional ideas of ownership could mean the difference between a quiet hive and the healthy buzz of community.

- Could selling limited edition "lifetime" NFTs, that provide the holder with access to special benefits, help grow a community around your brand?
- How could you take advantage of the lessons of DAOs in your business, for example, reimagining the way your company votes on decisions and ensuring team members have an active stake in the organization?

Fishbowl Brands

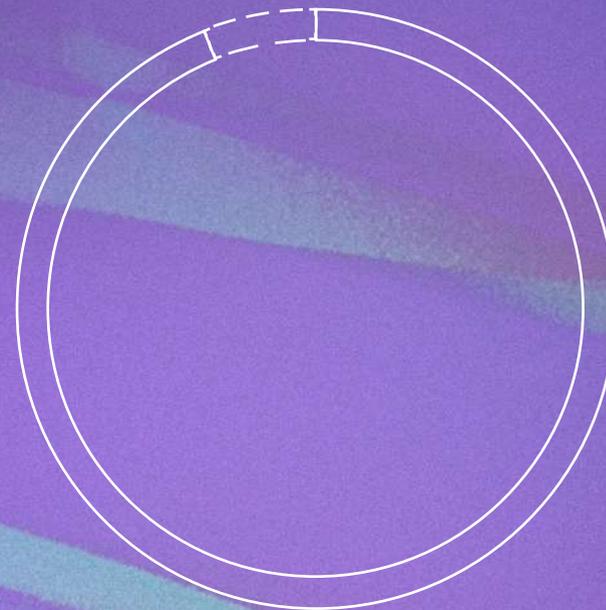
WHAT IT IS

Data is knowledge, and we're seeing a movement towards 360-degree data sharing for greater understanding and consumer empowerment. There's an increased interest in brands that exhibit radical transparency. This means more brands exist as if in a fishbowl, allowing consumers to view company data and information at every level, from product features to org structures.

Likewise, new opportunities are being created around consumer data transparency and sharing, with organizations creating products that provide their users with additional benefits by sharing their data. As such, new methods of verification, tracking and tracing will become increasingly important. The proliferation of accessible, trustworthy data will help consumers see clearly when it comes to their spending, fitness, health, travel and beyond.

94% of customers are likely to show loyalty to a brand that offers complete transparency about all aspects of their business.

Marcom (2021)



Prediction and control creates a sense of security.

- 83% of consumers want more control over their own data. PwC (2020)
- 93% of health organizations say predictive analytics, reliant on consumer data, is important to the future of their businesses. Health Tech Magazine (2019)

THEN AND NOW

Then: Transparency means exhibiting “doing good.” Businesses were called on to clean up their act and report their processes and impact—from the ingredients they used, to where they sourced raw materials and how they treated their workers. In other words, the first big transparency push, which saw consumers lean towards ethical companies, was deeply intertwined with a marketing push.

Now: Transparency means no surprises. Transparency continues to be about ethical issues such as workers' rights and the environment, but its reach now extends to multiple levels of consumer experience. Consumers can decide how to share their data and are able to harness the collective power of data to help predict costs and avoid risk in their daily spending choices. Organizations who combine openness about how they use personal data and offer benefits to those who chose to share gain consumer trust and win new business.

ANALOGS

Hopper | Safeguarding against uncertain futures with predictive travel analytics

Hopper rose to fame by archiving trillions of flight prices to help users answer one question: “Should I book my flight now, or wait?” In doing so, it promised to save consumers as much as 40% on flights. Rather than crushing its business, the pandemic accelerated Hopper's transformation from flight tracker to fintech giant via a two-fold strategy. First, the company expanded ancillary services with options like price freeze and trip protection, which provide an additional layer of futureproofing. Second, the company moved deeper into B2B territory, offering its data to businesses such as Capital One and co-powering Capital One Travel, a new service for cardholders.

- Hopper was valued at \$5B, as of February 2022, up from \$3.5B at the end of 2021. Skift (2022)

Allstate Auto Telematics | Saving money, living better

Allstate is championing telematics as a tool for expunging auto insurance practices that place minorities at a disadvantage. The insurer's B2B arm, Arity, also sells telematics services to other insurers. Considering that just over two million of Allstate's 22 million auto policyholders are enrolled in its telematics program, there is plenty of room for future growth. Early wins with Allstate telematics back the notion that consumers will share their data when there is a clear benefit in return (e.g., saving money) and transparency in how their data is being used. WSJ (2021)

- The valuation of auto telematics is forecasted at \$442B by 2030, up from \$64B in 2020. Globe Newswire (2021)



PROVOCATIONS

Brands who succeed in creating openness around their own information as well as enabling an honest and mutually beneficial openness in the data of their consumers are poised to win trust and markets. In a fishbowl environment, organizations that tap into these opportunities for two-way radical transparency will stand out.

- How might your organization create a system that offers rewards to consumers who monitor and share their data relating to lifestyle habits, product choices or spending decisions?
- How might you leverage the blockchain to build a virtual experience that offers consumers complete transparency about the provenance of your products or services?

TOOLS FOR TRANSPARENCY

- Eligible, a predictive B2C tool that protects patients from surprise medical bills, raises \$25M. [Crunchbase \(2022\)](#)
- Eluceda hardware checks the authenticity of whisky from the comfort of the home. [Yahoo! News \(2021\)](#)
- FYPM is the Glassdoor for creatives, offering transparent wage information. [NYTimes \(2021\)](#)
- Modern Fertility makes fertility testing accessible beyond the doctor's office. [NYTimes \(2021\)](#)
- Friso lets you track where your milk comes from. [Forbes \(2021\)](#)
- Dntl Bar promises dental care without surprise bills. [Business Insider \(2019\)](#)

PILLAR 2. IDENTITY

From rigid frame to multidimensional canvas

Personal identity will be as moldable and fluid as fashion, yet more true to the self than ever before.

Malleable Masculinity: The rules that dictated what traditionally 'masculine' consumers bought or used will break as individuals defy societal expectations and embrace their true interests and identities.

Extended Identity: Virtual worlds will alter traditional notions of identity, freeing people to change aspects of themselves—or completely distinguish themselves from the physical world, creating a new, reimagined version of the self in the process.



Malleable Masculinity

WHAT IT IS

Social change is impacting the strict concepts of what masculinity is, with more men feeling confident expressing themselves in ways that the traditional boundaries of masculinity previously prevented. New behavioral and aesthetic definitions of masculinity are being explored through the arts, media and industries from beauty to fashion. The critical examination of masculinity is no longer reserved for the avant-garde—it's becoming common, and it's having a big moment. A result is that the boundaries between masculinity and femininity are blurring, and genderless expressions are on the rise.



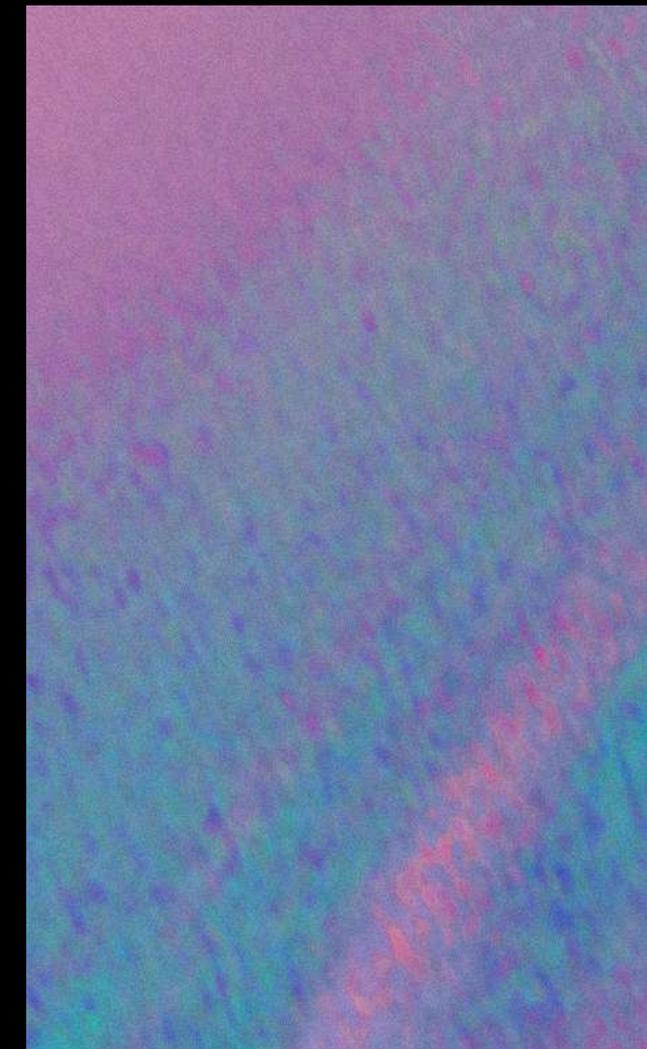
of consumers believe that gender doesn't define a person as much as it used to.

Wunderman Thompson (2020)

New perspectives in masculinity broaden horizons.

- The men's beauty and personal care market is expected to hit \$166 billion by the end of 2022. Statista (2021)
- 78% of men believe that fathers and mothers should have equal responsibility in childcare. GQ (2019)

The boundaries of masculinity will continue to expand as brands adopt a more fluid, sometimes genderless, approach to their product offerings.



THEN AND NOW

Then: Nonconforming definitions of masculinity are “alternative.” Any open exploration of the boundaries of masculinity was relegated to alternative boroughs of cosmopolitan cities. In mass media, individuals who broke the traditional mold of masculinity were few and far between, and when they arrived, they were set apart from the rest—provocative others rather than relatable subjects.

Now: The exploration of masculinity injects fresh energy into gender norm conversations. As society increasingly accepts the idea that gender identity is a spectrum, conversations and media portrayals of gender become more complex and nuanced. Masculinity is no longer constrained and prescriptive, but can be portrayed with greater richness, depth and relatability. Individuals can more confidently connect with new modes and styles of self-expression when they see places for themselves on the spectrum of masculinity.

ANALOGS

Telfar | Inclusive designs with all in mind

Telfar is a Brooklyn-based clothing brand that produces popular unisex garments and accessories. Telfar Clemens, the self-taught designer behind the brand, reached fame with the launch of his best-selling Shopping Bag—so popular some call it the Bushwick Birkin. Telfar's success is largely due to its inclusive designs. From petite to plus-size, Telfar's genderless accessories and garments are "not for you, but for everyone." NYTimes (2021)

HIMS | Male personal care takes center stage

Launched in 2017, Hims is a men's wellness brand and telehealth platform whose service offerings address issues like hair loss, erectile dysfunction and mental health. Recently, Hims has expanded its offerings to beauty products and skincare. Their new products include a moisturizer, wrinkle cream and a glow serum for men. Hims aims to make prescription skincare products accessible, attractive and acceptable for men.

Techcrunch (2021)

- \$1.6B Valuation, with celebrity backing of Jennifer Lopez and Alex Rodriguez. Forbes (2021)

REIMAGINING GENDER

- Founded by Harry Styles, Pleasing celebrates uniqueness through genderless beauty products.

Vogue (2022)

- Bad Bunny challenges 'traditional' ideas of masculinity in reggaeton with his music and personal style.

Remezcla (2022)

- VT x BTS Cosmetics empowers men to wear makeup.

Esquire (2021)

- Jaboukie Young-White uses comedy to promote new ideas of masculinity. The New Yorker (2021)

- Beau D. prioritizes inclusivity as their brand ethos.

Business of Fashion (2020)

- Aimé Leon Dore redefines cool with unisex clothing.

Who What Where (2022)

PROVOCATIONS

In this period of gender exploration, brands that rethink their assumptions relating to masculinity can connect with the new opportunities presented by a more open-minded consumer base.

- Could you be open to redefining masculinity in your company to ensure your workplace culture is inclusive to new forms of gender expression?
- How might your brand provide offerings for consumers who are exploring activities and products that may previously have been considered off-limits to their gender?



Extended Identity

WHAT IT IS

Identity is no longer confined to physical appearances or real-world relationships. Immersive digital worlds and experiences have given people the freedom to construct identities entirely separate from their IRL ones. These realm-fluid identities provide the space to explore a sense of self far beyond the limits, norms and expectations of physical lives.

Virtual worlds: a space for users to be their most authentic self.

- 33% of Gen Z believe their online identity is their most authentic self. [Vice \(2020\)](#)
- 55% Of Gen Z believe the internet is a more creative space than anything they experience offline. [Wunderman Thompson \(2019\)](#)



8hrs

The average American spent an average of ~8 hrs online each day.

[Marketing Dive \(2020\)](#)

THEN AND NOW

Then: Identity was inextricably bound to real-world structures and relationships. People's identities were almost always defined by their physical expressions and circumstances: appearance, style, possessions, job, social circle and IRL interactions. When determining sense of self, the adage "what you see is what you get" was a reasonable assessment.

Now: Meta-dimensional development of identity. As people spend increasingly more time online, their digital presence becomes an important part of their identity. The endless possibilities for expression and explorations in virtual spaces provide them the opportunity to create alternate personalities away from the pressures of the "real" world.

ANALOGS

Alter Egos | Projected Selves: Exploring artists' many selves

Alter Egos | Projected Selves was an exhibition at the Metropolitan Museum of Art that explored, through self-portraiture, the artists' many versions and perceptions of themselves. The exhibition sought to demonstrate the diverse virtual identities that exist through aliases, avatars, pseudonyms, alter egos and—most commonly—selfies on social platforms. Alter Egos | Projected Selves explored digital identity and the ways we distort, manipulate and project self-perception. [The Metropolitan Museum of Art \(2021\)](#)

The Sims | A space to create your own virtual reality

Initially launched in 2000, The Sims is one of the longest-running and most successful video game franchises in the world. The life-simulation game gives players the chance to build entire virtual lives by creating their characters' appearances, personalities, environment and, most recently, their Sims' pronouns. The Sims' popularity and longevity highlight the importance of a virtual space for exploration and authenticity. In 2020, the game surpassed 33 million players worldwide.

- There has been a 35% year-over-year increase in number of Sims players. [Electronic Arts \(2019\)](#)

DEVELOPING VIRTUAL SPHERES

- Balenciaga's collaboration with Fortnite recognizes that consumers are now realm-fluid. [Vogue France \(2021\)](#)
- Bitmoji creates personalized, customizable emojis of users for them to share with friends. [Digital Trends \(2021\)](#)
- DRESSX encourages virtual self-expression with their digital-only fashion brand. [Bloomberg \(2021\)](#)
- Instagram filters use AR to alter or enhance users' appearance on the app. [The Atlantic \(2020\)](#)
- Ready Player Me offers users an avatar passport to visit the many Metaverse worlds. [Yahoo! News \(2021\)](#)
- Spatial gives collaborators a space to interact through avatars and VR. [Wired \(2022\)](#)

PROVOCATIONS

- How might an IT company leverage cloud-based cybersecurity expertise to better understand how brands can help consumers build and protect their own 'phygital' identities?
- How might an eSports startup link students' physical sports performance to their digital identities to create a sports ecosystem that extends into the world of eSports and gaming?

PILLAR 3. INFLUENCE

From uniform and airbrushed to unscripted and vulnerable

Aspiration and inspiration sources
shift to reflect global realities.

Soft Power Moves: Businesses will continue to invest in developing global products, services and content. The best will celebrate different cultures in their own right, rather than in reference to U.S. culture. As brands learn to celebrate the richness of the world's citizens, they say: "Nothing is foreign."

The Post-Aspirational Standard: Luxury brands will emphasize inclusivity and accessibility. Aspirational brands will no longer focus on achieving perfection, but rather showcase wellness, diversity and authenticity by elevating the experiences of their customers.



Soft Power Moves

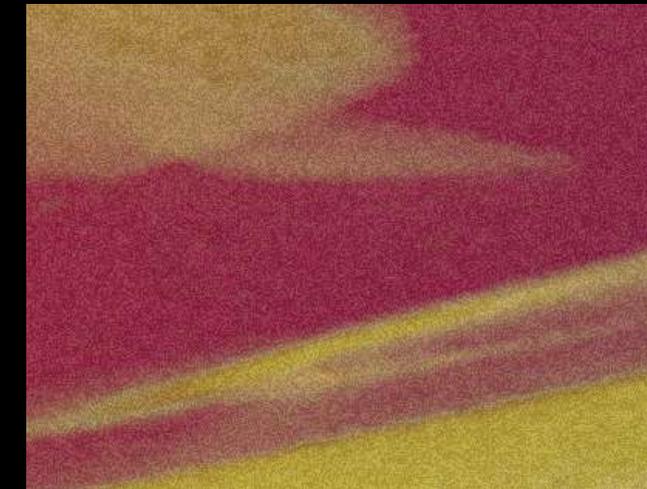
WHAT IT IS

The term 'globalization' was coined in 1983, yet we are just beginning to see what a true global melting pot looks like. Over the past few years, the South Korean government has doubled down on its largest export—culture—creating Hallyu, a “Korean Wave” of pop culture that is sweeping the globe and generating tens of billions of dollars annually. TikTok and Spotify have become culture-making machines, spreading songs, foods and social movements around the world faster than ever before. As a result, global mass media is becoming diversified like never before.



Boundaries between global cultures are dissolving.

- The global market for international food is expected to rise in value from \$49B in 2021 to \$98B in 2028. Fortune Business Insights (2020)
- Non-U.S. shows accounted for 30% of demand in the U.S. in Q3 2020. Axios (2021)



THEN AND NOW

Then: BTS who? Non-U.S. cultural influences defined and categorized by their “foreignness”—for example, the “Latin Billboards” or “Best Foreign Film.” The implicit message was clear: white, English-speaking American culture is the norm, and everything else is judged and defined in reference to it.

Now: You don't know who BTS is?! The consumption of media from multiple cultures and countries is no longer reserved for immigrants and arthouse aficionados. Mega-media platforms like Netflix, TikTok and Spotify make global virality commonplace, allowing a more diverse base of creators to access mainstream charts on a global scale. In 2020, *Parasite* became the first non-English-language film to win Best Picture (not Best Foreign Picture) at the Oscars—a clear sign of things to come.

ANALOGS

Korean TV Dominance | Netflix's South Korean shows break records

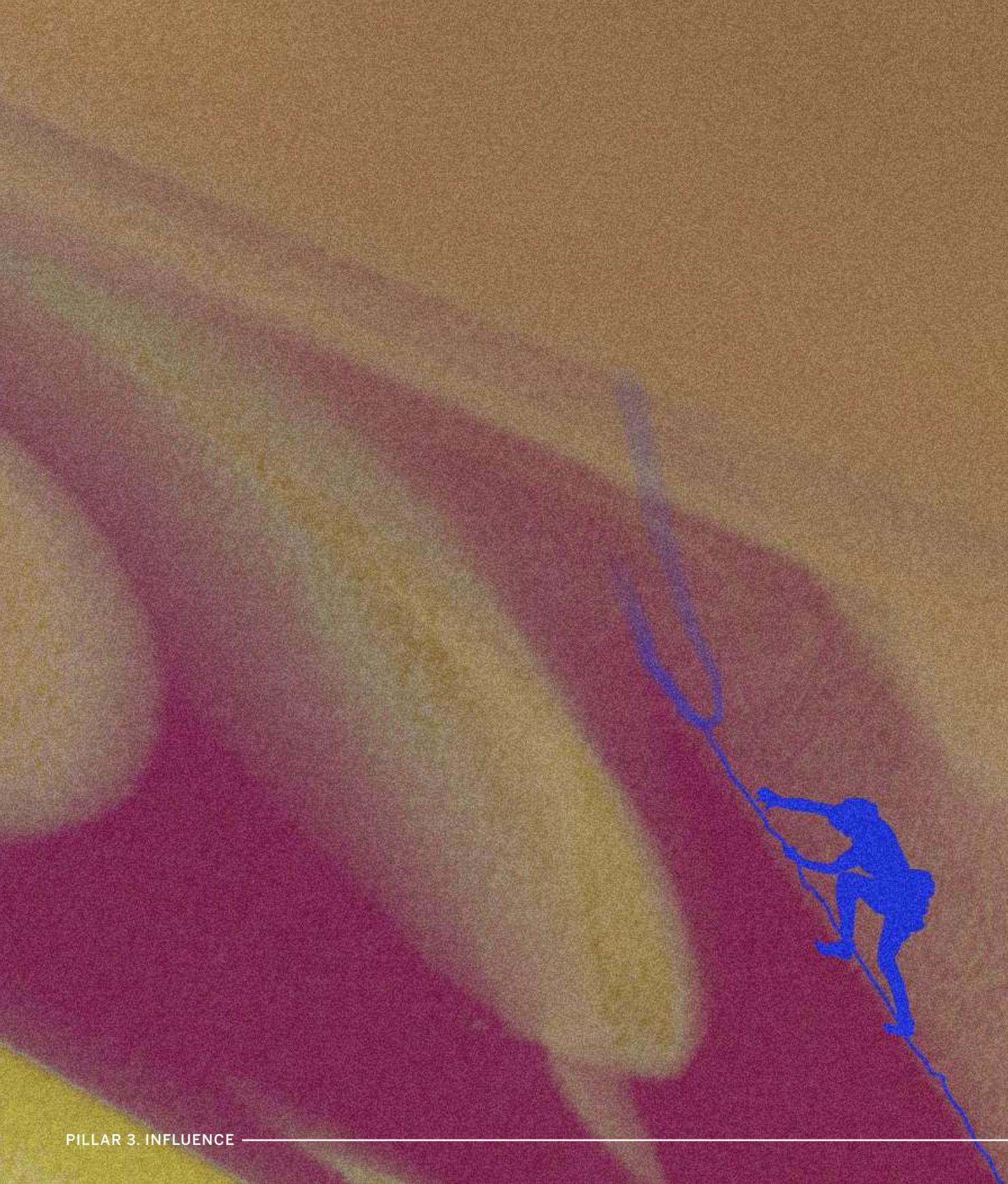
After its Netflix premiere in September 2021, *Squid Game* became a cultural phenomenon, with viewership reaching 111 million in its first 28 days, making it the number-one show in 94 countries. Shortly after, Korean horror series *Hellbound* toppled *Squid Game* as the platform's most-watched TV show ever. Netflix executive Minyoung Kim's commitment to spend over half a billion dollars on Korean content in 2021 alone has clearly paid off. Hollywood Reporter (2021)

- \$891M is the estimated “impact value” of *Squid Game*, which cost \$21M to produce. Impakter (2021)

Latin Music's Surge | Maluma goes mainstream

Latin music's recorded music revenues in the U.S. grew 37% in the first six months of 2021, generating \$407 million (up from \$298 million in first half of 2020). This makes Latin music the fastest growing sector in the entire U.S. music market, where the average growth rate is 27%. Popular artists like Luis Fonsi, Bad Bunny, J Balvin, and Daddy Yankee top the charts regularly. RIAA (2021)

- 20% is the amount of listening time younger fans spend on artists performing in languages other than English. RIAA (2021)



POROUS CULTURES

- Target picks up A Dozen Cousins Creole, a line of Caribbean and Latin American food products.

[The Source \(2022\)](#)

- Korean beauty and skincare brands like Krave Beauty and Purito are growing in popularity. [Premium Beauty News \(2021\)](#)

- Adidas x Bad Bunny release their fourth collaboration in 2022. [GQ \(2022\)](#)

- *Parasite* wins four 2020 Academy Awards and is nominated for two more. [USA Today \(2020\)](#)

- Nigerian artist Burna Boy top charts and land collaborations with Beyonce and Sam Smith.

[Billboard \(2022\)](#)

- Salmon Rice becomes one of the most popular food trends of 2021. [NY Post \(2021\)](#)

PROVOCATIONS

- How might a consulting agency build a global culture platform to help companies become fluent in the languages and trends of social influence?

- How might a global food and beverage company leverage insights into popular ingredients and flavors from around the world to create new offerings?

The Post-Aspirational Standard

WHAT IT IS

In the analog past, it wasn't hard to distinguish between 'normal' people and celebrities. With the rise of social media, seemingly everyone became a micro-influencer with a flawless complexion and luxurious life. By now, however, that type of influence has started to feel out of touch. Today, imperfection is the new authenticity, and post-aspirational consumers no longer flock to the luxury staples of the past.



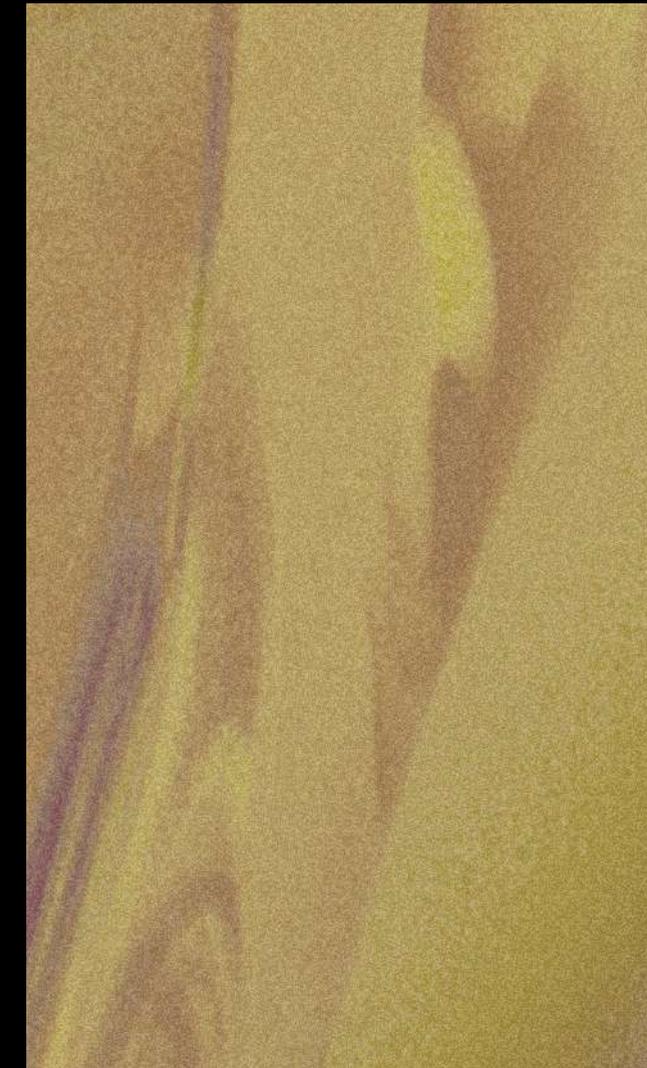
82% of Gen Z say they trust a company more if it uses images of real customers in its advertising.

Marketing Dive (2020)

Consumers are gravitating towards brands that celebrate users' authentic selves.

- 1B is the number of TikTok monthly active users in 2021, with 84% of users saying they come across relatable content and 53% saying they trust others to be their real selves on TikTok. TikTok (2021)

- 50% of luxury brands may not survive post-pandemic. Forbes (2021)



THEN AND NOW

Then: A culture that glorifies "thriving!" Social media created an entirely new generation of "discovered" celebrities from "normal" backgrounds. However, it also created the perception and expectation that people should always be thriving in all areas of life—socially, financially, mentally, physically. Consumers quickly grew tired of airbrushed filters and the incessant "life is amazing" tone that permeated the influencer landscape.

Now: It's okay to not always be okay. Mental health took center stage at the start of the pandemic. Stripped of most physical mobility and interaction, social life became limited to digital. In response to the unattainable appearances of influencers, consumers are turning to brands that create a safe space for them to feel nurtured and respected on their own journeys, rather than making them feel inferior or incomplete for what they are not.

ANALOGS

VS Collective | The end of the supermodel

After facing backlash for promoting unattainable feminine beauty standards, Victoria's Secret launched its new VS Collective initiative in 2021, which features body-positive role models across various industries, including tennis star Naomi Osaka and plus-sized model Paloma Elsesser. The initiative includes the VS Voices podcast, curvy mannequins in stores nationwide and a line of mastectomy bras. Through this initiative, Victoria's Secret is striving to reset beauty standards and appeal to everyday women. Cosmopolitan (2021)

Gap x Yeezy | Collaborations breathe life into luxury brands

Luxury brands are adapting to the post-aspirational mindset of younger consumers. Collaborations with more accessible brands have broad appeal, as they represent unique cultural and creative moments in time. In 2020, Kanye West signed a 10-year deal with Gap, projected to hit \$1 billion in revenue by 2023. When the first piece released, it crashed Gap's website and instantly sold out. Balenciaga wants in on the action and is set to drop a Gap x Yeezy collection in 2022. NYTimes (2021)

- When released in 2021, the \$200 Round Jacket crashed Gap's website and instantly sold out. Vogue (2022)

EMBRACING SHARED DIFFERENCES

- Instagram gives users the option to get rid of likes on posts. [TechCrunch \(2021\)](#)
- Angie, the relatable virtual influencer, challenges beauty standards in China. [CNN \(2021\)](#)
- Louis Vuitton launches an NFT-seeking video game to attract Gen Z consumers. [High Snobiety \(2021\)](#)
- Maye Musk becomes the face of CoverGirl at 69 years old. [Fashion Network \(2017\)](#)
- Rare Beauty promotes makeup that doesn't hide what makes you unique. [Medium \(2020\)](#)
- BuzzFeed's "Relatable" page features articles with popular shared sentiments. [NYTimes \(2019\)](#)

PROVOCATIONS

- How might a luxury clothing company use authentic and relatable brand ambassadors, rather than traditional models, to foster a more accessible brand image?
- How might a beauty brand for mature skin promote positivity and acceptance when it comes to the natural signs of aging?



From relationship points to relationships with purpose

Connections accumulated and displayed like points on a scoreboard will be replaced hand-picked human interactions that are mutually meaningful.

Slowships: Brands will aim to curb connection fatigue by enabling relationship reciprocity at the individual level. The most successful brands will not only seek to build strong connections between themselves and individuals, but between individuals directly.

Atomization of Community: Brands will increasingly segment consumers using psychographic and micro-behavioral data, which will allow them to form tight-knit audiences and encourage more active participation and loyalty—not just to the brand, but within the communities themselves.

Slowships

WHAT IT IS

In the pre-pandemic world life brimmed with chance meetings and interactions—at parties, or in checkout lines and elevators. When those interactions were suddenly sucked into the digital realm, they were no longer limited by the physical constraints of time or place. They broke the boundaries of personal space, always as close as the nearest device.

The ubiquity of digital interactions and relationships has produced a consumer desire for limitations that formerly existed solely in the physical realm. In other words, artificial constraints that enable slower, more authentic connections.

53%

of dating-app-users shifted toward more intentional dating during the pandemic.

Time (2021)

A loneliness epidemic fosters increased emphasis on intimacy.

- 87% increase in one-on-one chats in Teams, compared to a 5% decrease in large group channels, from April 2020 to February 2021. HBR (2021)
- 30% increase in demand for anxiety, depression and loneliness-related therapy treatment since the start of the pandemic. American Psychological Association (2021)



THEN AND NOW

Then: The more (followers, connections, dates) the merrier. Leveraging technology to connect with as many people as possible was the norm. Quantity was valued over quality, as social media platforms emphasized the number of followers or likes each user had, intensifying discrepancies through popularity algorithms.

Now: Intentional, reciprocally fulfilling relationships. Catalyzed by the pandemic, consumers are being more deliberate and discerning about their online relationships, favoring fewer yet more meaningful connections. Social media and dating apps are adding more intimate features like voice and video to foster interactions that are closer to those that exist IRL.

ANALOGS

Thursday | Meaningfully limited interaction

To combat dating app fatigue and stimulate successful connections, Thursday condenses the dating experience into a one-day marathon of matching, chatting and meeting. Paired with IRL events, this London-based startup facilitates authentic digital/physical interactions that demonstrably lead to more fulfilling experiences.

- \$3.5M Raised in June 2021, after accumulating 52,000 downloads in just two months. Tech Crunch (2021)

Coa | A better match for your mental health

Coa, known as an 'emotional fitness gym,' provides a better therapy experience for those exhausted by finding the right fit. With matching services running in New York and LA, as well as group mental fitness classes that span two to eight weeks, Coa encourages those suffering from mental health issues and loneliness to take proactive steps, gather routinely and form personal connections with others in their emotional fitness group.

- \$3M raised in seed round, with 3,500 members on the waitlist for its physical studio launch. TechCrunch (2020)

BUILDING CONNECTION:

- Tinder Swipe Night is an Emmy-nominated interactive series that allows users to break the ice faster.
[Fast Company \(2021\)](#)
- Marriage Pact sweeps through 66 university campuses, promising participants a more genuine pairing.
[The Stanford Daily \(2022\)](#)
- Outsite creates strong connections for remote workers through global co-living. [Forbes \(2021\)](#)
- Alma, the 'WeWork of the Soul,' offers easy-to-use client matching services. [Forbes \(2021\)](#)
- Purchasers of the Dinner DAO NFT get to make unique, IRL connections over a meal with eight other members.
[The Spoon \(2021\)](#)
- Mon Ami's Companions app helps seniors combat loneliness through student companionship.
[NYTimes \(2020\)](#)

PROVOCATIONS

- How might a student experience organization foster connection between high school students, even after they graduate?
- How can a healthcare company create consistent, meaningful touchpoints between telehealth providers and patients so that relationships don't wither?



Atomization of Community

WHAT IT IS

Individuals are moving beyond identification with broad communities in favor of smaller squads, with whom they share many interests and lifestyle factors. From stationary biker gangs to guerrilla gardener groups and gamer kin, micro-communities will form the basis for macro-societies as individuals work to unite their squads in new, exciting ways.

Community exists on a spectrum of size, shape and engagement level.

- Community-driven referrals have 3x the lifetime value of non-community driven referrals.

Talking Influence (2020)

- 80% of startup founders reported that building a community of users is most important to their business, with 28% describing it as a 'competitive moat.'

HBR (2020)

62%

of Gen Z and Millennials believe brands have the power to create communities based on common interests and passions.

Marketing Dive (2020)

THEN AND NOW

Then: Audience targeting split communities at the demographic level. Brands identified "core consumer audiences" based on demographic information such as gender, age and geography, which advertising could quickly identify and target. Even with more complex targeting factors, such as purchasing history, this approach could only tell part of the story of consumer identity.

Now: New-age psychographics tap high engagement microcosms. Brands have shifted to audience segmentation that clusters consumers based on cultural identifiers such as social identity and alignment, passions or personal characteristics, fostering greater emotional connection by tapping into engaged micro-communities. Beyond typical KPIs, brands might also begin to measure ad inputs such as "potential micro-virality," where the desired output is strength of engagement at the micro-community level rather than large-scale awareness.

ANALOGS

Saturn | Integrating social into the syllabus

Saturn makes every moment at school social by providing chat tools and notifications that revolve around students' schedules. By aggregating class groups, sports teams and club members into easy-to-use chat groups, Saturn links the entire school ecosystem through its micro-communities. Saturn also pioneered a student ambassador program to make the app feel student-led.

- \$44M raised in funding, with plans to expand nationally in 2022. **Forbes (2021)**

The North Face | The power of collaborations in staying relevant

Founded in 1968, The North Face has mastered the art of staying relevant through strategic collaborations. With their varied apparel offerings, The North Face appeals to a wide range of micro-groups. From outdoor adventurers and city dwellers who appreciate their functional basics, to retro-era lovers and fashionistas who couldn't wait to cop one of the highly-coveted Gucci x North Face designs, diverse collaborations have made The North Face a cult brand with a diverse and loyal following.

- 243% increase in Lyst searches of The North Face between 2020 and 2021. **High Snobity (2021)**

ACTIVATING PARTICIPATION

- Peloton Tags allow you to connect with others using keywords, such as alma maters, hometowns or identities.

Peloton (2022)

- Twitch's community map uses colors to visualize its many micro-communities. **GitHub (2021)**

- Chipotle Together unites 3,000 food lovers for digital lunch parties featuring celebrities and giveaways.

Thrillist (2020)

- Glow Recipe launched a private Instagram, @realglowgang, to target their micro-community exclusively. **Vogue Business (2020)**

- Squadded Shopping Party encourages users to shop online in real-time with close friends.

Vogue Business (2021)

- TikTok's behavioural algorithms profile individuals and show them content based on their 'side of TikTok'.

NYTimes (2021)

PROVOCATIONS

- How might a juice brand help juice lovers find others who share the same favorite juice flavor or bond over shared interests, from health and fitness to fashion and shopping?

- How might a youth camp company create micro-communities of educators across its hundreds of partnered schools that are organized based on teaching styles and passions to drive educator engagement?



PILLAR 5. FULFILLMENT

From climbing the ladder to nurturing the soul

Workers will be more intentional: setting boundaries, prioritizing wellness, making time to grow their side hustles, spending time with family and investing in friendships. There is no one-size-fits-all guidebook for life.

The Great Rebalancing: Companies will invest in tools that drive employee engagement to fight the Great Resignation. Work will be about maximizing productivity in a shorter period of time so that employees can get back to living life. We'll see more wellness policies in place to prevent burn out.

The Agency Economy: Brands will make it easier than ever for consumers to become creators and make some extra cash. We will see increased emphasis on ensuring that creators are fairly compensated for the size and engagement of their audience.



The Great Rebalancing

WHAT IT IS

Before the pandemic, companies succeeded in blurring the line between work and life with perks and distractions like happy hours, ping pong and free drinks on tap. For many professionals, remote work erased the line completely.

In response, they are setting new boundaries between work and their personal lives, regaining 'balance' by investing more in relationships, wellness and travel. The burden now falls on companies, who will have to meet workers' new needs and expectations with increased flexibility and better working conditions in order to retain them.



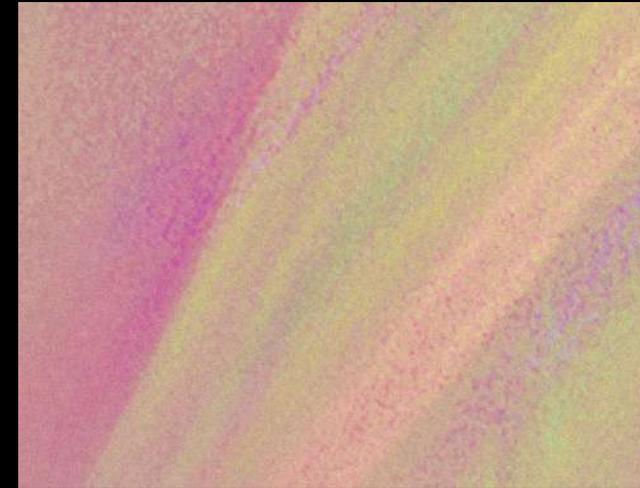
\$22B

The RPA market, including RPA-related services, is predicted to grow to \$22B by 2025.

Forrester (2022)

The humanization of the workplace is (finally) here.

- 78% of employees who work from home say it improves their work-life balance. ONS (2022)
- 83% of U.S. employees suffer from work-related stress, resulting in a loss of up to \$300 billion cost per year for businesses. American Institute of Stress (2019)



THEN AND NOW

Then: First one in, last one out. The relentless grind was not only accepted but glorified. Office perks such as endless cold brew on tap, nap rooms and midweek happy hours made it easier to justify arriving early and staying late. What's more, "bring your whole self to work" initiatives made it harder to bring your whole self back home, as boundaries between the two increasingly blurred.

Now: Don't push my boundaries. Employees don't want a Band-Aid for burnout, and they're asking for more from their employers—wellness policies, holistic medical plans that cover mental health and more vacation days. The power is in employees' hands as traditional companies fight for retention and adapt to evolving expectations.

ANALOGS

Lattice | Optimizing human resource management

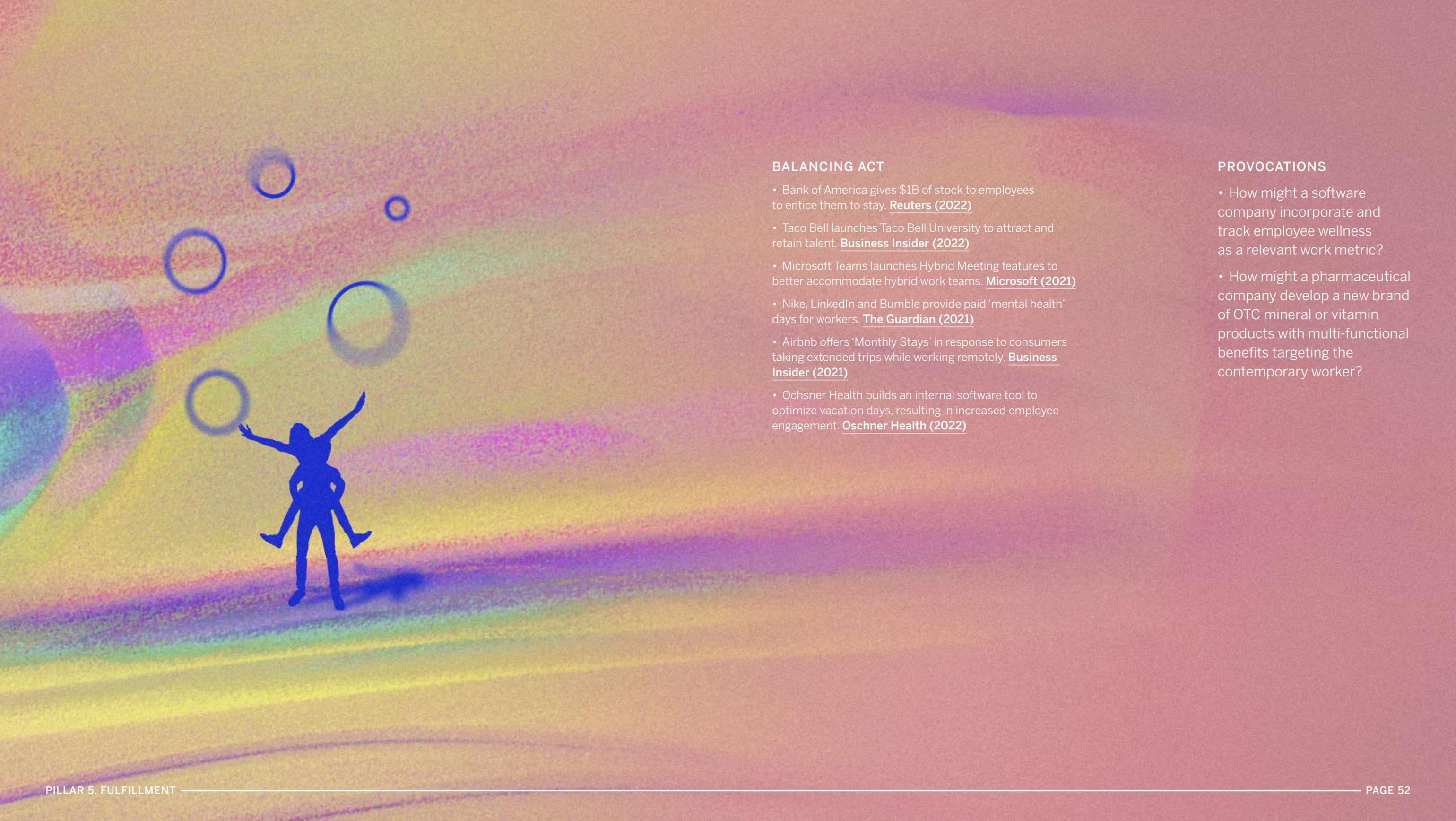
Workforce management platform Lattice focuses on employee engagement and development. Lattice helps companies increase retention rates by keeping employees attentive to personal growth goals, providing feedback, conducting reviews and setting up one-on-ones. Keeping employees of all levels connected to each other is proving key for companies hit by the Great Resignation. Today, over 3,000 companies use Lattice.

- \$175M raised in funding in 2022, bringing total funding to \$330M with valuation of \$3B. TechCrunch (2022)

Headspace | Mindfulness is the new power move

Headspace has made its name as one of the most popular meditation apps on the market. With the rise in wellness practices, companies are looking for a way in. Today over 600 businesses have partnered with Headspace to offer the app for free to their employees. Headspace also offers customized enterprise solutions that allow employers to launch mindfulness programs and manage engagement through measurement tools. TechCrunch (2020)

- \$97B is the size of the corporate wellness market by 2027, growing at a CAGR of 6.8%. Forbes (2020)



BALANCING ACT

- Bank of America gives \$1B of stock to employees to entice them to stay. [Reuters \(2022\)](#)
- Taco Bell launches Taco Bell University to attract and retain talent. [Business Insider \(2022\)](#)
- Microsoft Teams launches Hybrid Meeting features to better accommodate hybrid work teams. [Microsoft \(2021\)](#)
- Nike, LinkedIn and Bumble provide paid 'mental health' days for workers. [The Guardian \(2021\)](#)
- Airbnb offers 'Monthly Stays' in response to consumers taking extended trips while working remotely. [Business Insider \(2021\)](#)
- Ochsner Health builds an internal software tool to optimize vacation days, resulting in increased employee engagement. [Ochsner Health \(2022\)](#)

PROVOCATIONS

- How might a software company incorporate and track employee wellness as a relevant work metric?
- How might a pharmaceutical company develop a new brand of OTC mineral or vitamin products with multi-functional benefits targeting the contemporary worker?

The Agency Economy

WHAT IT IS

With significantly less time spent on commutes and social outings, and greater financial flexibility from side hustles and government pandemic payments, workers have been empowered to quit their pre-pandemic jobs and pursue their passions full-time rather than climb the corporate ladder.

As a result, they've reclaimed agency over their lives and, in doing so, made the hobbyist marketplace much larger. In the new era of work, promotions will be assessed in terms of time and interest, not only monetary compensation.



of the workers who resigned in first half of 2021 did so to launch their own business.

Inc. (2021)



Consumers are gravitating towards brands that celebrate users' authentic selves.

- 33% of Americans have a side hustle, and another 24% plan to start one. The average American with a side hustle makes a \$10k per year from it.

Zapier Harris Poll (2021)

- \$104B is the expected value of the content creator market in 2022, up from \$20B in 2021. Forbes (2021)

THEN AND NOW

Then: Working 9 to 5—it's all taking and no giving.

Social status was typically linked to employment, and "where do you work?" was one of the first things everyone asked at parties. With such pressure to climb the traditional corporate ladder, the majority of people's creative and entrepreneurial energy was reserved for (or drained by) their '9 to 5.'

Now: Working 9 to 5—got a passion and a vision.

Increasingly, the question "what do you do?" is more about what someone likes to do versus what they are paid to do. Workers are reserving more energy for exploring their passions, and having multiple revenue streams isn't necessarily a sign of economic struggle.

ANALOGS

Twitch | Getting paid to game

Twitch is an interactive live-streaming service, connecting millions of users with content that spans gaming, entertainment, sports and music. As users flock to the platform, skilled streamers stand to make a profit by sharing their hacks and expertise. Expert Twitch expert streamers can make between \$3,000 to \$5,000 each month playing around 40 hours a week—more than enough to comfortably replace an office job.

Business of Apps (2020)

- \$889M is the amount Twitch paid out to streamers from January to September 2021, up from \$517M over the same period in 2020. WSJ (2021)

Etsy | A megaphone platform for crafters

Etsy is a global online marketplace where people come together to make, sell, buy and collect unique items. As the creator economy booms, sellers are on the rise and Etsy has been busy with acquisitions. The company acquired Reverb, a shopping portal for musical instruments and gear, in July 2019 for \$275 million; fashion resale marketplace Depop in June 2021 for \$1.63 billion, and Brazil-based handicraft marketplace Elo7 in July 2021 for \$217 million.

- Number of active sellers up 2x YoY and 28% advertising revenue growth in third quarter of 2021. Etsy Third Quarter 2021 Results

OPENING NEW REVENUE STREAMS

- Amazon offers \$10,000 for workers to quit their jobs and start a business delivering Amazon packages.

[Wired \(2019\)](#)

- TikTok Shopping allows creators to promote and sell products through partnership with Shopify.

[NY Post \(2021\)](#)

- LinkedIn “Creator Mode” feature to display content and get access to tools. [WSJ \(2021\)](#)

- Twitter launches “Super Follows,” a premium subscription option for followers to support creators.

[Reuters \(2021\)](#)

- Sunroom connects creators with their audience through monthly subscriptions, direct messages, video calls and custom photos. [TechCrunch \(2022\)](#)

- Play-to-earn blockchain games take off in India.

[Business Insider \(2021\)](#)

PROVOCATIONS

- How might a company selling parental products design a social platform that brings consumers together and helps passionate parents monetize their parental tips and tricks?

- How might a software company create rewarding ways for freelance data scientists and engineers to contribute their expertise flexibly?

From all-or-nothing eco warrior to casual climate routinist

The fight against climate change will shift from radical to routine, becoming increasingly ingrained in the fabric of daily life.

Alexa, Save the Planet: Businesses will incorporate consumer-facing features that emphasize climate resilience, focusing on adapting to new climate realities rather than reversing climate change. These will emphasize everyday consumption choices instead of long-term executive strategies.

Ambient Climate Behaviors: Companies will develop apps and IoT devices that track the impact of individual actions on the environment, and brands will display climate claims on all packaging and marketing materials. Plant-based food options will proliferate further, moving from grocery stores and specialty restaurants to franchises and Michelin-starred restaurants.

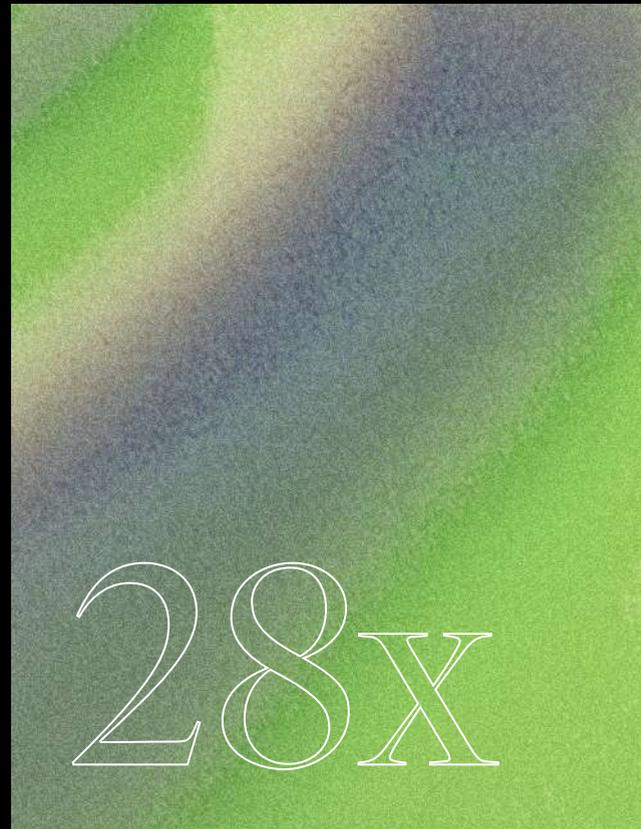


Alexa, Save the Planet

WHAT IT IS

Brands are realizing that carbon offset payments, mission statements and PR campaigns about “taking a stand” on climate action are insufficient to meet the challenge ahead. Instead, they’re beginning to incorporate sustainability measures directly into their business strategy and products, providing consumers with effortless climate-active features and services.

Even as consumers desire more sustainable product and service options, however, many will feel unsure how to change their behavior. They will look to brands to make it easy for them to make positive choices as a consumer.



is the average growth rate of companies with green initiatives, compared to companies without them.

Shawmut Communications Group (2020)

Change isn’t imminent—it has arrived.

- \$10T is the estimated value of business opportunities unlocked by the “nature positive” movement.

WeForum (2021)

- \$42B is the amount of losses covered by insurance firms (10-year high) due to climate disasters, with fires in the Western U.S. costing approximately \$13B.

Vox (2021)



THEN AND NOW

Then: Taking a ‘billboard’ stance on climate. Companies trumpeted their climate activism, adding climate pledges to their mission statements and publishing sustainability reports on their websites. But more often than not, these were branding shifts for the sake of optics, not operational shifts for the sake of the climate. Any real impact likely happened in areas of the business that were difficult for consumers to see or participate in.

Now: Expanding product and service ‘climate menus.’ Instead of loudly signaling their climate efforts, brands today are trying to become climate ambient—gently incorporating sustainability across their business—in order to meet consumers’ expectations for products and services that help them feel that they are fighting climate change without changing their routines.

ANALOGS

Google | Designing for the road less travelled (read: less polluted)

Google Maps recently launched a “green mapping” feature, which gives drivers the choice between the fastest and most fuel-efficient routes. This new feature is part of a number of updates Google introduced in 2021, each designed to help people make more environmentally friendly decisions. The green mapping option also includes providing sustainability information and alternatives in user searches for flights, hotels, financial services, home appliances and vehicles.

- 1M tons per year of CO2 emissions is what Google estimates to save with green mapping, the same as removing 200K cars from the road.

(Silicon Angle, 2021)

SAP | B2B solutions to reduce carbon footprint

Measuring and monitoring progress is essential to achieving sustainability targets. Software company SAP offers “Climate Change Solutions” services to its clients that help minimize the greenhouse gas emissions of products and operations using embedded analytics and transactional capabilities. By running customer applications in the SAP green cloud and providing full transparency about its charging processes, energy costs and power grid utilization, SAP is measuring its own way to carbon neutral by 2023.

- 14% is the average reduction in CO2 emissions year over year for SAP’s Climate Change Solutions customers.

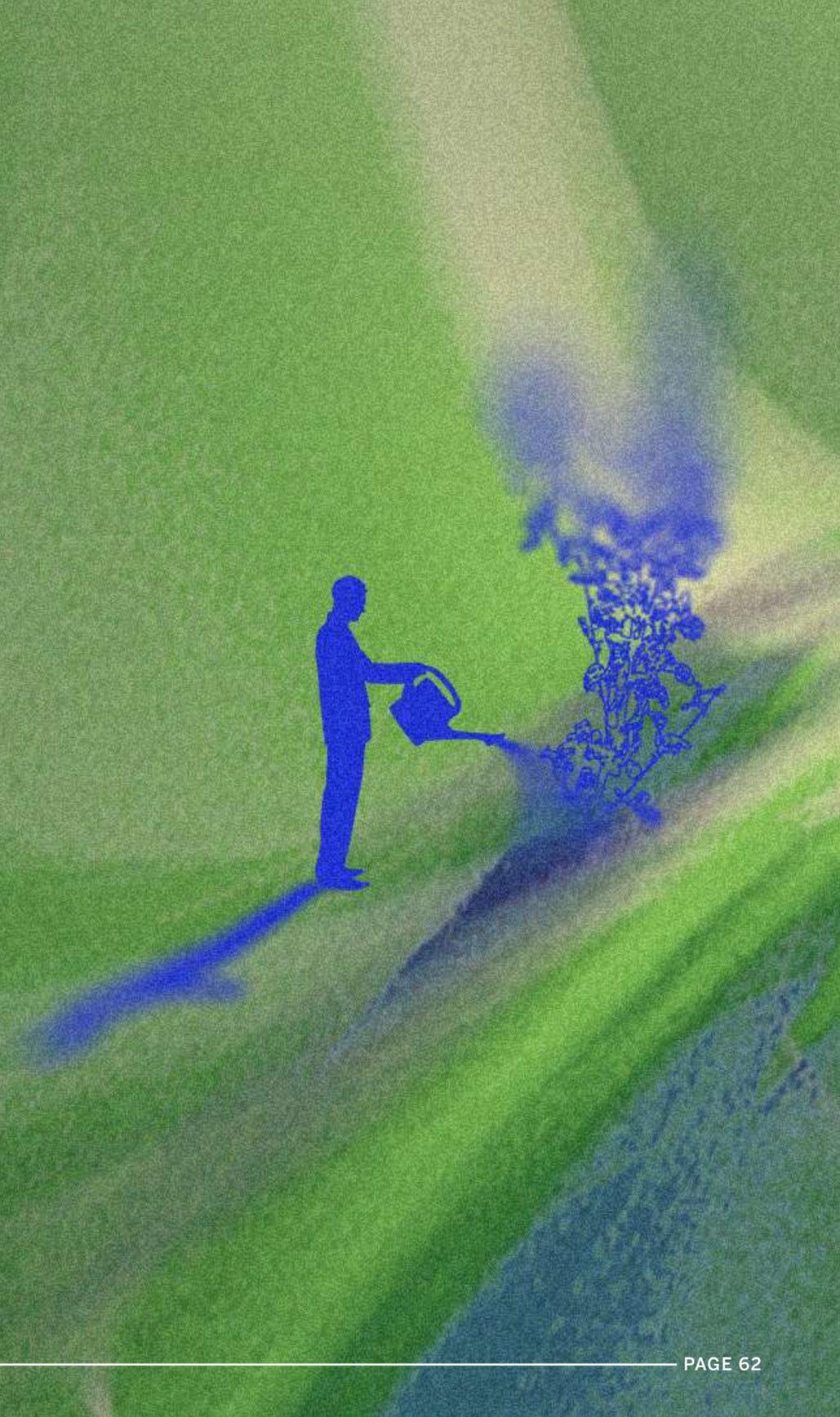
SAP (2022)

TAKING THE LONG VIEW

- Kroger partners with Loop to launch reusable packaging. [WasteDive \(2021\)](#)
- Danone fights soil degradation by helping farmers reduce water usage via training and financing. [Danone \(2021\)](#)
- Starbucks pilots its open-source Greener Store Framework in Shanghai, focused on circularity. [Greenbiz \(2021\)](#)
- LEGO reveals first prototype of sustainable bricks made from recycled plastic. [Lego \(2021\)](#)
- Nike Grind helps transform manufacturing scrap and old shoes into useable recycled materials. [Nike Grind \(2022\)](#)
- Vertical veggie farming startup Plenty raises \$400M from Walmart. [Food Dive \(2022\)](#)

PROVOCATIONS

- How might a commerce company develop a framework that helps their D2C consumer brands innovate with the sustainability of our planet at top of mind, from packaging to product development?
- How might an airline influence onboard consumers to be greener by communicating the impact that various flight activities have on the environment?



Ambient Climate Behaviors

WHAT IT IS

According to experts, our most realistic strategy for confronting climate change is resilience rather than reversal. As we pursue the critical goal of reducing emissions and greenhouse gas levels, it is inevitable that we will have to live with significant changes to the global climate. Businesses and brands can help build climate resilience by providing consumer solutions—food, clothing, skincare and even health insurance—that prepare individuals to live with and live within those changes.

\$44B is the current size of the global plant-based food market, expected to hit \$77B by 2025.

Statista (2021)

\$44B

Consumers consider the planet as a stakeholder in their daily purchase decisions.

- The resale market is growing at a rate 11 times faster than traditional retail and should be worth \$84 billion by 2030, with fast fashion predicted to be worth about \$40 billion. Harper's Bazaar (2021)
- 60% of millennials buy from companies that are conscious of protecting the environment and favor items with eco-friendly packaging. Strategy + Business (2021)

THEN AND NOW

Then: Climate activism as counter-culture. Until recently, the front line of climate activism was composed primarily of trailblazers who made absolutist changes to their lives: zero meat, zero flying, zero plastic. The impact of these efforts was limited due to a lack of mainstream uptake. A general response was “that’s honorable for you, but it’s not realistic or possible for me.”

Now: Quiet, commonplace sustainability. Consumers do not get a gold star for recycling, carpooling or picking trash off the beach. The severity of the climate crisis has been widely acknowledged, and consumers shift to brands and everyday products that help them adjust and minimize their impact to account for new climate realities.

ANALOGS

Depop | Pre-loved but no less coveted

Two in five consumers that buy pre-owned apparel say they are “replacing fast fashion purchases with second-hand clothing.” Riding this wave is Depop, a fashion resale marketplace where consumers can discover upcycled items from unknown brands and luxury staples. The retail industry is seeing rising demand for pre-owned items, driven by Gen Z’s desire for more sustainable clothing. Roughly 90% of Depop’s 30 million users are aged 26 or under. Retail Insight Network (2021)

- 33M is the number of consumers who bought second-hand apparel for first time in 2020. ThredUp’s 2021 Resale Report

Aspiration | The first climate-resilience incentives credit card

The Aspiration Zero credit card is an offering from Aspiration, a financial services provider with products geared toward socially and environmentally conscious consumers. Its main benefit is allowing cardholders to offset their carbon footprint by turning every purchase into a newly planted tree. Aspiration is one of the fastest growing financial institutions in America, with more than five million members.

- 36,548 metric tonnes of CO2 have been offset as part of Aspiration’s Planet Protection program. Forbes (2022)

GREENING THE EVERYDAY

- Reusable packaging is going mainstream—Dial, Dove and Palmolive are among those to have introduced refillable or reusable packaging. [Plastics Today \(2022\)](#)
- E-commerce giant Alibaba pledges to be carbon neutral by 2030. [Alibaba \(2021\)](#)
- The new Audi A6 e-Tron, with a 350+ mile driving range, is expected in 2022, pushing ahead the electric e-volution. [Top Electric SUV \(2022\)](#)
- Interest in 'wild foraging' shot up in 2020, with some foraging educators receiving up to 500% bumps in traffic. [Civil Eats \(2020\)](#)
- Doconomy enables users to make sustainable payments. [Doconomy \(2022\)](#)
- Google Flights adds carbon emissions data to its searches. [The Hill \(2021\)](#)

PROVOCATIONS

- How might a branded food company develop climate-conscious snacks using regenerative agriculture techniques that improve the health of the soil?
- How could a retailer make use of emerging technology to assess the climate impact of each product they sell—enabling them to make informed decisions on the items they stock?



These shifts in consumer values and behavior will define the coming months and beyond. Their potential to impact culture and spending is profound—and how each business responds to these trends will be crucial for success going forward. Now is the time to realize the opportunities that this time of change presents.

At frog, we imagine and build experiences, products and businesses that disrupt the status quo, win hearts and realize the future.

We work across five core pillars:

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Implement strategies, business models and ventures that drive sustainable growth.

BRAND

Engage audiences with a meaningful brand vision, purpose and content.

EXPERIENCE

Outperform competitors with compelling products, services and experiences.

ACTIVATION

Activate customers and deepen relationships across touchpoints.

ENABLEMENT

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