CONSUMER VISION 2035

The Era of the Insight to Foresight Pivot

About this study

At dentsu, we are driven to innovate. Through innovation, we ensure the impact our clients need to drive growth in their business, while also generating a positive effect on the industry, society, and the world. To help accomplishing this, we created the dentsu Consumer Vision research platform, that looks into the future of technology, culture, consumers, and brands to provide marketers with a view into upcoming shifts that will reshape the business landscape.

The first edition of this platform, *The Age of Inclusive Intelligence*, was a 2021 study that looked at how emerging consumer expectations, as well as societal and technological developments, were shaping a new landscape that brands needed to prepare for on the way to 2030. The study proved to be a powerful compass that our experts and clients leveraged to map implications in various industry sectors, and to think about planned initiatives from a different point of view. In fact, several of the trends and use-cases outlined in The Age of Inclusive Intelligence came to life earlier than expected: for instance, we speculated that we may see, before 2030, the first brain-computer chip implant and in January 2024 Neuralink announced human trials to that effect have begun.[1] Characterized by an acceleration in technological development set in motion by the pandemic lockdowns, the early 2020s outpaced some of our wildest predictions.

To keep our fingers on the pulse of a fast moving future, we are now pushing forward the perspective of our Consumer Vision research platform to 2035 to once again understand how evolving consumer expectations, shifts in culture and society and new horizons opened by technology development will shape the future mandates of brands.

As we embarked on this work, we knew life in 2035 would look different from the world we live in today. With the support of Foresight Factory, a leading consumer trends agency, we analyzed data from a survey of 30,000 consumers in 27 different countries to understand expected shifts in consumer attitudes, values, and behaviors. We also spoke with 20 experts and futurists to understand what they see as the most likely disruptions and innovations in their fields.

Coming out of this research, we identified the four forces that will reshape technology, culture, consumers, and brands – the areas of focus of our ongoing study - over the course of the next 10+ years. Each force is driven by 3 trends that point to fundamentally new ways brands and marketers need to engage consumers, which we validated leveraging our global dentsu Consumer Navigator intelligence platform.

The experts we spoke to specialized in a wide range of topics from sustainability to global politics and economics, from Afrofuturism to fashion and from art to safe AI design. They canvas the globe from Japan to South Africa to the United States.

When we talk about 'Insight to Foresight', we talk about a fundamental shift that dictates how in the 2030s it will no longer be enough to understand and respond to the moment, but instead there will be a mandate to get ahead of that understanding and act pre-emptively. This applies to all core areas of focus in our study.
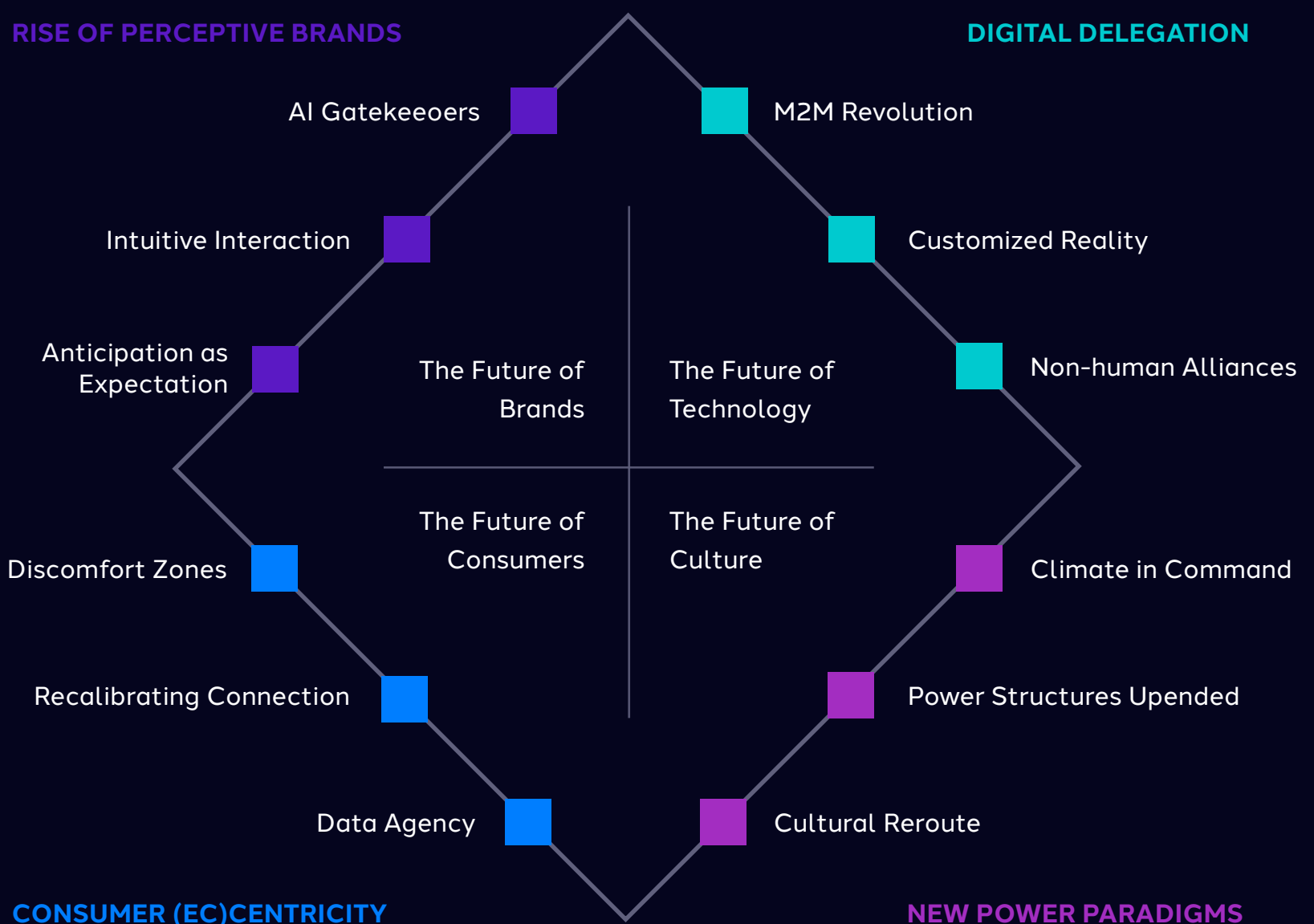
As we look to the **future of technology**, a strategy guided by foresight will ensure human reasoning and progress prevails as AI capabilities get increasingly adopted.

As we look to the **future of culture**, we will need to shift from simply reacting to change, to predicting which solutions will create new, untapped positive change to survive as a business, a society and a global civilization in an era where we'll face unprecedented constraints.

As we look to the **future of consumers**, we see that the way consumers buy and interact with brands will be more dependent on emotions and "in the moment" states, yet consumers will pre-determine the spectrum of experiences they are exposed to in those moments via greater data agency.

As we look to the **future of brands**, pivoting from insight to foresight will enable them to anticipate and deliver on predicted emotional states of consumers, a new requirement to thrive as a business by 2035.

Each of these four forces is supported by three underlying trends. To help the reader navigate this narrative, here is a breakdown of the journey ahead. Let's dive in!

RISE OF PERCEPTIVE BRANDS

DIGITAL DELEGATION

AI Gatekeeoers

M2M Revolution

Intuitive Interaction

Customized Reality

Anticipation as Expectation

The Future of Brands

The Future of Technology

Non-human Alliances

Discomfort Zones

The Future of Consumers

The Future of Culture

Climate in Command

Recalibrating Connection

Power Structures Upended

Data Agency

Cultural Reroute

CONSUMER (EC)CENTRICITY

NEW POWER PARADIGMS

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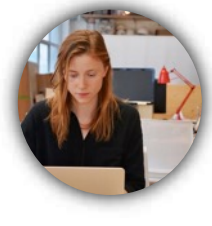PhD Researcher, U of Helsinki

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Executive Summary

Ten years from now, technology will completely envelop our experience of reality as we increasingly delegate more aspects of our day-to-day to AI. At the same time, constraints brought up by climate change will force us to re-examine aspects of our culture we have taken for granted. As consumers, we will react to these tensions by leaning further into our mood states and expect brands to use predictive capabilities to anticipate how we expect to be met by them.

To succeed in the 2030s, brands will need to pivot from insight to foresight and present consumers with emotive and instinctive solutions that will dictate not only whether they prefer a brand but also if a brand even crosses their radar in an AI-filtered and culturally reshaped reality.

Brands need to begin laying the foundation now to future-proof themselves, developing and adopting the predictive capabilities and anticipatory behaviors needed to differentiate and grow in this new era.

Here are the four macro-forces brands will need to navigate throughout the next decade:

The Future of Technology: Digital Delegation

We see a future where consumers feel increasingly comfortable with letting technology – and specifically AI assistants – take over a significant share of activities in various aspects of their lives.

Following the release of ChatGTP in November 2023,[2] the availability of customer-facing generative AI applications in the last 12 months has expanded consumers' willingness to delegate to technology a greater number of tasks and aspects of their daily lives.
In Switzerland, 25% of the respondents said that, by 2035, they'd like to have an AI 'clone' of themselves take care of shopping, admin, and communication tasks on their behalf.[3]

This will lead to a new business context where, increasingly, brands are selling to 'AI gatekeepers' rather than their human counterparts and machines plot with each other to enable a vast number of transactions that will occur without our direct intervention.

In this new world, technology will also become more seamlessly embedded in our experience of reality, as it will often overlay information onto the physical reality we interact with, as opposed to project information on screens that distract us from it.

AI will also revolutionize humans' ability to viscerally access and experience cultures and realms beyond their own, transforming how we communicate with each other, understand and interact with animals and the natural world and conceive of companionship with digital counterparts.

The Future of Culture: New Power Paradigms

While technology will facilitate our lives in many ways, we see a future where a series of forces beyond our control – from climate to trends in population growth – will lead us to re-examine our culture, re-address fundamental assumptions that currently inform our day-to-day and inspire brands to rethink how they go about production and serving consumers. For instance, it's estimated that by 2030, there will be a 2% loss in working hours due to extreme climate that will impact the global economy by 2.4 trillion U.S. dollars.[4]

66% of the respondents in Switzerland said that by 2035, they expect to change several daily activities, doing things like gardening in the evening, because of the effects of climate change.[5] The space- and time-shifting in our day-to-day will have an impact on industries like hospitality, travel, retail, and healthcare.

By 2035, there will be more young Africans entering the workforce each year than the rest of the world combined.[6] These shifts in the global population will create a new context for brands, creating a need to be more involved in supporting growth in emerging markets where the public infrastructure is less developed.

At the same time, we see a continuation of people's disenfranchisement from traditional institutions and centralized power structures in favor of more local, community-based initiatives.

In addition to transforming industries and how we think about institutions, these shifts will revolutionize culture, creating a new make up of the mainstream that will be profoundly more diverse and community-centric compared to today. Furthermore, in response to entertainment studios doubling down on AI, 43% of Swiss consumers will seek user-generated content to support and connect with human creativity.[7] In this context, brands will need to adopt a new mindset when it comes to the media and entertainment partnerships that they foster to garner cultural relevance.

The Future of Consumers: Consumer (Ec)Centricity

We see a future where consumers will lean further into their mood states and passions when engaging actively – as opposed to delegating to AI – with the brands that are able to garner their attention, as a way to react to both technology's cocooning effects on their lives and to the constraints the physical reality they'll live in will place upon them. Already today, 6 in 10 respondents in Switzerland said that a significant share of their buying decisions is influenced by the mood they're in at the time of purchase.[8]

Consumers' increasing eccentricity will first and foremost manifest in a pivot from only thinking about data in terms of privacy to thinking of data in terms of agency: consumers manifest their personalities online and will increasingly think of the data trail will leave as their own IP that they want to further curate, customize and potentially monetize in their interactions with other consumers, with AI, and with brands alike.

Consumers will also seek to 're-sensitize' themselves in human interactions that have been increasingly mediated by technology.

They will strive to experience an expanding range of emotions and manifest this desire in the interests they will expect brands to cater to: cathartic experiences, desires that feel 'forbidden,' and analog ownership.

The Future of Brands: Rise of Perceptive Brands

We see a future where, in order to differentiate and grow, brands will need to become more perceptive. The more consumers will lean into mood states, the more brands will need to develop anticipatory behaviors to stand out.

These capabilities will be needed to both navigate the filters put in place by AI gatekeepers and offer experiences that feel serendipitous to the end user: 70% of Swiss consumers in our study said that the best way for a brand to stand out and earn their loyalty is its ability to surprise and delight them in unexpected ways.[9]

Capturing signals from AI agents that manifest preferences on behalf of consumers, developing brand personalities to fuel the next generation of conversational engagement, and developing capabilities to decode human emotions will be key ways for brands to pivot from insight to foresight, going from simply reacting to consumer behaviors to knowing them before they know themselves.
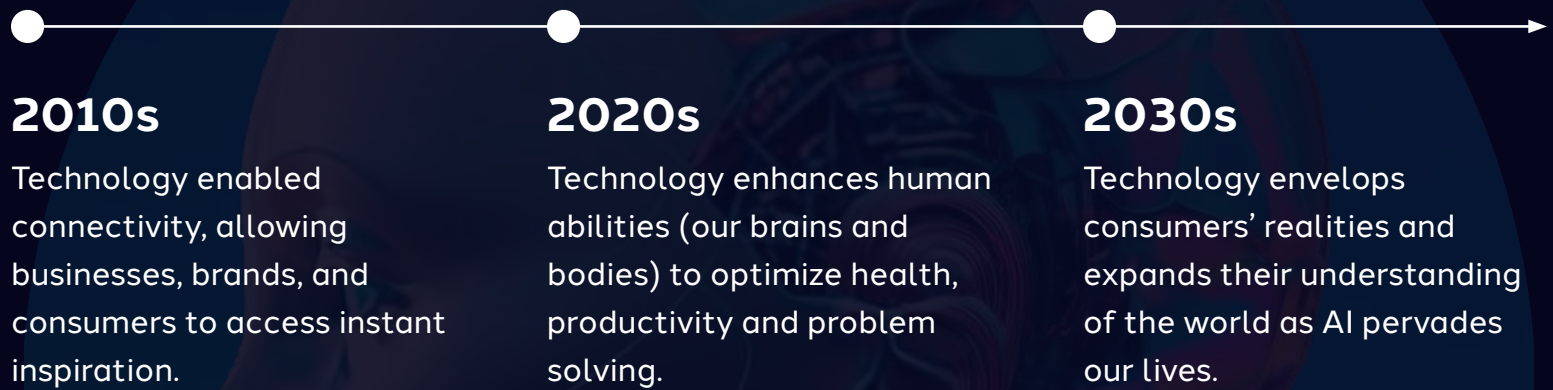
As anticipation becomes an expectation on our journey toward 2035, brands and marketers will need to become more perceptive, developing innovative solutions to enhance their understanding of consumer wants and reconciling them with business needs, leveraging their unique position at the intersection of both the inward and outward perspectives for the brand.

Digital Delegation

Technology has become more intertwined with consumers and brands in the last decades and will continue to do so.

2010s
Technology enabled connectivity, allowing businesses, brands, and consumers to access instant inspiration.

2020s
Technology enhances human abilities (our brains and bodies) to optimize health, productivity and problem solving.

2030s
Technology envelops consumers' realities and expands their understanding of the world as AI pervades our lives.

On the path to 2035, humans will increasingly and willingly outsource their autonomy to machines in exchange for a personalized and cocooned environment.

63%
of Swiss consumers surveyed in our study believe AI will be used in most aspects of our lives 10 years from now.[10]

25%
In Switzerland, 25% say that by 2035 they'd like to have an AI clone of themselves to take care of shopping, admin, and comm tasks for them.[11]

3 key trends will shape this landscape:

M2M Revolution

As consumers outsource tasks to AI, they are trusting in machine-only support networks.

Customized Reality

Consumers are opting for technology that is organically embedded into everyday life.

Non-human Alliances

Consumer empathy expands to include the natural world and AI-aided entities.

M2M Revolution

In the next decade, technology will evolve from productivity booster to full administrator. People and corporations alike will hand over the reins to machines, outsourcing tasks, roles, and even full ecosystems.

Machines will confer with one another without human input, making decisions based on information libraries once created and overseen by humans.

As data from these machine-to-machine (M2M) relationships grows, this new context will create demand for a superior technology infrastructure capable of delivering greater speeds and greater computing capacities. Business success will be predicated on companies' ability to graduate to these new standards.

Human Outsource to Digital

Artificial intelligence is no longer a plot of science fiction entertainment. It's a part of the mainstream and is already part of everyday life for many consumers — even if they aren't actively aware of it. Consumers have grown increasingly more comfortable with automation and relying on algorithms, and it's no longer a stretch to expect that very soon, most people will be outsourcing a number of daily tasks to AI.

6 out of 10 Swiss respondents in our global study would like to have an AI assistant to schedule meetings in their work and personal lives by 2035. This share is even more significant in countries like China.[12]

Easing administrative tasks or chores is just the tip of the iceberg in terms of how humans can outsource activities to AI. Consider, for instance, ChatGPT being used to suggest travel destinations, which then evolves to AI that plans the whole trip itinerary, and then becomes AI that automatically interfaces with other AIs to purchase the airplane tickets and make the hotel reservation for you. As AI become more established and trusted, outsourcing tasks will look more like outsourcing entire roles. Already, a robot CEO presides over a multi-million-dollar company — Polish-based rum producer Dictador appointed an AI entity named Mika, created by Hanson Robotics.[13]

Many want an AI assistant to schedule personal and work meetings by 2035.

Swiss	Global	China
61%	77%	92%
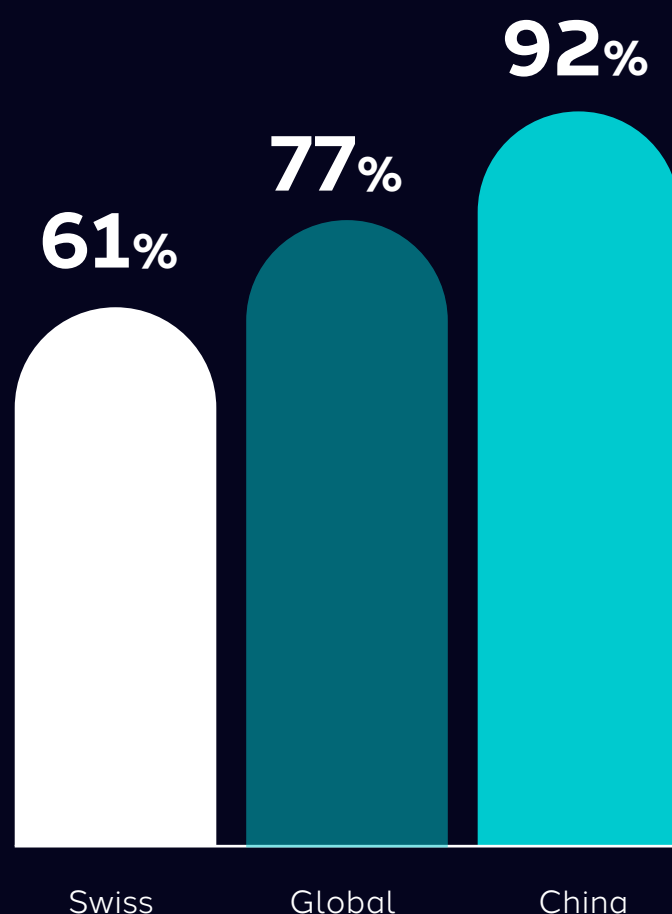
M2M Colleagues

As comfort with relying on AI grows, the responsibilities delegated to AI will become more significant, eventually cutting out the human middleman completely. Humans will allow machines to plot with each other, indefatigably collaborating and automating the world: the true realization of the so-called 'Internet of Things'.

54% of Swiss consumers surveyed in our study said that they expect by 2035 their appliances, devices, and vehicles will re-order parts and schedule service appointments independently.[14] In these circumstances, artificial intelligence will be viewed not as competition for your job but as a colleague working alongside you, producing results just as you are.

RFP Genie, developed by Twillio using GPT-4, is a great example of how the business world is starting to lean into the optimization opportunities opened up by the prospect of machines plotting with each other, The tool automates the task of filling out request for proposal (RFP) forms, and Twilio has stated that "RFPs that once occupied a pair of staffers for two weeks or more are now done in minutes."[15]

The New Speed of Business

An increasingly automated world with a reliance on digital assistants will create an exponential need to process a universe of data signals in real-time. This will create a new measure of differentiation in business, with quantum computing becoming a requirement to support the skyrocketing in-real-time operations. Nearly three-quarters of global tech executives, investors and academics in the quantum computing space expect to see a fully fault-tolerant quantum computer by 2035.[16]

Quantum computing is in its infancy, but its potential is becoming clearer. Prospective purposes include supply chain optimization, financial modeling, cybersecurity, and mass-scale applications with an impact on everyday activities, such as traffic optimization. This is

why companies like Volkswagen are partnering with Quantum companies like D-Wave to run pilot programs on a number of traffic- and travel-related optimization challenges, including streamlining traffic flows in Beijing, Barcelona and Lisbon.[17] Imagine a future where a vast majority of vehicles are driverless, and the amount of data that every unexpected variable (like a dog crossing the road) will add to the system when you have thousands, or millions of AIs reacting, optimizing, and delegating information in real time in the metropolis of tomorrow.

The emergence of these type of experiments is an indicator of how the businesses cycle is expected to speed up in coming years as a result of the exponential growth in data signals and the recording of ever more discreet aspects of our lives, and the opportunities and challenges this growth represents for brands.
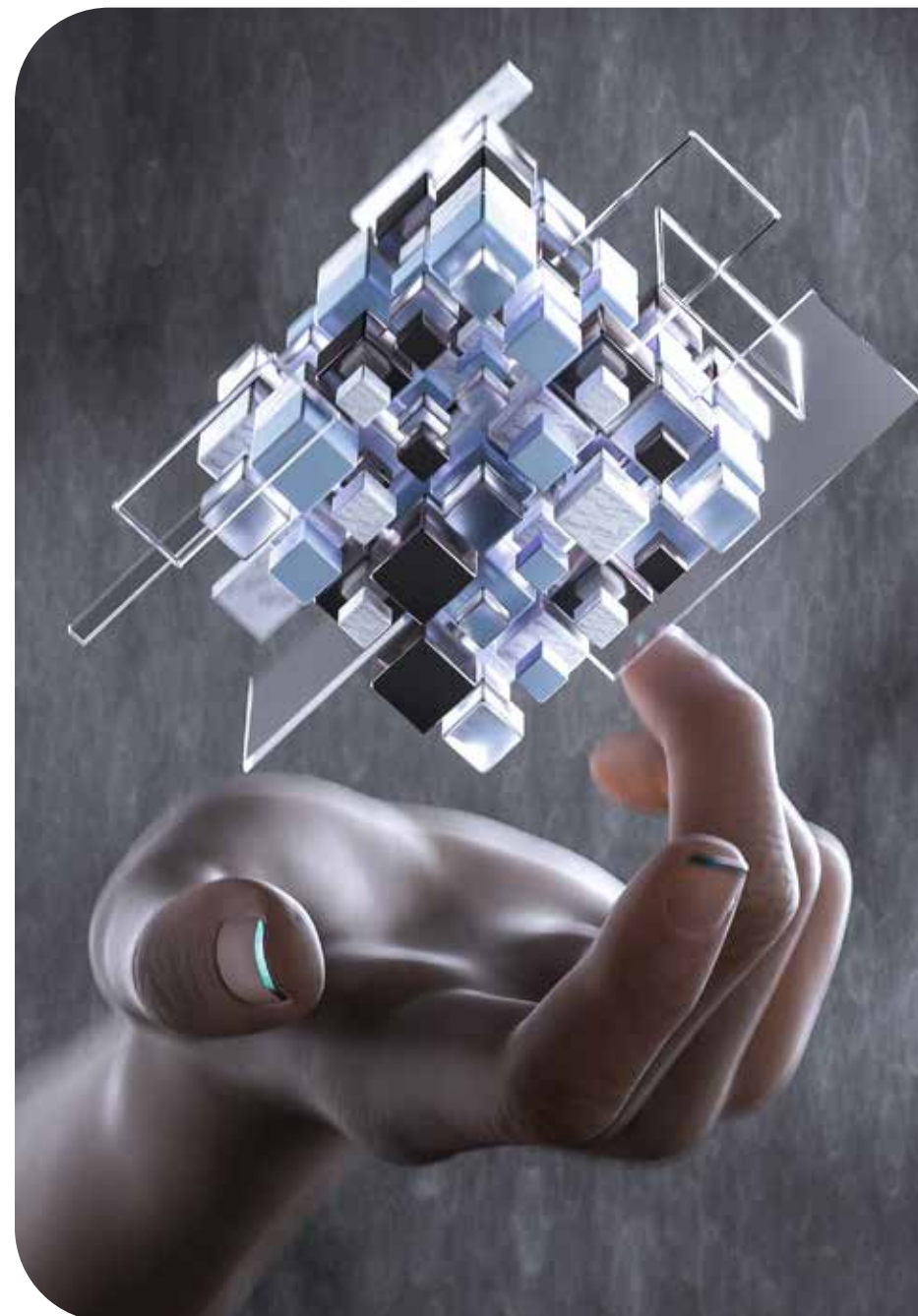
Customized Reality

By 2035, consumers will live in a profoundly curated reality. Technology will be organically embedded into daily life as voice, haptics, and gestural tech disrupt the route to information and connection traditionally gleaned from screens.

This tech-enriched reality will be further enhanced by stores of personalized data as quantification will track emotional and physical responses to surroundings and interactions. The concept of neuro-aesthetics will scale, allowing people to manipulate and customize their environment to their (data-informed) preferences on command.

Combining preferences with other factors, capabilities will naturally turn predictive – programming and optimizing the everyday.

Phygital Lives

Technology will enable the physical and the digital to become more naturally and intuitively merged.

68% of Swiss consumers surveyed would like technology to seamlessly embed and overlay information onto the world surrounding them. [18]

By 2035, consumers will be able to navigate their worlds using technological features that feel more instinctual than screens. The goal will be to minimize distraction and the negative effects of tech-laden living. Already, 4 in 10 consumers view technology as a disruptive force that they must avoid before going to bed because it interferes with their sleep, and this has grown 10 points since 2017.[19]

Screenless functionality is expanding as consumers desire time spent away from phones, laptops, tablets, and other devices. The Pin, created by Humane, is billed as the first AI wearable, using voice commands and superimposing graphics on hands rather than screens. Rather than typing on a screen to engage with the device, users use voice and gestures to engage, and Pin interacts with large language models rather than apps.

At launch, Pin can be used for voice-based messaging and calling, summarizing the user's email inbox, reading nutritional information from a photo or video of food and providing real-time translation.[20]

This and other wearables, such as the new AR and VR headsets that are increasingly becoming aesthetically pleasing, comfortable, and easy to use as seen at CES 2024,[21] will thrust tech to become more smoothly integrated into day-to-day interactions, offering the benefits of digital without disrupting the physical, as well as extending the physical into the digital realm.
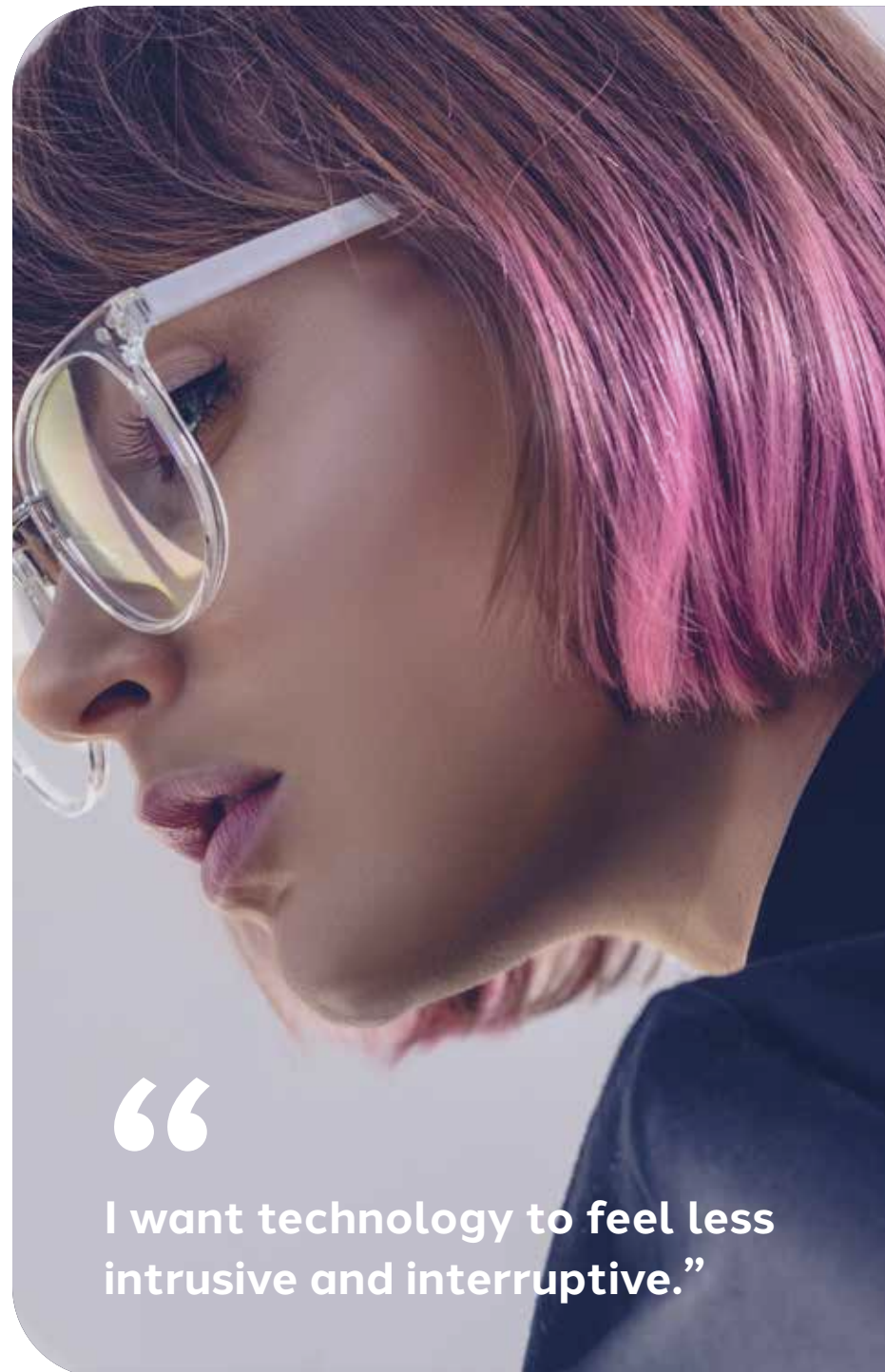
"I want technology to feel less intrusive and interruptive."

> ❝
> **Our interaction with devices will be much more blurred with our reality.**

Dom Heinrich
AI Design Professor at Pratt

I think we will, in many ways, go back to what life looked like before the digital age (so the mid 90s) rather than now where we are all prisoners of our devices and screens.

Instead, we'll evolve into a more human and integrated life, creating connections between us."

Quantified Living Produces Personalized Outputs

Empowered by a new understanding of the impact their surroundings have on them, consumers and brands will employ technology to redesign home, social and retail environments to suit their immediate needs and goals.

57% of global consumers are interested in smart glasses that overlay digital information (such as directions, prices, advice, ratings) onto their real-life surroundings.[22]

Brands that can offer such information and capabilities will be able to provide consumers with custom interactions. Critically, consumers will have to be willing to share their data. Brands will need to present significant reasons that consumers should give them access to such information — such as making their interactions more convenient, saving them money or time and providing personalized outputs.

New technologies are starting to offer personalized information even without the physical connection of a wearable device. Delta earned a spot on Fast Company's 2024 list of Most Innovative Companies in the travel category for its "hyper-personalizing airport wayfinding," earned for its Parallel Reality experience at Detroit Metropolitan Airport. It allows multiple people simultaneously looking at the same display to see their own uniquely personalized content. Developed in partnership with start-up Misapplied Sciences, passengers opt into the Parallel Reality experience by scanning their boarding pass, and then multi-view pixel technology directs different-colored light to specific viewing zones, allowing multiple people looking at the same display to see personalized content like gate or baggage claim numbers.[23]

Life Is Not Only Optimized, But Predicted

Data collection will evolve to not only optimize reality but also predict it. Tech advancements will allow personal data and information to be cataloged and collated by brands to predict behavior at both macro and micro levels —

forecasting the activity of a consumer segment as a group or projecting the way an individual consumer will conduct themselves.

Predictive analytics in healthcare is a massively growing segment of AI: MyHealthPal, launched by predictive analytics healthcare company Predictive Health, is an AI-based platform that predicts surgical site infections remotely by detecting early signs of trouble. It assesses wound health status, patient medication adherence, and patient vital signs to predict wound healing outcomes and intervene if and when necessary, to prevent readmission and other post-surgical health complications.[24]

Meanwhile, Life2vec claims to predict time of death — at least within 4 years, at a 79% accuracy rate. The predictive AI model was built on datasets that encompassed the entire population of Denmark (6 million people), which included information encompassing health, employment, and financial records, along with data such as education, doctor and hospital visits, diagnoses, income, and occupation.[25]

While consumers will be increasingly attracted to brands, products, and services offerings with predictive capabilities that can help them optimize their lives, at times they will want to react to this optimized reality by seeking spontaneity and serendipity: for some brands, being on the disruptive side will be more relevant.

57%

of global consumers are interested in smart glasses that overlay digital information (such as directions, prices, advice, ratings) onto their real-life surroundings.

Non-human Alliances

In the 2030s, technology will allow humans to more viscerally access and experience cultures and capabilities beyond their own. With a newfound understanding of different points of view, empathy will illuminate new areas, expanding the baseline definition of inclusivity.

Compounded with climate pressures, consumers will want to advocate for and protect non-human entities such as animals and natural environments, which they will more deeply understand.

Naturally, humans will transfer emotions into the relationships they have with AI-enabled machines, linking them with lost loved ones or simply holding them in high regard as personal assistants, further deepening the connections between humans and technology.

Omnilingual Tech

Technology is a great connector; it enables the link of people and ideas from all around the world. This will increasingly be used to imbue emotionally-impactful cultural context, as holograms, haptics and more will allow people to instantly put themselves in one another's shoes across the globe. Communication will be made easier by breaking down the barriers of language as translation technology becomes more advanced.

This is incredibly appealing to consumers, as 77% globally are interested in earphones that would immediately translate what someone speaking to them in a different language is saying.[26] The introduction of these capabilities will have a significant impact on all industry sectors, especially travel, hospitality, entertainment, and education.

Increased Sentience of Non-Humans

Facilitating communication will increase our understanding of non-humans. AI can be trained on data collected from the non-human world, resulting in a potential means of communicating with animals and plants. The Earth Species Project is a non-profit dedicated to using artificial intelligence to decode non-human communication, which could give people the ability to understand and communicate with animals.[27] Animal treatment could be overhauled based on new insights from the animals themselves, and humans could also learn more about the ways of the natural world that would inspire changes in the treatment of the earth and its resources.

As a result, people and brands may wish to advocate for animals' wellbeing. The rights of animals and plants will come to be considered more significant and worthy of protection.

32% of Swiss respondents in our global study said that, by 2035, animals should have voting rights through appointed human representatives that serve their best interest. [28]

Humans Empathize with Digital Counterparts

As we get closer to 2035, humans will be using AI to feel connected to personas who have never existed as humans or no longer do. AI will be able to emulate a specific human's persona, allowing living people the opportunity to interact with someone who is no longer alive: grief-tech HereAfter AI offers a service wherein users record answers to interview questions and upload photos while they're still alive, leaving behind a virtual version of themselves that their loved ones can engage with.[29]

This and the prospect of a potential loneliness epidemic – as stated by the World Health Organization[30] - will drive growing interest and comfort levels among consumers in digital companionship. Already, nearly half (47%) of global consumers are interested in an AI friend they could talk to for advice or companionship. Furthermore, pushing the perspective forward to 2035 consumers believe that relationships with AI companions could be as fulfilling and rewarding as the relationships they have with other humans today.

By 2035 relationships humans-to-AI companion relationships can be as fulfilling and rewarding as human-to-human relationships.[31]

Switzerland	Gen Z	Milennial
30%	**63%**	**64%**
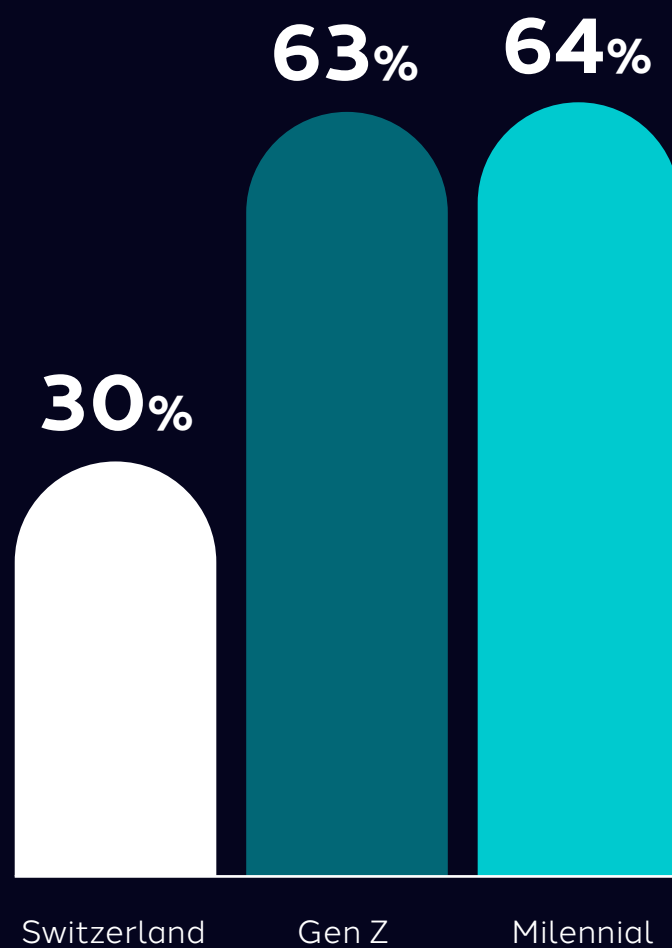
Implications

M2M Revolution

Marketers will need to determine which aspects of their brands are managed by humans and which are allotted to AI, transparently communicating how this workflow benefits consumers and protects human contributors. Businesses will need to invest in not just the technology itself but also the employees who will wield it and who can discover how to best implement it for the company.

Spanish bank BBVA launched several exploratory projects in late 2023 to gauge the potential of generative AI in making organizational processes more efficient and generating additional value for its customers. To recognize and tap into these emerging opportunities, BBVA hosted a DataRally competition to identify in-house talent. To continue fostering the skills of the employees who performed well in the challenge, BBVA will make generative AI courses part of its in-house Data University data training program.[32]

Customized Reality

With more technology prompts built to respond to human cues, brands will need to design experiences that are receptive to both emotional and physical interactions. Such experiences will need to be sensorial and feel both interactive and personal. Brands must be transparent about the user data they're harnessing to offer customized interactions and provide a way for consumers to opt out of data collection. Most importantly, brands need to start considering how experiences can go beyond screens and engage consumers through new means.

Claiming to be the world's firsthand— free touchpad, Augmental's retainer-like MouthPad^ gadget allows wearers to use their tongue to control devices that support a Bluetooth mouse, including phones, tablets, computers, and even sex toys.[33]
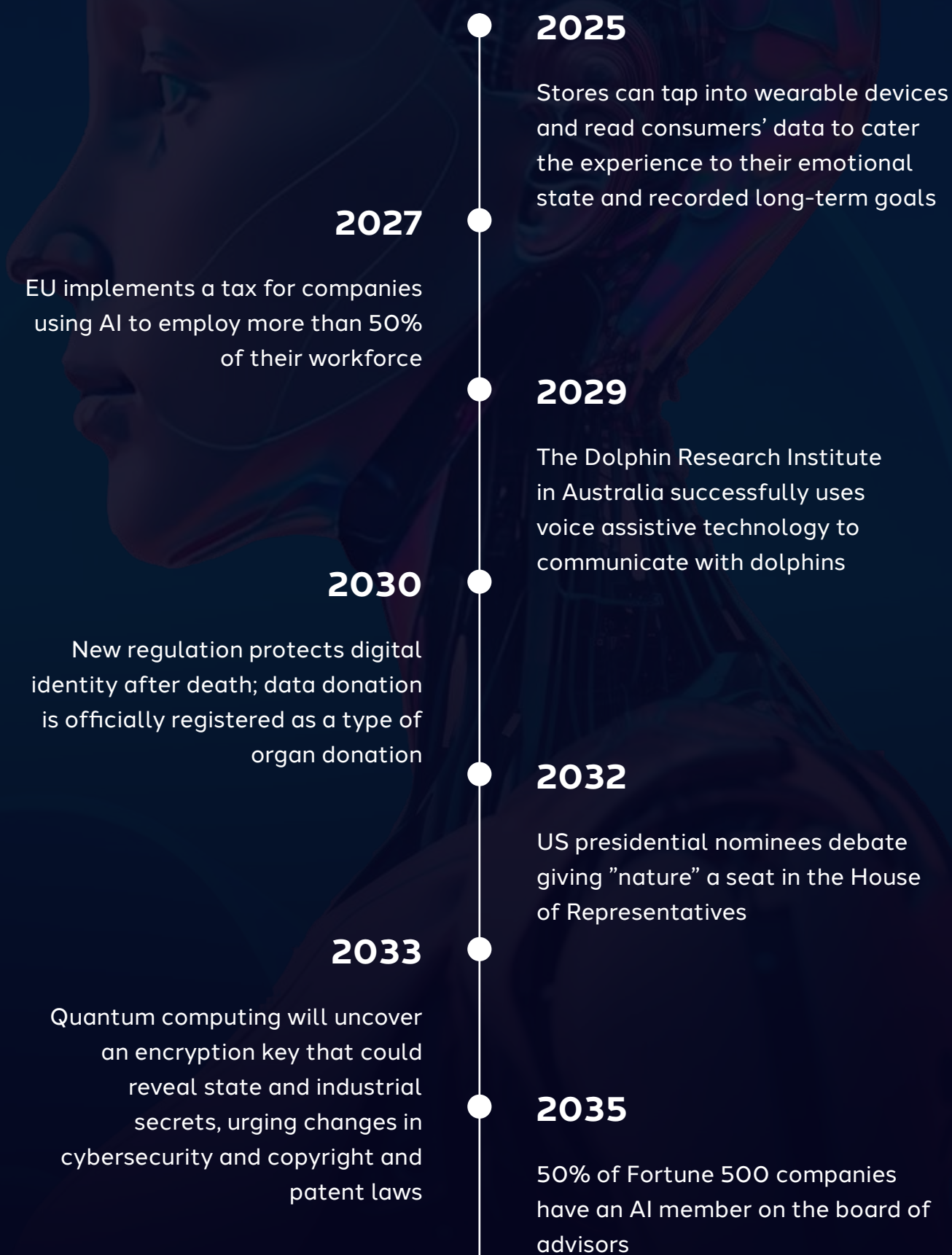
Non-human Alliances

As consumers build empathy for non-human entities, brands will need to include considerations for how to address these new needs among both audiences (human and not). Consider which parties your business can champion, empower, and advocate for them internally and externally. Ensure your brand's values are aligned with both the human and non-human stakeholders.

Some brands are giving nature a seat at the table as a stakeholder. British lifestyle brand House of Hackney has a legally appointed member appointed to their board of directors representing Mother Nature & Future Generations.[34]

Pathway to 2035

Here's a timeline of potential disruptions that could manifest in technology between now and 2035, as a result of the trends we outlined:

2025

Stores can tap into wearable devices and read consumers' data to cater the experience to their emotional state and recorded long-term goals

2027

EU implements a tax for companies using AI to employ more than 50% of their workforce

2029

The Dolphin Research Institute in Australia successfully uses voice assistive technology to communicate with dolphins

2030

New regulation protects digital identity after death; data donation is officially registered as a type of organ donation

2032

US presidential nominees debate giving "nature" a seat in the House of Representatives

2033

Quantum computing will uncover an encryption key that could reveal state and industrial secrets, urging changes in cybersecurity and copyright and patent laws

2035

50% of Fortune 500 companies have an AI member on the board of advisors

New Power Paradigms

In the last few decades, humanity has undergone a re-examination of previously held assumptions around culture. This re-examination will be even more significant in the future as societal conventions around growth and prosperity will be further unseated.

2010s
Society focused on digitizing life, business, and culture with the realization of constant globalized connection.

2020s
Society focuses on recalibrating people's relationship with technology by re-discovering human interactions and the value of human-led culture, recognizing the shortcomings of digital-only connections.

2030s
Society focuses on re-examining the assumptions that previously perpetuated culture and business as people reckon with climate-induced limitations

Economic growth, rather than being viewed as infinite, will bump against environmental and societal ceilings. Where expansion and abundance once were assumed, constraints and limitations will become the norm. New realities that stem from this context will shape culture.

GLOBAL GDP GROWTH

3.5

3.0

2.2

2022   2024   2030
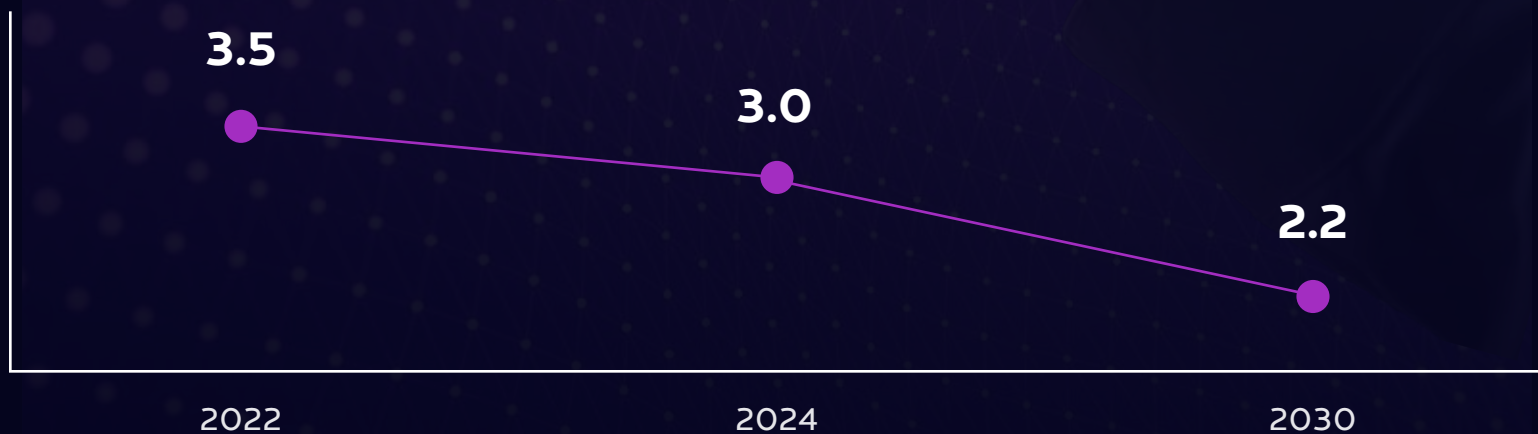
3 key trends will shape this landscape:

Climate in Command
Environmental issues will impose new lifestyle limits on consumers and society.

Power Structures upended
Emerging power structures will reshape a new age of growth and shifting influence away from traditional institutions.

Cultural Reroute
New cultural hubs will emerge outside the West and, in turn, will profoundly influence mainstream culture.

Climate in Command

Historically, people and corporations have exploited the environment to their advantage, leveraging resources to meet their needs. Yet, as climate change reaches climate crisis, the power dynamic reverses: the environment is now redirecting what we can create and consume.

As areas of the earth undergo extreme heat, flooding, wildfires, and more, where people can sensibly live and where certain types of agriculture, manufacturing, or commerce can occur is shifting.

To adapt, people are changing the way they carry out their daily lives via time-shifting and material innovation. Brands too will need to adapt, leaning into regenerative solutions or look beyond Earth's capacity; if not, profit could be at stake.

Climate-imposed Limits

As we look ahead to the coming decades, a harsh (and inconvenient) truth is setting in: changes in climate will majorly affect the ways we've been conducting business and our day-to-day. It's estimated that by 2030, there will be a 2% loss in working hours that will impact the global economy by 2.4 trillion U.S. dollars due to climate-related factors such as increasing heat.[35]

This new reality of climate-imposed limits will not only impact human productivity but also impact land, regions, and how we go about sourcing products: regions that are supporting vital agriculture and dense populations today may soon struggle to sustain historical levels of crop yields and habitability. Consequently, adaptation and migration will become inevitable in many areas.

For instance, according to Dan Petroski, winemaker at Larkmead, "Cabernet Sauvignon may no longer be relevant in Napa Valley by as early as the 2040s" and the winemaking industry will need to rely on other regions for that type of grape.[36] In fact, a recent study has estimated that by the end of the century more than 70% wine-producing regions will be at risk.[37]

Space- and Time-shifting

As climate impacts intensify, consumers' daily routines will evolve and reshape.

66% of Swiss respondents in our global study said that by 2035 they expect they will have to change how they carry out some day-to-day activities due to how the climate will change, taking on new habits like gardening in the evening or taking breaks from work in the early afternoon due to the heat.[38]

This will have an impact across many sectors: in media and entertainment, we might see sports events be broadcasted at radically different time slots to protect athletes' health; peak traffic in grocery stores may slide to late evenings; healthcare professionals might make new recommendations in terms of when we should be consuming pharmaceutical products, etc. In travel, entire niche tourist markets are forming around escaping heat, with "drizzle tourism" seeing travel spikes occurring as residents of hot, dry regions visit cooler, damper destinations: 27% of UK-bound tourists from Gulf nations are motivated by the appeal of cooler climates.[39] Brands that anticipate and enable new climate-adaptive habits will build strategic advantages.

Regenerative Solutions

In the future, sustainable solutions will become profitable, not just desirable. As climate change intensifies, sustainability is transforming from a virtue into an imperative for profitability.

In our prior Consumer Vision 2030 research, we showed how global consumers were turning into 'activists', placing greater attention on the negative environmental impact of products when selecting a brand to purchase.[40]

Now, 8 in 10 Swiss consumers are telling us that they prefer to shop for brands that offer solutions that not only minimize the negative impact on the natural environment but rather restore and create a positive impact for the environment.[41]

Innovative companies now deploy regenerative solutions, not only to meet emerging consumer expectations, but also to drive business results,

mitigate risk, and forge opportunity. Take the example of Lay's Smart Farm in India: PepsiCo India, through its brand "Lay's", announced a crop & plot-level predictive intelligence model to help farmers maximize both potato yields and product quality via functional dashboards on user-friendly mobile apps. By partnering with Cropin, an organization dedicated to narrowing the digital divide across the global agriculture ecosystem, they created a system that blends satellite imagery with AI and weather forecasting data to create an early-warning system for farmers. Smart Farm tells Lay's Indian farmers where and what human intervention is needed — and is helping to make its farming climate resilient.[42]

7 in 10

Expect having to change how they go about day-to-day activities by 2035 because of climate change.

Power Structures Upended

By 2035, we will likely confront a scenario where advanced economies will have reached their peak and, driven by climate and population changes, economic growth will be fueled by emerging and developing markets. This will also be a time when our trust in traditional hierarchical institutions reaches an all-time low.

In this new era, platforms like Web 3.0 will revolutionize the way communities collaborate and govern. This shift will empower consumers, granting them unprecedented influence over the trajectory of economic development. This, in turn, will compel businesses and governments to rethink their power structures. They will need to decentralize authority, not just to regain consumer trust but also to reignite economic growth, supporting the emerging markets and developing economies that have the potential to fuel it.

Economic Apex

We're already seeing a significant decline in GDP growth across the most advanced economies, while growth will remain stable across emerging markets.

As growth opportunities shift to emerging markets with a less developed public infrastructure, responsibilities will also shift, creating a context where businesses need to step up. Companies will need to deal with the direct effects of climate change and look after their communities more broadly. In fact, 59% of Swiss respondents in our global study said they trust businesses more to help address the critical social, economic, and environmental problems we face, than they trust governments to do so.[43] This means brands will be caring not just for their employees, but also their families and the wider community. Companies will also have to think about education and training, especially with AI and other new tech.

Growth Projections
World Economic Outlook July 2023

● EMERGING MARKET & DEVELOPING ECONOMIES
● ADVANCED ECONOMIES
● GLOBAL ECONOMY
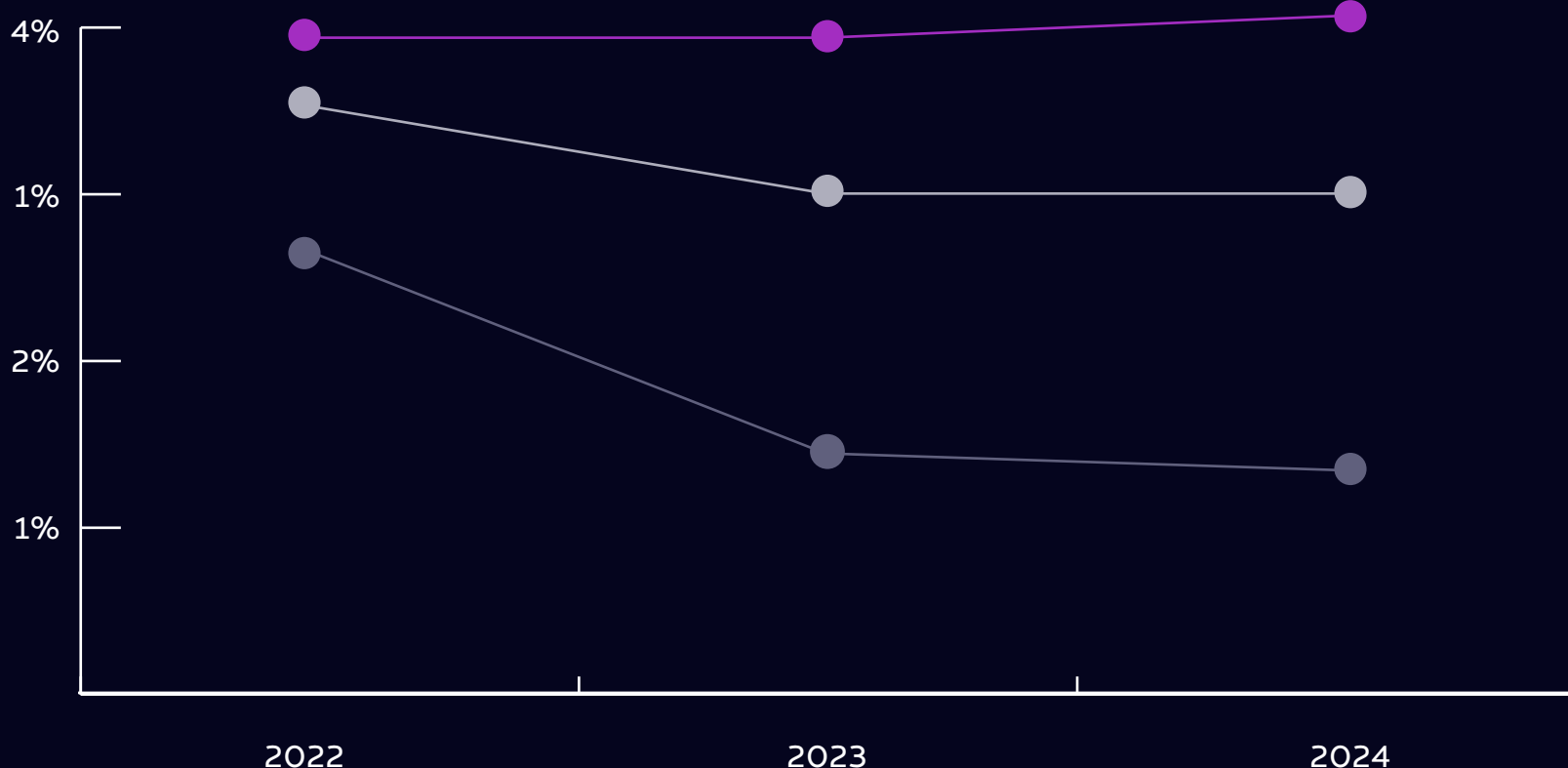
Decentralized Platforms Shift Power to Communities

As reliance on traditional drivers of economic growth will decrease, we will see emerging Web3 and decentralized technologies gain traction through their promise of a democratization of community building and governance. Consumer voices will carry new weight through decentralized autonomous organizations, or DAOs, that spread authority across wider groups rather than centralized hierarchies. Decentralized models like this will shift power to the wider community.

The emerging application of Web3 and decentralized technologies to new models of ownership and authorship will lead us to question traditional concepts of authority. Take the nation of Tuvalu, an independent island nation within the British Commonwealth, comprised of 9 islands in the South Pacific. Due to rising sea levels, Tuvalu is facing the prospect of losing its physical land, which is currently a requirement for the United Nations to recognized as a sovereign nation. Thus, during his address at COP27, Tuvalu Minister Kofe outlined a plan which involves gradually migrating Tuvalu's government services, culture, and history to a digital twin in the cloud and applying to become the first 'digital nation', ensuring its sovereignty and ability to govern in the face of a worst-case scenario.[44]

Minority Communities Act as Majority Coalitions

In a business context, these new perspectives on authority will be reflected in a growing expectation for mutual value creation and empathy, with audience groups re-conceived as shareholders rather than 'eyeballs' being aggressively monetized for attention.

Brands and organizations are finding power in bridging divides by connecting people around shared values, even if their agendas differ elsewhere. This is reflected in an emerging point of view, especially among younger consumers, when it comes to culture, identity, and the notion of belonging.

8 in 10 of Gen Z and Millennial consumers prefer engaging with entertainment content that reflects their values and the communities they care about, regardless of the country or region in the world where it is being produced.[45]

By embracing micro-communities, brands can foster resonance with minorities rather than just majority interests. Catering to the long tail allows going beyond just the mainstream middle. An example of this is Mastercard: it has nine Business Resource Groups (BRGs) with as many as 130 chapters across 47 countries to represent diverse communities and their allies. Beyond representation, Mastercard is actively investing in its support for communities: it offers benefits like coverage for sex reassignment surgery and surrogacy assistance and equality-driven sponsorships like Girls4Tech, a STEM curriculum for girls aged between 8 and 12.[46]

This approach reflects a growing recognition of the importance of inclusive and responsive business practices in meeting the challenges and opportunities of a rapidly changing world. Leading brands will proactively seek out marginalized perspectives and allow them to meaningfully participate in shaping the future.

Gen Zers and Millennials prefer entertainment content reflecting their values, regardless of where it's produced.

Zoe Scaman
Innovation, Entertainment, Founder
Bodacious

"

Brands need to pivot from extraction to mutual value creation within fandom communities.

It's about transforming from campaign-focused to community-centric, requiring a massive mindset shift towards empathy and deep understanding of these unique ecosystems."

Cultural Reroute

The cultural landscape of the past is set for significant change due to shifts in global populations. These shifts include the movement of climate refugees and natural demographic changes. As a result, we will likely see a declining influence of aging societies and a rise in the relevance of younger workforces, particularly in regions such as Southeast Asia and Africa. This demographic shift will have a notable impact on global culture and entrepreneurship, likely altering the current Western-centric cultural dominance.

Automation and technological advancements are expected to reshape routine tasks and certain job roles, which, in reaction, could lead to a greater focus on creativity in cultural interactions. This development suggests a future where cultural sharing will be more inclusive and diverse, transforming narratives and uniting people, creating positive narratives where there is negative history.
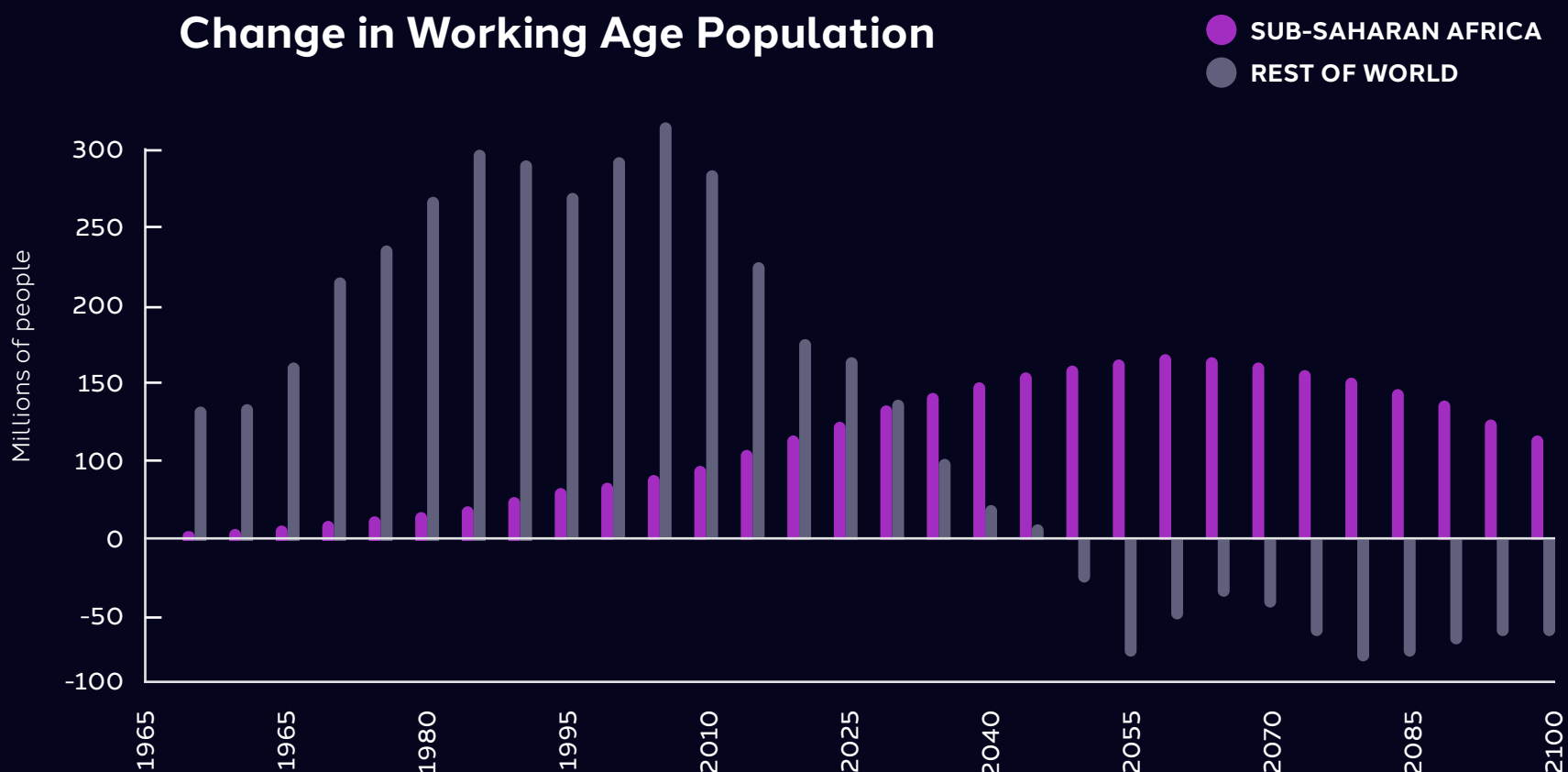
Cultural Decolonization

As we approach 2035, Africa's megacities will start to emerge and become pivotal cultural and economic hubs. Population growth of Africa's 7 largest cities is projected to grow to the megacity mark by 2050.[47] By 2035, there will be more young Africans entering the workforce each year than the rest of the world combined.

This growth will accelerate a profound cultural shift. Decolonization is empowering a return to indigenous traditions and a reclamation of opportunities once denied.

Afrofuturism – a movement reconnecting the African diaspora to their ancestral roots through a futuristic lens - is gaining momentum, blending science fiction with historical and cultural narratives.

In addition to a rediscovery of indigenous traditions, we will also see mainstream culture become increasingly representative and polycultural, as a result of the long-term effects of 'decolonization,' as well as evolving migration and immigration trends.

Change in Working Age Population

● SUB-SAHARAN AFRICA
● REST OF WORLD

Millions of people

y-axis: 300, 250, 200, 150, 100, 50, 0, -50, -100

x-axis: 1965, 1965, 1980, 1995, 2010, 2025, 2040, 2055, 2070, 2085, 2100

Marguerite Coetzee
South African Anthropologist,
Futurist, and Artist

"

Decolonization is unfolding in two pivotal ways.

Firstly, there's a reclaiming of what was lost — ways of seeing and being in the world that were suppressed or erased by colonial or external influences. This involves taking back cultural heritage, traditions, and identities that were once stolen or invalidated.

Secondly, there's a claiming of what was previously denied, such as economic opportunities, social integration, and political power. Individuals are now accessing what they were historically barred from."

"I expect in the future I will be spending more time engaging with user-generated content rather than engaging with Hollywood/mainstream studio content."[48]

Global	Switzerland	Millennial AT	Gen Z	China
70%	43%	75%	76%	88%
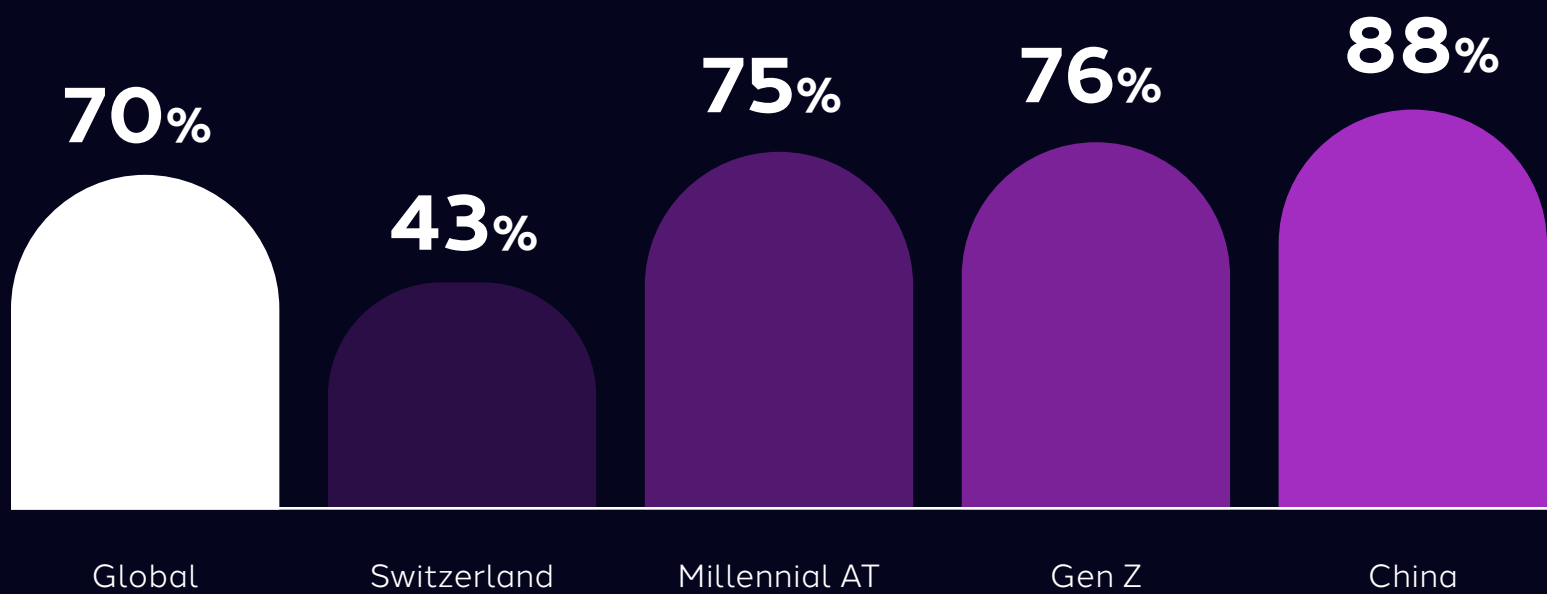
Human-led Creative Economy

As AI will continue to reshape productivity and the economy, consumers will place a greater premium on human creativity as the essence of innovation. The creative economy is set to grow — a sector where human imagination and creativity come first.

As mainstream studios across a number of genres and media formats will increasingly deploy generative AI capabilities in the pursuit of velocity and scale in production, consumers will seek authenticity and personability in user-generated content.

Recently, Professor of Marketing and best-selling author Scott Galloway noted that in 2023 Mr. Beast, a YouTuber, collected 30% more viewing hours than The Night Agent, the most watched show on Netflix.[49] In fact, in February 2024 Mr. Beast was featured on the cover of Time Magazine, an accolade we tend to associate with 'traditional' notions of celebrity and fame.[50]

In this future, brands will need to reconsider their entertainment and celebrity partnership strategies in light of the growing importance of user-generated content; mainstream content will obviously remain highly recognizable, but even activations revolving around mainstream IP might be more successful if they involve independent creators who are perceived as trusted sourced by that IP's fandom.


Source: Time Magazine

Borderless Influence

Cultural boundaries will be fading. The influence of Asian and African cultures will become more prominent, creating a new mainstream in which East and West meet increasingly often.

A tangible example of this trend is the growing popularity of manga and anime in countries like the United States. Globally, the anime market size was estimated at USD 31.23 billion in 2023 and is anticipated to grow at a compound annual growth rate (CAGR) of 9.8% from 2024 to 2030.[51] Furthermore, according to dentsu research, about one in three Americans aged between 18 and 54 watch viral anime titles, the share growing to 44% among Americans aged between 18 and 24.[52] Younger American consumers showcase even deeper fan behaviors when it comes to anime.

Anime has gained significant popularity in Western countries such as Italy, France, and Brazil for a while now, earlier than it has in the United States. However, the fact that it's now becoming a dominant entertainment genre in the cradle of Hollywood is indicative of borderless influence at play: in recent years, major American productions – animated or not - such as Castlevania, Cowboy Bepop, One Piece, are either direct adaptations of anime titles or heavily influenced by the anime style.

Businesses can leverage borderless influence in several ways: for instance, the South Korea tourism board has launched a series of Hallyu-themed travel courses, such as a 5-day trip to visit the most influential sites of K-pop for international enthusiasts to immerse themselves in their fandom.[53] Meanwhile, McDonald's launched a global campaign in February 2024 celebrating how often it's being depicted in manga and anime.[54]
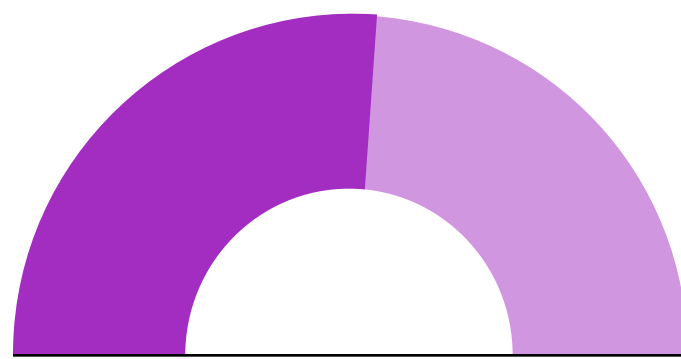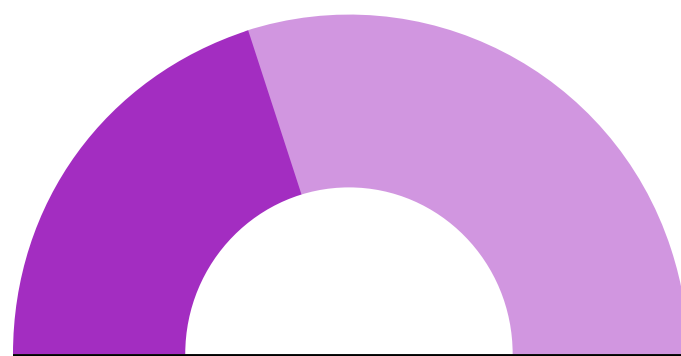

52.7%
"I have a favorite anime character"
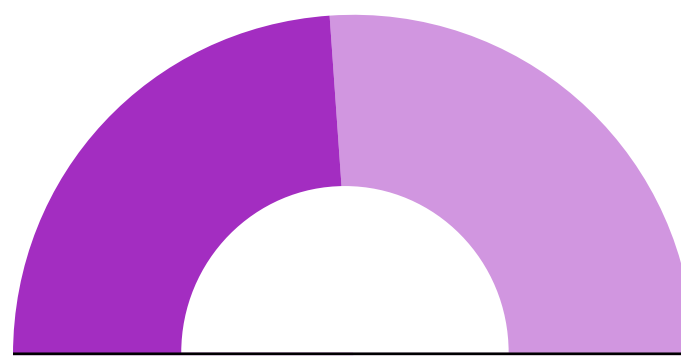
47.7%
"I have someone with whom I talk about anime."

42.3%
"I have read the original manga comics which anime series are based on."

Implications

Climate in Command

Brands must adopt regenerative practices to rebuild climate damage and re-invent Earth-friendly ways of working — from sourcing new, sustainable ingredients to setting up manufacturing in outer space.

Walmart is partnering with 30,000 farming operations to advance regenerative farming practices across 30 million acres in the Midwest, focusing on accelerating the pivot to regenerative farming in the production of critical commodities such as wheat, soy, corn, rice, and cotton.[55]

Power Structures Upended

Brands will need to find ways to build relationships and alliances with engaged communities and active representatives to help shape their offerings.

Consider The Kings League, a soccer league founded by Gerard Piqué in Spain and Argentina. The league was built from scratch, incorporating unique rules, player anonymity, and real-time fan interaction, and has rapidly gained popularity since its inception in January 2023. The league focuses on Spanish language content and leverages Twitch streamers to tap into existing fandoms, showcasing an innovative approach to sports broadcasting.[56]
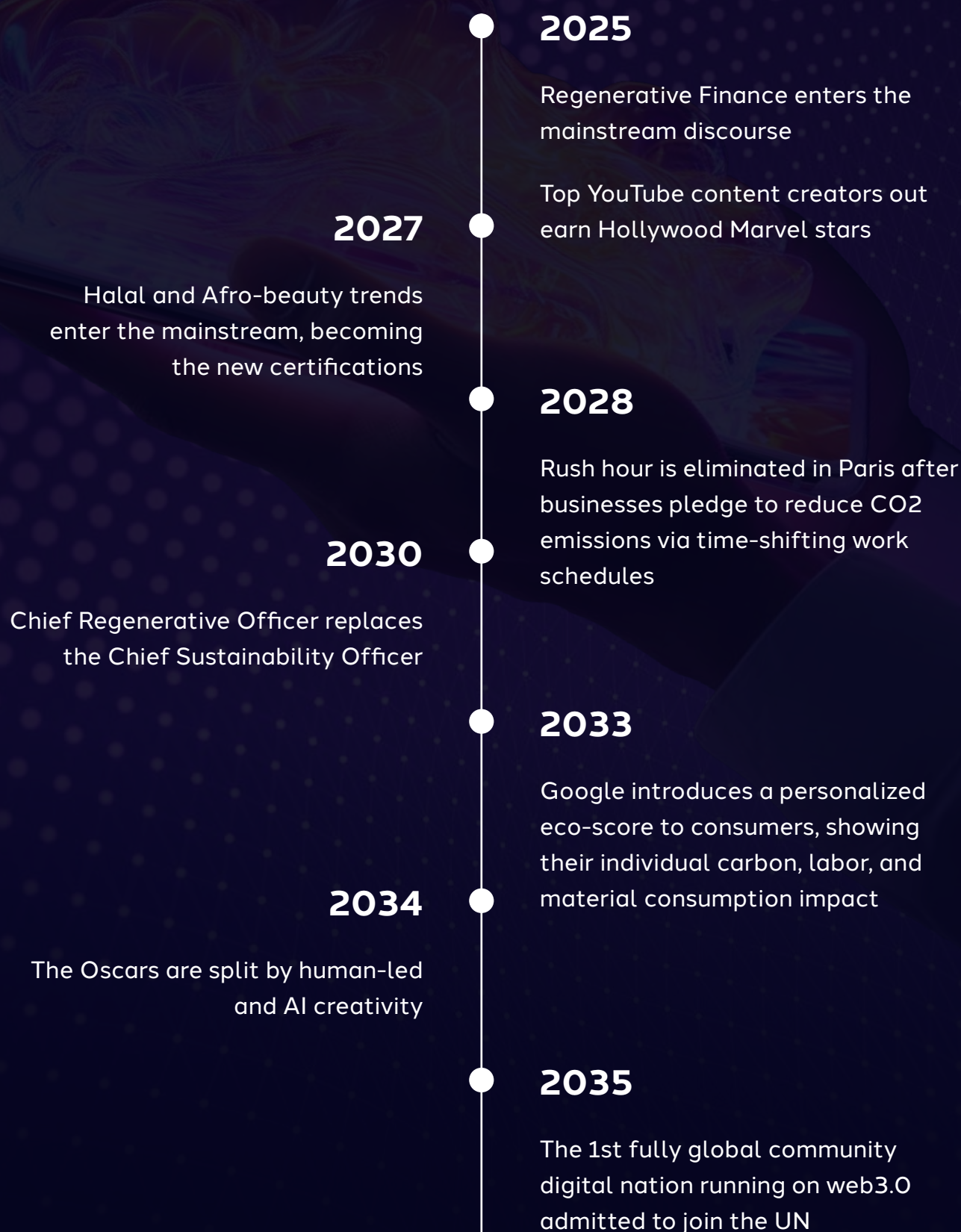
Cultural Reroute

First-mover advantage will be given to those brands who establish themselves as trusted establishments in the new cultural centers of influence by moving to help create jobs and new industries, and to amplify local creativity and give voice to the local populations.
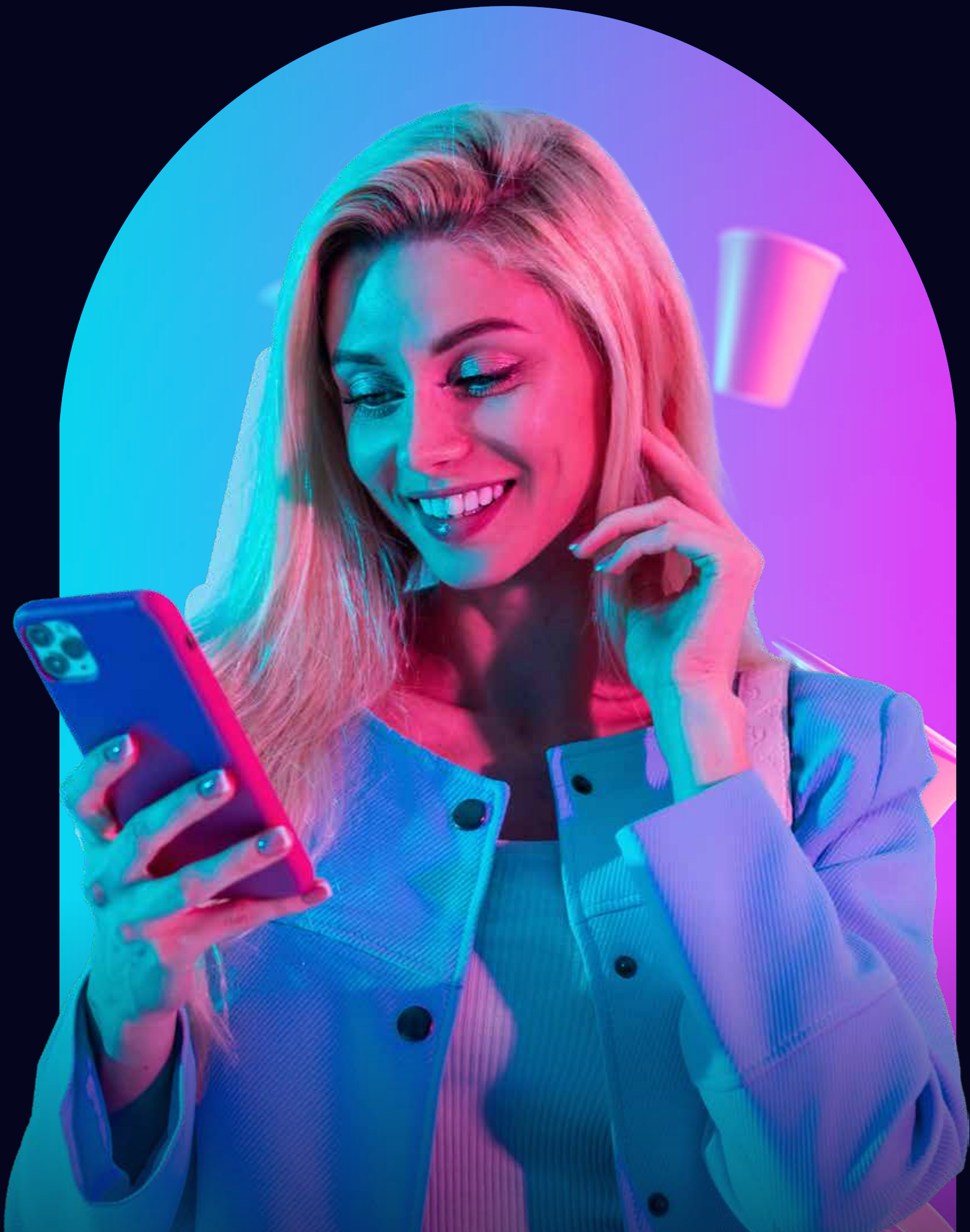
LEGO Ideas is a unique platform where LEGO enthusiasts can submit their own concepts for new LEGO sets. This community-driven initiative allows individuals to share their original designs, which can range from realistic models to fantastical creations. If a submission garners sufficient public support, typically 10,000 votes, it is reviewed by LEGO and has the potential to be developed into an official LEGO product. This process not only fosters creativity among the LEGO community but also bridges the gap between the company and its fans, turning imaginative ideas into tangible products for LEGO enthusiasts worldwide.[57]

Pathway to 2035

Here's a timeline of potential disruptions that could manifest in culture between now and 2035, as a result of the trends we outlined:
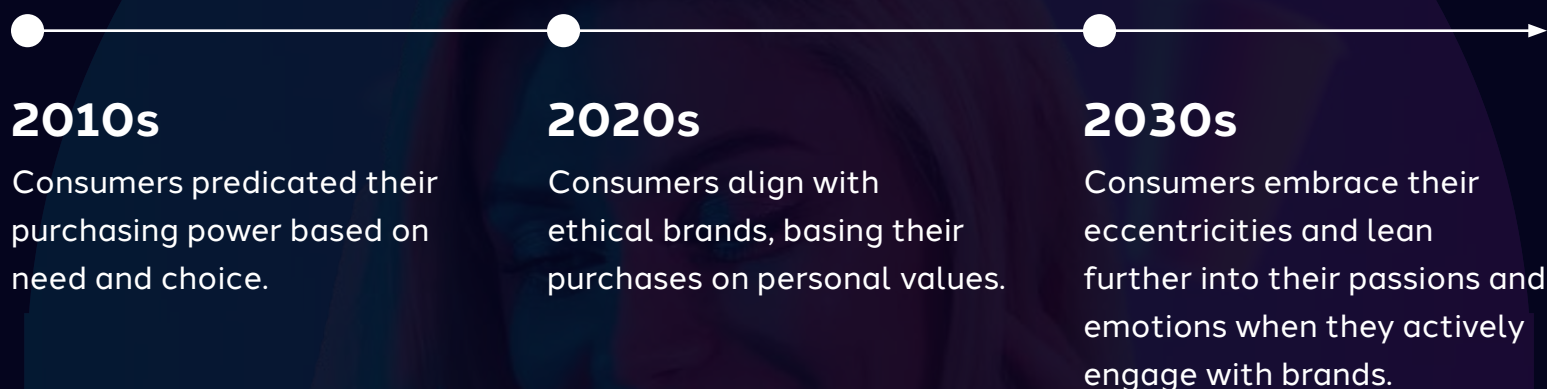
2025

Regenerative Finance enters the mainstream discourse

Top YouTube content creators out earn Hollywood Marvel stars

2027

Halal and Afro-beauty trends enter the mainstream, becoming the new certifications

2028

Rush hour is eliminated in Paris after businesses pledge to reduce CO_2 emissions via time-shifting work schedules

2030

Chief Regenerative Officer replaces the Chief Sustainability Officer

2033

Google introduces a personalized eco-score to consumers, showing their individual carbon, labor, and material consumption impact

2034

The Oscars are split by human-led and AI creativity

2035

The 1st fully global community digital nation running on web3.0 admitted to join the UN

Consumer (Ec)Centricity

In the last few decades, consumers' purchasing motivations, drivers and patterns have continually shifted as a result of profound transformations in their everyday lives.

2010s
Consumers predicated their purchasing power based on need and choice.

2020s
Consumers align with ethical brands, basing their purchases on personal values.

2030s
Consumers embrace their eccentricities and lean further into their passions and emotions when they actively engage with brands.

Consumers will start feeling that technology is cocooning their lives at the same time that nature is constraining their lives and reshaping their culture.

The resulting shared disorientation around identity, relationships, and mood will push consumers to eccentric extremes.

6 in 10

of Swiss consumers say that already today a significant share of their weekly shopping decisions is influenced by the mood they're in at the time of purchase.[58]

26%

say they wish they were even more impulsive.[59]

3 key trends will shape this landscape:

Data Agency
Consumers will take further control over their data in the age of AI.

Recalibrating Connection
Consumers will refocus on building social skills and opportunities.

Discomfort Zones
Breaking away from synthetically optimized environments, consumers will seek extreme emotional range to feel alive.

Data Agency

The scaling of predictive AI will allow people to try on new personalities and outsource their own. Human experiences — and personal image — will become valued IPs as the data connected to them is used to create AI avatars of real people and act as them.

While many will want to consent in data collection to gain value in exchange for this IP, others will look for ways to leave certain aspects of their lives unanswered.

Consumers will be cautious about what parts of themselves they express publicly, as every gesture has the potential to be a facet of their "forever-self." Safe spaces siloed away from recording entities will first be positioned as a luxury, then a basic human right.

Personalities Are Now IP

Data collection will evolve to capture more aspects of a person (e.g., tech will accurately portray real people and their personalities). As a result, people will be pressured to establish authority over their publicly consumed personas. Already, 8 in 10 global consumers agree with the statement, "I believe I own the copyright over the data that brands, platforms, and governments collect about me, as it is an expression of my unique personality."[60] Data will be seen as a key enabler for this desired individualism.

As consumers pivot from simply thinking about data exchanges with platforms and brands in terms of privacy to thinking about these exchanges in terms of data agency, we will see more businesses developing capabilities and services enabling consumers to bank and potentially monetize their personal data.

Today, we are already seeing companies emerge to shape this future. Startup Delphi AI digitally clones human personalities by using existing data. Consumers can make a clone of themselves to preserve it, and even re-create AI clones of deceased individuals to gain the experience of interacting with them. Still in its early stages, the company raised $2.7M in funding in September 2023.[61]

The Siloed Self

As more of consumers' experiences take place in online environments, our attitudes towards expressing ourselves are evolving.

38% of Swiss respondents in our global study agree: "Worrying about what other people think of me keeps me from experimenting with new things in my life and exploring new aspects of myself."[62]

This has an immediate repercussion on how we behave online and what we expect of the social platforms we use to connect with other consumers: 48% of global early tech adopters worry about what others think of their social media posts, versus the global average of 36% of consumers.[63]

In the future, consumers will crave unmonitored experimentation, flocking to spaces and channels where they can express their personhood and preferences without being cataloged.

Some initiatives are being spun up to address this need: Modulate is a moderation platform that helps gaming studios protect their players by reducing toxicity in voice chats through an AI-powered voice moderation system.[64] Historically and culturally, gaming spaces have not always been the most welcoming and now even the World Economic Forum is looking at how a more responsible gaming landscape can be created in the context of its broader initiative to improve online safety through its partnership with the Global Alliance for Responsible Media.[65]
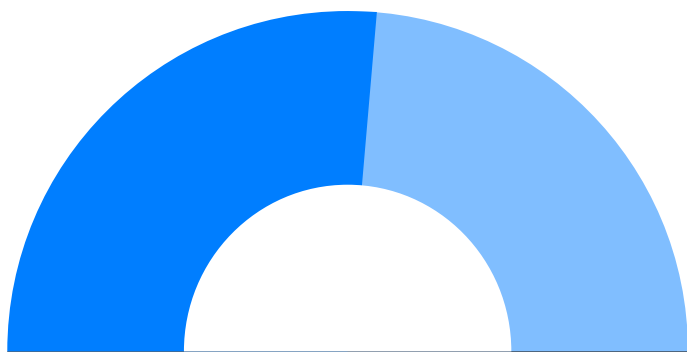
54%

Want a single interface to manage and curate how their personal data is shared across platforms

> " **Worrying about what other people think of me keeps me from experimenting with new things in my life and exploring new aspects of myself."**

Aiding Incognito Mode

Savvy brands will partner with consumers and creators to undermine pervasive data collection and provide users with greater control as to which aspects of their digital selves will be accessible. Already, 71% of global consumers agree with the statement: "I would like more control over the personal information I give companies and the way in which it is stored."[66] The desire to filter who can see our online profiles will increase as AI continues to source from public domains.

54% of Swiss consumers want a single interface to more easily manage and curate which aspects of personal data are shared and socialized with platforms and people.[67]

So imagine a future where the consumers you engage are 'data shapeshifters' and they actually favor the brands that enable them to be extremely flexible in how they present themselves in any given interaction, on any given channel, or favor the brands that aid them in the practice of 'moral malware': Nightshade is an "AI poisoning tool" which corrupts data used by AI image generators.[68] It does this by adding invisible pixels to art to confuse scanning results.

On the road to 2035, we will see more services offering ghost profiles and ways to corrupt AI data collection.

Recalibrating Connections

A connection between socializing and health will be forged as consumers cherish relationships that combat loneliness and holistically support wellbeing. Activities previously performed solo will be socialized to boost mental wellbeing and maintain friendships.

Aided by both technological and analog innovations, new means and nuances to communicating will erupt, providing shorthand options to signify opinions, experiences, and mood states (and thus boundaries) instantly. This will transform the way consumers opt to encounter and engage each other.

As a result of technology over-dependence for some, social skillsets will take on new importance, creating a new mandate for brands to retrain social ability.

The Loneliness Antidote

Consumers' eccentricity will manifest in a recalibration of how they go about forming connections and relationships compared to today.

While a global average of 27% of consumers feel at personal risk of loneliness, this is playing out quite differently among generations, rising to 40% among Gen Z.[69]

More activities and rituals previously done alone will have the option to be performed together, allowing consumers to multi-task connection and meet personal goals. In the future, we may even see doctors advise social activities as prescriptive measures. Some brands are already simulating connection, such as Tokyo's Tomodachi ga Yatteru Café which trains employees (many of whom are aspiring professional actors) to act as familiar friends to anyone who enters.[70]

"I am at risk of loneliness"

All	Gen Z	Millennials	Gen X	Boomer
27%	40%	28%	23%	23%
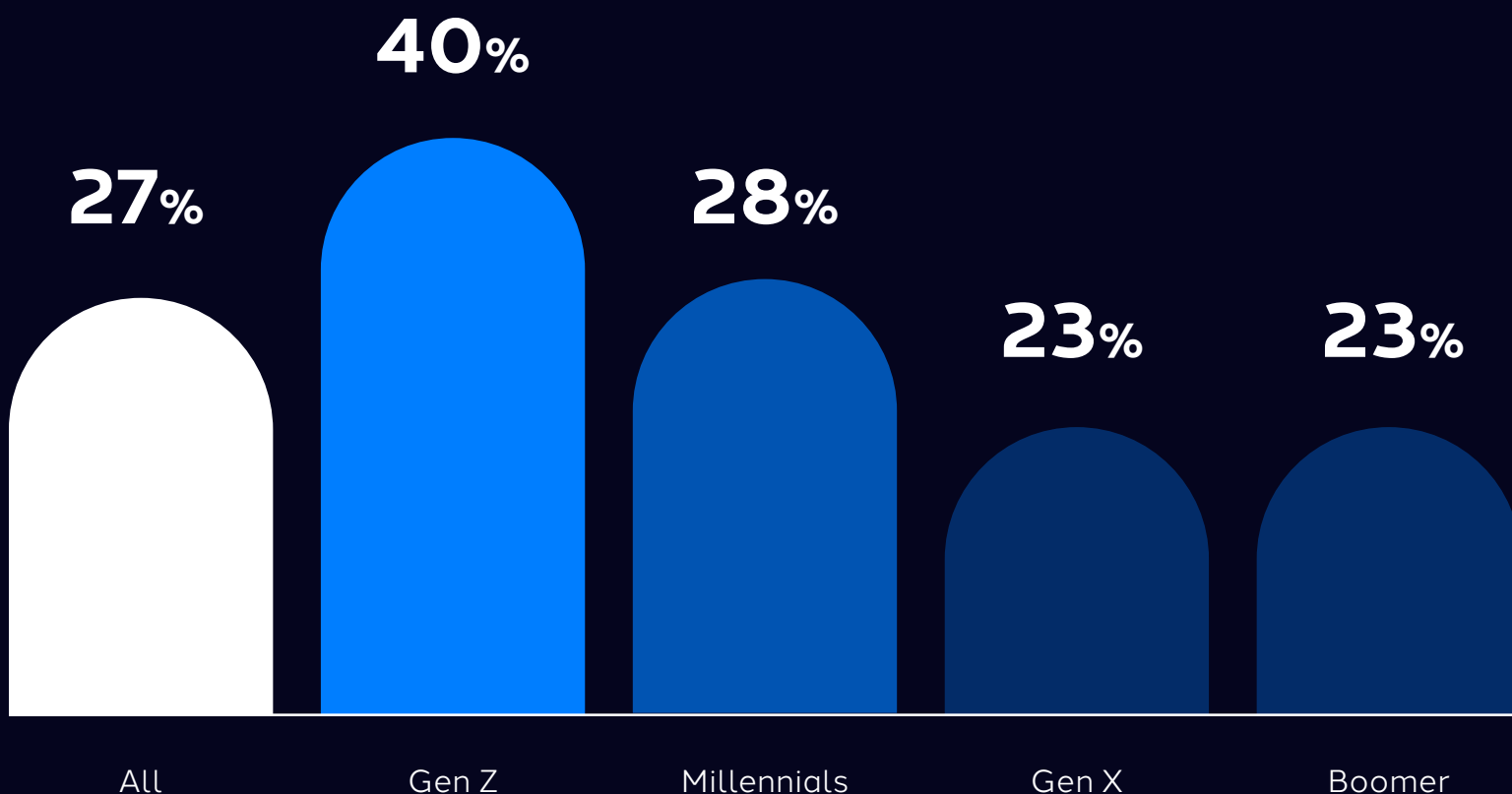
Relational Retraining

Digital dependence is atrophying social skillsets, creating a need for humans to retrain themselves on soft skills and intuition.

36% of consumers in Switzerland say that as they spend more time online, with social media and digital worlds, they feel less secure in their interpersonal skills when interacting with people in person. [71]

Brands will be tasked with investing in personable employees and upskilling consumers in basics such as body language, attention span, and conflict resolution. According to a new survey of 1,548 business leaders by Resume Builder, 45% of companies are already offering these kinds of classes while 18% plan to implement such classes by the end of 2024.[72]

There is an opportunity for businesses that help consumers, and not only employees, fill these gaps: Meeno is a chatbot app which aims to combat loneliness by offering relationship advice to users generated by artificial intelligence.[73]
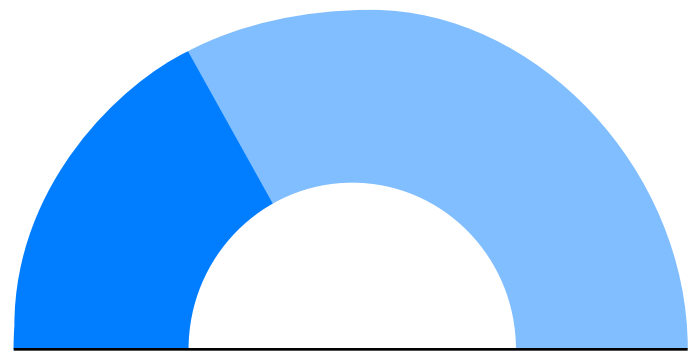
Advanced Ideology Markers

While, in some instances, our dependence on technology is weakening our social skillsets, at the same time, there's a certain effectiveness and convenience in online interactions that we'll expect to see replicated in the world of in-person interactions.

36% would like technology to help them better discern the intentions and moods of other people when meeting in person (and for them to discern theirs). [74]
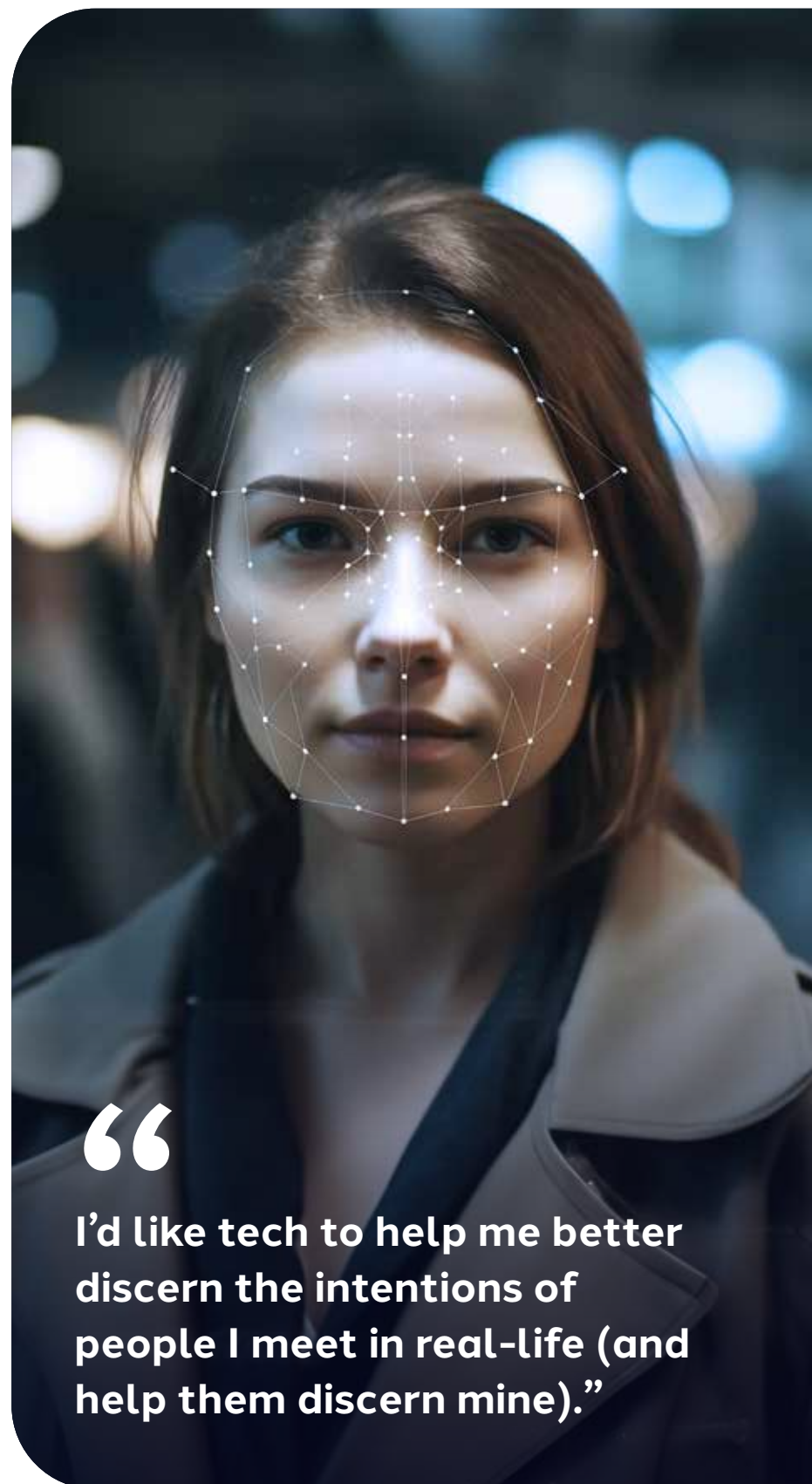
This type of mindset will create a need for solutions that enable people to signal their moods, needs, interests, and boundaries to others more quickly.

A market for visual and virtual signifiers that communicate how open or closed a person is to interaction is starting to emerge. The Waze navigation app enables drivers to display their moods to fellow travelers[75] while digital accessory company Pear allows wearers of its rings to signal IRL their relationship status, sexual identity and openness to romantic relationships reflective of online social networks. [76]

36%

feel less secure when interacting in person, as more of their time is spent online.

" **I'd like tech to help me better discern the intentions of people I meet in real-life (and help them discern mine)."**

Discomfort Zones

Breaking away from synthetically optimized environments, consumers will seek extreme emotional range to feel alive in 2035: enter the rise of Discomfort Zones.

Consumers will need to redefine what it means to feel human as multiple areas of life are solved and streamlined. Extreme emotions, such as joy, hope, fear, surprise, and even disgust, will be the new attention-getters.

Nestled in optimized environments, humans will feel an innate need to be catapulted from their everyday routines and comfort zones. To exert control, humans will aspire to feelings, activities, and goods that are now scarce.

Primal Emotions

With the worlds in which we interact becoming continually controlled and curated by technology, experiences that stir up visceral emotions will become more appealing.

5 in 10 Swiss consumers seek experiences and encounters that elicit more visceral emotions.[77]

As a result, consumers will be drawn to media and spaces that don't necessarily numb these emotions but rather help address them and safely reach catharsis: an early example of this is Fandangoe Discoteca, a world touring dancing space for mourners to shake out grief and help maintain mental health.[78]

5 in 10 Swiss consumers say they seek visceral emotions.

64%	57%	58%	76%
Global	Americas	EMEA	APAC
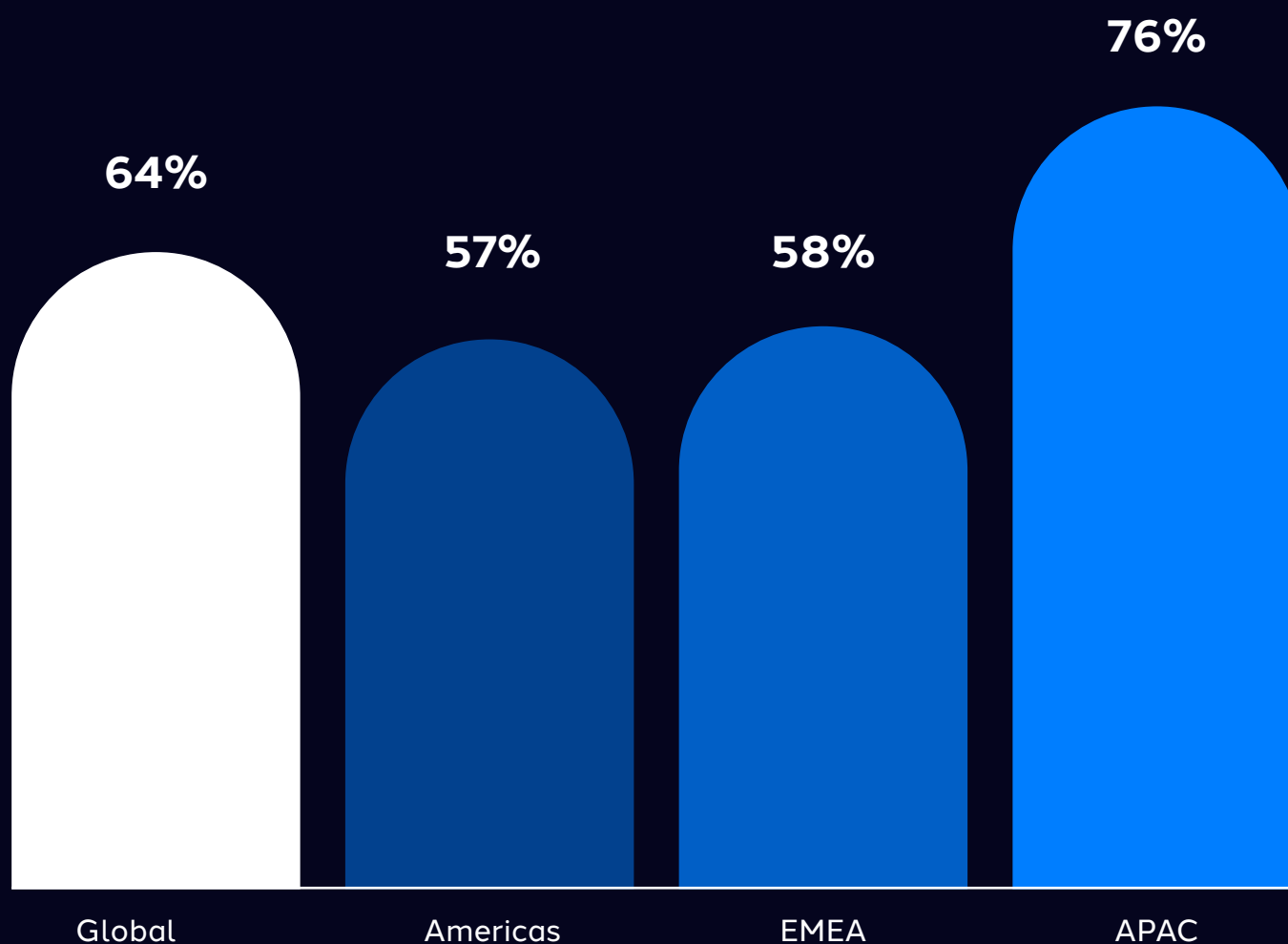
Geraldine Wharry
Foresight, Cultural Theory, Founder,
Trend Atelier

"

It's almost like we need a 're-sensitization' process.

Our ability to feel and respond deeply is being dulled down, leading to a societal state of emotional fatigue."

Replicated Vices

This desire to 're-sensitize' ourselves will, at times, manifest in the pursuit of experiences and products that feel out of the ordinary or risqué. Already, 21% of global consumers feel they need to do dangerous or forbidden things, rising to 31% of Gen Z.

In terms of purchasing behaviors, these attitudes will likely be reflected in the idealization of the look and feel of materials and goods that have been phased-out due to climate change, health breakthroughs, and other evolving social standards.

As a result, we will witness an inversion of some of the current luxury trends: Bottega Veneta's $10k Cabat bag employs woven silicone to mimic bubble wrap- a material being phased out due to sustainability concerns.[79] Additionally, Louis Vuitton's Freezer Sac Plat bag emulates the look of a plastic freezer bag and costs more than the original bag it mimics: the handbag, which is designed to appear as a Louis Vuitton bag contained in a plastic bag, is actually made up of silver-coated leather and retails for $3,950, over $1,300 more than the Sac Plat PM bag.[80]

Analog Ownership

A segment of consumers will reject AI and technological progress in favor of the analog. Services and products that are AI-free will be coveted as physical objects are phased out in much of consumers' daily lives, fueling a craving for tangibility beyond the click or swipe.
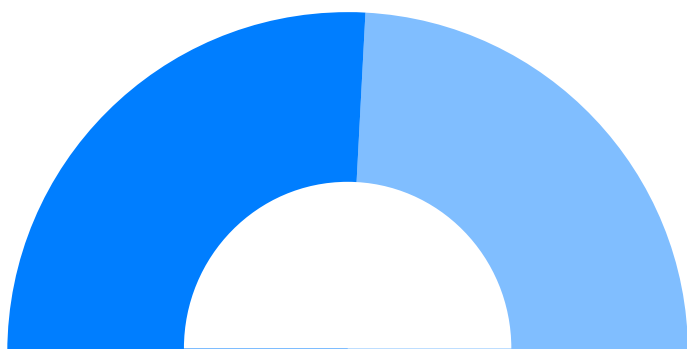
51%

want to own more physical things than they do now

Current data supports this despite the rise of the shared economy and shifts in sustainability norms.

51% of global consumers want to own more physical things than they do now.[81]

By 2035, physical media and completely analog human services will surge as pushback to a predominantly digital landscape. We see early inklings of this with the resurgence of DVDs: consumers are buying media in its physical form to maintain original stories and not have to chase after their favorite content from platform to platform. A 2010 documentary film, The People Vs. George Lucas, focuses on Star Wars fans' grievances towards the franchise originator for retiring the original theatrical cuts of the films from the market and forcing the CGI-enriched special editions of the late 1990s and early 2000s as the only available versions on all the formats that have succeeded VHS.[82]

The case of music on vinyl is another example of this trend. LPs have experienced a resurgence in recent years to the point that their prices have been considered statistically significant enough that they will feed into UK inflation measurement for the first time since 1992.[83]

Implications

Data Agency

Allowing consumers to have agency over their identities and creating will be the next frontier for creating trust. Brands that allow consumers to dictate how their data is used, to what degree, and in what context will earn customers' loyalty.

Italian knitwear line Cap_able's Manifesto collection can outsmart facial recognition technology, registering humans as animals instead.[84]

Recalibrating Connection

Brands will earn consumer trust by acting as social wellness stewards, bringing people of opposing ideologies and experiences together in third spaces to sharpen social skills.

To encourage politeness on the road, auto manufacturer Vauxhall has teamed up with decorum expert Debrett's on an etiquette guide for EV drivers, offering advice on respectful queuing and negotiating access to charging points.[85]
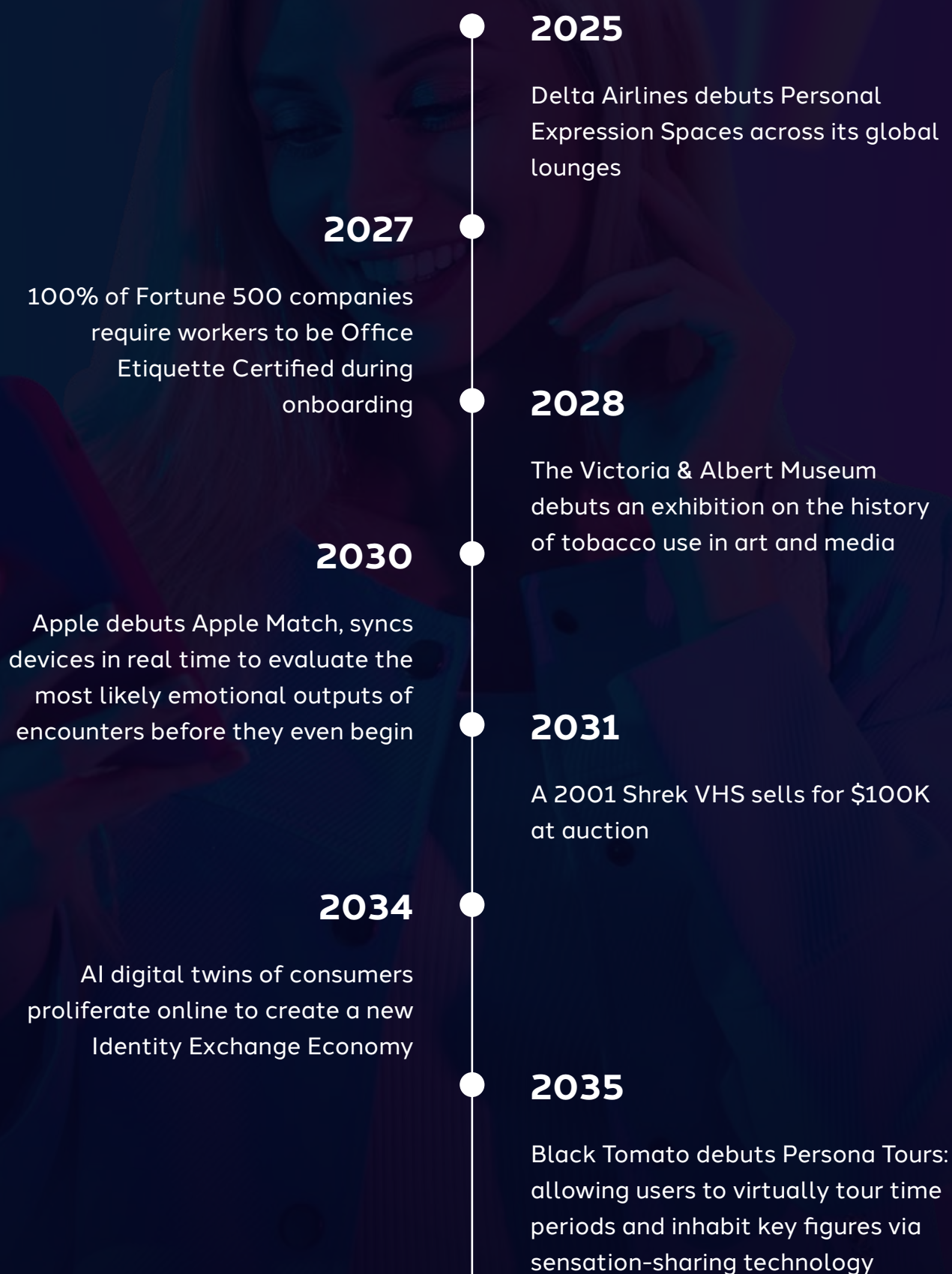
Discomfort Zones

In sectors like luxury, the future of brands will be visceral, sparking strong emotions and referencing over-the-top indulgence. Extreme experiences, emotions, and replicated vices will carry social cache.

U.S. rum brand The Kraken debuted Screamfest VII: Shock Exchange in selected UK bars for Halloween 2023. Developed in partnership with the Recreational Fear Lab, it challenged drinkers to try an immersive horror experience wearing a heart-rate monitor: the lower their bpm, the cheaper the cocktail.[86]

Pathway to 2035

Here's a timeline of potential disruptions that could manifest among consumers between now and 2035 as a result of the trends we outlined:

2025

Delta Airlines debuts Personal Expression Spaces across its global lounges

2027

100% of Fortune 500 companies require workers to be Office Etiquette Certified during onboarding

2028

The Victoria & Albert Museum debuts an exhibition on the history of tobacco use in art and media

2030

Apple debuts Apple Match, syncs devices in real time to evaluate the most likely emotional outputs of encounters before they even begin

2031

A 2001 Shrek VHS sells for $100K at auction

2034

AI digital twins of consumers proliferate online to create a new Identity Exchange Economy

2035

Black Tomato debuts Persona Tours: allowing users to virtually tour time periods and inhabit key figures via sensation-sharing technology

The Rise of Perceptive Brands

# In the last few decades, brands' mandate has profoundly evolved as a result of technology innovation and major shifts in consumer attitudes.

2010s
Brands had to be responsive to new terms of engagement set by consumers newly empowered by expanding choice and access.

2020s
Brands are becoming bigger and bolder, reclaiming control from consumers by being expansive with new terms of engagement through the establishment of titan brand ecosystems.

2030s
Brands will need to become perceptive and stay one step ahead of consumers – both humans and their AI "gate-keepers" – anticipating future needs and desired mood states by offering experiences that are both intuitive and serendipitous.

Brands will be required to be more intimate with consumers and engage them proactively through intuitive interactions.
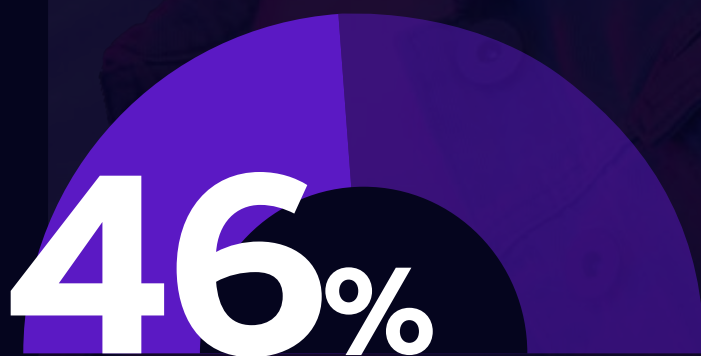
46%
of Swiss consumers would welcome brands being able to anticipate or predict what they want and pro-actively offer relevant and helpful products and services.[87]
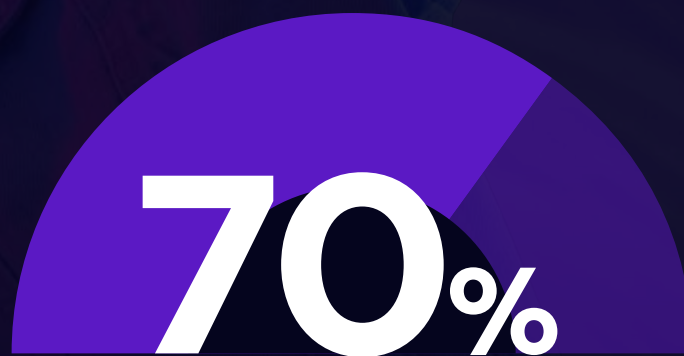
70%
agree: "The best way for a brand to stand out and earn my loyalty is its ability to surprise and delight me in unexpected ways."[88]

3 key trends will shape this landscape:

AI Gatekeepers
Brands will need to navigate AI barriers that protect consumers from unwanted solicitation.

Intuitive Interaction
Brands will be expected to interact in emotional, personal ways.

Anticipation as Expectation
Brands will be expected to anticipate consumer needs, rather than reacting to them.

AI Gatekeepers

Perceptive brands will succeed in the future because this trait will allow them to gain more traction with both active and AI-filtered consumers. Every moment will be a consumer-facing touchpoint with consumers' AI listening in. Brands will need to be diligently ready with individualized content to gain resonance, as well as recommendations that do not just push a sale but enhance the overall lives of the consumer and their personal goals.

The marketing approach will need to evolve from a consumer-centric model to a life-centric model of engagement, requiring brands to develop a deep contextual understanding of individual consumers to be permitted into their domain, starting first with their AI Gatekeeper. Brands will need to relearn and reconfigure the best means of getting exposure to potential customers — from cooperating with entities outside their ecosystem to establishing new processes.

Selling to Digital Guardians

Outsourcing organization or app control to AI is one thing, but there are indicators that, in the coming future, consumers will entrust more personal and central aspects of their lives and livelihood to digital assistants: for instance, by 2030, 6 in 10 consumers will be interested in using AI to guide their financial investments too.[89] Increasing digital delegation will manifest in tech-enabled screenings that often keep brands at bay and removed from human consumers.

6 in 10 respondents in our study say that by 2035 they would like to have an AI assistant that takes care of vetting the ads and promotions they're being sent.[90]

Services catering to consumers who are becoming more comfortable with entrusting their interactions to AI Gatekeepers are already starting to emerge: recently launched Sixty AI uses AI and machine learning to adopt the communication style of an individual consumer to then filter out unwanted communication and pass along only the most relevant of what is received, set and clear schedules, and even communicate around key milestones (e.g., sending birthday wishes).[91]

Respondents want an AI assistant to vet ads and promotions on their behalf by 2035.

77%

73%

87%

57%

All   US   China   Switzerland
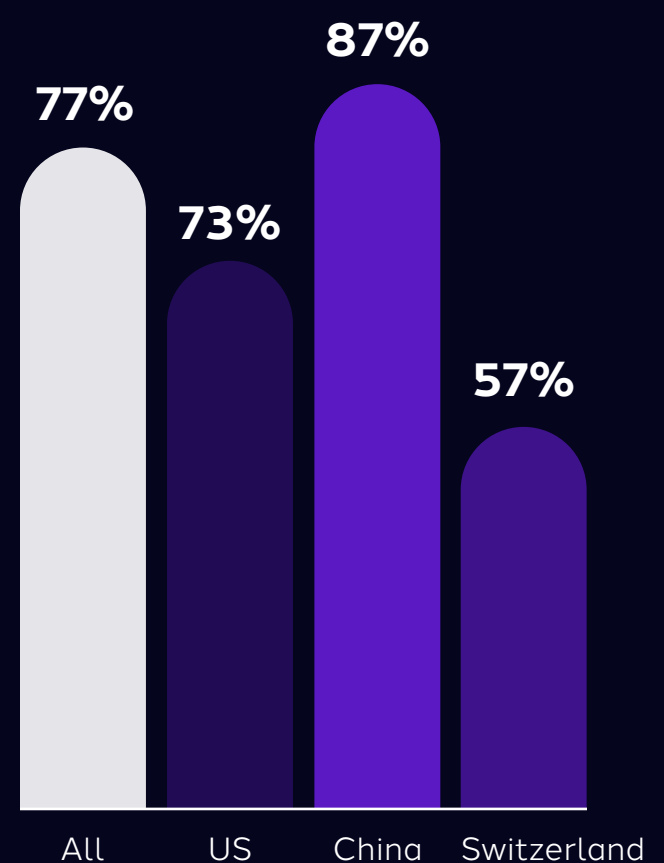
Seamless Cooperation

As consumers' AI assistants take control, brands will need to heed to the individualized paths and preferences set by consumers. Forcing consumers into pre-set partnerships and brand ecosystems will lead to being worked out of their set algorithms. Brands across all industries will need to play nice with other brands to enable consumers' preferences.

Under the right circumstances, AI Gatekeepers will actually facilitate brands by enabling repeat purchases, completely devoid of friction. As mentioned in our Digital Delegation chapter, more than half of Swiss consumers expect that by 2035 their appliances, devices, and vehicles will re-order parts and schedule service appointments independently.[92]

Brands' desire to lean into data-driven insights to remove friction from commerce is going beyond the notion of offering subscription models or serving an ad based on consumption patterns: for a while now Walmart has had a program where an associate will not only deliver groceries to consumers' homes but places them directly into their pantry or refrigerator. At CES 2024 Walmart added a new element to this service called InHome Replenishment. Using AI, Walmart will learn a household's consumption patterns and try to anticipate what will be needed next. Then, without the consumer having to implicitly order anything, the products needed will directly show up at their doorstep, ready to be placed in their pantry or fridge.[93]

3 in 10

want an AI assistant taking part in brand-led focus groups on their behalf by 2035

From Gatekeepers to Helpers

Preparing for this future, brands should not only think of AI assistants in terms of 'blockers.' In fact, in many instances, consumers' digital assistants will act as powerful allies to brands looking to develop new and better ways to engage their human customers.

32% of Swiss consumers would like to have an AI assistant that takes part in focus groups on their behalf to make their preferences known to brands by 2035.[94]

No one will know customers better than their AIs. Involving AI in the R&D process will help not only quickly iterate on product concepts and design but also get instantaneous feedback on the customer experience.

Market research companies like Toluna are already experimenting with virtual panels that simulate consumer responses to help users validate and optimize the surveys they are creating, before they are actually fielded to a 'human' panel.[95] In a future where AI Gatekeepers will become the norm, brands will be able to lean into research conducted with our individualized digital assistants to glean insights that we simply don't have the time to provide to them.

"

The way the world counts and values attention has to be completely rethought.

Sari Azout
Founder, Sublime

We must change our mental model from building things people 'consume' to building things people 'use.' From building products that demand our 'attention' to building products that help us further our 'intentions.' The companies that get it right will be well positioned to grow."

Intuitive Interaction

Brands in every sector will be expected to lead with emotion. To do so will require a sophisticated technology infrastructure of tracking, monitoring, predicting, augmenting, creating, and sensing customers. This ever-present process will need to fade into the background of customer interactions so that what is fundamentally human can be brought to the forefront of the brand experience.

Neuroscience will be leveraged to tap into the inner workings of the human brain and form deep sensory connections — a signature brand smell upon entering its website, store mannequins that reflect each shopper's body type, and a commercial that contextualizes to mood states.

Conversation Overtakes Promotion

Brands will need to become more human in their interactions. One way this will occur is via natural language interactions rather than one-sided promotion. Voice technology is being readily adopted: by 2032, nearly half of global consumers will have used voice commands.[96] As voice control overtakes screens, brands will need to respond with personality-forward personas.

51% of Swiss consumers expect brands to manifest distinct personalities in their interactions with them as AI is increasingly leveraged in customer service.[97]

AI bots are becoming more dynamic with unique personalities, even mimicking celebrities. At the end of 2023, Meta rolled out an initial 28 AI chatbot personalities, including that of Snoop Dog, Paris Hilton, and Dwayne Wade, alongside task-specific assistants such as a travel agent. Users can pick the bot that fits their needs and mood.[98]

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Off-setting with Serendipity

Using neuromarketing tools, brands will analyze human emotional cues to deliver against of-the-moment, individualized desires. These highly personalized experiences risk being expected and eventually mundane, paving the way for brands to also deliver serendipitous surprises.

6 in 10 of Swiss respondents in our global study expect that, by 2035, brands will send them personalized offers and promotions reflecting both real-time events (such as traffic, weather, etc.) and their personal context (e.g., the tone of the entertainment they are engaging with, their geo-location, etc.) [99]

Leveraging these discrete signals, tied to contexts that have a profound influence on how we feel in the moment, brands will be able to deliver experiences that are perceived by the end-user as 'meant to be' as opposed to planned or reactive.

Another way to achieve this will be developing experiences that leverage signals that, as human beings, we are not even aware we are giving out: HungerStation, a food delivery app out of Saudi Arabia, has created a new solution for the indecisive diner. The app tracks eye movement across a number of presented cuisines and meal types to help hone in on what the individual is craving most. It then presents a curated list of restaurant options within the determined preference to order from. Rather than predicting, the app is leveraging subtle, unconscious responses, serving consumers what they want before they know they want it.[100]

60%
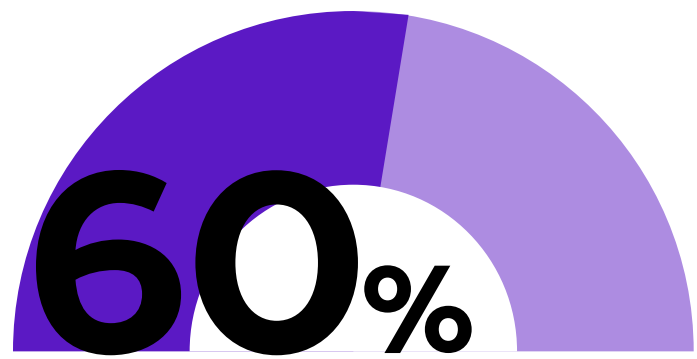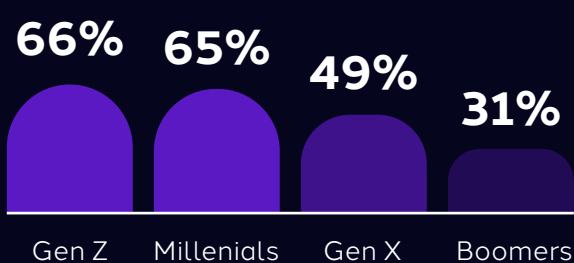
expect that by 2035 brands will send them offers and promotions reflecting real-time events and their personal context.

Mood-filtered Consumption

As they look to 're-sensitize' in active engagements with brands, as opposed to the more mundane ones they delegate to AI Gatekeepers, consumers will become more selective when it comes to granting their focus to experiences provided by businesses. Mood and emotion will be key levers for brands to pull. YouTube is starting to lean into this, leveraging the existing association between colors and mood, asking users to select a color, and then creating video feeds based on the selection.[101]

Two-thirds of respondents are interested in an online shopping tool that allows them to find products that help them achieve a desired mood state.[102]

As they look to deliver more mood-oriented experiences, brands will lean further into engaging all our senses: L'Oreal partnered with bioinformatics company EMOTIV to create a neuro-science tool that recommends the right scent for a consumer based on the brainwaves of the emotional state they wish to achieve. The unique fragrance consultation experience connects neuro responses to fragrance preferences through a multi-sensor EEG-based headset that consumers wear during an in-store consultation. The headset uses machine learning algorithms that interpret EEGs, while consumers experience proprietary scent families, to provide the ability to accurately sense and monitor behavior, preferences, stress, and attention in real-world contexts.[103]

Multi-sensory experiences are emerging across several fields: GameScent is a new product that leverages AI to let gamers smell the virtual worlds they are interacting with.[104]

Most people globaly are interested in an online shopping tool that allows them to find products that help them achieve a desired mood state.

66% **65%** **49%** **31%**

Gen Z   Millenials   Gen X   Boomers

Anticipation as Expectation

As consumers become increasingly eccentric and the optimization of customer experiences will almost become mundane, brands will need to anticipate our wants to differentiate — knowing us before we know ourselves – as being reactive will no longer be enough. To break free of a futile feedback loop, brands will need to anticipate and shape the future of what consumers crave, are passionate about, and flock together for.

This anticipatory approach will give way to fundamentally new approaches to generate consumer interest and promote novelty from fast-paced brand creation to catering to micro-communities. It will also move CSR from a flag-waving reaction to a fundamental business objective.

Orchestrating Emotion

As consumers' emotional states are increasingly monitored and predicted, brands will be expected to recognize these emotional patterns and short-circuit undesired states, even inducing desired states.

40% of Swiss consumers say brands should be able to understand their mood in the moment and respond accordingly in their interactions with them. [105]

With AI and machine learning technology, brands can assess an increasing amount of information to get ahead of consumers. Supply chain management software provider O9 Solutions is helping companies like Total Wines and More to understand weather patterns and local events to stock store supplies, Walmart to understand digital search to stock regional fulfilment centers, and Walgreens to understand illness patterns to ensure appropriate medical supplies are available during disease peaks.[106]
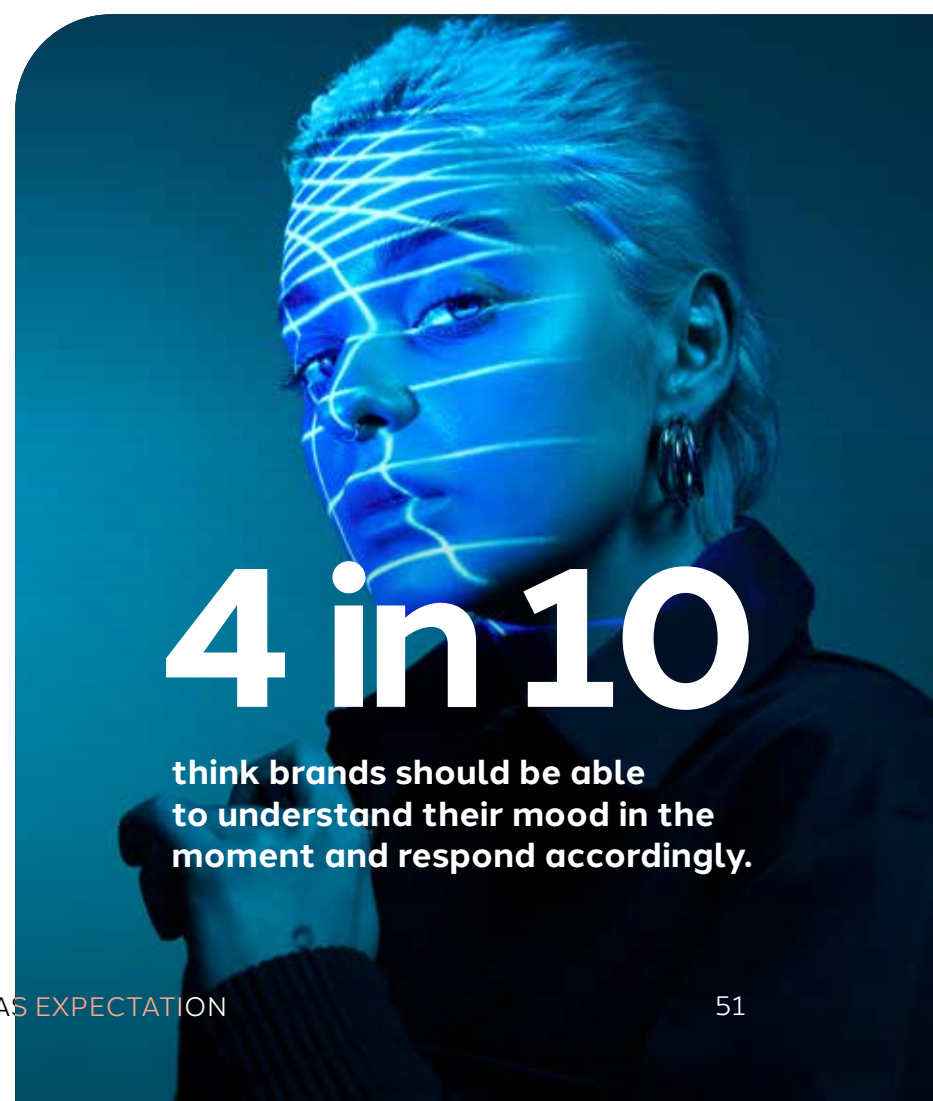
4 in 10

think brands should be able to understand their mood in the moment and respond accordingly.

Micro Brands Set Trend Cadence

Anticipation will also be critical for brands in terms of identifying trends before everyone else and spinning up 'micro-brands' to monetize this type of foresight. While people are growing older, the lifespan of the world's largest brands is declining.[107]

The hype cycle of brands and marketplace trends will accelerate as preferences can be more easily anticipated. To keep up, short-lived brands that are made for and gone with a single moment in time will become a strategy of titan brands to keep consumers in their ecosystem.

One industry that has felt this most acutely is luxury watches. Once ruled by traditional brands that prided themselves on timeless design, over the last several years micro-brands that leverage niche passions and unique materials have gained increasing popularity. For example, Mr. Jones, a London-based micro-brand watchmaker, creates unique watches that tell stories and encourage the wearer to think differently about time.[108]

Average company lifespan of S&P 500 companies 1965-2030

Average company lifespan in years (7 year rolling average)
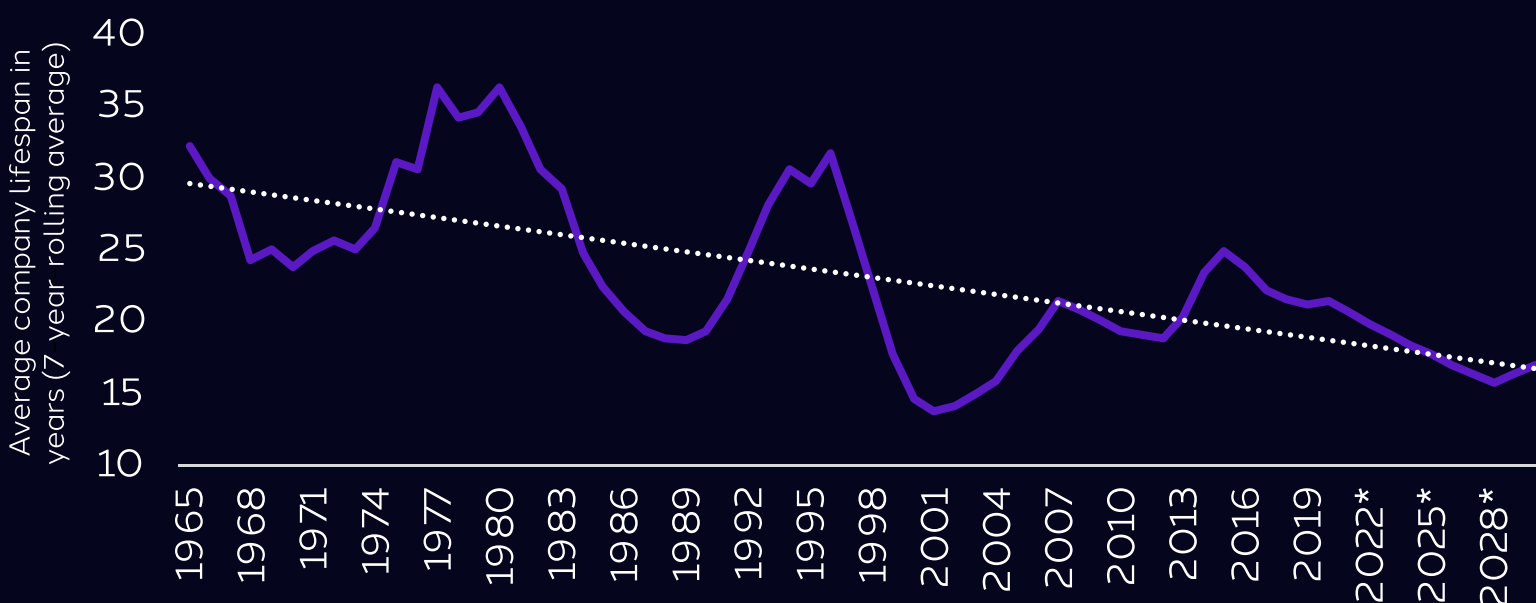
Requisite Crisis Prevention

Another area in which brands will need to adopt more anticipatory behaviors is crisis prevention and the development of proactive solutions that benefit the greater good.

8 in 10 Swiss consumers expect businesses to provide solutions that not only address the impact of climate change, but rather mitigate it and prevent it from escalating.[109]

Brands will need to be seen as developing ongoing stewardship over claimed CSR territories. They will need to demonstrate consistent programming and having a preventative impact rather than taking reactionary measures.

An example of this type of preventative attitude is The Inflation Cookbook, an interactive digital resource designed in the fall of 2022 to help Canadians source affordable, nutritious food and maximize their grocery budgets when inflation was having a profound impact on the North American economic environment. The tool leverages the power of data and technology to track the top ten food items that are trending downwards and upwards in price each week. Insights are regionally dictated and brand agnostic, providing Canadians across all provinces with an opportunity to find better-priced groceries. Generally, consumers who are struggling to generate savings often end up turning to less healthy diets. However, using AI and the guidance of both a top nutritionist and chef, the Cookbook curates seven healthy recipes that consumers can create at home using the best-priced items from that week. In the context of this initiative SkipTheDishes also donated $100,000 to Food Banks.[110]

8 in 10

expect businesses to not only address the impact of climate change, but help prevent it from escalating.

Implications

AI Gatekeepers

Brands will need to forge algorithmic alliances with AI systems as a means for access and influence over consumers' many points of decision.

Zowie is a conversational AI start-up chatbot that uses an advanced LLM (language learning model) to understand the intention behind consumer queries from pre- to post-purchase. The service can solve more advanced problems, such as suggesting a filtered search for alternative products after a return is processed to unlock hidden revenue.[111]

Intuitive Interaction

Brands will need to develop personalized and branded signature sensory experiences with delivery that is interactive and feels personal.

Gumgum bills itself as a "contextual advertising agency" specializing in ad placement determined by AI analysis of the full content of a web page. The service employs existing content, rather than gathering consumer data to predict and present the most relevant advertisement a visitor would want.[112]
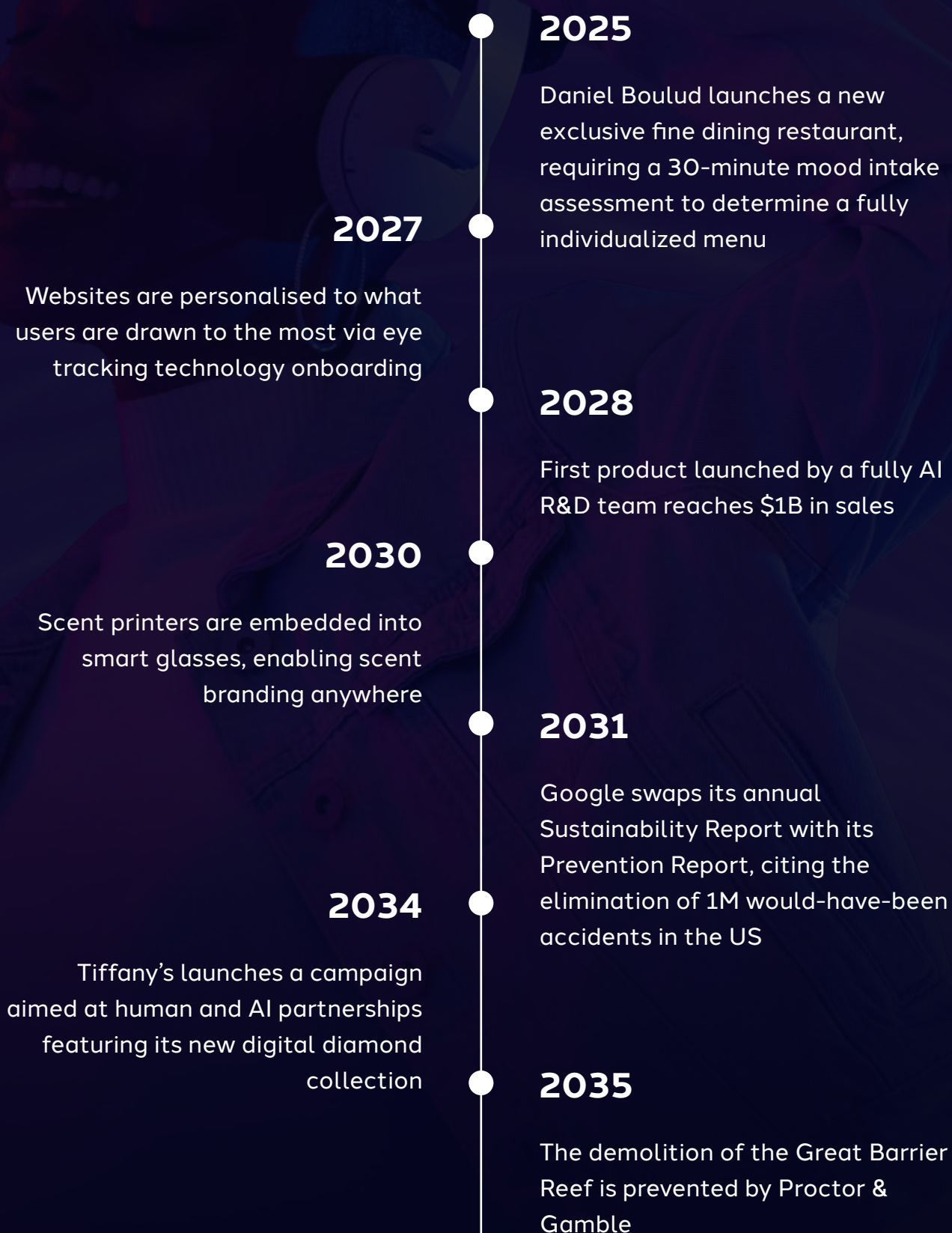
Anticipation as Expectation

Brands must elevate consumer understanding beyond demographics and current conversations by anticipating emotions and predicting consumer behaviors before they happen.

Blueskeye AI, a company out of the UK, has been working on perfecting voice- and face-sensing artificial intelligence to identify which people are heading towards depression – often before the individual is aware of it, and long before they might seek out help.[113]

Pathway to 2035

Here's a timeline of potential disruptions that could take place between now and 2035, as a result of brands striving to become more perceptive:

2025

Daniel Boulud launches a new exclusive fine dining restaurant, requiring a 30-minute mood intake assessment to determine a fully individualized menu

2027

Websites are personalised to what users are drawn to the most via eye tracking technology onboarding

2028

First product launched by a fully AI R&D team reaches $1B in sales

2030

Scent printers are embedded into smart glasses, enabling scent branding anywhere

2031

Google swaps its annual Sustainability Report with its Prevention Report, citing the elimination of 1M would-have-been accidents in the US

2034

Tiffany's launches a campaign aimed at human and AI partnerships featuring its new digital diamond collection

2035

The demolition of the Great Barrier Reef is prevented by Proctor & Gamble

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About dentsu

Dentsu is an integrated growth and transformation partner to the world's leading organizations. Founded in 1901 in Tokyo, Japan, and now present in over 145 countries and regions, it has a proven track record of nurturing and developing innovations, combining the talents of its global network of leadership brands to develop impactful and integrated growth solutions for clients. Dentsu delivers end-to-end experience transformation (EX) by integrating its services across Media, CXM and Creative, while its business transformation (BX) mindset pushes the boundaries of transformation and sustainable growth for brands, people and society.

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