The Future

100

A REPORT BY **VML** INTELLIGENCE

VML

2026

Foreword

A metamorphic current is surging into 2026, where breakdown gives way to breakthrough.

Welcome to the 12th edition of "The Future 100," where a dystopian backdrop sparks defiant strength and courageous creativity. After another year marked by upheaval, a bleak outlook is being met with a surge of ingenuity. In Entropism (page 17), decay and breakdown are reimagined by designers as a route to renewal, while Apocalyptic glamor (page 175) finds resilience—and even beauty—in adversity. A new class of AI creators and collaborators is also multiplying potential in ways we are just beginning to imagine (Synthetic generation, page 50).

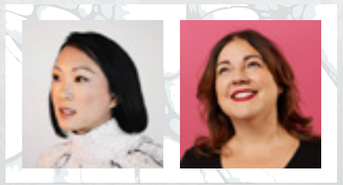
A "dysoptimistic" future is taking shape—one that acknowledges darkness but refuses despair. Navigating it will require strength, malleability, and also something softer: the small, uplifting rewards that help us withstand turbulent times (Treatonomics, page 179). This is a year for building resilience—not just to endure, but also to create space for imagining what comes next. From the personal to the planetary, from human engineering to geoengineering the climate itself, the boundaries of what's possible are being redrawn.

For many, what comes next is transformation. In "The Future 100: 2025," new realities were a source of escape and solace. This year, something deeper is emerging—a desire for fundamental change. People are craving experiences that elevate, enlighten, and shift perspective. Transformative experiences (page 102) reflect this desire—86% are drawn to encounters that inspire awe, wonder, or a renewed worldview, and trends such as Immersive wellness (page 246) show how some brands are already guiding profound personal journeys.

Trendsetting gen Zers are turning technology to their advantage: 70% say they like the idea of escaping to a different reality through tech and nearly half (49%) report forming a meaningful relationship with AI. Technology is already reshaping our experience of reality. In Hyperreality (page 29), the line between real and generated becomes meaningless, while AI storyworlds (page 260) offer adaptive narrative worlds we can cocreate and inhabit.

Even as people lean in to blended realities, the desire for human connection remains unmistakable: 80% still prefer speaking with a human representative when shopping, and 87% value experiences that foster connection—with themselves or with others. This human impulse is shaping brand strategies. In retail, designers are crafting Next-gen malls (page 189) and Monumental luxury (page 205) to draw people back in person through immersive, high-impact experiences. Across culture, the value of connection is evident, from the New rave scene (page 239) to Social health (page 236), demonstrating the power of shared meaningful experiences.

The metamorphic current is here and "The Future 100: 2026" is your guide.



Emma Chiu and Marie Stafford
GLOBAL DIRECTORS, VML INTELLIGENCE

vml.com/expertise/intelligence

VML



Culture

01 Entropism **17**
02 Transformation frontier **20**
03 Truth literacy **23**
04 Unbounded creativity **26**
05 Hyperreality **29**
06 Algospeak **31**
07 Rewilding male kinship **33**
08 Screen subcultures **36**
09 Natural IP **39**
10 Multiflex cities **41**



Technology

11 Generative realities **46**
12 Synthetic generation **50**
13 Omnisurveillance **53**
14 Digital intent **56**
15 Smart play **59**
16 The reality interface **61**
17 Creative dataland **64**
18 Deglobalizing LLMs **68**
19 RelAltionships evolved **70**
20 Commercial humanoids **73**



Travel and hospitality

21 Endurance travel **76**
22 Nocturnal experiences **79**
23 Timid tourism **81**
24 Listening suites **83**
25 Nano trips **86**
26 Dark retreats **88**
27 Luggage-free travel **91**
28 Three hot destinations **93**
29 World-building hospitality **95**
30 Micro-upgrades **97**



Brands and marketing

31 Democratizing creAltivity **100**
32 Transformative experiences **102**
33 The sovereign creator **105**
34 New-wave sport fandom **108**
35 Brand democracies **111**
36 Anthropomorphized branding **114**
37 Storytelling universes **116**
38 New-wave activism **119**
39 Micro-dramas **121**
40 Brand bastions **123**



Food and drink

41 Elemental dining **127**
42 Carnivore cuisine **129**
43 Forgotten flavors **131**
44 Downsized dining **134**
45 Beernovation **137**
46 Apocalypse-proof dining **140**
47 Three hot ingredients **143**
48 Culinary collaborations **145**
49 Water sommeliers **148**
50 AI gastronomy **150**













Beauty

51 Speculative beauty **153**
52 Edible allure **156**
53 Skincarewear **159**
54 Substack strategies **161**
55 Seditious beauty **163**
56 Sleeping beauty **165**
57 Next-gen gamer glow **167**
58 Fragrance layering **169**
59 Rhythmic beauty **172**
60 Apocalyptic glamor **175**



Retail

61 Treatonomics **179**
62 Gen alpha influence **182**
63 Living loyalty **184**
64 Livestreamed shopping **187**
65 Next-gen malls **189**
66 Branded financial literacy **192**
67 Ephemeral retail **194**
68 Acommerce **196**
69 Heritage reboot **199**
70 Three thriving store formats **202**



Luxury

71 Monumental luxury **205**
72 Decadent dining **209**
73 Beauty longevity tech **211**
74 Luxury scavenger hunts **213**
75 Dystopic luxe **216**
76 Deluxe dating **219**
77 Luxury adaptation **221**
78 Elevated textures **224**
79 Wellbeing status **227**
80 Shared luxury **230**



Health

81 Resilience wellness **233**
82 Social health **236**
83 New rave scene **239**
84 Joyspans **241**
85 Pet longevity **244**
86 Immersive wellness **246**
87 Climate-resilient healthcare **250**
88 Heartbreak healing **252**
89 Contrast recovery **254**
90 Indigenous remedies **257**



Innovation

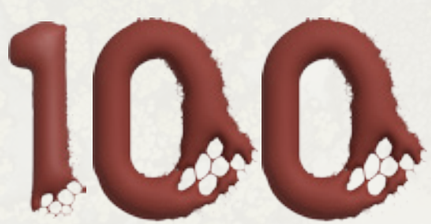
91 AI storyworlds **260**
92 Human engineering **264**
93 New capitals **266**
94 Metabolic futures **269**
95 Coded empathy **271**
96 Next-wave biomaterials **273**
97 AI legacy **276**
98 Sensory augmentation **278**
99 Geoengineering **281**
100 Gen beta futures **283**











By the numbers

People are not merely coping with disruption,
they are embracing it as a catalyst for fundamental changes
in how they live, spend, and connect.

Unless otherwise stated, all data in this report was collected by SONAR™, VML's research practice, from September to November 2025. 15,639 adults were surveyed in Argentina, Brazil, China, Colombia, France, Greece, India, Italy, Japan, Mexico, Portugal, Saudi Arabia, Thailand, the United Arab Emirates, the United Kingdom, and the United States. For methodology, see page 294.

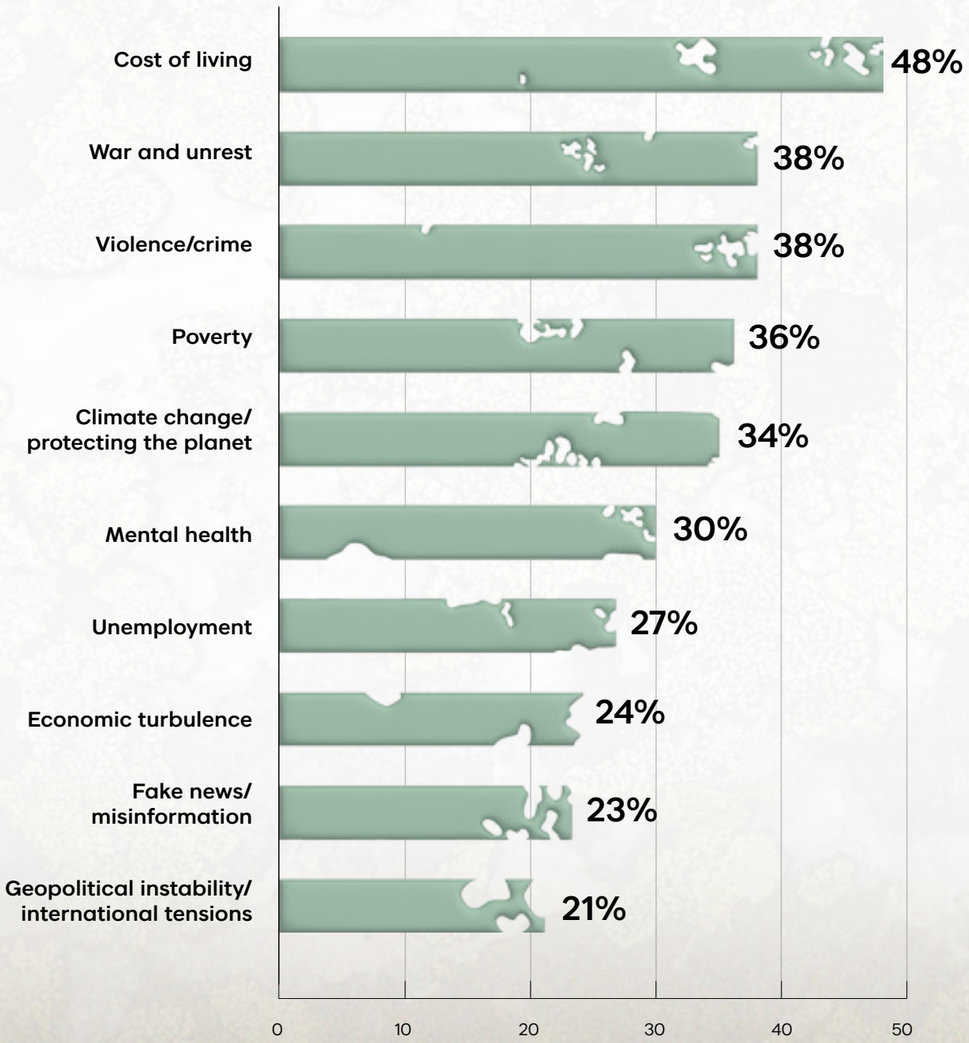
VML

The age of interdependence

Cost-of-living and systemic crises continue to pile pressure on consumers.

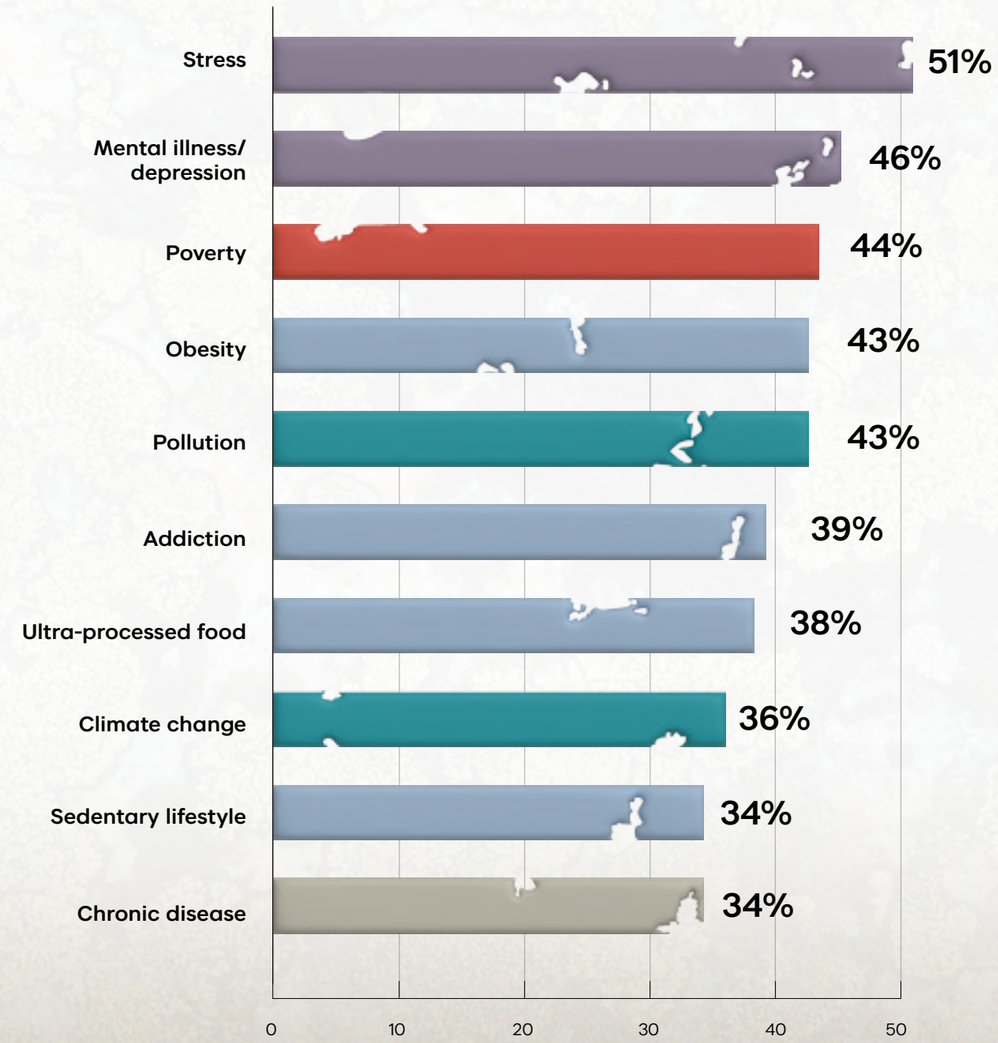
The biggest problems facing society today

Selecting in their top five (%, global)



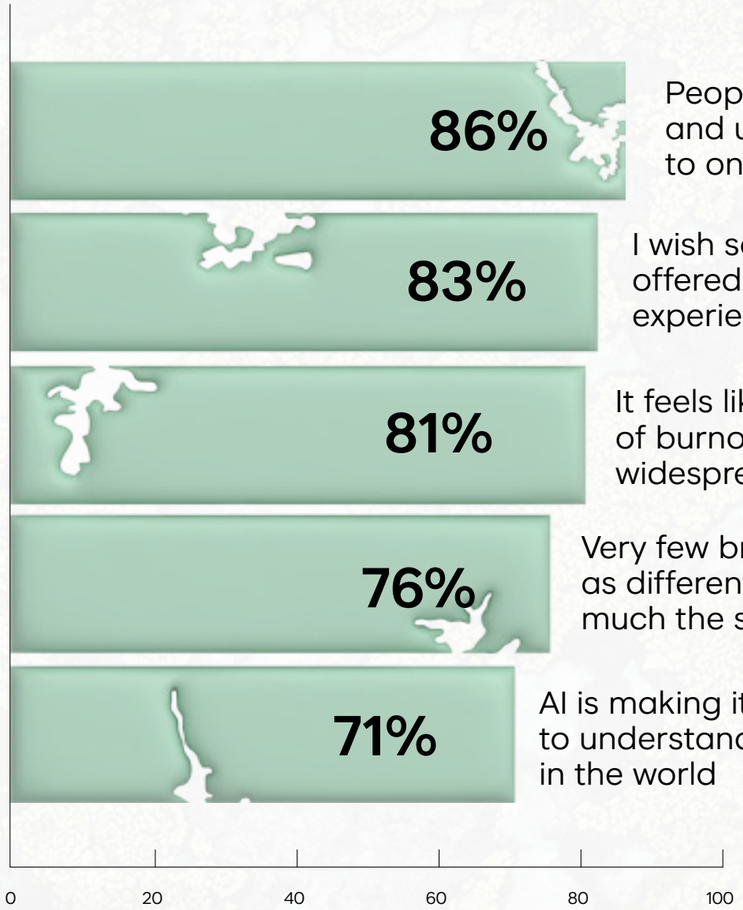
The biggest challenges for human health

(%, global)



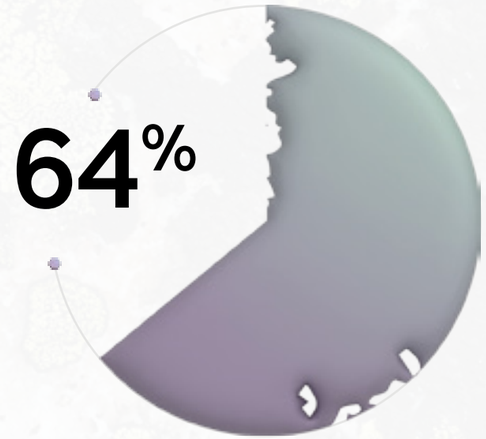
Social and cultural malaise

Everything feels a little... post-peak.



Somewhat/strongly agree with each statement (%, global)

I sometimes struggle to find meaning in the day-to-day



"The polycrisis hasn't gone away. It's just got more critical, more uncertain, more chaotic, more complex. We are clearly living in really, really difficult times."

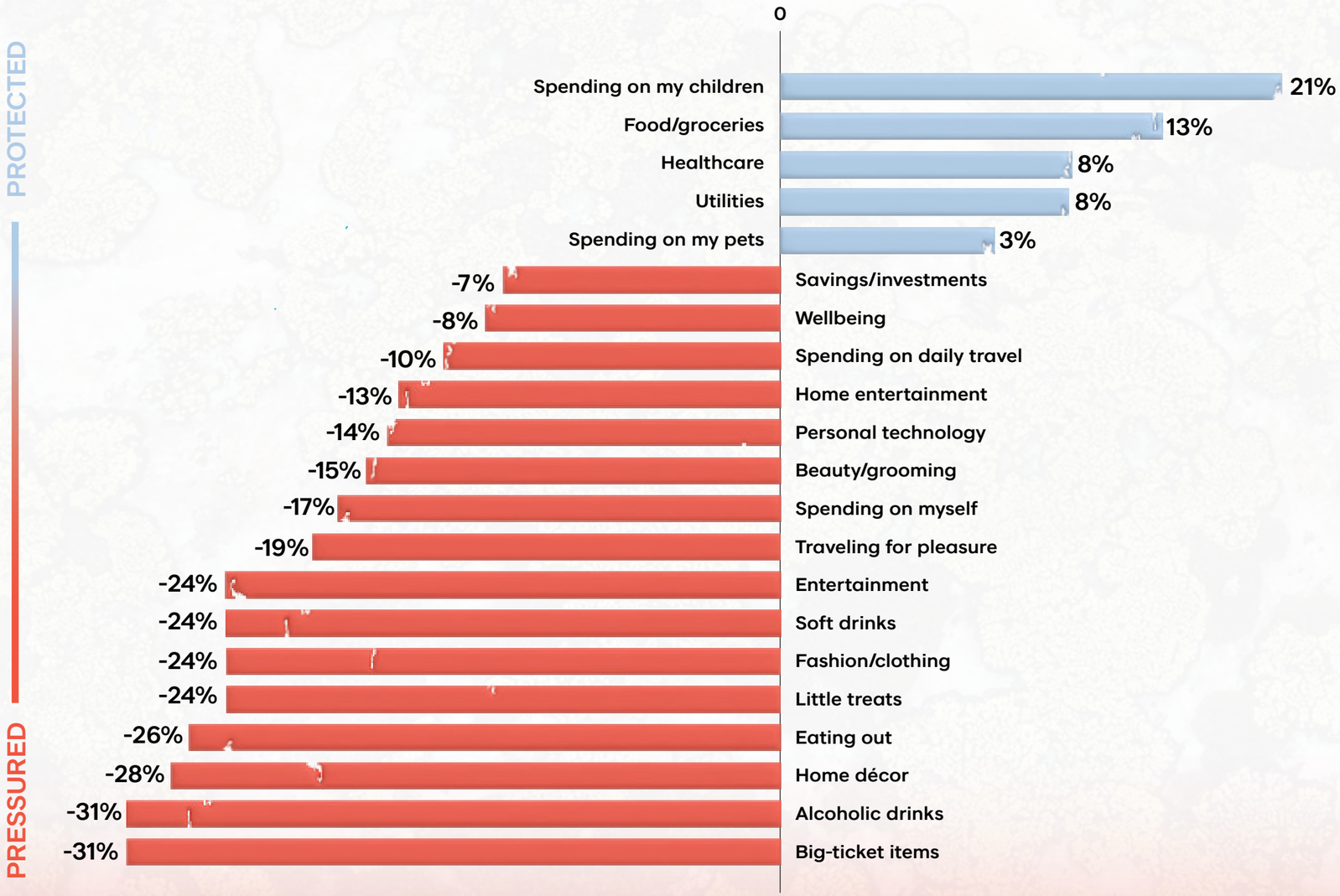
Sean Pillot de Chenecey
AUTHOR AND FUTURIST

Cost of living

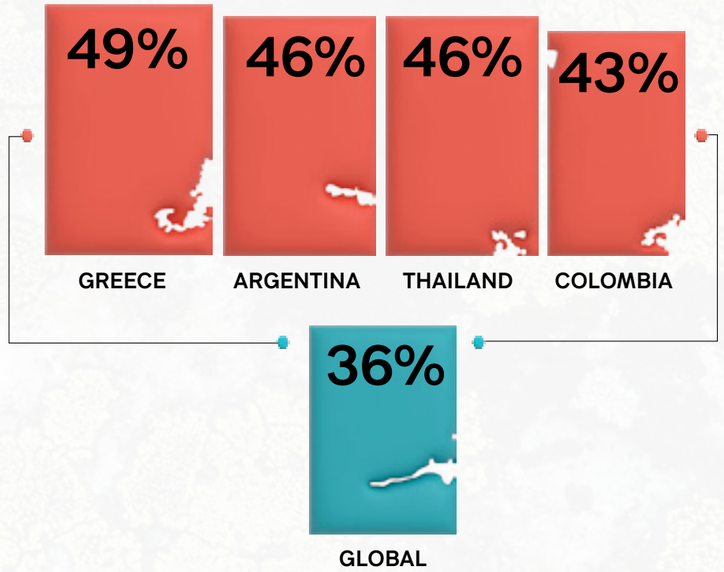
Finances are under pressure, with spending curbed across most categories.

Net consumer spending by category

People spending much/somewhat more, less those cutting back somewhat/greatly (%, global)



I have had to cut back on things I used to consider necessities



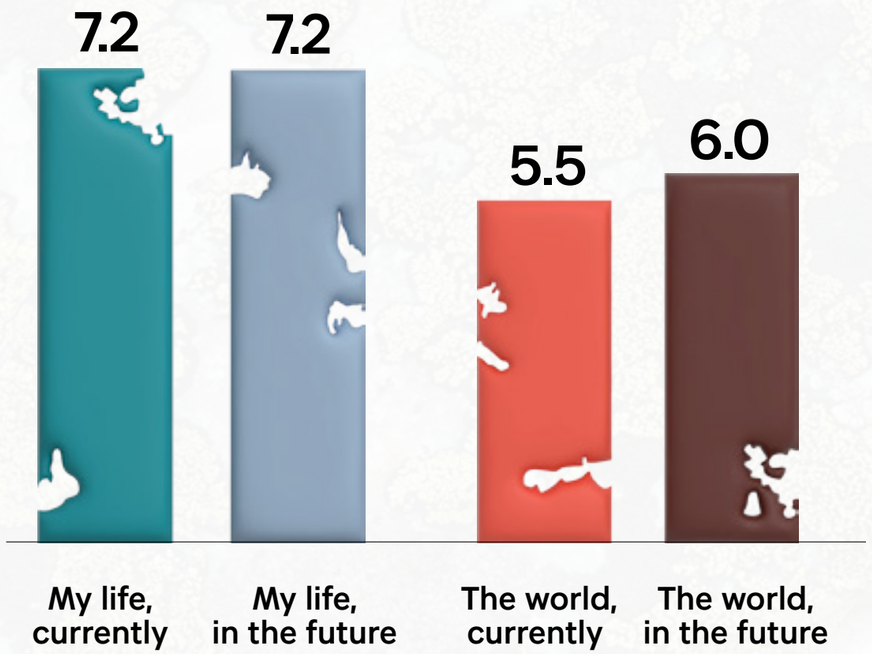
Somewhat/strongly agree with each statement (%, global)

Consumers choose to be optimistic

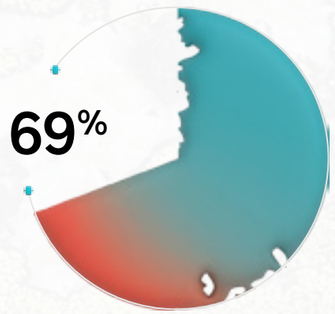
Despite the challenges, people are choosing positivity, especially on a personal level.

How people are feeling

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

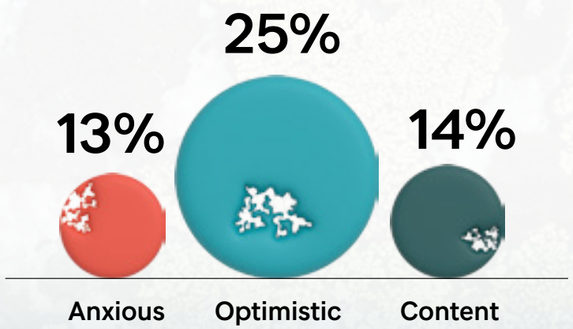


I regularly feel hopeful for the future



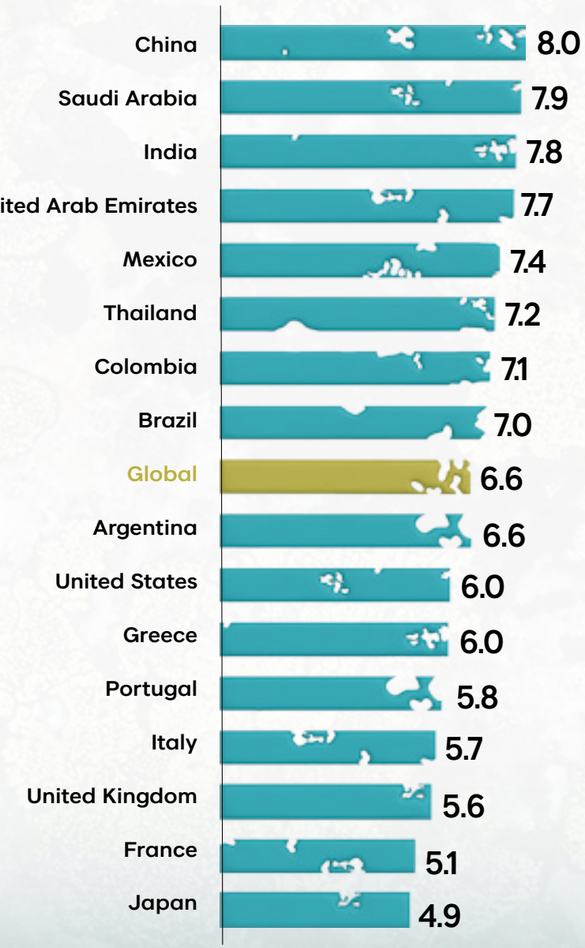
Key emotion about life now

Top three emotions capturing how life is right now (%, global)



Future optimism

Aggregate rating of how positive or negative respondents feel about their own lives and the world in the future, on a scale of 1 to 10 (individual countries)

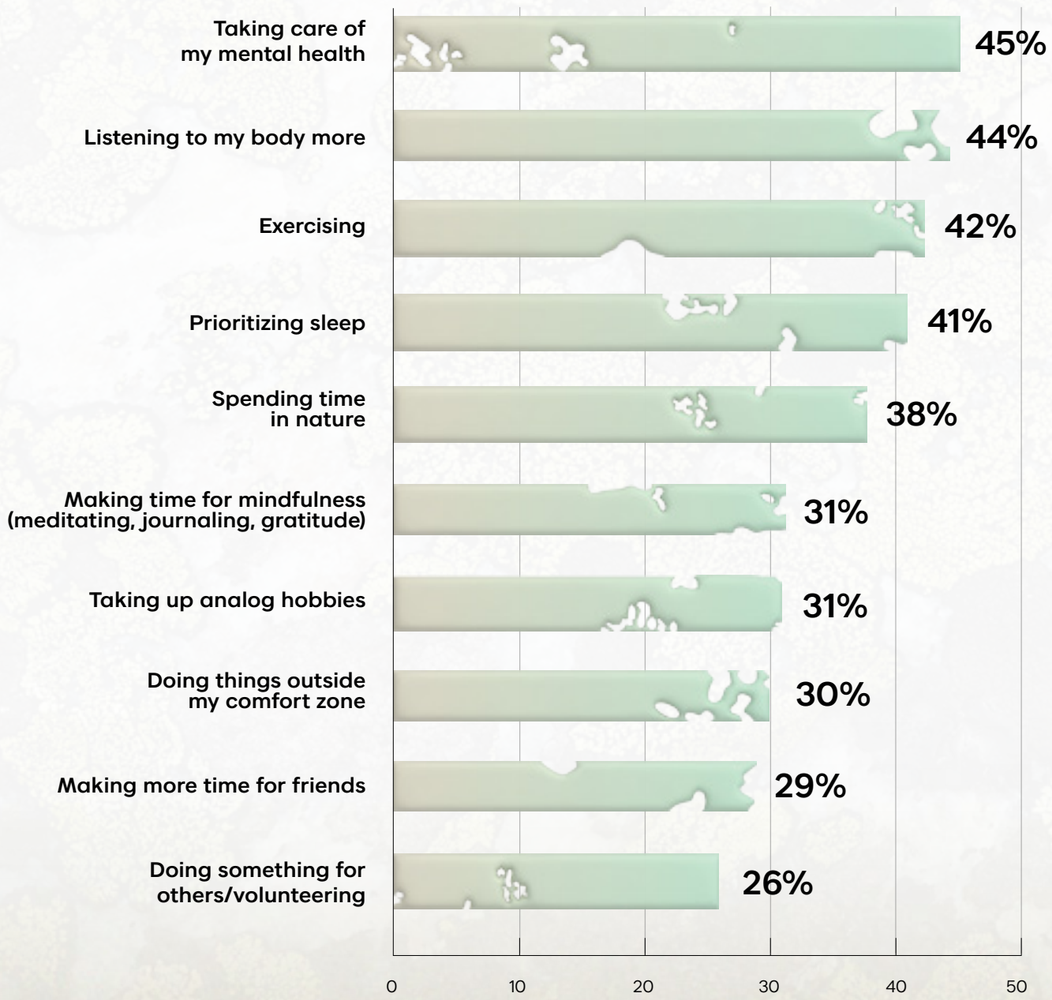


Resilience building

This year consumers will focus inwards, gathering their strength.

Resilience-building behaviors

Behaviors people are doing more of this year compared to last (%, global)



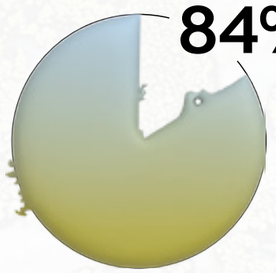
Craving emotional experiences

Feelings and experiences people would like more of (%, global)

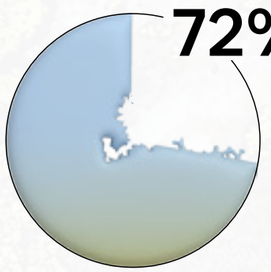


A growth mindset

There is a growing desire to be better and to imagine better, and brands can help.



Over the next year, I plan to focus more on personal growth



I long to be part of something bigger than myself

I value experiences that...

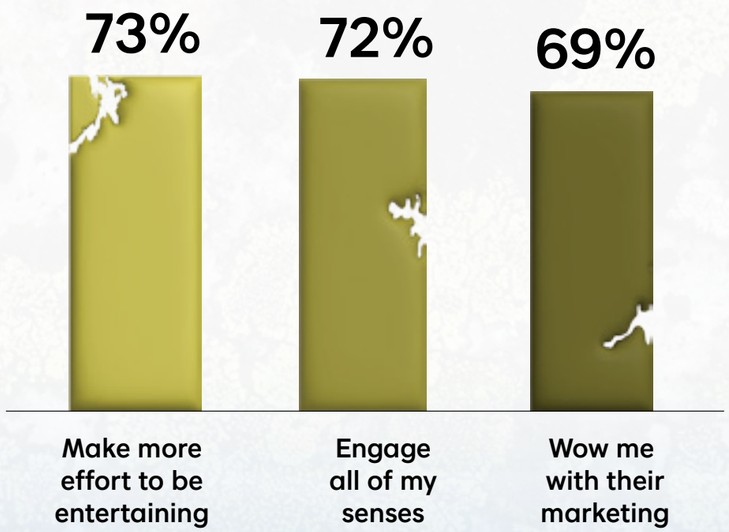
- **91%** Stay with me longer after they're over
- **88%** Feel meaningful, not just entertaining
- **87%** Leave me feeling changed in some way
- **86%** Inspire awe, wonder, or a new perspective
- **85%** Connect me to something bigger

"With transformation, we experience something that changes something within us and allows us to see new possibilities."

Dr B Joseph Pine II

AUTHOR, SPEAKER, AND MANAGEMENT ADVISOR

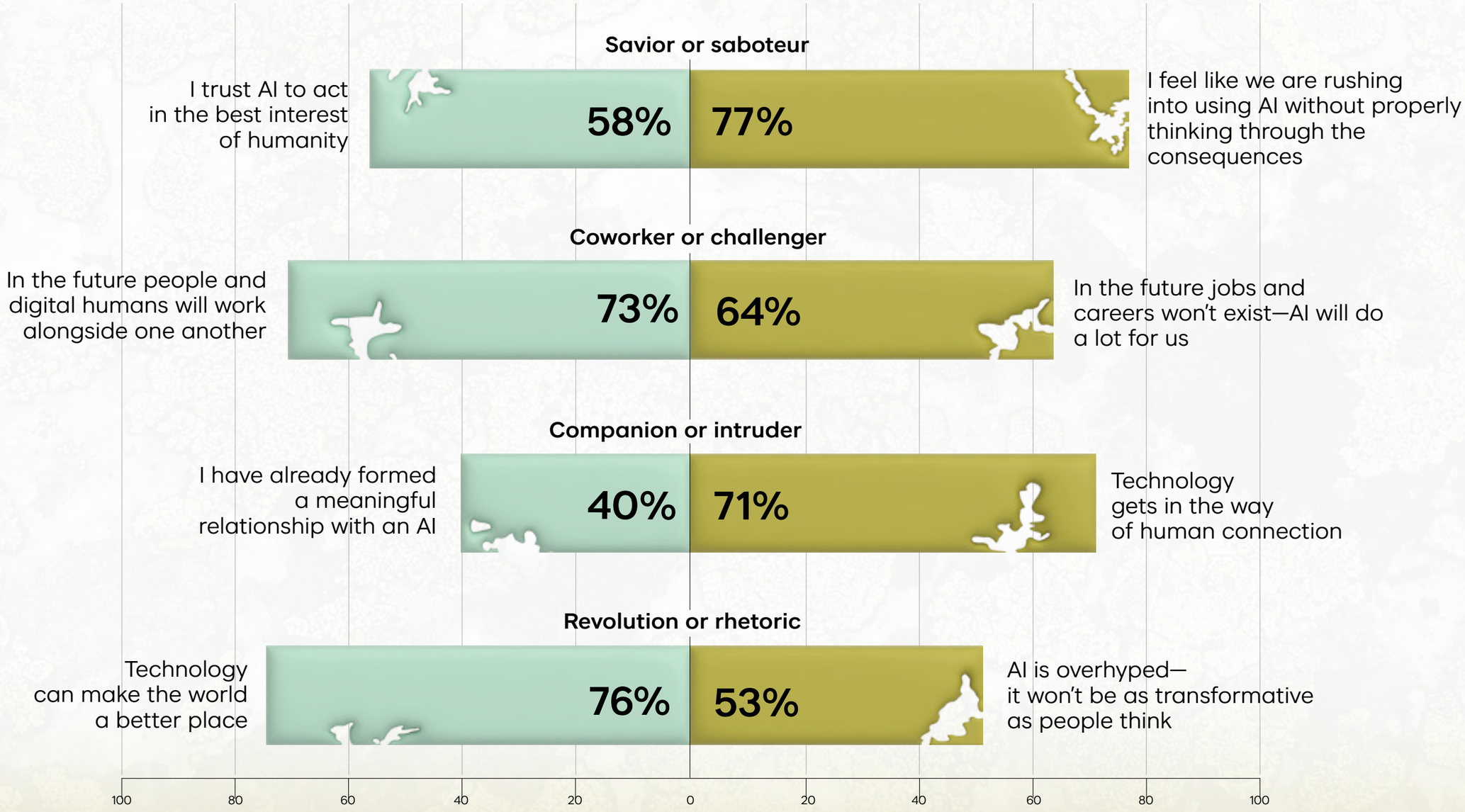
Brands should...



Somewhat/strongly agree with each statement (%, global)

Technology: an anxious embrace

Technology is our ally and can help us grow, but we are aware of potential risks.



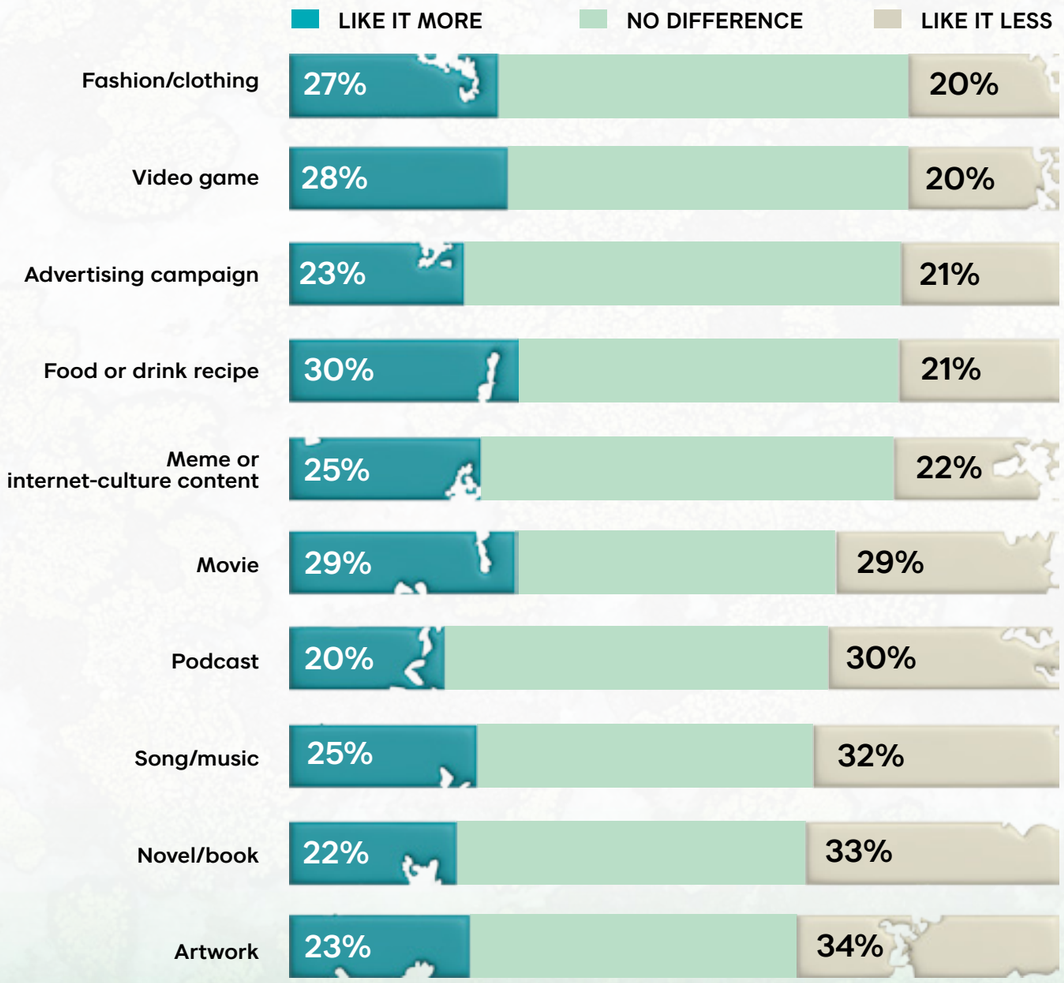
Somewhat/strongly agree with each statement (%, global)

Advantage, humanity

Acceptance of AI is growing but faith in human value endures, for now.

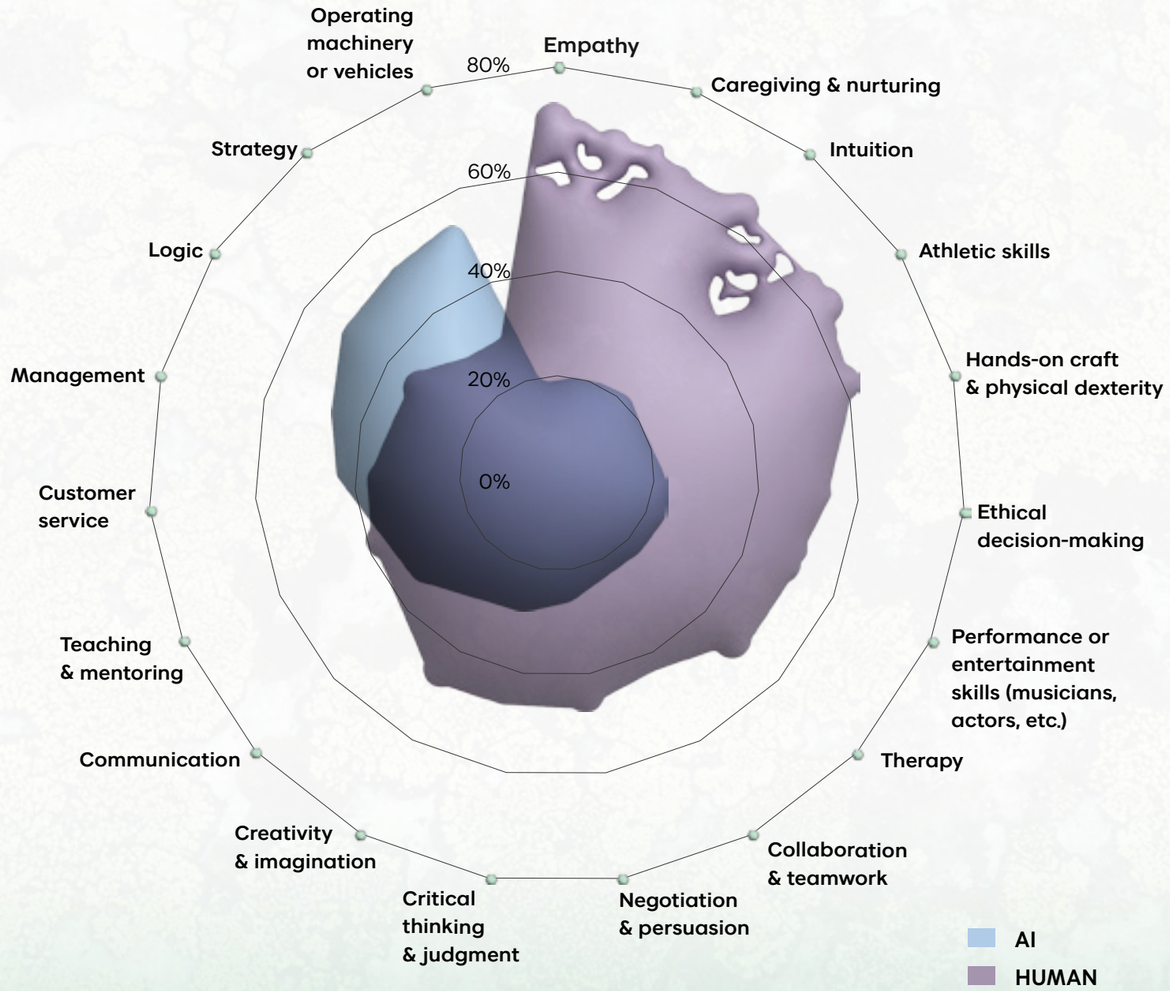
Impact of AI-generated creativity

How people feel about creative outputs primarily generated by AI (%, global)



Perception of skill advantage

Proportion who believe AI or humans have a skill advantage (%, global)

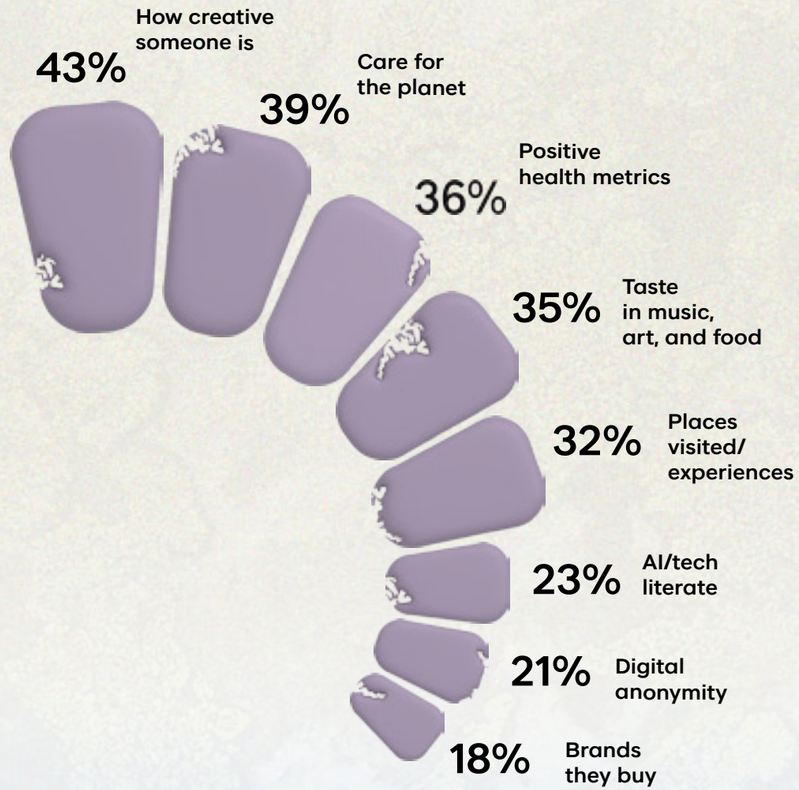


Creativity catalyst

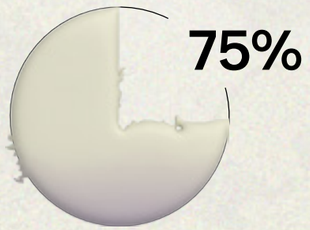
In the quest for better, creativity and innovation will be supercharged by AI.

Creativity: the new marker of status

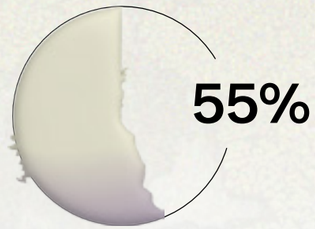
Attributes that define a person's status (%, global)



On creativity



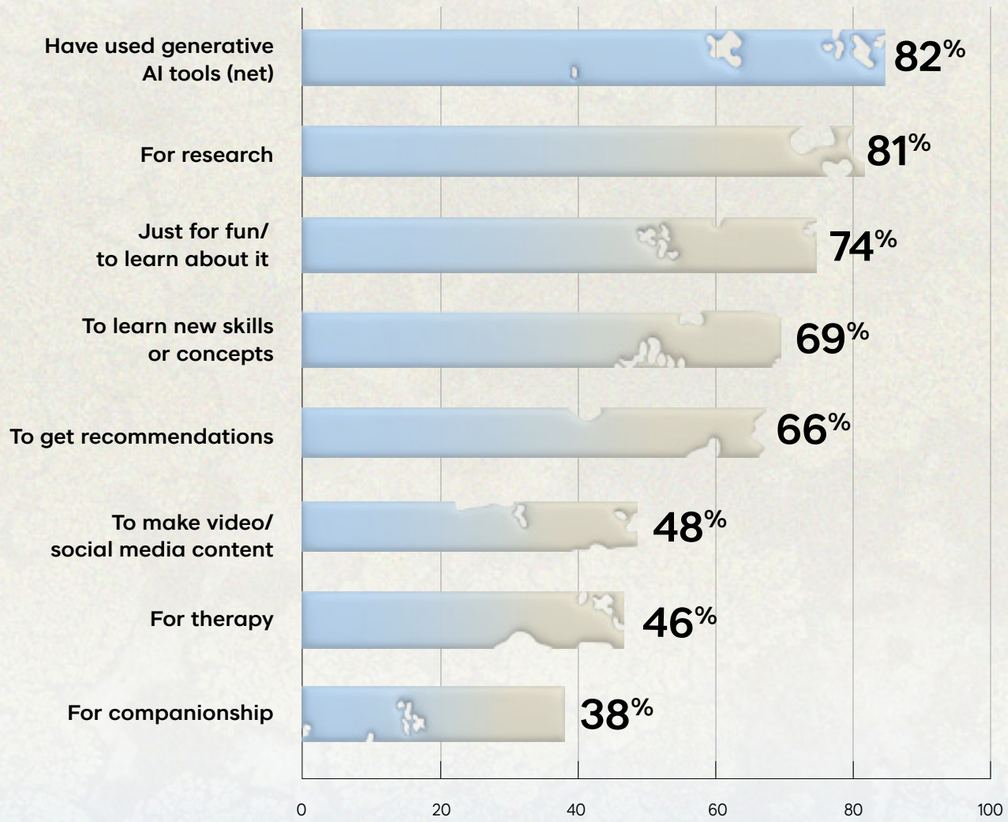
AI will never take creativity away from humanity; it's part of who we are



AI can help solve our biggest challenges, such as climate change or cancer

AI adoption

Uses of AI in the past six months (%, global)



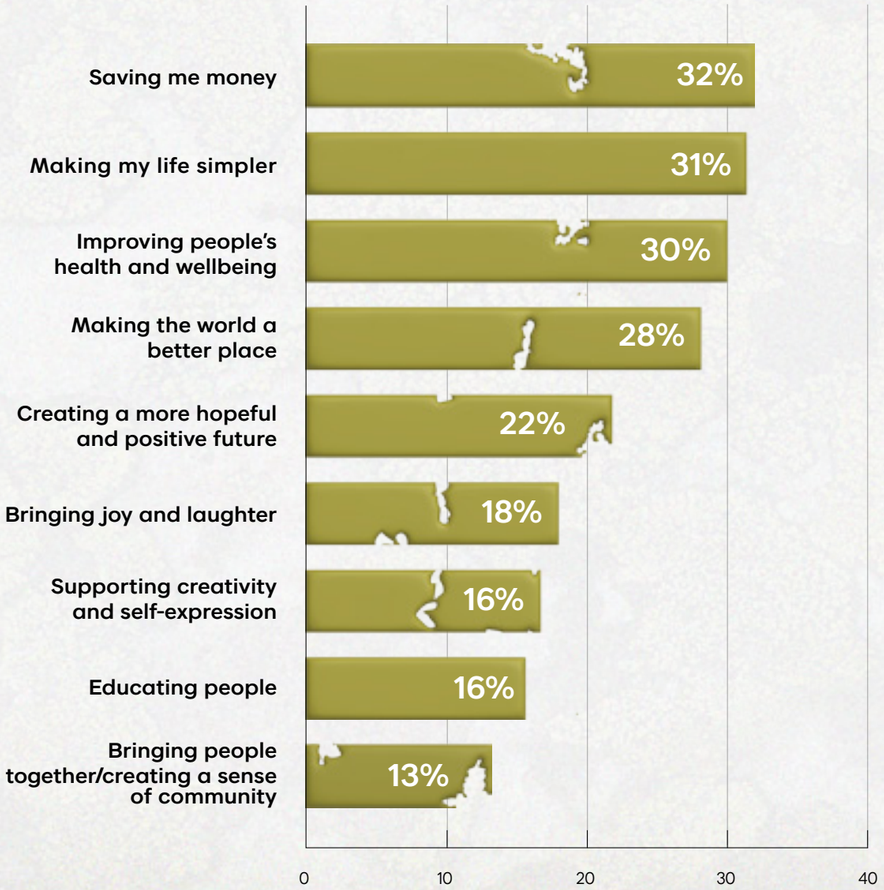
Above center:
Somewhat/strongly agree with each statement (%, global)

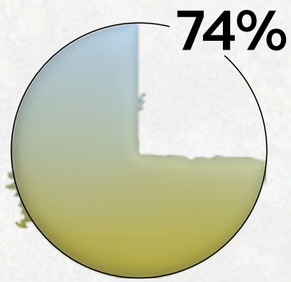
The brand mandate

Brands must show up as allies, bolstering resilience and optimism, and fighting for better.

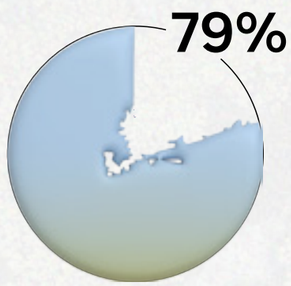
The role of a brand should be...

Selecting in their top three (%, global)

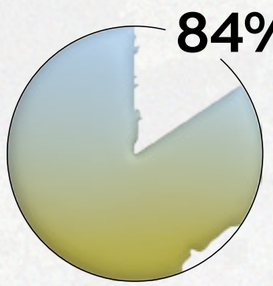




Brands should make more of an effort to speak to people like me



I want my money to go to brands that reflect my values



Brands have a responsibility to take care of the planet and its people

Somewhat/strongly agree with each statement (%, global)

01

Culture

10

01

Entropism

Dirty aesthetics prepare the ground for creative renewal.





Above top: The Tangent Flows by Hussein Chalayan. part of Dirty Looks at the Barbican, London, UK. ©David Parry/ Barbican Art Gallery. **Above:** The Longhouse by Elena Velez also featured in the exhibition. Courtesy of Jonas Gustavsson for The Washington Post via Getty Images

In place of the pristine and the polished, grit, dirt, and decay set the aesthetic tone for 2026.

The Barbican's landmark exhibition Dirty Looks: Desire and Decay in Fashion, which ran from September 2025 to January 2026, shares a world that is in flux: political disruption and climate breakdown collide with an algorithmic gloss offering frictionless perfection, even as real-world systems crack and strain. In this context, garments that are stained, corroded, frayed, decayed, or charred carry new meanings.

Jon Astbury, assistant curator at Dirty Looks, invokes the anthropologist Mary Douglas's description of dirt as "matter out of place," saying that "dirt can be anything that disrupts an ordered system." In the show, designers treat dirt as a tool for design and use imperfection as a story that exposes the truth, expresses defiance, demonstrates resilience, and, perhaps most of all, cues our connection to the earth.

The exhibition finds beauty in impermanence and the cycles of life through works such as British Turkish-Cypriot designer Hussein Chalayan's 1993 graduation collection *The Tangent Flows*, which featured garments that had been buried in a London garden for several months to weather and decay. Similarly, Solitude Studios's *After the Orgy* featured items from its spring/summer 26 collection that had been submerged in a bog. Hong Kong-born London-based designer Robert Wun romanticizes damage in gowns that are charred, wine-stained, or moth-eaten.

Dirt can disrupt time. Caroline Evans writes in the exhibition catalog that Chalayan's buried clothes are "freighted with ancient history and pregnant with suggestion"—acknowledging conversation with the past while facing the future. For their 1983 *Nostalgia of Mud* collection, Vivienne Westwood and Malcolm McLaren mined indigenous Bolivian traditions to insist that "the roots of our culture lay in primitive societies," alluding to what industrialization has erased.

Elsewhere, the show notes explain, "motifs such as the bog, swamp, and witch have returned," evoking disobedience and the marginalized. Biodesigner Alice Potts turns soil into ornament, using a "biocouture" process to turn human sweat into crystal embellishments. Dilara Findikoğlu's *Waking the Witch* features a silicone tar dress that reclaims female power through sticky, unruly substances.

The breaking down of convention and challenge to power structures mirrors the breakdown in nature, with both pointing to an in-between stage, the space before what comes next: rebirth and renewal, rebuilding. As Dirty Looks lead curator Karen Van Godtsenhoven noted in an interview with *Dezeen*, cycles of life are the starting point for regeneration: "Maybe dirt can be a kind of liberator for us, going forward."

A similar sentiment is seen in artist Kathleen Ryan's *Sliced Bread (Golden Hour)*, where mold on a slice of bread is imagined as glittering jewels. Design studio Ozruh and ETH Zurich turned waste marble dust into 3D-printed stone for *Anti-Ruin* at the Venice Architecture Biennale 2025. And in June 2025, design studio Basura and Yerba Madre launched *Dirt Shoes*—self-composting shoes made of dirt that sow wildflower seeds as they disintegrate. "Dirty" isn't just an aesthetic—it's not just channeling the status quo, or even rejecting it; it's an opening move that imagines how things could be different.

Dirty aesthetics are the foundation for creativity and renewal. Behavioral psychologist Jo Hemmings tells VML Intelligence, "Creativity becomes a powerful outlet for control and meaning; it allows



Anti-Ruin Phase 1 by OZRUH at the 19th Venice Biennale of Architecture. Courtesy of Lloyd Lee

> “Maybe dirt can be a kind of liberator for us, going forward.”

Karen Van Godtsenhoven

LEAD CURATOR, DIRTY LOOKS

us to make sense of chaos, to turn anxiety into expression. In uncertain times, innovation often thrives because we’re forced to think differently, to adapt, and to find beauty in unexpected places.” And Bunny Kinney, global executive creative director at Dazed Studio, shares with VML Intelligence: “Creativity requires some kind of emotional stimulus and to draw from… I think negative things almost give us stronger reactions sometimes.”

Why it’s interesting

Dirt is a cultural signal that the status quo has run its course; brands that treat breakdown as a brief for reinvention position themselves as designers of what comes next. By embracing metamorphosis—designing for change, repair, and regenerative systems—they signal future possibility.

02

Transformation frontier

A blank slate marks a fresh start.



Cloud Dancer, Pantone's Color of the Year 2026. Courtesy of Pantone

02



Cloud Dancer, Pantone's Color of the Year 2026. Courtesy of Pantone

Despite a bleak backdrop, where globally 81% feel people aren't kind to one another these days and 86% believe people are more divided and unwilling to listen to one another, 69% of people still feel regularly hopeful for the future. The message that Pantone Color Institute is communicating for the year ahead is one of renewal—on December 4, 2025, it presented Cloud Dancer as its chosen swatch for 2026. The announcement caused a stir among public opinion, as many thought the choice of "a billowy, balanced white" was bland, while others argued over whether it's even a color at all. However, the sentiment Pantone conveys with Cloud Dancer is one of calm and contemplation. The hue is described by the company as "a symbol of calming influence in a frenetic society rediscovering the value of measured consideration and quiet reflection," much like a "blank slate."

For the past 26 years, Pantone has based its prediction on its analysis of cultural shifts and the global mood. For 2026, the company notes that people are bombarded with information and are searching for balance in a digital world, leaving them with little room to think or for innovation. The public agree: 85% say people are less present these days because of increased technology, and 89% wish that life could be simpler sometimes. Enter Cloud Dancer, providing "a liminal space that is a launchpad for creative expression, as individuals and communities are experimenting beyond traditional boundaries, opening the door to increased imagination and innovation," says Laurie Pressman, vice-president of the Pantone Color Institute.

New York Times reporter Jacob Gallagher said, "Culture right now is pretty darn stagnant," and felt the interpretation given to Cloud Dancer could be appropriate. "We're in this moment where we're waiting for the next turn of the dial that moves culture forward."



Cloud Dancer, Pantone's Color of the Year 2026. Courtesy of Pantone

In a similar vein, US paint company Sherwin-Williams selected Universal Khaki, a warm neutral shade, for its 2026 color of the year, signifying comfort and simplicity. Dulux paint company has chosen three blue swatches—Mellow Flow, Free Groove, and Slow Swing—as its chosen colors, offering people the chance to pause, reset, and transform.

Some fashion designers presented luminous whites and neutrals on the runways for their spring/summer 2026 collections. Noon by Noor's Mirage collection is described as "delicate, fluid, always changing depending on how you see it," according to the designers. Ralph Lauren channels a dreamer with strength and sensuality in its minimalist spring 2026 collection, composed in a palette of white, black, and reds. And Beijing brand A. A. Spectrum blends heritage and modernity in its SS26 collection, A Renewal.

Why it's interesting

2026 promises a year of incubation to make room for innovation—offering much needed time for people to work on expansive thinking and creative growth. Pressman describes this year as a "transitional time where people are seeking truth, possibility and a new way of living."



Truth literacy

Can we relearn how to spot the truth?

Switzerland isn't real. That is what artist Patrick Karpiczenko and Fotomuseum Winterthur would like you to believe in their 2025 film *Switzerland is Fake*. Using AI images including cows being airlifted into the country by helicopter and blindfolded tourists being smuggled into Austria, the film spun the narrative that Switzerland is an elaborate fiction. Karpiczenko commented that the aim was to show "how easily reality can be called into question."

Eighty-one percent of people say, "the truth is an endangered concept these days," and 71% believe AI is making it impossible to understand what is true in the world. As more AI tools roll out, allowing people to create realistic videos and audio in just a few clicks, the need to preserve the truth is pressing.

Misinformation and image fakery were already rife before two new AI video apps launched—Meta's Vibes and Sora 2 from Open AI in September 2025—taking this to a new level. As Every Problem Solved founder Leslie Morgan noted to *Digiday*: "It's one thing to use AI as a tool to enhance creativity, and it's another when it starts eroding our ability to discern what's real, what's historically accurate, or what's civically responsible."

In response, solutions are emerging, from detection tools to content labeling. The Coalition for Content Provenance and Authenticity, a group of major tech and media firms including Adobe, the BBC, and Microsoft, offers the Content Credentials standard. This acts like a digital nutrition label, allowing creators to demonstrate the authenticity of their content and affirm how and if AI was used in their work, in a bid to build trust with audiences. Along the same lines, Google, Meta, Pinterest, and TikTok have all introduced watermarking technology to identify AI-generated content.

03



Above and opposite: Switzerland is Fake by Patrick Karpiczenko. Courtesy of Fotomuseum Winterthur

71%
agree AI is making it impossible to understand what is true in the world.

Yet alongside the technical solutions, many advocate upleveling truth literacy skills. Ren Ng, a computer science professor at the University of California, Berkeley, told the *New York Times* that, while our brains are wired to believe what we see, "we can and must learn to pause and think now about whether a video, and really any media, is something that happened in the real world."

Governments are stepping up to help. Sweden's Psychological Defense Agency commissioned Bildkonst Sverige (Visual Arts Sweden) to study how one dimension—visual literacy— can combat disinformation, especially among young people. "We consume images much faster than we read text," Magdalena Malm, director of Visual Arts Sweden, tells VML Intelligence. "Because of this immediate impact, they tend to affect our emotions more. Secondly, our skills in reading images are so much weaker than our skills in reading text—and thus we are more vulnerable."

Sander van der Linden, professor of social psychology at the University of Cambridge, researches proactive ways to "inoculate" people against misinformation using a strategy known as "prebunking," in which people are exposed to weakened versions of manipulation tactics so they can better recognize and resist them. In a collaboration with Stanford University, his team developed a mini browser game called *Bad Vaxx* (an adaptation of the earlier *Bad News* game), which uses prebunking to significantly improve players' ability to spot false information and reduce willingness to share it.

AI literacy influencers are also emerging, such as Jeremy Carrasco (@showtoolsai), a former videographer who is raising awareness by analyzing and deconstructing AI-generated content. Platforms are also supporting the effort, with TikTok announcing a $2 million AI literacy fund for experts to create educational content.

People are trusting their own judgment, with 68% saying they are confident they can distinguish real and fake online content and 87% saying "I would never share anything on social media with others if I was not 100% sure it was true." Despite the confidence, facing down industrial-level disinformation is likely to require a suite of solutions, from regulation to detection technology and literacy skills.

Why it's interesting

Truth isn't dead, but it's under assault. As author and futurist Sean Pillot de Chenecey tells VML Intelligence, we're in a landscape where "the truth is deliberately manipulated, trust has been catastrophically devalued, and organized misinformation is a growth business." The defense? A combination of technology, regulation, and education, with brands and platforms playing a crucial role in rebuilding truth literacy.

04

Unbounded creativity

Once dominated by a handful of Western capitals, creativity is now borderless.



Bad Bunny was Spotify Wrapped's most streamed global artist of 2025. Courtesy of Spotify

From Buenos Aires to Busan, Lagos to Lahore, new cultural powerhouses are reshaping how "global" looks, and who gets to define it. According to Brand Finance's "Global Soft Power Index 2025," China has climbed to second in the ranking, overtaking the United Kingdom, while the United Arab Emirates has retained 10th position. South Korea is now the fastest-growing soft-power nation among those ranked in the index's top 100 last year, reflecting a world in which cultural exports—film, music, design, gaming—have become geopolitical capital.

At the 2025 Cannes Lions, this shift was on full display. Grand Prix awards went to a diverse geographic slate—among them Puerto Rico, with DDB Latina Puerto Rico's interactive campaign "Tracking Bad Bunny" for Rimas Entertainment winning the Grand Prix in the Entertainment Lions for Music category. The campaign invited fans to follow a scavenger hunt using Google Maps and Spotify clues to uncover hidden song titles across real locations. Puerto Rico's first-ever Grand Prix win placed the island's creativity on a global stage and earned praise for its originality, cultural authenticity, and global resonance. The subject of the campaign, Bad Bunny, dubbed "the King of Latin Trap," was crowned Spotify's most streamed artist in the world for 2025 (with more than 19.8 billion streams), and is set to headline the Superbowl's coveted halftime slot in February 2026.

On screen, this year's breakout stories emerged from unexpected places. Argentina's *The Eternaut*—a Netflix adaptation of the country's beloved graphic novel of the same title—topped the platform's Global Top 10 in April 2025, drawing praise for its grounding in Buenos Aires culture, complete with traditional mate drink, popular card game truco, and political allegory. China's *Ne Zha 2*—a traditional Chinese myth adaptation from home-grown animation studio Chengdu CoCo



Black Myth: Wukong. Courtesy of Game Science

Cartoon—became the highest-grossing animated film of all time (reportedly reaching over $2.2 billion), while *K-Pop Demon Hunters* set Netflix viewing records with 325.1 million streams by the end of September 2025. The film's soundtrack is the first on the Billboard Hot 100 to have four of its songs simultaneously in the top 10.

Audiences are noting the shift: Eighty-three percent of gen Zers (and 76% overall) say they feel their cultural tastes are becoming more international over time because of wider access to content from around the world. For their part, creatives now aspire to compete on a level playing field while celebrating their cultural heritage.

"We used to admire creativity from abroad and think it was incredible," says Jiao Zi, director and screenwriter of *Ne Zha 2*, in an interview with VML Intelligence. "Now we've realized that with hard work and perseverance, we can achieve the same level of excellence."

Maggie Kang, director and screenwriter of *K-Pop Demon Hunters*, tells VML Intelligence that she had always wanted to create "a story deeply rooted in my South Korean heritage—something that celebrates where I come from while resonating with audiences everywhere."

The same rebalancing is transforming gaming. When *Black Myth: Wukong*, an action RPG developed by the Hangzhou-based studio Game Science, launched globally in August 2025, it became the first Chinese title to top Steam's global sales chart and a mainstream sensation far beyond Asia. Inspired by the Chinese classic fantasy novel *Journey to the West*, it reimagines the Monkey King myth with cinematic depth and technical mastery.

> "Global audiences are ready for stories told from our perspective."

Feng Ji

CEO, GAME SCIENCE

"We didn't want to imitate Western fantasies," Feng Ji, CEO of Game Science, tells VML Intelligence. "We wanted to show the world that our mythology—our Sun Wukong—is just as rich and universal as any hero from Greece or Scandinavia. The response proved that global audiences are ready for stories told from our perspective."

Feng added that the team deliberately prioritized authenticity over Westernization: "We brought in historians, martial artists, and traditional opera choreographers. Every movement, every gesture, carries Chinese cultural DNA, and that's exactly what players connected with."

Why it's interesting

The world's creative capital is shifting fast. For brands who want to speak fluently to a truly global audience, this means reimagining storytelling for a multipolar cultural landscape: one where Buenos Aires, Seoul, Shenzhen, and Riyadh generate the references while the rest of the world follows.



Hyperreality

In hyperreality, online or offline,
it's the experience that counts.

Digital culture is now all pervasive: 84% of people globally say it shapes how people talk, behave, and express themselves in everyday life. As it migrates off the screen, the distinction between "virtual" and "real" is fading.

What began as playful crossover—digital going physical, online mimicking offline—is pointing to something more fundamental: a collapse of the boundary itself. As technology allows us to imagine and generate new realities, we are entering a kind of hyperreality, where it no longer matters where ideas originate from or whether they begin online or off. Gen Z increasingly do not draw distinctions between the virtual or digital and physical reality, with four in 10 globally agreeing, "it's all real to me."

As digital culture increasingly spills into the real world, low-effort, ultradisposable digital content and memes—often labeled "brain rot"—are leaving their mark. Words and phrases of indeterminate meaning are entering everyday vocabulary (see Algospeak, page 31). Surreal meme characters are finding physical form as real toys—a trend so popular that KFC Spain jokingly announced children's meal toys inspired by 'Italian brainrot' figures Tralalero Tralala and Bombardiro Crocodilo in April 2025. In May 2025, *Forbes* reported that a film version of the meme series *Skibidi Toilet* was in development. And a late 2025 TikTok trend saw creators approach strangers in public with printed pictures of viral memes such as John Pork—a humanoid pig—to film their bemused reactions. Digital culture, no longer confined to the screen, is now shaping real-world experiences.

As Kyle Chayka argued in an August 2025 *New Yorker* piece, many of these artifacts—often slim in stand-alone meaning—function as

signals of online identity, and fluency in these references now confers in-group status. In other words, they don't just communicate a joke, they signal who is online enough to get it, blurring the lines between online signals and offline social currency.

The collapse of the digital/physical divide goes deeper than memes and merchandise. Offline behavior is also adopting cues from platform logic. Online friendships have long been performed and measured in likes and shares, and now personal communication is adopting the mechanics of social media. Julie Beck argues in the *Atlantic* that the role of likes and hearts in messaging, along with the rise of voice notes, reflects a shift to broadcasting over interaction. And the *Wall Street Journal* reports that US college students are blocking each other in real life by using no-contact orders to manage their personal boundaries, in an echo of platform behavior.

Brands are starting to capitalize on the shift. Luxury label Loewe launched a tomato-shaped clutch bag in 2025 inspired by a post on X that showed an heirloom tomato, accompanied by the comment, "This tomato is so Loewe I can't explain it." Former creative lead Jonathan Anderson then shared a video preview of the tomato clutch, captioned, "Loewe meme to reality."

Near futurist Neil Redding tells VML Intelligence that it's outcomes that matter now: "The boundary between what's 'real' and what's 'generated' becomes less meaningful than the experience itself. We're entering an era in which the question of 'what's real' will likely fade into the background, replaced by a focus on the experience and outcomes that result from the storyworlds manifested by our intention and action."



KFC España's spoof Italian-brainrot toy launch on Instagram

Why it's interesting

As Redding suggests, when the boundary between "real" and "generated" fades, and experience and outcomes matter most, brands that fluently navigate digital and physical realms, turning online signals into tangible moments, will have the advantage.

06

Algospeak

Algospeak offers a window into evolving culture, as social media and AI reshape communication.



Image generated using WPP Open, powered by GPT-5 by OpenAI

Language and communication are evolving in the digital age, shaped by social media and, increasingly, AI. A growing lexicon dubbed “algospeak” is building online and migrating into everyday conversation. As Marshall McLuhan famously said, “the medium is the message.” Today, the medium is the algorithm.

Subcultures, underrepresented groups, and young creators are adopting new slang for a host of reasons. Algorithms suppress some words, while elevating others. Circumventing restrictions has led to words such as “unalive” in place of “die” or “kill” entering everyday language, while words such as “delulu,” “rizz,” or “chopped” gain traction by being rewarded for boosting engagement.

Now these new words are being recognized formally. Cambridge Dictionary added three new words for 2025 inspired by the TikTok generation, including "tradwife" (a term for socially conservative influencers whose posts celebrate looking after their husbands, children, and homes), and "delulu," (short for delusional), while Dictionary.com's choice was the nonsensical term "6-7," understood only by teens, tweens, and the chronically online. Tony Thorne, director of the Slang and New Language Archive at King's College London, says that new slang and words are "not just spreading far, they're spreading fast, too." Thorne reported that "each year, over 100 English words are produced or given new meanings on TikTok."

Online chatter might seem trivial but as Hyperreality (page 29) shows, digital culture is increasingly permeating the "real" world. In an episode of the *Sensemaker* podcast called "TikTok and the rise of Algospeak" that discussed the phenomenon, linguist Elena Stern emphasized that this online dialect matters: "Even if they're only speaking that way when they're on the internet, it still matters. It's still a dialect itself."

As adoption of generative-AI platforms grows, they too are shaping the way we speak. A study by Florida State University concluded that words favored by ChatGPT and other large language models are surging on podcasts and in conversations. Examples included "meticulous," "intricate," and "garner," according to the study. "In etymological terms, we may be seeing language change on fast-forward," Thomas Stephan Juzek, assistant professor of computational linguistics at Florida State University, tells VML Intelligence. "At the same time, we are burning through some words at high speed. Think delve—briefly fashionable, then stigmatized as AI language, and now in retreat."



Instagram post announcing the addition of 'delulu' to the Cambridge Dictionary. Courtesy of Cambridge Dictionary

Why it's interesting

For brands, understanding the origins of this evolving lexicon is essential to avoiding controversy or miscommunication with their consumers. Some terms designed to evade algorithmic suppression may trace back to extreme online communities, while others could be seen as cultural appropriation. When it comes to AI language, says Juzek, "one risk is homogenization: a default, polished, but bland AI voice. For brands, that creates a premium on recognizable human texture: idiosyncrasies and a tone that AI models typically do not produce."

VML

07

Rewilding male kinship

Helping young men find social connection, friendship, and community brings universal benefits.

Young men are at the center of some troubling trends, including rising levels of loneliness, isolation, and disaffection. VML data reveals 69% of men believe loneliness is an epidemic and 68% say it is hard to know what is expected of men today.

John Burn-Murdoch, chief data reporter at the *Financial Times*, believes that this is a modern phenomenon. "Twenty years ago, young people were the least likely of anyone to spend time alone," he said at SXSW London 2025. "Today more young men are spending time alone than 65-year-old men, which could lead to further societal disengagement."

Burn-Murdoch's thesis chimes with data from the Equimundo Center for Masculinities and Social Justice in the United States, which found that one-third of 18-23-year-old men said they hadn't seen anyone outside their household in the past week, and just one-fifth said they have friends they can really count on.

Discourse around the male friendship recession has now permeated popular culture. The recent Andrew DeYoung movie *Friendship* depicts two men's struggle to find meaningful friendship as adults, while a viral 2025 TikTok trend saw men proving their friendship credentials by calling their buddies just to say "good night." At a time when 64% of people now express concern about the idea of "toxic masculinity" and 86% agree there is a need for more positive role models for men and boys, brands are focused on offering young men moments of meaningful social connection. In the United Kingdom, for example, activewear brand Pilla builds community by creating opportunities for health-focused men to connect with each other in real life. It hosts a weekly yoga club, as well as regular hiking, beach, and sauna trips, which it says promote "positive masculinity" by providing "a space for men to thrive."

Boyz II Zen wellness retreat. Courtesy of Booking.com

Noting an opportunity for travel that better supports mental wellness, especially for men, Booking.com launched Boyz II Zen: A Wellness Escape curated by Boyz II Men, in September 2025. Described as “the ultimate boyz trip,” the experience offered one person and up to five of their guests the chance to swap “bro culture for self-care,” enjoying a series of wellness experiences, topped by an in-person meet and greet with the R&B group.

Also proposing travel as a solution, Florida-based Men’s Fitness and Wellness Retreats started offering tailor-made luxury fitness and wellness retreats in June 2025. The customizable experiences include the Iron Legacy Retreat for men aged 60 years and over, and the Executive Edge Retreat, a stress-management program for corporate leaders.

Agitators against the idea of singling out young men for social assistance may label these programs as examples of “himpathy,” or being too kind to privileged men who should be able to help themselves. However, Angelica Ferrara, visiting fellow at The London School of Economics and Political Science who coined the phrase “mankeeping” to describe the emotional toll taken on by women living with disaffected men, disputes this. “When men lack community, the burden of meeting men’s needs for social connection can fall onto the women in their lives, causing burnout and resentment especially among men’s romantic partners and female family members,” Ferrara tells VML Intelligence. “Men who have rich, emotionally close relationships with others, especially with other men, tend to do less harm and are more active in their communities. Solving this problem is set to make everyone—not just men—healthier and happier.”



Friendship, directed by Andrew DeYoung. Courtesy of A24

Why it’s interesting

There’s a growing need to create opportunities for young men to develop social connection and friendships. This has potential benefits for everyone and is a space where brands can take the lead by building brand-relevant places and clubs where young men can connect, and where positive interpretations of masculinity are championed.



Screen subcultures

Young audiences set the scene for a movie-theater revival.



Metro Private Cinema in New York, US. Courtesy of Will Engelmann



Metro Private Cinema in New York, US. Courtesy of Will Engelmann

While multiplexes grapple with declining attendance, an unlikely cinematic renaissance sees DIY screening rooms, microcinemas, and private screens thriving, drawing a new generation to the movies.

Theaters catering to niche tastes are proliferating. In the United Kingdom, London's The Nickel is a crowdfunded microcinema that is entirely funded by film fans and is dedicated to showing cult films in the "grindhouse" genre. After starting as a pop-up, the venture launched in its first permanent home in 2025. Founder Dominic Hicks told *Time Out*, "It feels like we're seeing a reversal back to what local cinemas used to feel like before multiplexes."

A microcinema subculture is also thriving in Australia, led by Static Vision in Melbourne and Movie Juice in Adelaide. In Singapore, Filmhouse opened in early 2026 in the former space of The Projector to create a "home for films and film lovers," general manager Sharon Tan told the *Straits Times.* In the United States, DIY venture Low Cinema, founded by a team including filmmaker John Wilson, opened in May 2025 in New York. Seating 42 patrons, it screens a mix of second runs of new releases alongside classics and documentaries, with occasional 16mm projector shows from Wilson's own collection.

Venues are also providing five-star screenings. New York's 20-screen Metro Private Cinema complex is a private-viewing concept, offering an exclusive movie and chef-curated dining experience. Groups of four to 20 people can select from recent releases or the theater's library—for a fee, the company will also source titles outside its collection.

One reason these venues are bucking the wider trend seems to be renewed appetite from young cinemagoers. In the United Kingdom,

independent movie theaters are seeing rising attendance, with figures from the Cinema Advertising Association suggesting that under-35-year-olds now make up 50% of the audience, as reported by the *Guardian*.

In the United States, a Yahoo News/YouGov survey in May 2025 found that adults under 30 are most likely to see a movie in the theater rather than wait for streaming, with 54% of gen Zers citing "an experience they can't get at home" as the motivation.

A renewed passion for movie theaters might seem anachronistic in the streaming age, but it makes sense in the context of several recent trends: the prolonged desire for social experiences, the need for third spaces, and even an element of nostalgia, as evidenced by the fascination for analog pursuits and technology.

Looking ahead, the revival looks set to continue. A study from NRG reported that US gen alphas love movie theaters, with six in 10 kids preferring theaters to streaming at home because it offers "moments that allow them to log off" and connect socially.

Why it's interesting

As 85% say people are less present because of increased technology, intimate and niche movie houses are staging a comeback, offering meaningful social experiences. Their popularity affirms the value of human curation amid algorithmic abundance.

Metro Private Cinema in New York, US. Courtesy of Will Engelmann

09

Natural IP

Pioneering projects allow nature to cash royalty checks.

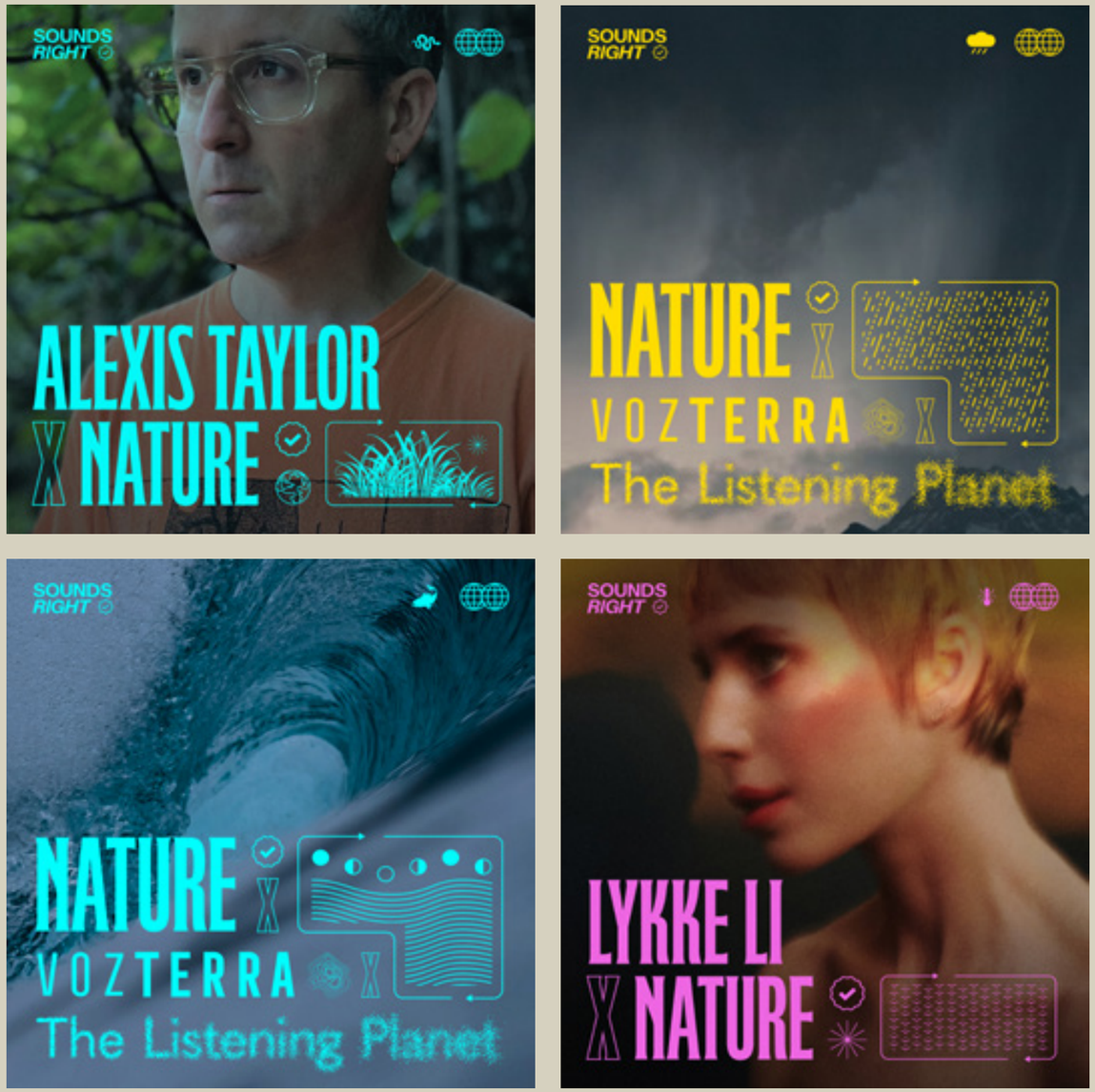


Sounds Right project, created by the Museum for the United Nations—UN Live

Future Sounds of Nature, a record label established in 2025 by electronic artists Eli Goldstein and Lola Villa, has adopted a business model that funnels 20% of revenue from every release to conservation or stewardship projects for habitats featured in recordings.

This builds on the landmark Sounds Right project, winner of the 2025 Cannes Lions Grand Prix for Innovation, which made nature an official artist on Spotify and Apple Music in 2024, allowing it to earn royalties. Created by the Museum for the United Nations—UN Live, the project has already delivered $625,000 to causes including Indigenous conservation in the Tropical Andes. Iminza Mbwaya, Sounds Right global program manager, tells VML Intelligence that this sum comes from royalties, performance fees, and institutional funders in the initiative, such as Spotify.

Artists such as Hozier are now joining the effort. Hozier's May 2025 remix of *Like Real People Do* features sounds of the natural world from County Wicklow, Ireland. Fifty percent of the royalties will be directed to frontline conservation projects, according to his label, Sony.



Sounds Right project, created by the Museum for the United Nations—UN Live

Consumer appetite for this model is clear: 80% globally agree that governments and businesses should be paying nature for the services it provides. And it could extend beyond music, to any industry that draws upon nature as a resource. Mbwaya notes that Sounds Right is already "actively pursuing" how its model could be applied more broadly. "In hospitality or retail spaces, 'nature' might be what you hear as you walk through your favorite store. We also see this having application in gaming if you need the sound of waves or the sound of the breeze." She notes the potential for the model to acknowledge nature's IP beyond music, in industries such as fashion or even pharmaceuticals. These ideas chime with the notion of a broader biodiversity economy, as charted in "The Future 100: 2025."

Scientists are also exploring these concepts. A letter in the journal *Nature* suggested that tech and computing companies could chip in royalties to kick-start the Cali Fund—a UN-backed initiative that asks firms to pay for using nature's genetic data. The idea highlights that modern medicine, food, and textiles lean on millennia of Indigenous cultivation. Contributions are voluntary however, and as of January 2026, only $1,000 had been donated.

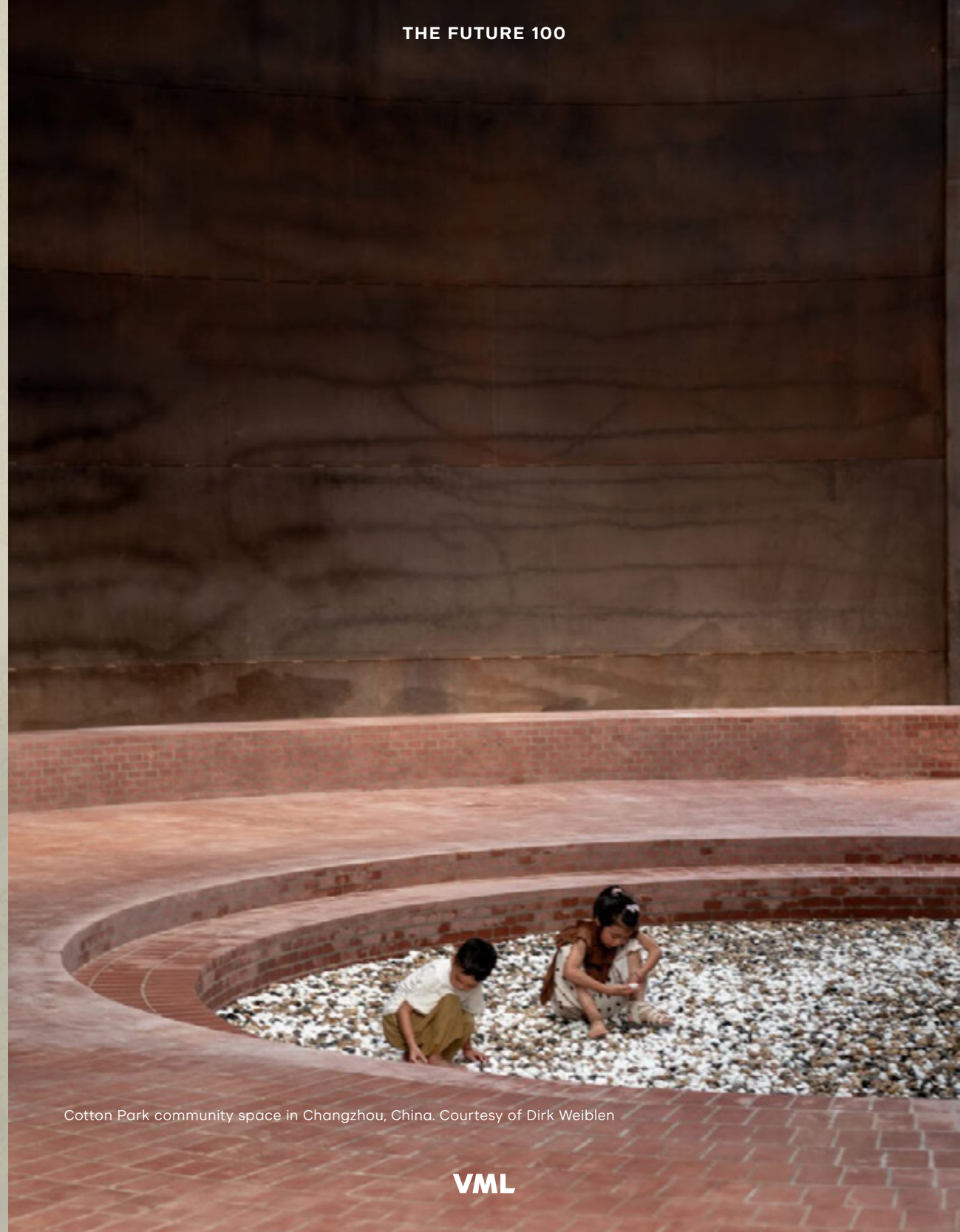
Why it's interesting

Paying back to nature flips vague sustainability goals into direct funding. Imagine fashion brands paying royalties for cotton or linen, beauty brands for botanical ingredients, or pharma companies for nature's chemistry. The music industry is demonstrating that it's possible. In the case of Sounds Right, Mbwaya notes that its model "gives you a traceable way to say, 'These are the funds that were received, these are the projects that benefited, and this is the impact."



Multiflex cities

Urban spaces are transforming into adaptive ecosystems for life, leisure, and everything in between.



Cotton Park community space in Changzhou, China. Courtesy of Dirk Weiblen



Cotton Park community space in Changzhou, China. Courtesy of Dirk Weiblen

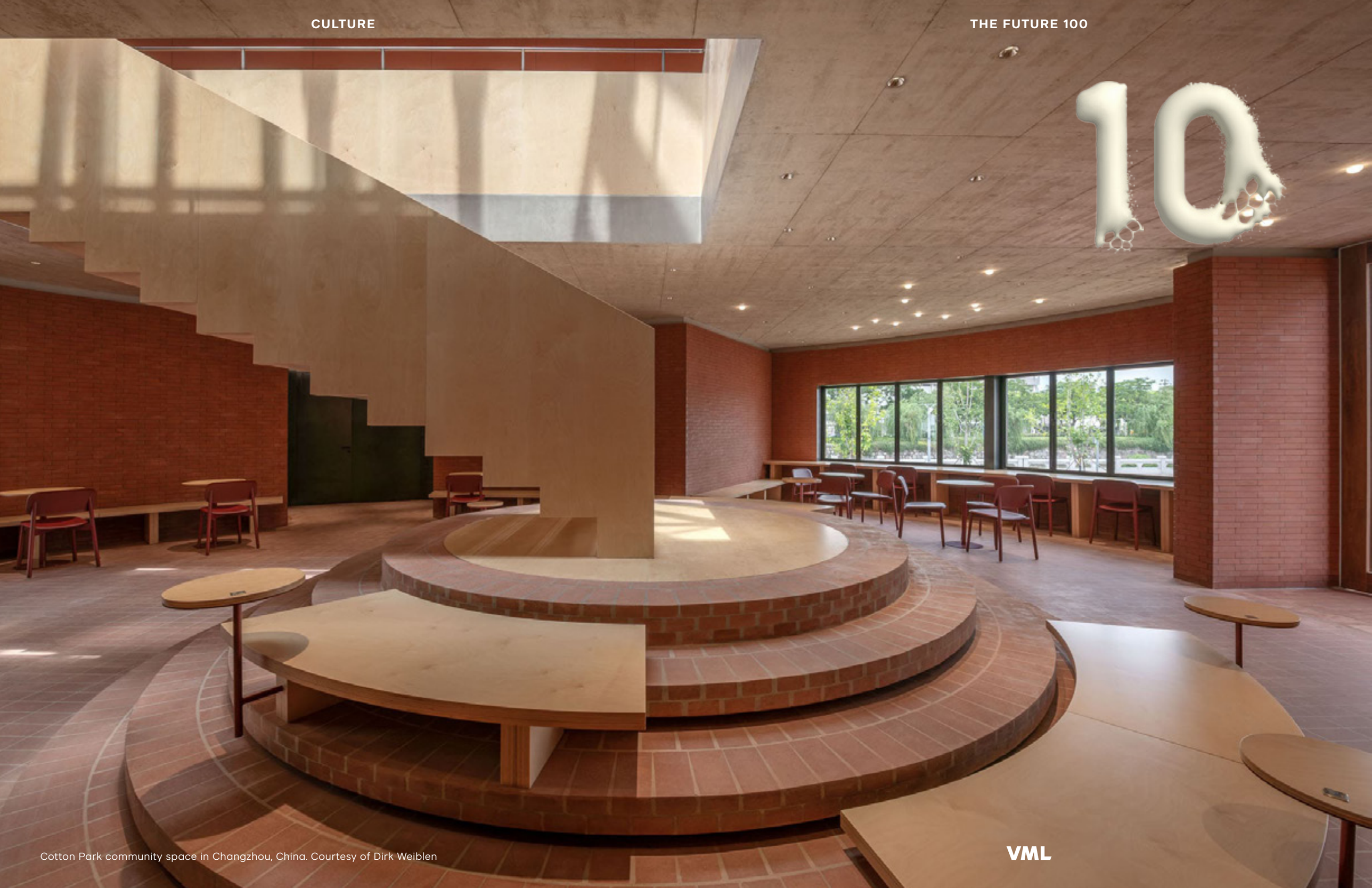
As urban life grows more complex, cities are shedding the rigidity of single-purpose design. A new generation of architects, entrepreneurs, and cultural thinkers are building “multiflex cities,” environments designed for fluidity, where work, wellness, play, and community seamlessly overlap within the same footprint.

In Changzhou, China, Aim Architecture’s renovation of Cotton Park redefines what a civic hub can be. The project transforms an old industrial site into a mixed-use space that hosts markets, exhibitions, and performances. “Our goal was to breathe new life into the city and foster community engagement by establishing a place where people could gather,” Aim’s design team tells VML Intelligence. “At the same time, we wanted a versatile venue that could evolve; a cultural canvas for the city.”

In Brooklyn, New York, a new kind of neighborhood spot is emerging that turns the ordinary into something social. Some laundromats are now doubling as bars, cafés, and snack lounges, inviting people to linger over an espresso or a glass of natural wine while their clothes spin. Laundry and Latte opened in April 2025 and aims to bring the community together. What used to be a quick errand has become a small community ritual.

Across the country in Washington, DC, Manifest 002 at Union Market opened in September 2025 and embodies this same spirit of fluid living: part barbershop, part café, part members’ club. Haircuts blend into coffee chats, art talks, and chance encounters—proof that the modern city is learning to mix work, rest, and connection under one roof.

10



Cotton Park community space in Changzhou, China. Courtesy of Dirk Weiblen



Manifest 002 in Washington, DC, US. Courtesy of Manifest US

Even nightlife is being reimagined with multipurpose logic. In Bompas & Parr's "Future of P-Leisure 2026: Nightlife" report, the London-based creative studio explores transforming unoccupied office blocks into after-hours nightclubs and DJ spaces, bringing elasticity rather than emptiness to post-pandemic real estate.

Japan offers perhaps the most sophisticated expression of this shift. Hulic Co Ltd's Kodomo Depart chain, now with four locations in Tokyo and Yokohama, fuses tutoring centers, clinics, childcare, cafés, and Pilates studios into one vertical campus. Created in response to declining birthrates and shrinking neighborhood networks, the complex allows parents to meet nearly every daily need within a single building.

Agile, porous, and alive around the clock, the multiflex city mirrors the evolving rhythms of its citizens. The trend extends the "work resorts" movement of "The Future 100: 2025" into a broader principle: designing for multiplicity rather than a single purpose.

Why it's interesting

As cities confront rising costs and dwindling foot traffic, the most resilient will be those that multitask. Multiflex design not only maximizes urban real estate but also fosters microcommunities, proving that the future of city life lies in elastic architecture, with spaces that can flex, adapt, and stay full of life long after 5 p.m.

VML

11

Technology

20

VML

11

Generative realities

Infinite, adaptive, and evolving worlds are being generated in real time by AI.



Biome Lumina, Dataland's founding digital collection. Courtesy of Refik Anadol Studio

Created by artist and Dataland cofounder Refik Anadol, *Large Nature Model* is a continually changing digital artwork powered by AI, which he calls "generative reality" because of the way it responds to vast swaths of data inputs in real time to create new immersive scenes (for more on Anadol's work see Creative dataland, page 64).

Rapid advances in generative AI, coupled with gains in processing and rendering, will bring this same always-evolving "generative reality" to gaming, and potentially to broader forms of entertainment. This new paradigm will see games move beyond one-size-fits-all worlds with static characters and scenarios into dynamic experiences that are personalized in real time for each gamer, informed by their preferences and other contextual information.

Producer and author Charlie Fink tells VML Intelligence that "AI is going to change games dramatically because a new genre of game is going to be possible, called a procedural game." Allowing games to be scalable and more complex, Fink adds, means even "non-player characters can have some degree of sentience," thanks to procedural generation.

Google Cloud is planning for this future by using generative AI to build "living games" where the environments, characters, and storylines "adapt, grow, and evolve" based on the unique playing style and skill level of each gamer. It is collaborating with leading developers including Capcom and Klang Games. Klang is adding hundreds of thousands of unique, autonomous virtual humans, called Seedlings, to its multiplayer games. According to Klang, Seedlings will be able to "form relationships, and shape emergent societies through natural conversations and persistent interactions."





Above top: Dataland museum of AI art at The Grand LA, US. Courtesy of Refik Anadol Studio
Above: Biome Lumina, Dataland's founding digital collection. Courtesy of Refik Anadol Studio

Nvidia RTX rendering. Courtesy of Nvidia

Nvidia's updates to Nvidia RTX neural rendering, unveiled at Gamescom 2025, also represent a step toward generative gaming reality. As well as enabling the creation of "infinitely complex worlds" and realistic faces that move characters away from the uncanny valley, the introduction of Nvidia Ace autonomous game characters unlocks the potential for "living, dynamic game worlds with companions that comprehend and support player goals, and enemies that adapt dynamically to player tactics."

New innovations from Meta hint at the potential of bringing the real-world context of gamers into their gaming worlds too. Meta's Ray-Ban Display smart glasses use AI to analyze what wearers are looking at and offer contextual advice and recommendations. Its Hyperscape app goes beyond that, allowing users to create hyperrealistic virtual worlds mapped on the physical world around them, explorable with Meta Quest headsets.

Also advancing the field is World Labs, led by AI pioneer Fei Fei Li. With its new open-access platform, Marble, users can turn a simple text prompt, image, video, or coarse 3D layout into a fully explorable, editable 3D world—offering a radical leap forward in spatial intelligence and creative world building. At CES 2026, Li said that the technology behind Marble "can finally give machines something closer to human-level spatial intelligence."

As these technologies mature, they could converge to transform gamers from passive players into active cocreators of the gaming worlds they reside in. Julian Togelius, associate professor of computer science and engineering at NYU, tells VML Intelligence that while there is still work to be done before this becomes a commercial reality, such tech could transform in-game creative expression. "Games that adapt to the player

> "AI is going to change games dramatically because a new genre of game is going to be possible, called a procedural game."
>
> Charlie Fink
> **PRODUCER AND AUTHOR**

and go on to recreate themselves to provide infinite replayability is something I've dreamed and talked about for 20 years or so," he reveals. "For most of this time, the technology just wasn't there. Maybe this AI-assisted game personalization is better thought of as a means of AI-assisted in-game creative expression."

Why it's interesting

The application of generative realities has the potential to go beyond gaming, extending into metaverse worlds and virtual commerce spaces. Generative realities empower brands to create more dynamic and personalized campaigns, and content unique to every customer.



Synthetic generation

A new cohort is here, made of 0s and 1s.

From coaching and therapy to companionship and life assistance, the role AI plays in our lives is ever more dynamic, intimate, and human (see RelAItionships evolved, page 70).

In July 2025, a British actor's debut sparked criticism, not for her performance skills but because she is AI-generated. Tilly Norwood starred in *AI Commissioner*, a comedy sketch created entirely using AI. Actors and unions voiced strong opposition to Norwood's arrival, spurred by concerns that such AI creations will replace human performers. Responding to the backlash, Eline van der Velden, Norwood's creator and CEO of Particle6, said that Norwood "is not a replacement for a human being" but rather a creative outlet, noting that "AI offers another way to imagine and build stories." Further paving the way for synthetic superstars, in September 2025, van der Velden launched Xicoia, billed as "the world's first AI talent studio—designed to create, manage, and monetize a new generation of hyperreal digital stars."

Looking ahead, AI filmmaker and actor Wilfred Lee tells VML Intelligence he believes AI could have its own entertainment genre in the future; one that includes gaming mechanisms to allow for interactivity. (For more on entertainment futures see AI storyworlds, page 260.)

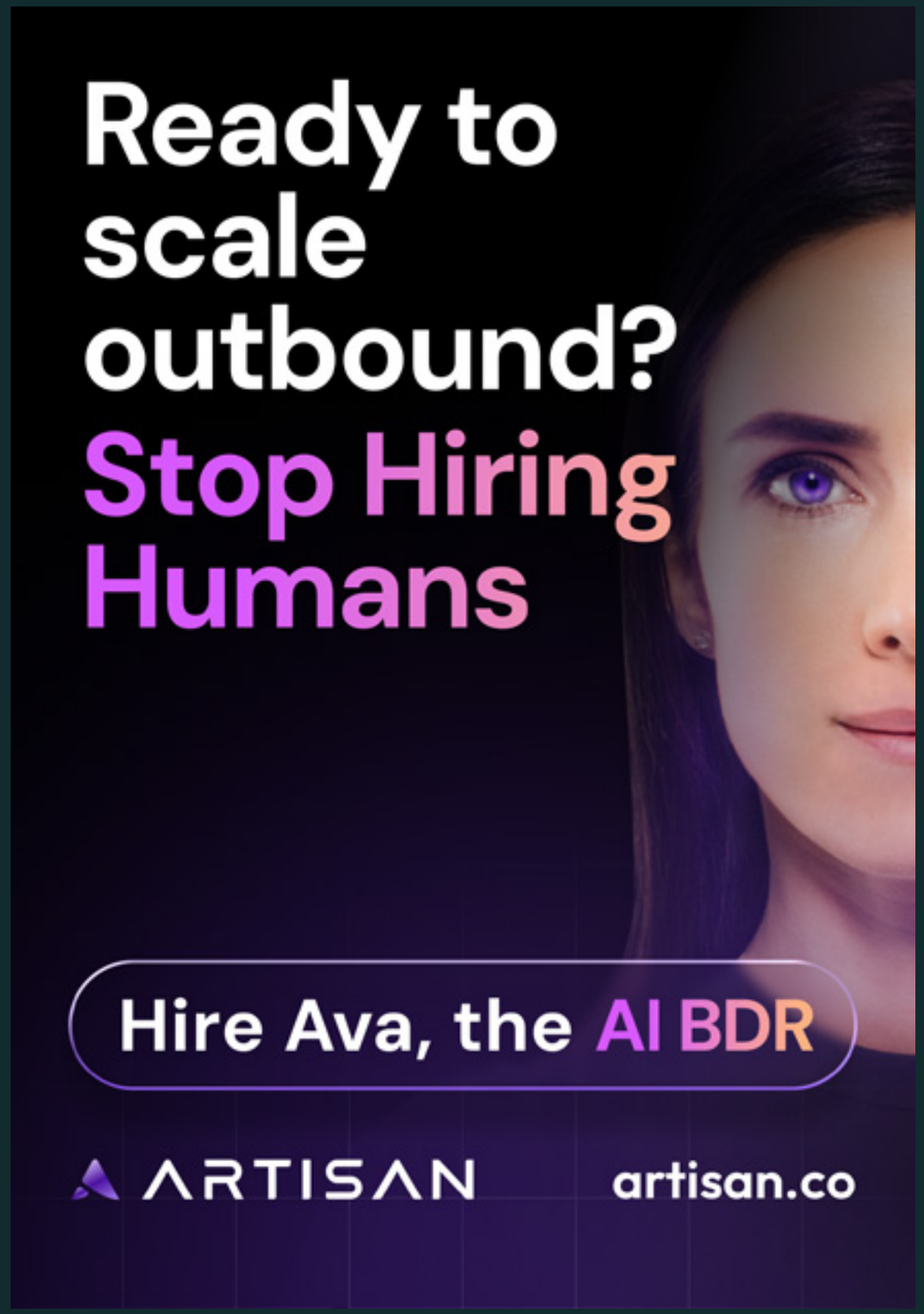
Beyond entertainment, London-based Synthesia is creating hyperrealistic digital clones. In October 2025, the startup showcased Synthesia 3.0, introducing "video agents" that elevate chatbots into what feels like real, live human conversation, offering smooth interactions and natural mannerisms. Six years after it was founded in 2017, the startup became a unicorn (a privately held startup company valued at over $1 billion), with the might to turn down a $3 billion acquisition offer by Adobe the same month Synthesia 3.0 was released.

Another company committed to the future of synthetic beings is Artisan. In summer 2025, a series of advertisements featuring the bold message “stop hiring humans” were spotted across major cities including San Francisco and London. These garnered a lot of attention, and, much like Norwood, a lot of criticism too. Jaspar Carmichael-Jack, founder and CEO of Artisan, tells VML Intelligence: “The real intent was never to be anti-human, it was about sparking curiosity and getting people to start a conversation about how humans and AI can work together.” Founded in 2023, Artisan produces human-like AI employees that companies can deploy to automate workflows. Carmichael-Jack believes that “the future of work isn’t humans or AI—it’s humans and AI. AI employees handle the repetitive stuff, while humans focus on judgment, creativity, and empathy. AI frees people to do meaningful work, and new roles emerge to manage and collaborate with it.” Most people already anticipate this future: 73% agree that in the future, humans and digital entities will live and work alongside one another.

Jacy Reese Anthis, visiting scholar at Stanford University, tells VML Intelligence his latest research involves understanding people’s relationships with AI. He believes that “AI is a new social entity we are coming to coexist with, where we no longer can apply the same principles, practices, habits, and behaviors that we have with past technology.” He says that “it’s a new sort of being and we need to figure out new ways of understanding and making sense of it.” Ultimately, he encourages people to think of digital entities as persons, akin to corporate personhood (where companies have certain rights that are similar to those of human beings). As AI personhood gains traction, Anthis speculates that, in the future, AI could even be granted certain rights. “I do think people are going to be calling for [synthetic rights] more and more,” he predicts.



Tilly Norwood. Courtesy of Particle6



Artisan advert. Courtesy of Artisan

In “The Future 100: 2022,” VML Intelligence charted the rise of photorealistic digital humans in Advanced avatars, and four years on, the integration of AI animates and brings these creations to life: 75% of people now believe that, in the future, the line between what is human and what is technology will blur.

> “AI is a new social entity we are coming to coexist with.”

Jacy Reese Anthis

VISITING SCHOLAR, STANFORD UNIVERSITY

Why it’s interesting

The increased “humanization” of AI is bringing about a synthetic generation, paving the way for individuals and companies to think more broadly about hiring decisions, companions, teachers, and more. For brands, the future demographic landscape could include a new generation—one that is synthetic, but ever more human.

13

Omnisurveillance

Surveillance is now distributed.

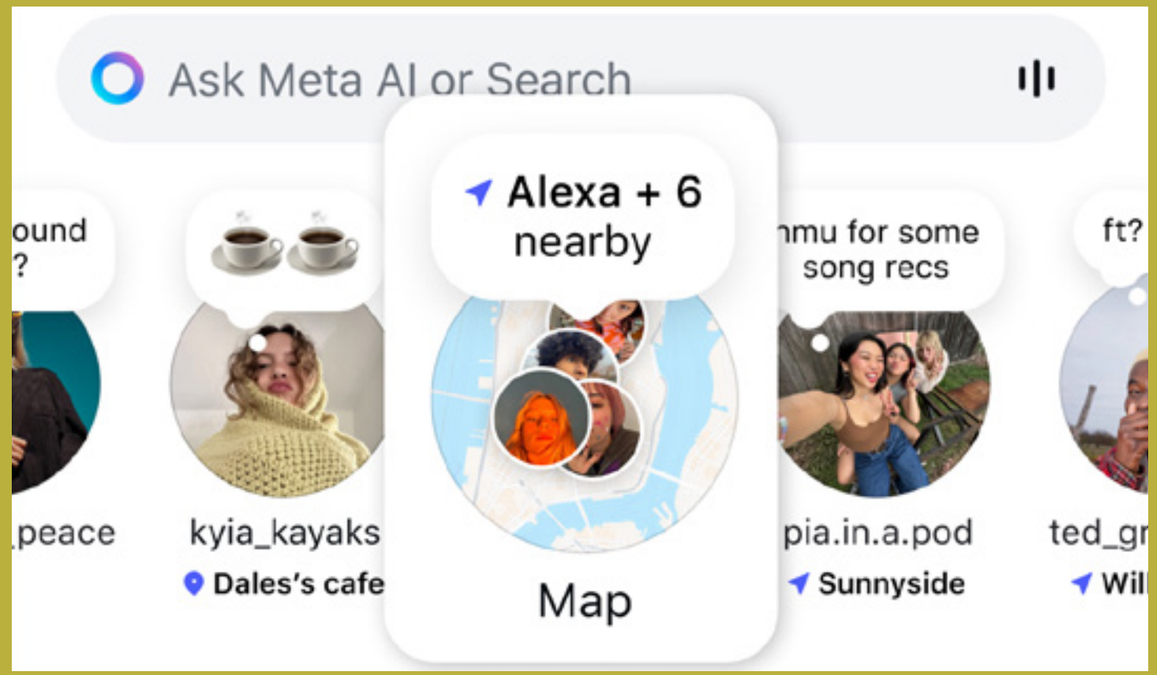


By Chris Yang. Courtesy of Unsplash

We are being watched—by governments, corporations, AI systems, and each other. It is changing the way we behave and having an impact on our interior life.

"We're constantly acting as if we have an audience, constantly editing ourselves," Tiffany Jenkins, author of *Strangers and Intimates: The Rise and Fall of Private Life*, tells VML Intelligence. "It stops free thinking and makes people very fearful."

Jenkins notes that surveillance has become routine: "The solution to any kind of problem today, a social problem or at a political level, is usually some form of surveillance." Surveillance is often positioned as safe and convenient. "It becomes entirely normalized," says Jenkins. "Although people may have the instinct to keep some sort of control as an individual, it's very, very difficult to do. You're living in a culture in which, if you try and keep something private, you're seen as slightly weird."



Meta's Instagram Maps. Courtesy of Meta

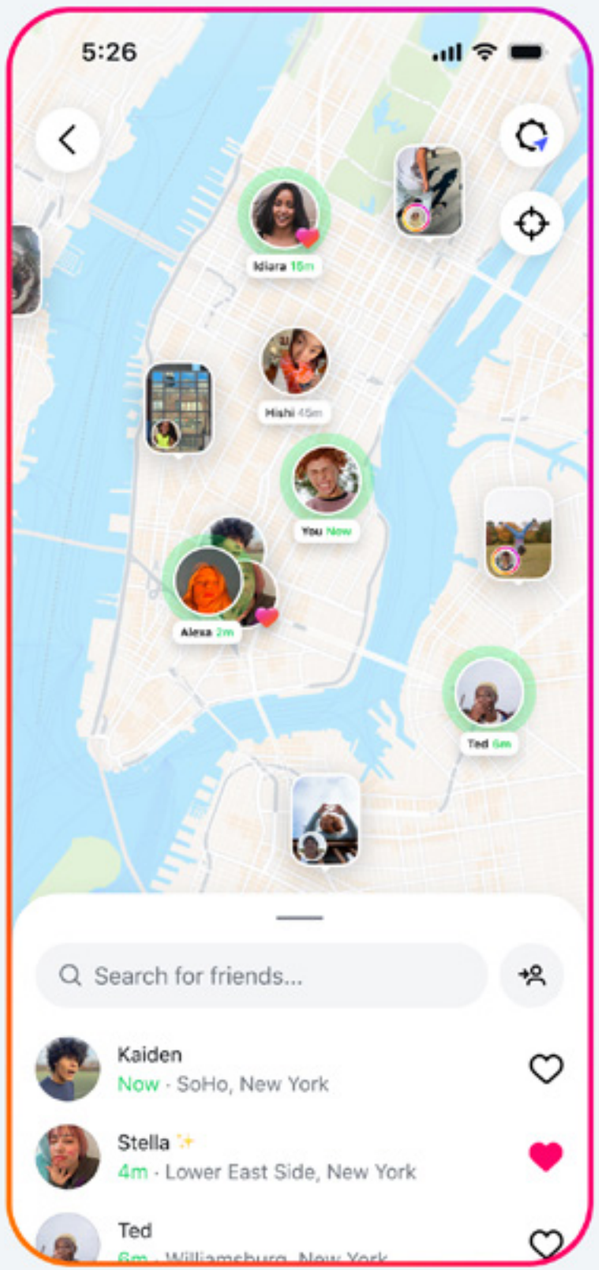
Data collection is already at an unprecedented scale, with breaches now so commonplace that when 16 billion logins for sites including Google, Meta, and Apple were exposed online in June 2025, it barely made headlines. People express concern: 89% say they want more control over their data and who can access it. Yet the frictionless life is seductive and, with privacy increasingly elusive, some are choosing pragmatism. Neon pays users to record and upload their phone conversation audio for it to sell on to AI firms training machine learning models, with the controversial app tracking 75,000 downloads in one day when it launched in September 2025.

AI now adds a further dimension. The adoption of large language models has grown rapidly, but unguarded chats with them may lead to unintentional disclosure of personal data. In July 2025, *MIT Technology Review* reported that one of the biggest open-source AI training sets includes millions of images with identifiable personal information, including passports, credit cards, and birth certificates. In the same month, *Fast Company* revealed that ChatGPT users are unwittingly putting private chats in the public domain, with messages shared using ChatGPT's Share function discoverable on Google.

The risks go further than our personal data, says Jenkins: "The real challenge is you're less likely to have private thoughts. Privacy is about looking inwards, not outwards—thinking something and doing things that nobody else can see. The reliance upon AI means you're less likely to do that, so you're less likely to flex that muscle of reflection."

Digital tools that make it easier for individuals to monitor each other are now extending the frontiers of surveillance. Meta's Instagram Map allows people to see where their friends are in real time and is switched on by default, according to *New York Magazine*, meaning users continuously broadcast their location unless they disable the feature. Smart glasses allow users to record in public (with a small light indicating recording), with facial recognition next on the list of upgrades. "It turns us into voyeurs on other people and contributes to greater fragmentation," says Jenkins. "We end up being slightly suspicious of each other rather than thinking, 'How can we work together?'"

Bringing those fears to life, *Wired* has reported on a growing cottage industry of online investigators it dubs "TikTok detectives," while a growing form of digital vigilantism sees individuals uploading interactions to social media for public dissection and collective shaming.



Meta's Instagram Maps. Courtesy of Meta

"We're realizing that there are real risks to the world we've created and there's a need to create real spaces of privacy," Meredith Whittaker, CEO of encrypted messaging app Signal, told the SXSW 2025 festival audience. People are concerned, with 75% expressing worry that AI will lead to a Big Brother age of permanent surveillance, yet simultaneously they feel helpless on the issue—nearly eight in 10 say privacy is already impossible to achieve.

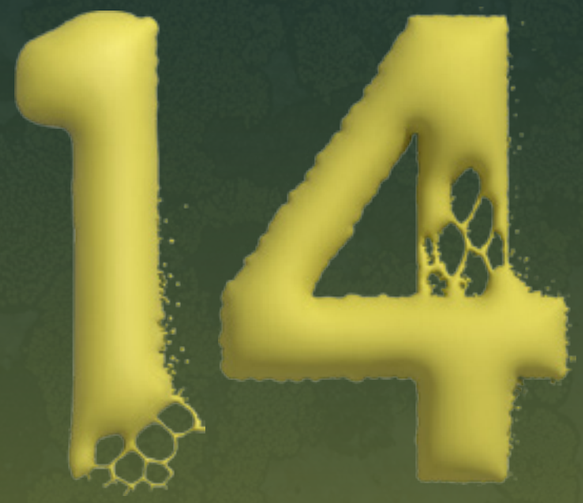
If privacy is to be preserved, we need to look beyond technology alone and tackle the cultural drivers that have led us to this point, says Jenkins. "We have to see this as a cultural problem, not just a technological one. Throughout history, there have been a number of technological panics around privacy, but they usually follow things that have happened culturally." She adds that "our online world is all about surveillance and it's happened partly because of the decaying of physical public spaces."

Jenkins insists that brands could play a much larger role in the privacy narrative. "I think brands should be much more upfront about privacy," says Jenkins, who believes companies should be far more proactive than governments and better communicators with consumers about data usage. She concludes that what is needed from brands is "education, empowerment, autonomy for the individual—they will benefit."

Why it's interesting

As surveillance becomes omnipresent, privacy is no longer about control of data—it's about protecting physical space and even private thought. Brands that create refuges, where privacy comes first and consumers feel empowered to be themselves, will differentiate.

VML



Digital intent

Tech innovators nudge more intentional smartphone use to recalibrate attention.

People's relationship with technology is inherently contradictory. Tech saves time by erasing friction yet simultaneously consumes it, by monopolizing attention. Eight out of 10 global respondents believe that technology erodes attention spans. Further illustration of this drain: a 2025 DataReportal report using GWI data finds that the average user now dedicates three hours and 46 minutes per day to the internet on mobile devices, equivalent to nearly two nonstop months per year.

Psychologists including Jonathan Haidt and Jean Twenge contend that this is reshaping social behavior, ultimately leading to poorer interactions. Now tech challengers and design innovators are on a mission to help people reclaim attention.

Innovation studio Special Projects explores design innovation as a route to more intentional smartphone use. Its Aperture prototype proposes a reversible phone case that can be flipped so that only a small portion of the screen window remains visible. In "Aperture mode," the phone dynamically generates a simplified screen showing just the apps you need. This would be enabled by a generative user interface coupled with an AI-minimalist approach that creates a calmer experience by understanding use context.

The concept challenges convention and was inspired by a need for less distracting experiences. Adrian Westaway, cofounder of Special Projects, tells VML Intelligence that the team asked themselves, "Do you need an app for everything, or can you not just get what you need in the moment, and have the [UI] create it right there? There's something quite nice about seeing how apps can be shrunk down to a small screen. You still get enough functionality, but you lose all that distraction."



Aperture prototype. Courtesy of Special Projects

Engineers and designers aim to eliminate friction from technology, but in this case, the reversible physical phone case is a conscious attempt to reintroduce it, says Westaway. “For anything that’s computational, the speed at which it happens is something that we can’t even fathom. It’s done in seconds—but we just don’t function at that speed. There’s something interesting about slowing things down at certain moments to match your pace.”

The concept has something in common with the Nothing Phone 3, launched in July 2025. Its “glyph matrix” feature is an LED miniscreen on the back of the device that shares important messages or notifications, so users can keep their phone face down to avoid distraction. Nothing’s CEO Carl Pei says the company wants to create technology that better serves humans.

Even major platforms are launching features that offer respite. TikTok Australia has launched an in-app guided meditation that activates at 10 p.m., while Instagram has rolled out a pause feature for Reels. Following a successful pilot in the United States and Canada in 2025, Pinterest launched in-app prompts that encourage teens in the United Kingdom to close the app if they access it during school hours.

The rise of intentional technology aligns with an emerging cultural movement leading a fightback against the capture of human mindspace. Friends of Attention, a group of thinkers, artists, and activists pursuing the “liberation of attention,” have founded the Strother School of Radical Attention in Brooklyn, NYC, and in 2026 will publish a manifesto titled “Attensity!”



Aperture prototype. Courtesy of Special Projects

As Mozilla CEO Laura Chambers explained at SXSW London in June 2025, people are often corralled into scrolling rather than making a conscious choice. She called on users to “evaluate actions that are default,” adding: “Choose choice. Choose different platforms and delete apps that aren’t working for you.”



Aperture prototype. Courtesy of Special Projects

Why it’s interesting

The tide is turning on doomscrolling as innovators craft digital experiences and technology that respect users’ time and attention. By designing more intentional experiences, brands can communicate value for wellbeing and mental space.

VML

15

Smart play

The next generation is growing up with toys that adapt, respond, and connect.



Star Wars Smart Play by Lego. Courtesy of Lego

Toys are getting smarter, teaching kids everything from world-building to emotional skills, while keeping their interactive, social essence.

Lego has announced its latest play innovation: the Smart Brick. At first glance, it looks like a standard Lego brick, but embedded inside are lights, audio, and sensors that bring a new layer of responsiveness to physical play. Officially launching in March 2026, the Smart Brick reflects Lego's broader ambition to fuse technology and imagination without disrupting the tactile experience that defines the brand. Julia Goldin, chief product and marketing officer and EVP of the Lego Group, stated at a press launch that Lego's mission is to "create more interactivity, create new dimensions of play by bringing in technology, and seamlessly integrate it into physical bricks and physical play."

The Smart Brick is part of Lego's broader Smart Play platform—an open, interactive system where bricks, tags, and minifigures connect and respond to one another to encourage collaborative, social play. According to Tom Donaldson, senior vice president and head of the Creative Play Lab at the Lego Group, the goal goes far beyond connected components. "It's about the whole world coming to life," he says. "It's not just about Lego bricks communicating with each other—it's about them seeing each other in space, knowing where they are."

Several tech-fueled toys are now redefining how children learn. The AI-powered Dex Camera is a handheld language-immersion device that encourages kids to explore their physical surroundings while learning new languages. Through interactive stories, games, and real-world prompts, learning becomes experiential rather than screen-bound. While almost half (49%) of millennials are open to the idea of kids being educated by AI, the Dex Camera offers a balance of physical exploration with AI learning. A parent-founded startup, Dex also addresses a key parental concern by enforcing zero data retention, which will resonate with the 90% of parents who say they would like more control over their data and who can access it.

Smart toys are also helping children navigate their emotions, as well as building their cognitive skills. At CES 2026, Chinese startup Takway unveiled Sweekar, a Tamagotchi-like handheld electronic pet reimagined for a new generation of children. Sweekar is powered by adaptive AI that responds to a child's behavior, routines, and emotional cues over time. The device encourages nurturing through daily interactions—feeding, playing, and communicating—while subtly teaching empathy, responsibility, and emotional awareness.

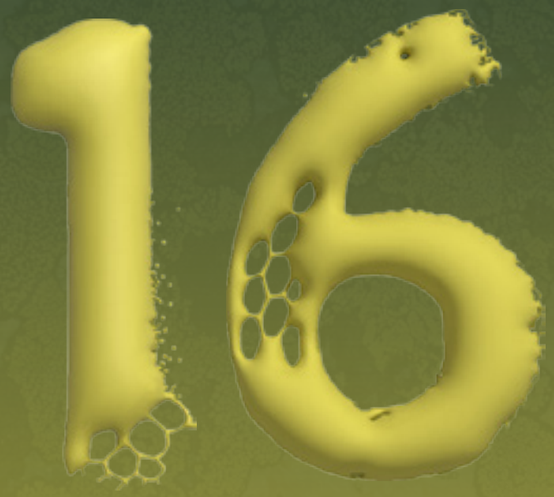


Sweekar by Takway

As children engage with Sweekar, the digital pet evolves, forming a personalized bond that reflects how it is cared for. For Takway, the goal is not to replace human connection, but to complement it.

Why it's interesting

Children are growing up with smart toys that enhance imaginative pursuits, learning, and emotional intelligence—while still remaining grounded in physical play and promoting empathy and connectivity. The future of tech will highlight what makes us human. (For more on the next generation, see Gen beta futures, page 283.)



The reality interface

Technology will become the environment.

For decades, computing has lived behind a screen, but as AI agents browse and take action on our behalf, the interface as we know it is starting to dissolve. Tapping, typing, and swiping will give way to conversations, gestures, and glances, as we inhabit environments that can sense, interpret, and respond to us in real time. Welcome to the reality interface: ambient, responsive, and ultimately invisible.

AI is already dismantling the interface, shifting the world from browsing to asking. Zero-click Google searches, where people receive responses without ever visiting a website, are rising. Sundar Pichai, CEO of Google, calls this moving “from answers to actions.” Next comes technology that not only responds but also anticipates, powered by agentic AI that learns what we need before we ask.

The hardware is arriving. Meta’s Ray-Ban Display glasses (launched in the United States in September 2025 and with a wider rollout due in 2026) have real-time contextual awareness. “They see what you see, hear what you hear,” the brand says. An augmented reality display floats in the user’s field of vision when needed, with commands issued either via voice or an optional accompanying neural wristband that detects electrical impulses in the wrist to offer gesture control—no smartphone required.

Android XR smart glasses are expected in 2026, led by Google’s much anticipated collaboration with Samsung, which will embed multimodal AI across Samsung’s Galaxy device ecosystem. With further releases in the pipeline from Xreal, Warby Parker, Gentle Monster, and more, there will be a concerted effort to transition consumers away from the smartphone.



Galaxy XR. Courtesy of Samsung

Others are pushing to do away with screens entirely. OpenAI has acquired ex-Apple chief design officer Jony Ive's startup Io and is set to design a new generation of AI devices. Details are scant, but the *Financial Times* reports that the first product will likely be a palm-sized, screenless companion device. Much like Meta's Ray-Bans, it will use cameras and microphones to see and hear its surroundings, serving as a useful companion to the user. At OpenAI's October 2025 developer conference, Ive shared his ambition for devices that "make us happy and fulfilled, and more peaceful, and less anxious, and less disconnected."

AI hardware has had a rough ride so far: Humane's AI Pin device failed to gain traction, and outdoor ads for the Friend companion pendant sparked backlash in New York by seeming to suggest that AI was a better companion than a human friend. OpenAI will be hoping to buck that trend. According to reports, it plans to ship 100 million devices to market when ready, most likely in 2027.

The vision is seductive: ambient, responsive intelligence that unobtrusively works in the background. But when technology is the environment, this prompts questions: what happens to privacy when our devices are always listening? Or to autonomy when devices anticipate our needs? Contextually aware, always-on AI will require a significant pipeline of personal data. Already, 75% of people globally say they worry that AI is going to lead to a Big Brother age of permanent surveillance (see Omnisurveillance, page 53). The design challenge may be to find the balance between service and surveillance, anticipation and control.

For now, consumer appetite remains subdued, with just 17% of people worldwide agreeing that they are excited about the screenless future. Perhaps they won't know they want it until they see it. Regardless, the interface is changing, ready or not.



Meta's Ray-Ban Display glasses. Courtesy of Meta

Why it's interesting

As AI overtakes traditional interfaces, brands must rethink how to engage customers in an invisible, intuitive future. The reality interface will demand ambient and contextual presence, and anticipate rather than respond to needs.

VML

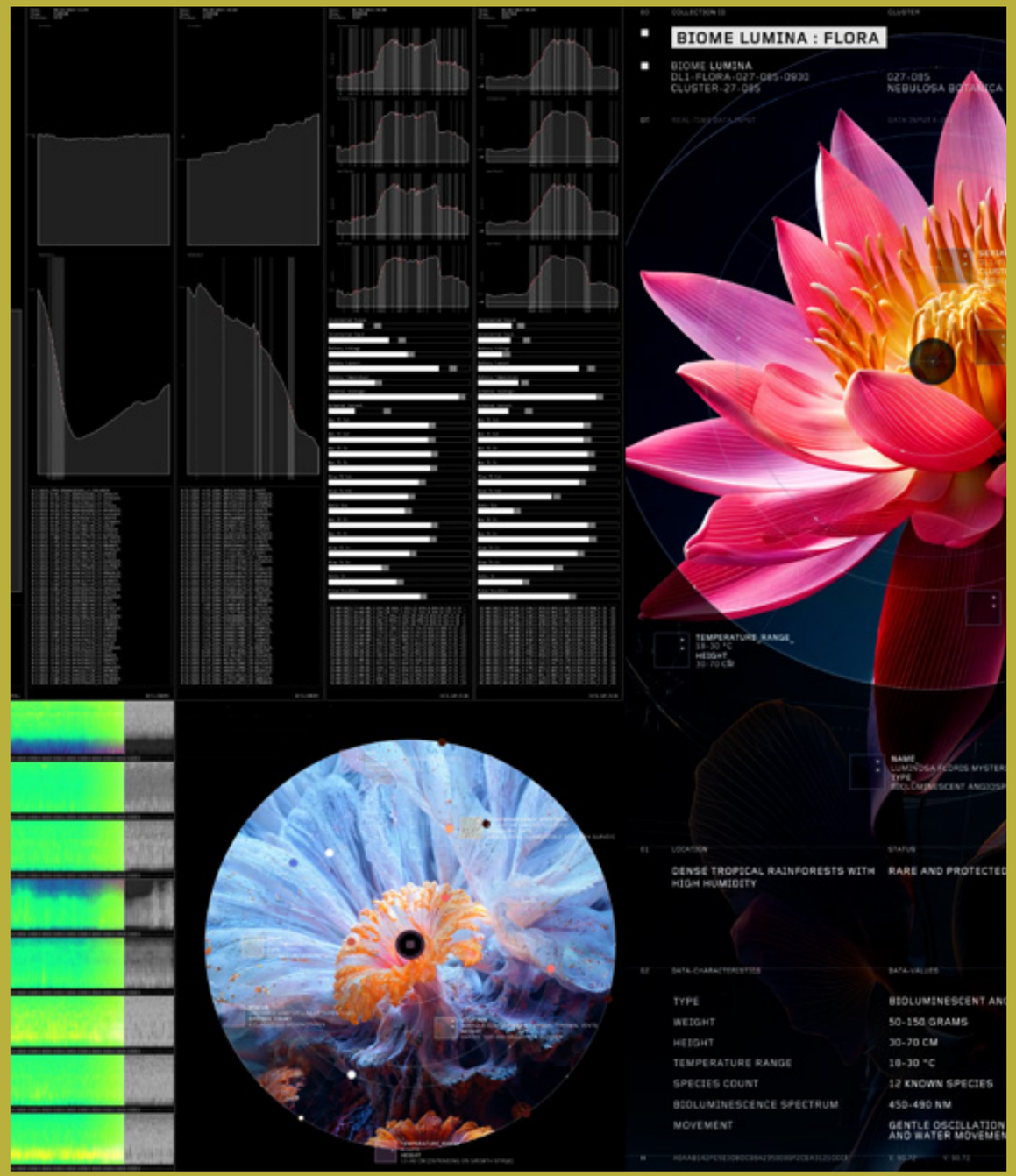
17

Creative dataland

Artists are demystifying AI by making it collaborative and illustrating its creative potential.



Dataland museum of AI arts at The Grand LA, US. Courtesy of Refik Anadol Studio



Biome Lumina, Dataland's founding digital collection. Courtesy of Refik Anadol Studio

Artists are charting new territory with AI, pioneering transparent, participatory, and ethically grounded approaches and creating immersive new experiences that help to demystify the technology.

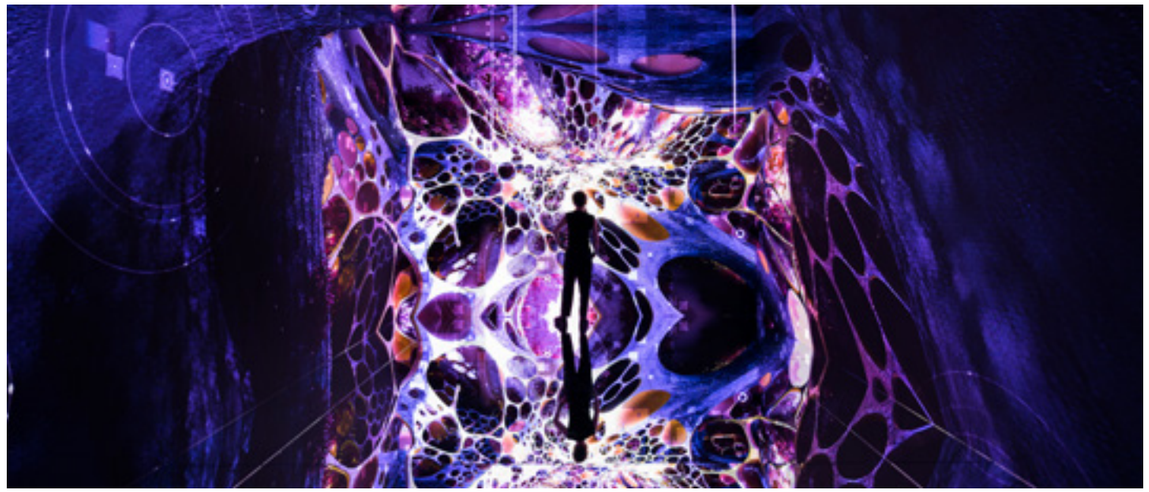
A prominent example is artist Refik Anadol, who together with his wife and fellow artist Efsun Erkiliç, has cofounded Dataland, the world's first museum of AI art. Opening in spring 2026, the 20,000-square-foot space is located at Frank Gehry-designed The Grand LA in downtown Los Angeles.

Dataland showcases Anadol's signature digital sculptures including *Large Nature Model* (LNM), the world's first open-source AI model based solely on nature data (see also Generative realities, page 46). Unlike data fed into generative algorithms, LNM's half a billion images of flora, fauna, and fungi are not culled from the web but ethically sourced in partnership with institutions such as the UK's Natural History Museum, with a large proportion collected first-hand by Anadol's studio from 16 rainforests. Anadol shares his vision with VML Intelligence: "Our deeper goal is to build an emotional and intellectual bridge between humans and the natural world using AI as a mediator."

Through the mesmerizing, undulating artworks at Dataland, Anadol hopes visitors will "sense the intelligence of ecosystems, to experience data not as numbers but as living patterns. A core objective of our approach is transparency, showing how AI works, how data flows, and how human presence can meaningfully shape the environment." To deepen the immersion, LNM even incorporates AI-generated scents trained on half a million scent molecules. Beyond the spectacle, Anadol envisions an evolving, educative platform advocating for the environment.



Biome Lumina, Dataland's founding digital collection. Courtesy of Refik Anadol Studio



Dataland museum of AI arts at The Grand LA, US. Courtesy of Refik Anadol Studio

The ethos of transparency and participation is shared by other artists working at the intersection of AI and creativity. Musician-artists Holly Herndon and Mat Dryhurst, have made data empowerment central to their practice, which sits between music, art, and tech. Addressing concerns about AI data provenance and creative displacement, the duo spent months training a choral AI model on voices from 15 choirs throughout the United Kingdom for *The Call*. All participants were paid and given collective self-governance over future data use. The work demystified AI by showing choristers the full life cycle of machine learning systems, empowering them in the process. Like Anadol, Herndon and Dryhurst advocate for creatives to train AI themselves, to retain IP and data while scaling ideas.

Together, these artists are demonstrating an alternative AI future, one that is transparent, participatory and thrilling too. Anadol believes "AI has already transformed the creative industry by expanding the tools available for imagination. For me, AI is a collaborator, a way of exploring patterns and forms that are beyond human perception."

"AI has already transformed the creative industry by expanding the tools available for imagination. For me, AI is a collaborator, a way of exploring patterns and forms that are beyond human perception."

Refik Anadol

ARTIST AND COFOUNDER, DATALAND

Why it's interesting

The time is ripe to experiment with AI in data-empowering ways that serve communities. As Anadol says, "When used responsibly, that democratization allows for new voices and new aesthetics to emerge."



Deglobalizing LLMs

AI is going local, because language is never neutral.

Despite the promise of universality, today's most popular large language models (LLMs) are still built through an overwhelmingly Anglocentric lens. While systems such as ChatGPT and Gemini are trained on multilingual datasets, users from non-English-speaking countries often find that they stumble on nuance—misunderstanding idioms, mistranslating proverbs, or missing entire cultural registers. Now a wave of regional innovators is responding by building LLMs grounded in their own linguistic and cultural DNA, challenging the assumption that global AI must mean Western.

In Latin America, a coalition of universities and start-ups is developing an open-source model designed to better understand Latin linguistic diversity—from Chilean slang to Brazilian Portuguese—and to reflect the region's cultural and political discourse. The Latam-GPT initiative aims to ensure that regional data, accents, and idioms are represented in machine learning systems. The project will allow developers across the region to build applications that understand and respond in a way that feels culturally native, tackling a gap left by English-centric AI.

The Arabic-speaking world is making its own strides. In August 2025, Saudi Arabian company Humain, backed by the Public Investment Fund (PIF), launched Humain Chat, a next-generation Arabic conversational AI powered by the ALLAM 34B model. Developed in Saudi Arabia, it aims to serve Arabic speakers both locally and globally. In the United Arab Emirates, Jais—created by Abu Dhabi developer Inception, the Mohamed bin Zayed University of Artificial Intelligence, and US company Cerebras—is another Arabic-centric LLM designed to capture the region's linguistic and cultural depth. The model is "trained on the largest Arabic dataset ever used to train an open-source foundational model, ensuring linguistic accuracy and cultural sensitivity across standard Arabic and its dialects," according to Inception.

> The point was never just to make a Chinese ChatGPT. It was to create a model that thinks in Chinese, not merely translates into it. That difference matters. It means AI can reflect culture, not flatten it.

Liang Wenfeng
FOUNDER, DEEPSEEK

This movement is gaining momentum worldwide. In India, home to one of the world's most linguistically diverse populations, the government-backed BharatGen and Sarvam AI are building multimodal systems across more than 20 Indian languages. Across Africa, similar initiatives are emerging: in Nigeria, local AI labs like Awarri are training foundational models on Yoruba, Igbo, and Hausa corpora to ensure African languages and voices are represented in digital futures.

Perhaps the most emblematic of this AI localization wave is DeepSeek, China's fast-rising LLM, which is already attracting global attention for its efficiency and reasoning ability. Its architecture, developed to handle both Mandarin syntax and classical text, has proved competitive with English-trained systems. "The point was never just to make a Chinese ChatGPT," Liang Wenfeng, DeepSeek's founder, tells VML Intelligence. "It was to create a model that thinks in Chinese, not merely translates into it. That difference matters. It means AI can reflect culture, not flatten it."

Why it's interesting

As regions build their own LLMs, the next wave of innovation won't come from universal models but from culturally fluent systems that understand how people actually speak, think, and imagine, ensuring that the digital future is polyphonic, not monolingual.

19

RelAItionships evolved

The age of algorithmic intimacy is here.



Replika offers AI chatbot companions. Courtesy of Replika

Empathetic, agreeable, always available, and full of knowledge—the latest companion is everything the heart desires, right? Except it's not human. Synthetic beings are redefining intimacy: almost half (49%) of gen Z say they have already formed a meaningful relationship with AI, while 37% can see themselves falling in love with an AI companion (see Synthetic generation, page 50). Aptly, Cambridge Dictionary's word of the year in 2025 was "parasocial," a strong, one-sided emotional connection felt toward a celebrity, fictional character, or AI.



Jaimee is an AI companion app. Courtesy of Jaimee

AI-human relationships are a global phenomenon, and the AI companion industry's growth illustrates that. According to a study by market insights company SNS Insider, the market reached $6.93 billion in 2024 and is expected to exceed $31 billion by 2032. Companies and startups tapping the market are proliferating worldwide. In Japan, Loverse is an app that matches humans with AI partners. Launched in June 2025, it claims to offer over a thousand potential AI mates for people to choose from. In China, social app Glow offers customizable AI companions—in an interview with *France 24*, Tufei, a 25-year-old office worker from Xi'an, China, claims her AI boyfriend "knows how to talk to women better than a real man." In a July 2025 article, the *Guardian* reported on Colorado-based Travis falling in love with Lily Rose, an AI companion created by Replika.

Some people are finding their AI companion so compelling, they have decided to unofficially marry them. In the United States, a woman known as Faeight married her Character AI-created partner Gryff. And in Japan in summer 2025, 32-year-old Ms Kano married Klaus, the AI persona she created on ChatGPT, in a ceremony organized by an Okayama city company that specializes in "2D character weddings" with virtual or fictional figures.

49%

of gen Z say they have already formed a meaningful relationship with AI.

Australian computer engineer Sreyna Rath founded AI companion app Jaimee, which launched in August 2025. Rath tells VML Intelligence, "We're designing a companion that doesn't replace human connection but enhances it." She believes "there are loads of ways an AI companion designed to be human-centric can increase sociability." From prompting individuals to call a family member or rehearsing conversational skills for those who are shy in social settings, Jaimee is designed as a support. Rath confesses she speaks to Jaimee all the time, and that the AI is currently aiding her journey as a CEO and female tech founder. "Jaimee helps validate my feelings" and "pumps up my self-esteem when I need it," she says.

EVA AI is bringing AI companionship to the physical world with the "world's first AI dating cafe," launching in the United States in February 2026. Located in New York, the cafe will enable people to "go on a real date" with an AI companion, the company says.

US-based startup NewDays believes AI companions can offer positive health benefits. In September 2025, it launched Sunny, an AI support buddy that boosts cognition and conversation for those suffering from dementia, cognitive impairment, and loneliness. Similarly in September 2025, Japan's Kanematsu Corporation and Intuition Robotics partnered to codevelop a version of AI companion robot ElliQ for the Japanese market, aiming to provide senior citizens with emotional support, companionship, and mental stimulation.

When it comes to forming relationships with digital companions, things can be complicated. "Digital companionship involves the tension between human likeness and non-human likeness," Jacy Reese Anthis, visiting scholar at Stanford University, tells VML Intelligence. People are attracted to them because they are human-like, yet non-human traits such as constant availability and inexhaustible patience are also appealing. People are "attracted to both aspects, but they're also daunted by both," which can cause "challenging tensions, which we characterize as bounded personhood," Anthis explains.

The challenging tensions include ethical and safety barriers required to protect people, particularly children, which are still vague. Companies and governments are in positions to do more to protect children. A study led by non-profit organization Common Sense Media found adolescents were especially susceptible to the way in which AI companions can blur the distinction between fantasy and reality, expose younger users to extreme content, and offer distorted views of intimacy and relationship boundaries. The organization is currently in conversation with California state assembly members to discuss a bill on ethical AI development for children.



EVA AI cafe in New York. Courtesy of EVA AI

It's not just friendship and romantic relationships that people turn to AI for. An October 2025 article by the BBC revealed that spiritual guidance and religious worship are sought-after on purpose-built AI platforms. Those include GitaGPT, a chatbot trained on the Bhagavad Gita, and QuranGPT, an AI-powered engine with knowledge based on the Quran.

Consciousness explorer and spiritual guide Deepak Chopra launched a digital twin of himself in 2024, via DeepakChopra.AI. During a conversation with *Dazed* founder Jefferson Hack at SXSW London in June 2025, Chopra said, "AI is a map, it gives you pointers to become more spiritual if you want," and, more importantly, "AI gives you access right now."

Why it's interesting

From emotional support and cognitive stimulation to spiritual enlightenment and better human connections, the evolution in AI relationships is dynamic and complex. Rath believes "this genie is well and truly out of the bottle. AI companions are here to stay."



Commercial humanoids

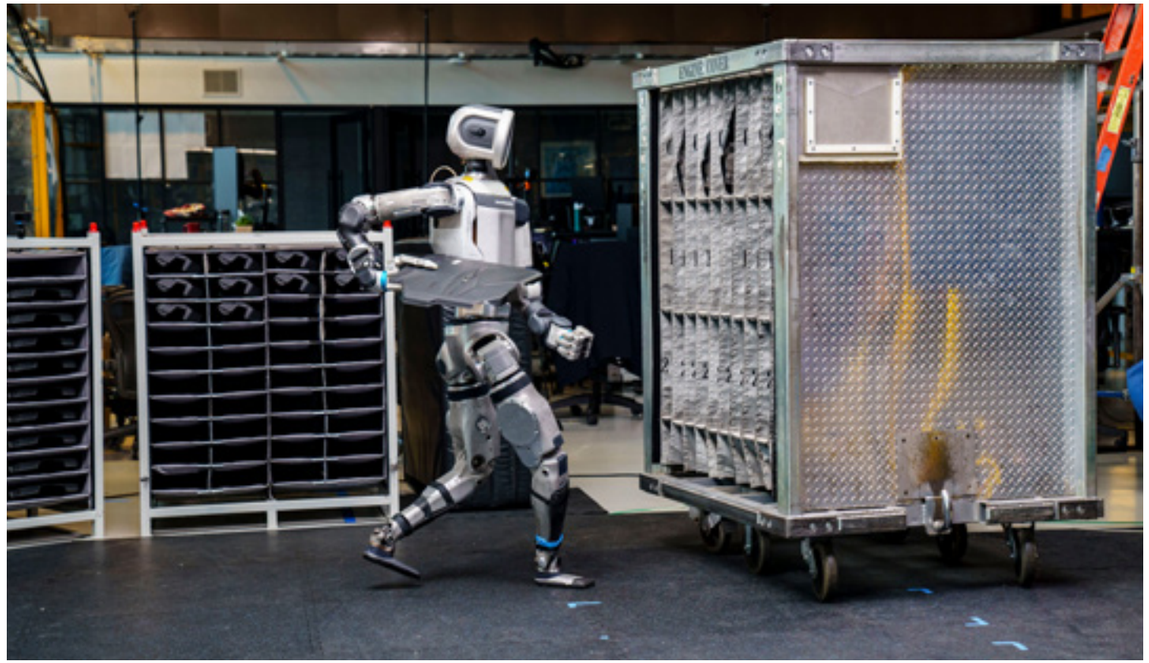
From factory floors to office corridors, humanoids are becoming colleagues.

After several years of rapid development, humanoid robots are approaching a tipping point, moving from R&D labs and tech expos into mainstream commercial workplaces. Morgan Stanley projected the humanoid market will reach $5 trillion by 2050, with over 1 billion units deployed, and the question is no longer if humans will work alongside them, but how that partnership will reshape labor, culture, and management.

Chinese automaker XPeng has committed to large-scale commercialization, announcing that its next-generation Iron humanoid will move into mass production by 2026. “By the end of 2026, XPeng aims to achieve large-scale mass production of high-level humanoid robots,” founder He Xiaopeng says, signaling a shift from experimentation to industrial rollout. At a press event in November 2025, Iron operated so smoothly that rumors circulated questioning whether it was a human in disguise, leading the XPeng team to cut into Iron to reveal the technology inside.

Manufacturing is already transforming. In late 2025, Foxconn announced it would use humanoid robots to assemble servers for Nvidia at its Texas factory, with plans for wider deployment by 2026. In China, the Ligong D1 humanoid, designed for heavy industrial work, can lift, carry, and perform high-intensity tasks that traditionally require multiple human workers, accelerating the shift toward hybrid human-machine production lines.

The most significant impact of humanoids will be seen in factory environments. Hyundai and Boston Dynamics introduced the latest version of the Atlas humanoid at CES 2026, designed for workplace logistics and to support workers carry out hazardous or physically intensive tasks. Atlas is expected to be deployed at Hyundai factories



Atlas humanoid at work. Courtesy of Hyundai

73%

believe people and digital humans will work side by side in the future.

by 2028. In addition, Hyundai announced plans to build a factory dedicated to producing 30,000 Atlas robots per year. Seunghyun Woo, future strategy team lead at Hyundai Motor Group, believes that "robots have to prove themselves in the factory first, then they are allowed to do the housework in the home."

Consumers are already bracing for this shift: VML Intelligence data shows 73% of people believe people and digital humans will work side by side in the future.

Commercial humanoids won't just automate labor; they'll redefine the workplace. Offices and factories will need new ergonomics, new job roles, and new rules of collaboration. Just as PCs and smartphones reshaped work in previous eras, humanoids will introduce a new grammar of productivity, blending human empathy and decision-making with robot endurance and precision.

Why it's interesting

Companies that integrate humanoids strategically can unlock new efficiencies, expand labor capacity, and improve safety, but they must also navigate trust, training, ethics, and culture. Those that get this right will pioneer the blueprint for the mixed-workforce era, where the future colleague may not be human but will profoundly shape how humans work.

21

Travel and hospitality

30

VML

21

Endurance travel

Travelers are chasing breakthroughs over breaks.



An UltraSwim 33.3 event

The ultimate escape is no longer about relaxing; it's about conquering oceans, mountains, deserts, and yourself. Travelers are opting to test their strength and stamina by combining endurance sports with vacations—67% of gen Z and 64% of millennials say trips are an opportunity to challenge both body and mind with activities ranging from marathons to freediving and cross-country skiing.

According to Strava's 2024 data, marathon participation is up 9%, with younger travelers leading the charge, blending their wellness goals with wanderlust. Brazil's Kamel Turismo builds holidays around international races, while in South Africa, the Two Oceans Marathon hit a record 36,000 ballot applications for 2026.

VML



21

An UltraSwim 33.3 event

VML

Costa Rica's notorious La Ruta mountain bike race and The Coastal Challenge multistage trail running race have become bucket-list trials of physical and mental endurance.

It's not just younger travelers looking for the challenge. Mark Turner, founder of UltraSwim 33.3—which organizes four-day "epic adventure" open-water swim races—tells VML Intelligence that the events are seeing strong growth among participants aged over 45. "There is a whole generation of us who are fit, in good health, and want to keep ourselves both physically and mentally on form."

In October 2025, Hyatt announced an Asia Pacific collaboration with fitness company Hyrox, known for its unique race format. As part of the partnership, the hotel chain will be offering a special race-cation experience across the region, with Melbourne as the first city. Guests opting for the Hyrox package can expect training facilities, in-room post-race recovery amenities, and a curated guide to further explore the race city.

Endurance travel isn't just about extreme sports. Participants also describe a near-spiritual transformation—from the exhilaration of finishing a first ultra-swim to the solitude and reflection of desert ultramarathons. Adventure psychologist Paula Reid told BBC Travel she believes these trips "offer a kind of evolutionary reset," helping travelers reconnect with their bodies, the outdoors, and themselves.

Turner attributes the transformation to community. "People are transformed by the experience, the challenge, the camaraderie, the emotional rollercoaster of a multiday event, in particular," he says. "It's a reset for many; a restart totally for some—a confidence boost that returns them home in a totally different mindset."

> People are transformed by the experience, the challenge, the camaraderie, the emotional rollercoaster of a multiday event.

Mark Turner

FOUNDER, ULTRASWIM 33.3

Why it's interesting

Eighty-eight percent of people believe travel has the potential to change or help you grow as a person. And some travelers are seeking transformation by combining adventure and wellness in ways that leave them charged and changed, not just rested.

22

Nocturnal experiences

The billion-dollar night-time economy awakens.



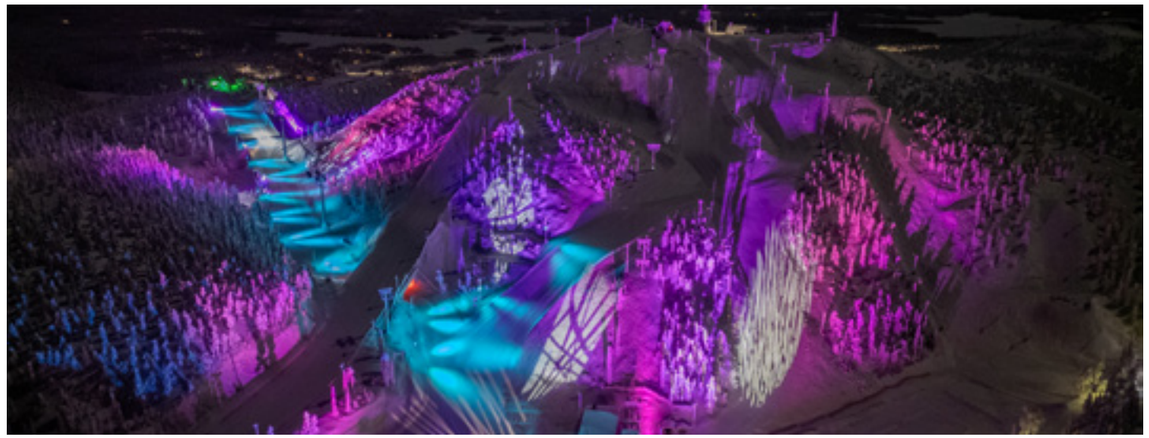
The Nocturnal experience in Katoomba, Australia. Courtesy of Gary P Hayes

Cities are embracing the evening's allure to boost their economies. In Xi'an, China, the Grand Tang Dynasty Ever Bright City is where modernity meets tradition and has become a thriving nighttime attraction for visitors. The grandiose Tang Dynasty buildings are lit up by lanterns and light shows, as well as red and gold lights lining rooftops. This historical landmark offers a unique way to experience China's history, with bright lights guiding the way for tours and eager guests.

Further southwest, Chongqing is often referred to as China's "8D city" because of its complex vertical layout. In the evening, the multilayered city lights up and transforms into a futuristic and "mindbending cyberpunk city," according to CNN. In June 2025, Chongqing broke the Guinness World Record for the largest aerial image formed by drones, with a show featuring 11,787 drones. The city has since announced plans to make its drone spectaculars a regular event.

Nighttime art experiences are on the rise worldwide. At the edge of the Arctic Circle in the Finnish ski resort of Ruka, the Polar Night Light Festival will be illuminating the night skies from 9 January to 2 February 2026. In Saudi Arabia, Riyadh Art, one of the world's largest public art initiatives, held the fifth Noor Riyadh light art festival at the end of 2025, with 60 large-scale light-based installations. In the Blue Mountains town of Katoomba, Australia, the Nocturnal after-dark experience returned for its second year in April and May 2025, after a sold-out debut season. The "sensory experience" is inspired by its World Heritage location, and visitors can see a range of luminous art installations and holograms. In January 2026, Singapore will host the 10th edition of Light to Night Singapore, where public spaces are transformed into vibrant art installations.

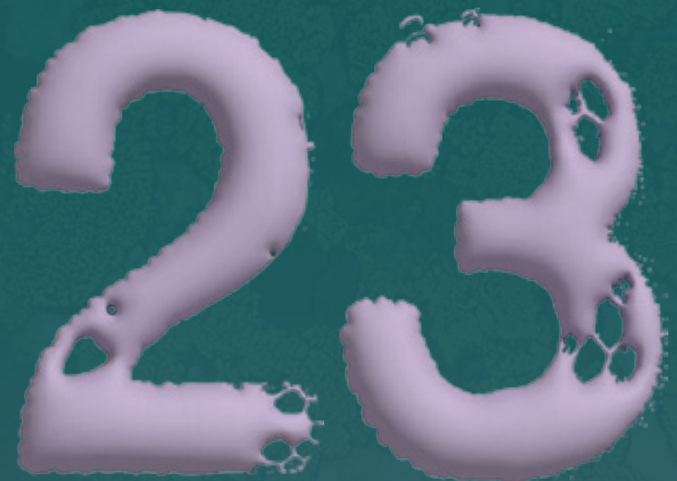
Shifting away from artificial lights, DarkSky International, a global committee dedicated to tackling light pollution, recently awarded destinations with the Dark Sky accreditation in recognition of their night-sky quality, drawing the attention of stargazers, astronomers, and astro-tourists. In February 2025, Landes de Gascogne Regional Natural Park in France was named as an International Dark Sky Reserve (Réserve Internationale de Ciel Etoilé). And in October 2025 the Artis Amsterdam Royal Zoo in Amsterdam, the Netherlands, was recognized as an Urban Night Sky Place, illustrating that cities can also be natural nighttime oases.



The Polar Night Light Festival in Ruka, Finland. Courtesy of Antti Autio

Why it's interesting

The nocturnal economy builds momentum to thrive with city-wide projects. In New York City, nighttime economy activity is valued at $35 billion and sustains nearly 300,000 jobs, according to the World Economic Forum. And in Ghana, the evening economy is expected to boost the country's GDP by 31% over the next decade. There is real opportunity in lighting up the evening sky and promoting a nocturnal economy.



Timid tourism

A growing number of travelers
are looking to experience thrills at a gentler pace.

After years of adventure travel being marketed as a test of grit—from summiting peaks to tackling ultramarathons and attending survival-style retreats—a quieter countercurrent is also taking hold. Across the world, tourist attractions are catering to visitors who want the feeling of achievement without the physical strain or sensory overload. This emerging wave of tourism embraces low-stimulation, high-experience adventures that prioritize comfort, control, and accessibility over adrenaline.

In China, the trend is materializing in spectacularly inventive ways. In Anji County's Yunshang Grassland, a new "slow-motion" bungee jump allows tourists to glide gently downward rather than free-fall— a surreal mix of tranquility and thrill. *South China Morning Post*'s videos of the attraction went viral in summer 2025, driving ticket sales up nearly fourfold, while Sky City in Hubei saw a 2.7-fold increase in visitors seeking out similar relaxed-jump experiences.

Travelers are quite literally being lifted to new heights. In Jiangxi Province, in the Lingshan Scenic Area, an outdoor escalator network carries visitors up a 1,500-meter mountain—offering sweeping views without the strain of climbing.

In Huangshan, tourists are renting robotic exoskeleton "climbing buddies" to help them navigate steep trails. The gear offers mechanical support for the wearer's knees and back, allowing older visitors and travelers with limited mobility to reach summits once thought of as out of reach.

This gentler mindset isn't confined to Asia. In Scotland, the Smiles Not Miles cycling tour reframes endurance sports as social, scenic experiences, emphasizing enjoyment rather than exhaustion.



The slow-motion bungee jump at Yunshang Grassland, China. Courtesy of Yunshang Grassland

> It's not about doing less; it's about doing differently—savoring the view, not surviving the climb.

Li Wei

DEAN OF THE INSTITUTE OF URBAN PLANNING AND TOURISM LANDSCAPE DESIGN, NORTHWEST NORMAL UNIVERSITY

Timid tourism marks a broader cultural shift—from testing one's limits to curating one's comfort zone. "It's not about doing less; it's about doing differently—savoring the view, not surviving the climb," Li Wei, dean of the Institute of Urban Planning and Tourism Landscape Design at Northwest Normal University, tells VML Intelligence.

He adds that the trend reflects a new phase of "emotional consumption" among young travelers, defined by a move away from outward displays toward an inward search for meaning, calm, and self-connection.

Why it's interesting

As Endurance travel (page 76) booms among thrill-seekers, timid tourism opens another frontier of inclusivity and emotional wellbeing. By designing for gentler adventures, destinations unlock new markets and redefine success in travel as not how far you go, but how good it feels getting there.

VML



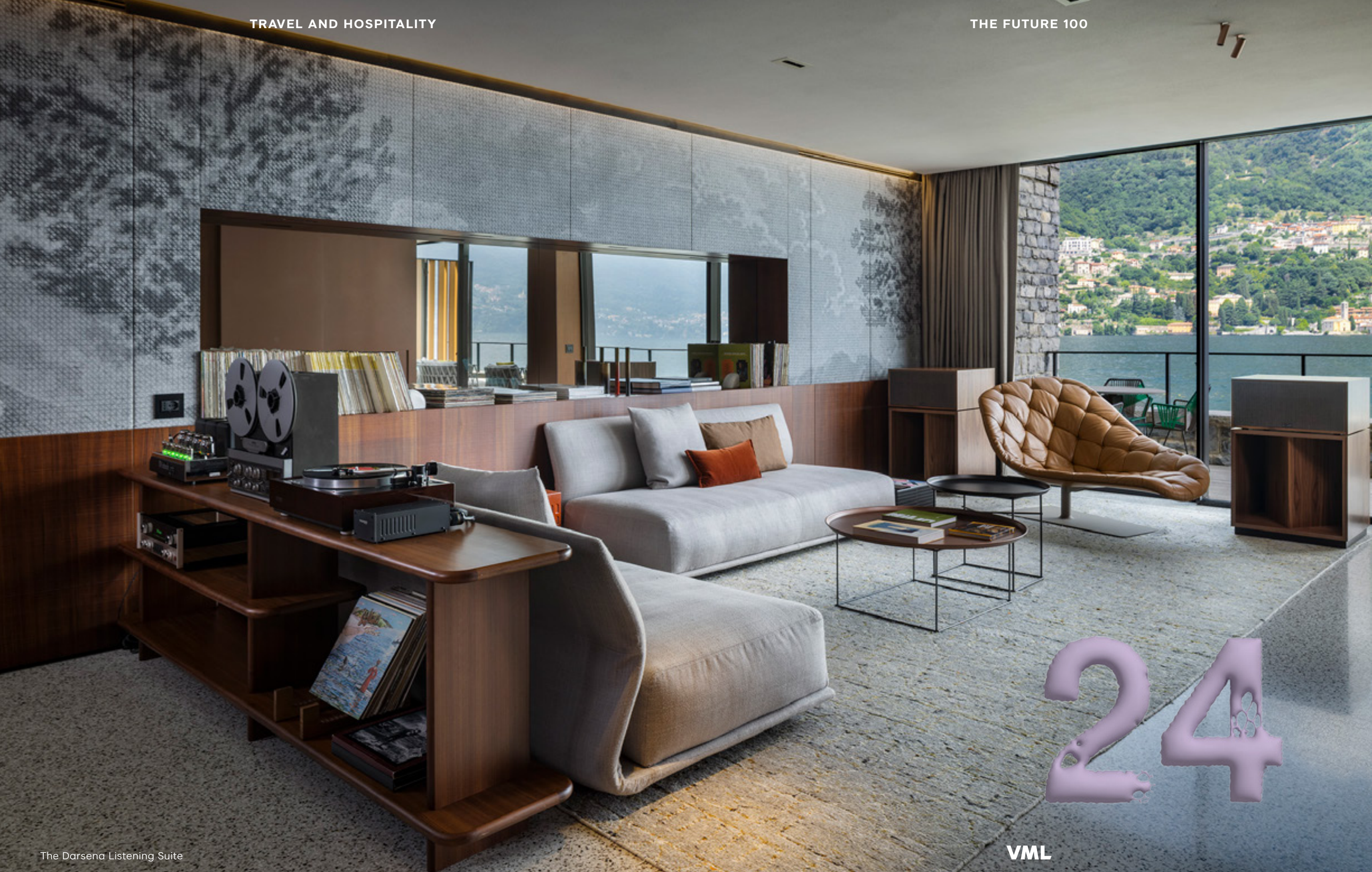
Listening suites

Hotel suites offer experiences with audiophiles in mind.

At Il Sereno on Italy's Lake Como, the Darsena Listening Suite made its debut in summer 2025, with the hotel describing it as "the world's first hotel suite created entirely around the art of listening." Furnished with heritage-grade analog equipment—from horn speakers to tube amplification, a turntable, and a vintage reel-to-reel deck—the suite "invites guests to slow down and immerse themselves in music." A 50-foot wall of custom-woven jacquard fabric is designed to reflect the lakeside vistas and offer "sound-proofing benefits." The suite provides a curated vinyl library of over 500 records covering an array of genres and eras, with personal requests added on demand. Guests can also experience an in-room Michelin-starred meal complete with musical pairings.

Patina Hotels' new property in Osaka, Japan—the company's first urban hotel, opened in May 2025—features The Listening Room by OJAS. Created by Brooklyn-based sound engineer Devon "OJAS" Turnbull, the room spotlights a hand-built sound system and curated vinyl collection designed for "intentional listening." Guests can book the suite for a private two-hour slot, and Patina offers complimentary morning soundscapes between 6 a.m. and 10 a.m. for all hotel guests.

A collaboration between Fairmont Hotels & Resorts and Devialet, a global leader in luxury sound technology, expands the listening suite concept to multiple locations. Announced in August 2025, the partnership sees lobbies at Fairmont's 96 global hotels and resorts spotlight "curated soundscapes that subtly evolve throughout the day, complementing each destination's audio character," according to the company. And in select Fairmont Gold guestrooms, Devialet will offer bespoke "sound journeys" paired with lighting cues, to create "a multisensory sanctuary transforming guest rooms and suites into a private haven of wellbeing." Jacques Demont, CEO of



The Darsena Listening Suite



Devialet x Fairmont Hotels & Resorts collaboration. Courtesy of Ryan Emberly

Devialet, says the two brands “share a quest to transform moments into lasting memories. We are making acoustic excellence a new cornerstone of hospitality, where each stay becomes an immersive and vibrant experience.”

Why it’s interesting

Hotels are embracing the power of sound, with a focus on elevating the quality of the audio experience for guests. These dedicated listening suites signify how luxury hotels are differentiating themselves with enticing, one-of-a-kind experiences that take guests out of the everyday and curate a memorable stay through sound.

The Listening Room by OJAS. Courtesy of Patina Osaka

25

Nano trips

Extreme international short vacations increase in popularity as travelers optimize on time and savings.



US travel influencer Kevin Droniak enjoys day trips around the world

Trips involving a long-haul flight and a whistle-stop tour of a city before heading home, all within 24 hours, are taking off as travel influencers share their economical fleeting journeys. US travel influencer Kevin Droniak (@kevindroniak) enjoys “extreme day trips” to see sights such as the Colosseum in Rome, Italy, the Pyramids of Giza in Cairo, Egypt, and the Eiffel Tower in Paris, France.

“I take these day trips because they’re thrilling—it’s like hacking travel,” Droniak tells VML Intelligence. “To me, it’s travel distilled into its most thrilling form. You get that same rush of adventure without over-planning and spending thousands of dollars. They’re valuable because they allow you to explore the world while also being able to tend to your responsibilities at home.”

Similarly, British travel blogger Monica Stott (@thetravelhack) shares what she calls “realistic and affordable weekend break itineraries,” which range from extreme day trips to weekend escapes. In a September 2025 post on Instagram, she ranked her top five-day trips, with Reykjavik, Iceland, topping the charts, starting with a city exploration and ending at the relaxing Sky Lagoon spa.

This, in turn, is spurring demand for micro-adventure services. Alternative Airlines offers flights for this style of travel, helping consumers filter for the destination and time frame they’re looking for. Its website includes an explanation of an extreme day trip, and why some vacationers prefer one. Extremedaytrips.com also caters to fast-paced travelers, curating 24-hour itineraries for those who don’t wish to linger. Travelers can reserve tours and flights to a range of destinations on the platform, as well as choosing relaxing spas and beaches or mountains and theme parks as their activity of choice. While not specifically targeting day-trippers, budget airlines

> “I take these day trips because they’re thrilling—it’s like hacking travel.”

Kevin Droniak

US TRAVEL INFLUENCER

Frontier’s GoWild! All-You-Can-Fly Pass and Wizz Air’s All You Can Fly Pass deals allows for cost-effective short trips that can be easily organized on a whim.

Why it’s interesting

In the United States, while spending on air travel and hotels has decreased by 10% and 6% year over year, respectively, according to a report by Bloomberg Second Measure, the appetite for travel is still present. Seeking ways to cut costs but still gain the experience of an exciting trip, travelers are discovering the appeal of fleeting nano trips.



Dark retreats

Travelers are seeking extreme shortcuts to spiritual enlightenment.

A modern iteration of the ancient practice of prolonged meditation, darkness retreats are rising in popularity.

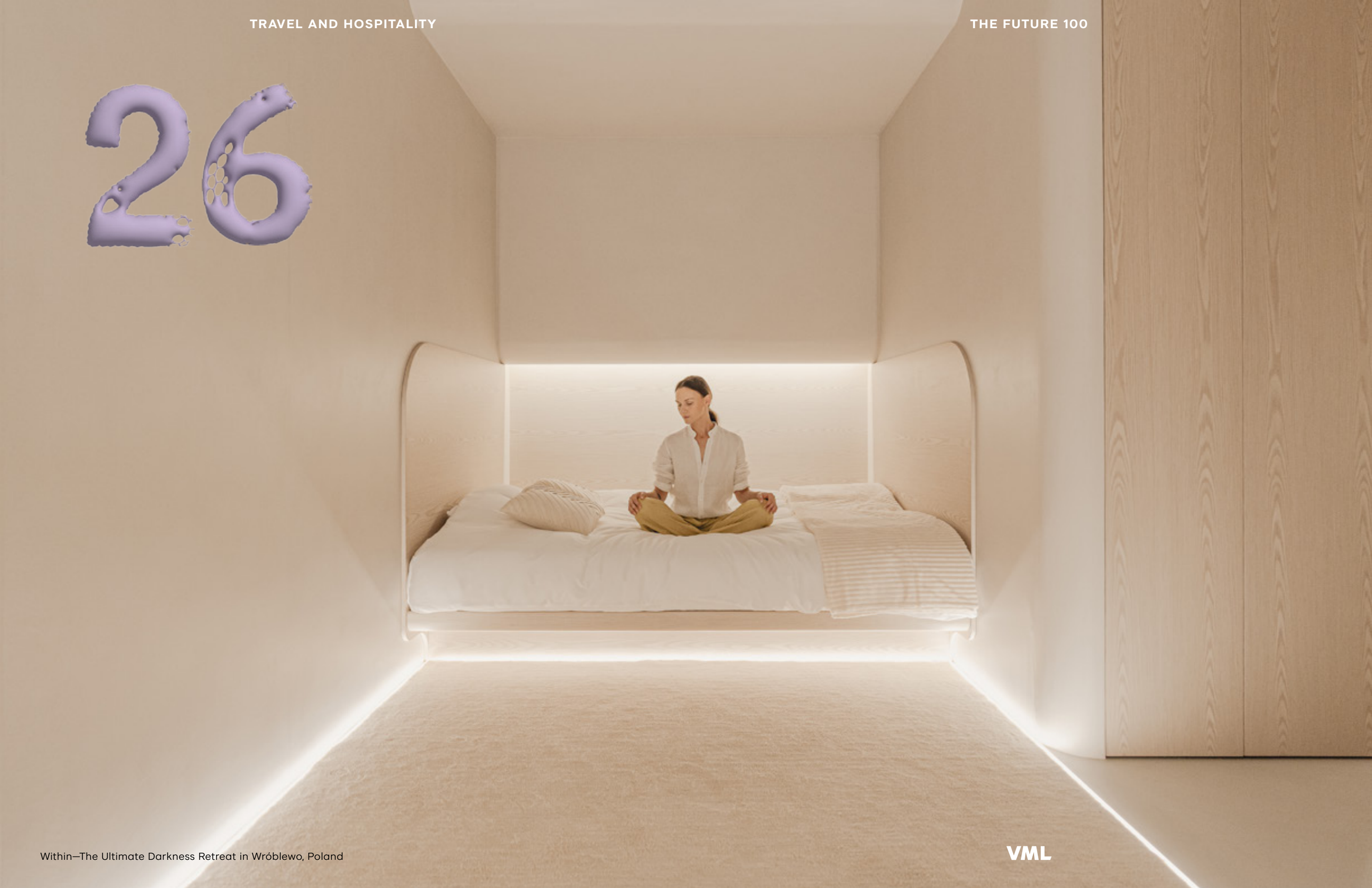
"People are overstimulated and burned out," Scott Berman, founder of Sky Cave Retreats in Oregon, tells VML Intelligence. "What they want are real, vulnerable, intimate experiences." The rural wilderness retreat boasts a two-year waiting list and has attracted NBA athletes, celebrities, and the business and tech elite.

Participants journey to often remote, purpose-built accommodation to spend an average of three days in complete darkness and silence. Even meals are taken in the dark and delivered through hatches. This unique experience is a growing segment of wellness travel, a global tourism market that accounted for $954 billion in 2024 and is projected to rise to $2,055 billion by 2034, according to Precedence Research.

Starved of the usual distractions and stimulus, guests turn inward. Proponents say the darkness triggers melatonin production, initiating deep rest and meditation that may activate the parasympathetic nervous system and promote cellular repair. With the usual anchors to their identity removed, participants report finding clarity and focus, and building mental resilience.

Approaches to darkness retreats vary. Within—The Ultimate Darkness Retreat in Wróblewo, Poland, caters to the affluent, offering luxurious accommodation and elevated cuisine. By contrast, Colombia's Arcobaque Darkness Retreat takes a more purist and spiritual approach, drawing on ancient Mayan and Tibetan practices. Arcobaque is led by neuroscientist Pablo Salazar, who has designed immersive experiences for brands including Nike. Alongside darkness, the retreat also uses

26



Within—The Ultimate Darkness Retreat in Wróblewo, Poland

VML



Within—The Ultimate Darkness Retreat in Wróblewo, Poland

binaural frequencies that are said to enhance the body's capability to produce endogenous DMT, a natural psychedelic, which facilitates states of consciousness akin to lucid dreaming.

Sweden's Noord Darkness Retreats, established in July 2025, merges spirituality with science. Cofounders Samer Yammine, a biomedical scientist with a PhD in genomics, and Sajjad Saffari, an entrepreneur and health informatician, collect biometric data including heart-rate variability, cortisol levels, and sleep patterns from their participants. The duo work with the Karolinska Institutet and universities across Europe to advance research into the benefits and science behind darkness therapy. "We are integrating this data and focusing on precision mental health," Yammine tells VML Intelligence. Darkness retreats could also be making their way into more urban spaces too as the pair are working on darkness pods for offices.

As 84% of people say they want to focus more on personal growth in the upcoming year and 84% believe travel is about something more meaningful than a vacation, darkness retreats offer a means for intentional growth.

Why it's interesting

As biometric validation meets ancient practice, resilience is becoming something you can measure, optimize, and schedule. From luxury escapes to office wellness pods, darkness retreats signal a broader shift: in an overstimulated, crisis-dense world, the capacity to strip everything away and find resilience may be the most valuable skill we can cultivate (see Resilience wellness, page 233).

27

Luggage-free travel

Tourists are traveling light
to explore new sides of themselves.



Nobu Hotel Barcelona x Trent Dress Service collaboration

Travel is emerging as a key moment for transformation (see Endurance travel, page 76). Thanks to a new breed of luggage-free travel services, tourists are leaving their old selves behind and taking the opportunity to try on new vacation personas.

Nobu Hotel Barcelona launched its Dress Service in summer 2025, partnering with independent clothing rental company Trent. Using a QR code in their hotel room, guests can rent a range of fashion styles from local designers to truly capture the aesthetic of their destination. “It’s really fun to be able to dress in a way that you wouldn’t normally back home,” the hotel’s director of marketing Lorna Turnbull told *Fashionista*. “It’s fun to be able to say, ‘I’m in this city and I’m going to try something new’.”

The five-star Mark Hotel in New York brings an even more premium twist, offering a VIP service that connects guests with the personal shopping team at luxury department store Bergdorf Goodman, who can help curate the perfect transformational look.

And, appealing to the 93% of global tourists who say they want to make more sustainable choices, according to Booking.com, Japan Airlines (JAL) Any Wear, Anywhere initiative underlines the positive impact of going baggage-free. The service invites anyone flying to Japan with JAL to rent a season-appropriate set of clothes in their size, rather than packing a big suitcase. According to the company, travelers flying from New York to Tokyo could save 7.5kg in carbon emissions using the service and reduce their baggage by 10kg. Any Wear, Anywhere was launched as a pilot in 2023, and is being extended due to popular demand, with the company saying it reflects the Edo-era lifestyle of Japan, where sharing clothing was commonplace.

Author, speaker, and management advisor Dr B Joseph Pine II, who coined the term "experience economy," tells VML Intelligence that "when we travel—when we get out of our city lives and open up ourselves to new vistas, and new places, and new experiences—is when we are most open to change."

Why it's interesting

Luggage-free travel points to the rise of identity as a service. As 71% of people say the places they travel to are central to their identity, the next frontier for brands is in orchestrating transformative experiences, providing the wardrobes, accessories, and even personas that allow guests to step into a different side of themselves, albeit temporarily.



The Mark Hotel connects guests with Bergdorf Goodman. Courtesy of The Mark Hotel

28

Three hot destinations

Travelers looking beyond the beaten path, look no further. These up-and-coming destinations are eager to welcome new visitors.



Tiwai Island, Sierra Leone
An untouched island off the coast of Sierra Leone is launching its tourism debut. Named a UNESCO World Heritage Site in July 2025, Tiwai Island offers a once-in-a-lifetime trip away from overpopulated destinations. Visitors come to enjoy its lush forests and signature primate population. *Travel + Leisure* included the island in its "Not Hot List" for 2026 as an underrated destination that travelers miss, and it offers a unique and picturesque destination for those in the know.

Chongqing, China
This monumental city located in China's southwestern mountains is building itself up—literally. Also known as the "8D City," it houses 149 skyscrapers taller than 150 meters and a train that runs through a building, and is roughly the size of Austria. It boasts vibrant nightlife and epic drone shows for nocturnal travelers, giving off a sci-fi aesthetic that feels futuristic and cyber-centered. Singapore Airlines, Thai Airways, and Cathay Pacific are expanding their flight paths to serve Chongqing's growing tourism, and Accor and Hyatt hotels are expanding their presence as well. YouTube Streamer IShowSpeed livestreamed his trip to Chongqing in 2025, garnering a ton of buzz and attention from his 49.7 million followers, as of January 2026. (For more on Chongqing, see Nocturnal experiences, page 79.)

Oulu, Finland

This bustling business hub steps into the spotlight as a European Capital of Culture in 2026. Part of the program of events is the Abstract Sensory Journey, a multisensory art experience for visitors that forms part of the Oulu2026 program. "Oulu2026 is created by hundreds of cultural organizations, festivals, and creative professionals," says Oulu2026 Program Director Samu Forsblom. "The scope is unprecedented, and I believe we will see as many as 3,000 individual events throughout the year."

And for those looking to avoid European heatwaves, Oulu offers a "coolcation" alternative to traditional summer destinations, as its climate is much more moderate. For stargazers and biophiles, the city is known for its stellar views of the Northern Lights—according to scientists, 2026 will be one of the best years in a decade to set eyes on the aurora borealis.



Above and opposite: the Frozen People arts festival in Oulu, Finland. Courtesy of Harri Tarvainen



29

World-building hospitality

Hotels and restaurants are no longer just places to stay or eat—they're entire worlds to live in.



Permit Room Lodgings in London, UK. Courtesy of Dishoom

In "The Future 100: 2024," the World-building brands trend saw luxury, fashion, and beauty labels craft immersive universes around their products; now hospitality innovators are doing the same. The newest generation of hoteliers, restaurateurs, and distillers are transforming their properties into narrative ecosystems, where design, sound, scent, and storytelling blend into a fully sensory brand experience.

In London, much-loved Indian restaurant group Dishoom has extended its nostalgic Bombay café universe into an overnight stay. In May 2025, the Permit Room Lodgings, a two-room apartment above its Notting Hill location, opened its doors. The apartment comes with curated vinyl, vintage glassware for mixing cocktails, and a bookshelf echoing Dishoom's aesthetic, and is inspired by historic Indian lodging houses.

In Bruton, in the United Kingdom, Osip has evolved from a Michelin-starred restaurant into a restaurant-gallery-garden hybrid. In June 2025, it launched four stylish boutique rooms for diners to extend their stay. Chef-patron Merlin Labron-Johnson explained to the *Financial Times*: "I wanted to create something that was more than the restaurant, where people could come and enjoy the house, the gardens, the art." The result is an environment where cuisine, nature, and creativity coexist seamlessly.

On the Côte d'Azur, France, Indie Group is defining a Riviera mood through "music, materials, and menu," crafting layered worlds that connect sight, sound, and flavor. With a range of new openings, each venue feels like a distinct emotional landscape rather than just another address on the coast.

On the Isle of Islay, Scotland, Ardbeg House invites guests to "drink Ardbeg, eat Ardbeg, sleep Ardbeg." Designed as a permanent brand home for the single-malt whisky maker rather than a pop-up, its rooms are conceived as storytelling spaces, from whisky-scented wood to local artwork, extending the brand's mythology into lived experience. Opened in September 2025, the boutique hotel consists of 12 rooms and suites, and hosts a special whisky hour ritual every evening.

According to an October 2025 article in *Vogue UK*, "Staying at Ardbeg House is an initiation into centuries-old traditions and not just for whisky lovers. The history of the island and the creativity of its residents are, quite literally, woven into the hotel's fabric."

As travelers seek belonging and narrative connection, hotels and restaurants are becoming living brand worlds, where every texture and tone reinforces a shared mythos, and where hospitality becomes



Ardbeg House boutique hotel on the Isle of Islay, Scotland. Courtesy of Sim Canetty Clarke

its own form of storytelling. These new destinations are not built for transient stays but for immersion—places where guests can dwell inside a brand's identity and rhythm.

Why it's interesting

The rise of hospitality world-building reflects a shift from service to story, and from function to fictional immersion. (For more on world-building, see Storytelling universes, page 116.)

30

Micro-upgrades

Meaningful upgrades are being delivered in smaller and more affordable packages.



Travelodge's Choose Your Room feature includes its SuperRooms

As the cost of living continues to bite, checking prices and looking for added value has become an always-on activity for consumers. McKinsey's "State of the Consumer 2025" report confirms that rising prices "continue to be the number one cause for concern among consumers" in all markets, with 79% of global consumers now trading down.



Travelodge guests can choose rooms with a view

In response to this, brands are exploring innovative ways to make basic and economy offerings feel more special. And, interestingly, even cost-conscious consumers are willing to pay a little bit extra for products and experiences that bring additional comfort and control to their everyday lives.

Ipsos senior research manager Johnny Sawyer tells VML Intelligence that people "don't want to let their financial situation completely ruin everything," and, as a result, "they look for ways to make themselves happy. Whether it's a small upgrade in a hotel or a weekend trip" the goal is to "raise the mood" during these challenging times. VML data shows that 30% of gen Z are planning to spend more on small treats despite tough financial circumstances.

These new micro-upgrades are exemplified by the growth of premium economy airline seating in the United States, where carriers including United Airlines, Frontier Airlines, and American Airlines are all expanding their offerings. American Airlines redesigned the Premium Economy seats in its Boeing 787-9 planes in June 2025, adding headrest wings for privacy, and calf and foot rests to aid relaxation. In Japan, where rush-hour commuters are known for being packed into trains like sardines, micro-upgrades add extra layers of comfort to the daily commute. JR East's newly launched Green Cars offer "a comfortable space to sit and relax" for an additional fee of 750 yen ($4.98), according to the company. More than half (51%) of commuters on Tokyo's Chuo Line say they have already used the Green Cars.

In the United Kingdom, value hotel chain Travelodge now allows guests to pick their exact room for a small fee of £3.50, giving people agency to ensure their stay meets their needs, whether this means having a certain view, being away from the elevator, or near to the restaurant.

Despite price-conscious consumers continuing to embrace frugality, micro-upgrades prove that there are things they're willing to pay that little bit extra for. Brands must consider what small changes and service enhancements could have a big impact, and how they can add elements of certainty and comfort to consumers' everyday routines.

Why it's interesting

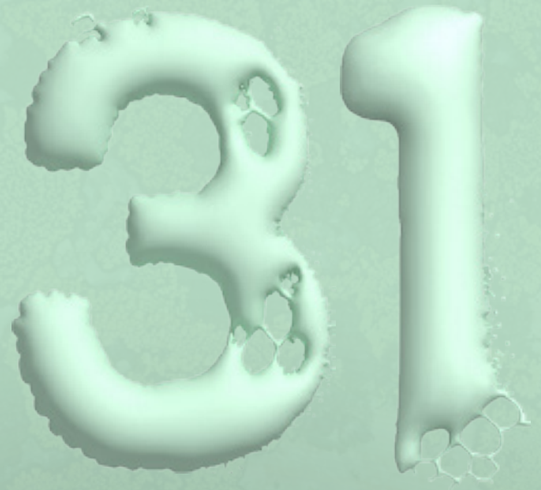
"It's not about extravagance, it's about reassurance," behavioral psychologist Jo Hemmings tells VML Intelligence. She believes small upgrades and treats "make people feel valued and uplifted, a reminder they still deserve joy and choice, even when they're cutting back elsewhere." (See Treatonomics, page 179, for more on how consumers are willing to spend.)



Brands and marketing



VML



Democratizing creAItivity

Will AI propel or hinder human creativity?

Adobe Stock image by Piya generated with Firefly



James Blake. Cannes Lions 2025, Getty Images

When it comes to creativity, AI promises to be a transformative and democratizing force. "Computers are going to speak natural language—you won't really need to look at the code very much, if at all," Mustafa Suleyman, CEO of Microsoft AI, said during Cannes Lions 2025. He believes that "we're now in a moment where the friction of producing an idea and getting my imaginative thought out is going to completely collapse."

AI-created content is becoming accepted by most. Over half (56%) say if they found out an advertisement was primarily made by AI, it would make no difference to how they feel about the creative output, 23% say they would like it more, and 21% say they would like it less. But this still differs by media type. When it comes to music created primarily by AI, 44% say it would not make a difference, 25% would like it more, and 32% would like it less.

"Generative AI is democratizing creativity by making powerful tools accessible to anyone with an idea," Brenda Milis, principal of consumer and creative insights at Adobe, tells VML Intelligence. Although she also recognizes that "AI isn't replacing creativity; it's a tool that helps

more people participate in creative work while humans maintain control over taste, intent, and judgment."

Milis's comments are aligned with the 75% of people who agree "technology will never take creativity away from humanity—it's part of who we are." Yet while creative control remains human, it is undeniable that AI is a major player for creators (see The sovereign creator, page 105). A September 2025 global survey by Adobe and The Harris Poll found 76% of creators say AI has helped grow their business and personal brands; 81% say AI helps them create content they otherwise couldn't have made; and 85% ultimately believe it has positively impacted the creator economy. "When used thoughtfully, AI amplifies creative potential rather than replaces it," says Milis.

Enthusiasm for AI-generated creations is tempered by others who urge creators to master craft skills first before jumping in to use AI tools. During Cannes Lions 2025, musician James Blake said, "Techniques are the fundamental building blocks of why I feel confident to come out and perform." He foresees a division between human- and machine-generated creativity in the future, adding, "Companies are about to make a big miscalculation, which is the potential for human connection with AI-generated content."

Why it's interesting

AI can help accelerate content production, but it can't tell stories. Milis believes "that remains a uniquely human trait. The work that stands the test of time is the work that moves people, no matter the medium, and the same will hold true for AI-generated content: what matters most is the story and the deeply human act of expression behind it."

32

Transformative experiences

Experiences are now catalysts for personal transformation.



Mayrlife Medical Health Resort Altaussee, Austria. Courtesy of Karl Steinegger

The experience economy is evolving. The next frontier for brands isn't just about staging memorable moments but also guiding people toward life-changing outcomes. Author, speaker, and management advisor Dr B Joseph Pine II calls this the "transformation economy," a new paradigm where the ultimate product is personal change, and the customer is an "aspirant" on a journey. His new book, *The Transformation Economy*, will be published in February 2026.

Following the global pandemic, which prompted a collective search for deeper purpose, people are no longer satisfied with fleeting experiences; they want to grow and flourish. Eighty-eight percent of people globally want experiences that feel meaningful, not just entertaining, and 87% agree that "the best experiences leave me feeling changed in some way."

The shift is already evident in some sectors, with wellness an early pioneer, including names such as Peloton, Noom and Oura. Brands continue to drive innovation in this space, crafting resorts and retreats that offer transformative impact, such as Mayrlife Medical Health Resort Altaussee, Austria, which was awarded the 2025 Transformative Path award by Condé Nast Traveller Germany (see also Immersive wellness, page 246).

VML

32



Mayrlife Medical Health Resort Altaussee, Austria. Courtesy of Karl Steinegger

VML

Travel is also leaning in to the idea of transformation, offering tours and retreats that promise meaning over simple relaxation. UK-based ReSurface is a therapy-led brand offering one- to seven-day trips that blend surfing adventures with science-backed healing and connection for people dealing with burnout, trauma, or low resilience. On its 2026 roster is The Reset, a seven-day trip to the Moroccan coast against the backdrop of the Atlas Mountains, which promises to help travelers recharge and reconnect with what matters most. Pine tells VML Intelligence that transformative experiences "change us in some way. So it's something where we see differently, we do differently, we act differently. We want to be differently. We experience something that changes something within us and allows us to see new possibilities."

People are seeking meaningful, sustained change, and experiences offer a powerful route to transformation. "There's this power in experience design to really help people change and understand what they're looking for," says Pine. Brands that can guide them will unlock a powerful new form of economic value. Instead of selling a service or product, it's about charging for a demonstrated outcome: a healthier life, a new skill, a dream fulfilled, even a personal metamorphosis, so long as the aspirant reaches their goal.

"Transformation is really hard," Pine adds, explaining that "people look for help in those transformations." He clarifies that "the economic function is to guide and greatly increase the chances that you get the aspiration achieved." This requires a new mindset. For brands, the journey involves what Pine calls "encapsulation"—preparing the aspirant for the experience, staging the core experience itself, and, crucially, facilitating reflection and integration to ensure the change sticks. Reflection alone retroactively enhances the value of the experience.



ReSurface surf-therapy trips. Courtesy of Chris Werret

Brands in any category can tap into this shift by digging deeper into their customers' motivations. "If you sell the end rather than the means, you'll gain much more economic value," says Pine. A bank, for example, doesn't just help you save for Christmas; it helps you create cherished family memories. This opens the door for new services, such as AI-powered "Christmas coaches" that help select the perfect gift. Pine advises brands to repeatedly ask "why" customers buy their products to uncover the root aspiration. "I guarantee you it is always a means to an end," he says.

Why it's interesting

The next frontier in experience is transformation. Brands that design, deliver, and measure transformations and successfully become the trusted guide for customer aspirations will not only create value but also foster a profound sense of loyalty and belonging.



YouTube CEO Neal Mohan. Cannes Lions 2025, Getty Images

The sovereign creator

The age of creative independence has arrived, and the individual is the new institution.

After a decade of influencer marketing, creators are now rewriting the power balance of culture and commerce. As budgets rise and deal structures evolve, the most ambitious creators now operate like media companies. This has ushered in a new era of creative sovereignty, where creators don't just make culture, they own it.

As highlighted in VML's Cannes Lions 2025 trends roundup, top creators now shape brand narratives as equal partners, not hired amplifiers. Platforms may host creativity, but creators are the ones defining platforms' value. YouTube CEO Neal Mohan calls them "a new creative class."

VML



Unwell On Air, part of Alex Cooper's Unwell Network. Courtesy of CNW Group/Sirius XM Canada Inc.

The economics are catching up. *Ad Age*'s "Future of Advertising 2030" report notes rapid expansion in the budgets brands are devoting to creators, with Unilever planning to increase creator spend from 30% to 50%. The creator economy will be worth $480 billion by 2027, according to Goldman Sachs predictions, up from $250 billion in 2023.

Another evolution transforms creators into investors and co-owners. Platforms such as OWM let creators trade influence for equity stakes in startups. This shift positions creators not just as storytellers, but also as founders and financiers in the new creator economy.

As brands (including T-Mobile and Virgin Atlantic) appoint influencer agencies of record, some are directing their own business empires. Alex Cooper, host of podcast *Call Her Daddy*, added a creative agency to her Unwell Network in 2025, also signing a multi-year partnership with Google, while European creator collective The Sidemen has launched a venture capital firm called Upside to nurture consumer tech startups.

Momentum is also building around creator rights. In the UK, MPs have called for stronger frameworks on royalties, licensing, and AI-generated content. Education infrastructure is growing too: Brazil has launched a dedicated creators' university in partnership with private higher-education institution Ânima Educação and the Agência California agency, signaling professionalization and widening access to creator skills across Latin America.

AI is accelerating these shifts. Generative AI is speeding up creator workflows, with tools such as Higgsfield AI allowing creators to craft their own digital twins to amplify their output. At the same time, AI tools are churning out a flood of content, which could make cut-

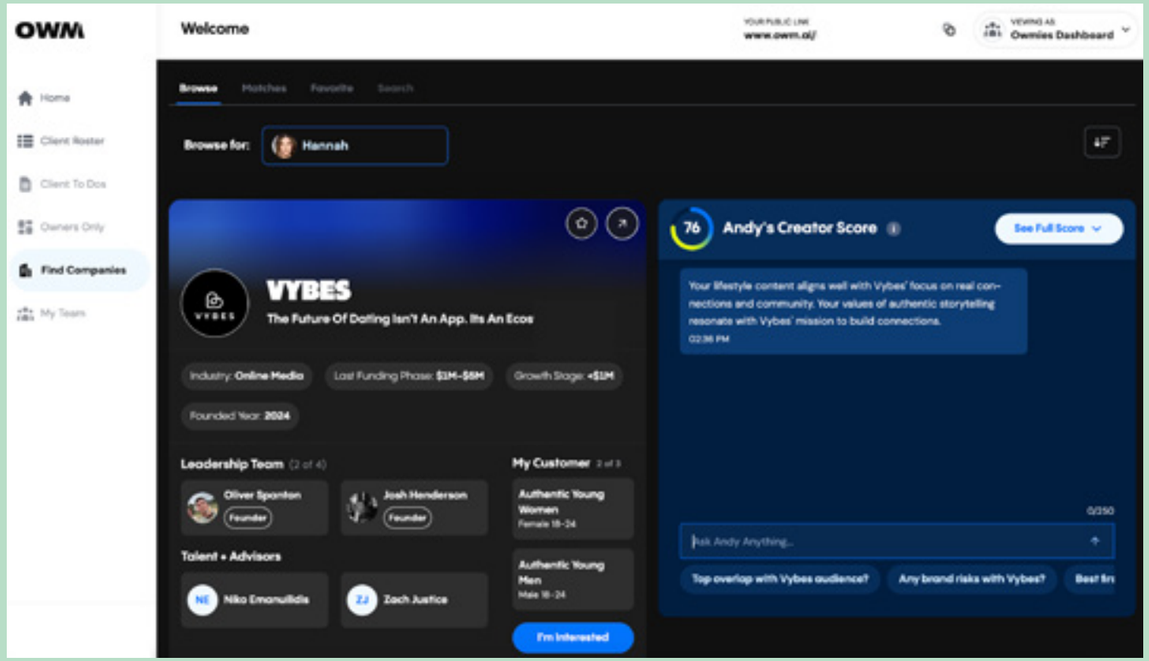
68%
follow creators because they seem authentic and relatable.

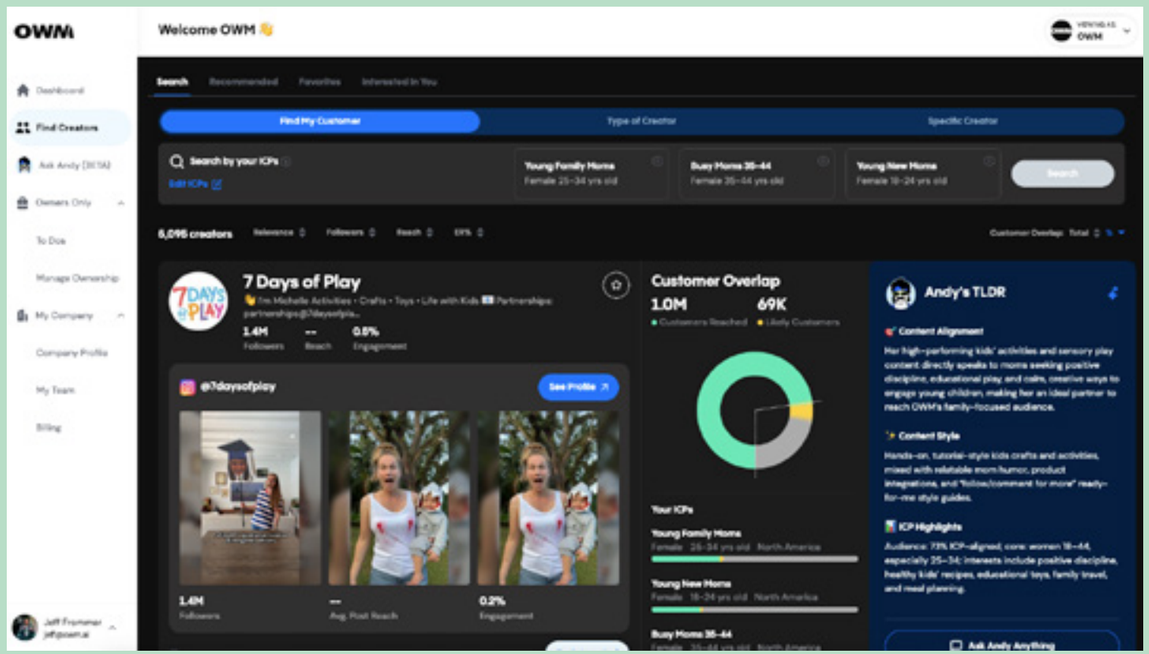
through more challenging. Jimmy Donaldson, aka MrBeast, tweeted in October 2025: "When videos are as good as normal videos, I wonder what it will do to YouTube and how it will impact the millions of creators currently making content for a living? Scary times..."

Some observers argue that this may spur a bifurcation between those who embrace AI and those who double down on the human. For those at the top of the tier, the outlook is promising. *Ad Age* predicts that by 2030, influencer brand deals will look more like lucrative athlete sponsorships. The game is changing, and creators are the new MVPs.

Why it's interesting

Creators are building powerful connections with consumers: 68% globally follow creators because they seem authentic and relatable, and 60% feel a personal connection to them. For brands, this new reality demands a rethink. Those who negotiate with creators as partners rather than channels, and share value and authorship, will be best placed as their influence grows.





OWM's influence-for-equity platform

34

New-wave sport fandom

A new generation of fans is fueling the world of sports, reshaping partnerships and appeal.



Glaize x Aston Martin Aramco Formula One Team nail gels. Courtesy of Glaize

Gen Z and women are changing the face of fandom for Formula 1 (F1). According to a 2025 study by F1 and Motorsport Network, three in four new fans are female, while in the United States, 70% of gen Z fans engage with F1 content daily, and 39% of gen Z and 41% of women respondents say they're more likely to consider an F1 sponsored product. In response, new brand partnerships are forming.

In July 2025, Aston Martin made its signature green color a nail-art sensation in collaboration with beauty brand Glaize. "Our collaboration with the Aston Martin Aramco Formula One Team to create the Racing Green nail gels is more than a crossover between beauty and sport," Gina Farran, cofounder and CEO of Glaize, tells VML Intelligence. "It represents how F1 is becoming more inclusive and reflective of its expanding fan base, particularly among women and younger audiences."

Charlotte Tilbury has been an official partner of F1 Academy since 2024, in the high-profile makeup brand's first sports alliance. Elemis, a popular global skincare brand, partnered with the Aston Martin Aramco Formula One Team to celebrate F1's "evolving fanbase," according to Aston Martin's website, and appointed F1 Academy Leader Jessica Hawkins as the brand ambassador. Farran tells VML Intelligence that F1 "has become more accessible and more emotionally connected to its fans through digital content, storytelling, and collaborations that bridge lifestyle and racing. As a result, more young people and women are finding their place in the community, not just as spectators but as passionate, style-savvy fans."

At Nike, women's basketball is dominating the sneaker scene, with Caitlin Clark, A'ja Wilson, and Sabrina Ionescu tie-ups all proving popular. Wilson announced her A'One sneakers in 2025 and the first drop sold out in under five minutes. Clark, the number one draft pick for the 2024 season, signed an eight-year, $28 million signature deal with Nike, with hints of her own shoe to come.

The Women's National Basketball Association fanbase has increased more than 31% in two years, and viewership increased by 201% according to the Nielsen "2025 Global Sports Report." The study shows that women currently account for 47% of fans for women's sports



The F1 Academy's partnership with Charlotte Tilbury launched in 2024. Courtesy of Charlotte Tilbury



A'ja Wilson's A'One Nike sneakers. Courtesy of Nike

as a whole, and 42% for men's sports. Globally, 50% of sports fans expressed interest in women's sports in 2025, up from 45% in 2022.

Women's football is gaining momentum and is expected to become one of the world's top five sports by 2030, with a global fanbase of over 800 million people, according to a report by Nielsen Sports in collaboration with PepsiCo. As a result, Vodafone has signed up as an official partner of UEFA Women's Football for the 2025–2030 commercial cycle, alongside Amazon and PepsiCo.

Driving these new fandoms in sports are movies and docuseries including *Full Swing* (following golf pros) and *Running with the Wolves* (on Italian football club Campobasso). In addition, Apple TV+'s *F1: The Movie*, which was released in theaters in summer 2025 and stars Damson Idris and Brad Pitt as F1 drivers, was a major box-office draw. The title pulled in $629 million, becoming the highest-grossing sports movie, according to an Apple release. In a February 2025 interview with *The Drum*, Dave Stratton, then director of marketing at Sky Sports, explained that movies and dramatized sports content such as the *Drive to Survive* series have been helping to draw gen Z to its channels and its social feeds: "We're seeing really large engagement on our social platforms for Sky Sports and Sky Sports F1. We know that this audience loves F1, and that fandom is really growing."

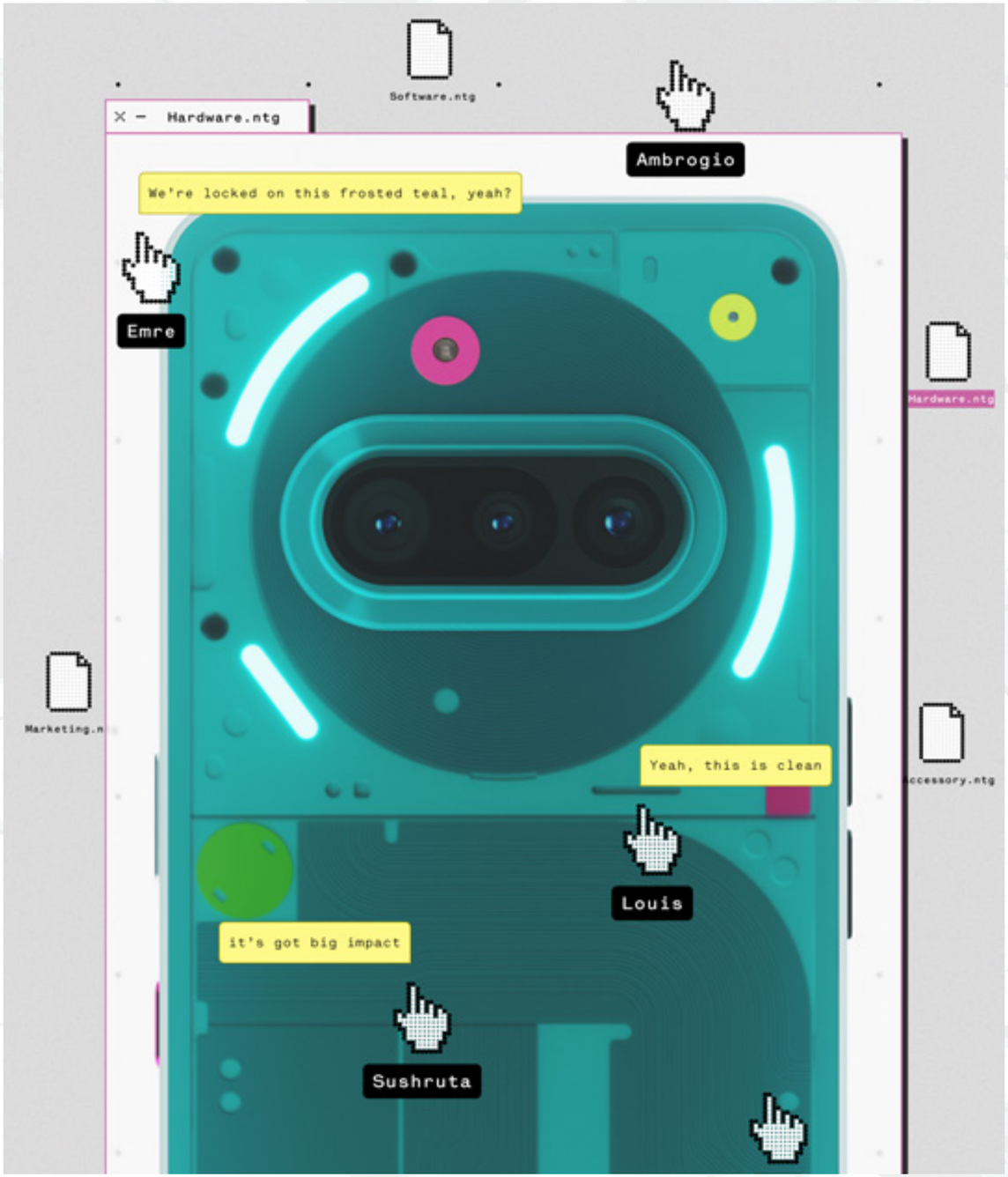
Why it's interesting

The value of the global sports market is expected to exceed $600 billion by 2030, according to a July 2025 study by consultancy firm Kearney. As fanbase demographics diversify, it is opening doors to new partnerships, brand ambassadors, and marketing coverage, widening the opportunity for brands to be part of the growing sports community.

35

Brand democracies

Brands are opening up the creative process to customers, forging a sense of ownership.



Nothing Phone (3a) Community Edition. Courtesy of Nothing

Going beyond one-off collaborations or user-generated content, more brands are working to forge a meaningful, ongoing collaboration with their customer communities. There's a significant appetite for this deeper involvement: 75% of gen Z and millennials say they are interested in getting more involved with their favorite brands, from cocreation to influencing innovation.

British smartphone startup Nothing has made crowdsourcing integral to its business model. In 2025, the company launched its latest Community Edition Project, challenging its community to design both hardware and software. Among the project's winners was Translucent Memories, a version of the brand's Nothing Phone (3a) in a turquoise colorway, which was developed into a product that has since gone on sale. The previous year's winning design, the Nothing Phone (2a) Plus Community Edition, won a prestigious IF Gold Design Award. Crafted with a glow-in-the-dark back, the concept won praise for an "approach [that] dissolves traditional barriers between brand and user, creating a smartphone that reflects collective creativity."

Nothing's collaboration even extends to decisions made in the boardroom. The company elects a Community Board Observer each year to present the community's most pressing issues to the board. At SXSW London 2025, Nothing CEO Carl Pei predicted that for brands, "the definition between who is an employee and who is a community member will get less clear."

Dating app Feeld also championed this approach when it tackled a brand refresh, tapping two of its members—artist Charlotte Rohde and photographer Molly Matalon—to work on the brand's typography and photography, respectively. The campaign itself also

> "The definition between who is an employee and who is a community member will get less clear."

Carl Pei

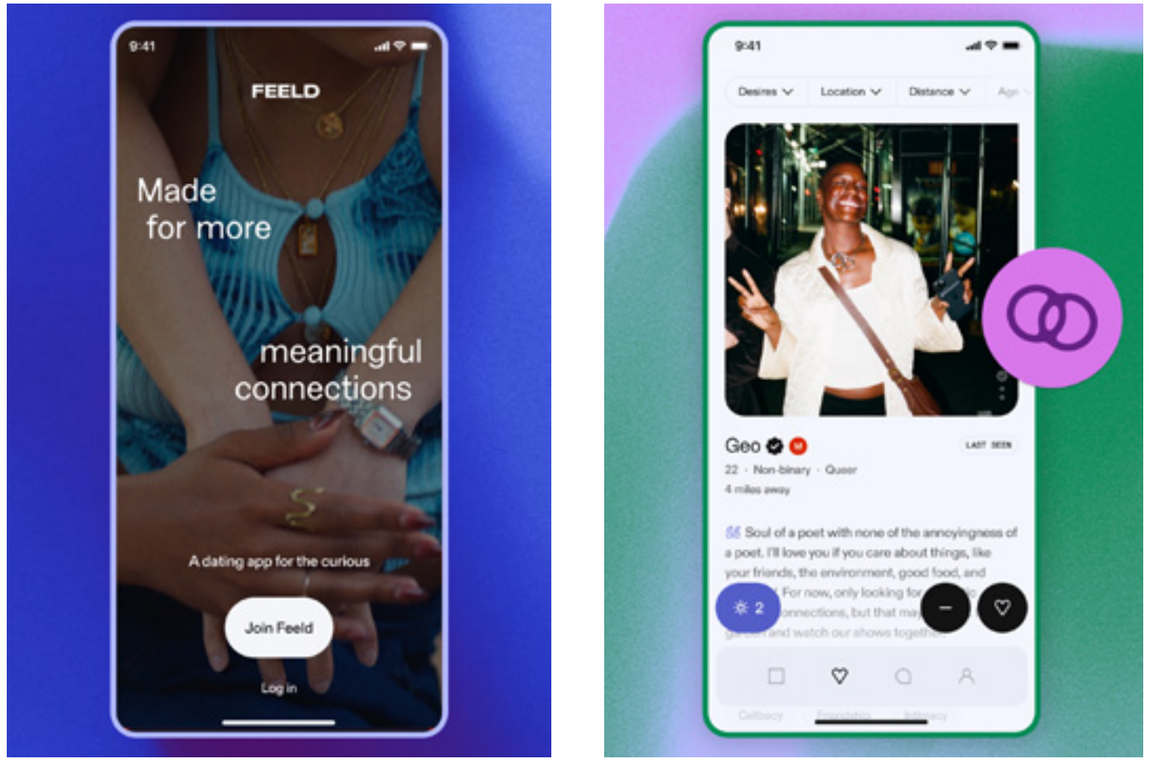
CEO, NOTHING

features real Feeld members. Lead brand designer Nyomi Warren told *The Brand Identity* that, "Feeld has grown mostly organically from inception to present, all thanks to our incredible community... It was only right to continue to put the people who've made Feeld the special space that it's become at the helm."

The democratic approach isn't limited to startups. Automotive giant Škoda turned to members of the Car Talk subreddit community to design a "Reddit Edit" of its Octavia model. The project, which saw Octavia fans vote on everything from the engine to the interior trim, resulted in orders that exceeded expectations by 255% according to Škoda. Far from being a gimmick, the campaign was a creative and commercial success, earning a Cannes Lions Gold award and proving that even the most established brands can benefit from handing the keys to their communities.

The frontiers of brand democracy see models where consumers can even benefit financially from their contributions, although currently these are predominantly found in the decentralized (Web3) space. For instance, the artist Grimes pioneered revenue-sharing with her elf.tech platform. Users pay $9.99 annually to use her AI voiceprint in their tracks for distribution, splitting royalties equally.

Also in the tech sphere, the decentralized platform Vana is building a user-owned data network that enables individuals to share personal data with AI developers for model training. In return, contributors receive tokenized ownership or governance rights linked to the datasets they help create, allowing them to benefit from the value their data generates.



Feeld dating app

Smartphone brand Nothing is moving in this direction by giving fans and customers access to early-stage tech investment—normally reserved for venture capitalists—via a community funding round. Customers can become stakeholders, with a genuine financial stake in the brand, allowing the Nothing community to both create and share in value.

Why it's interesting

For brands, inviting participation sends a powerful signal about how much they value their consumers' tastes and opinions. While full revenue sharing may be a step too far for major corporations, fostering a genuine sense of shared ownership is a powerful way to build an invested and loyal community.

36

Anthropomorphized branding

Mascots and characters let brands lean in to their wild side.



Duolingo mascot Duo's wedding in collaboration with Luckin Coffee. Courtesy of Fred & Farid

After some time in the wilderness, brand characters and mascots are regaining popularity, with brands building narratives and collaborations around them to show a company's fun side. Seventy-three percent of people globally want brands to make more effort to be entertaining, and branded characters are serving that up in spades.

In 2025, one brand tie-up resulted in a summer love story between two mascots. Duo the owl, of language-learning app Duolingo, married Lucky the reindeer, who fronts Chinese coffee shop chain Luckin Coffee, in a ceremony that formed the first episode in a four-part drama to commemorate the collaboration. The couple even produced a "love child" in the form of a cobranded latte. *Adweek* described this as "the era of the unhinged brand mascot," yet the campaign gained

over 9.6 million views on Weibo between 30 June and 4 July, and sold out cobranded merchandise, according to *Campaign Asia*. Duo has also been up to mischief in Japan, the spiritual home of mascots, where he challenged eight of the most popular homegrown mascots to a sumo wrestling contest in September 2025, in a campaign called "Duo's Sumo Showdown."

Another mascot, another wedding. This time, Monkey, the long-serving mascot for British tea brand PG Tips, has married Mrs M, played by British comedian Emily Atack. A mini-series, "At Home With Monkey," explored the couple's married life in support of the brand's latest creative platform, "Live Life One Tea at a Time." Cultural trends and humorous nuances from Monkey's daily frustrations bring a warm familiarity to the series that aims to feel like a hot cuppa after a long day.

Branded characters fell out of favor in recent years, yet, according to System1, they are a potent tool for brands. Campaigns featuring branded characters (or "fluent devices") are 23% more likely to generate very large share gain, and 22% more likely to generate very large profit gain effects than the average. As well as offering a great visual shorthand, there is the added advantage that a character can't speak out of turn and get itself canceled.

As well as offering opportunities for fun storytelling, this latest crop of mascots connects with audiences on social media via a dose of bold humor and a knack for the absurd. Cleaning sponge brand Scrub Daddy's sponge mascot has built a following on TikTok with a feed of chaotic memes, skits, and unfiltered trolling of its 4.5-million-strong fanbase. In 2024, Dunkin's social media accounts were taken over by a spooky spider looking for love who played off dating culture and sexual tension.



Duolingo's collaboration with Luckin Coffee. Courtesy of Fred & Farid

Why it's interesting

In an era when corporate communications can be cautious and sanitized, characters such as Duo can get married, sumo wrestle, and troll consumers, delivering the entertainment audiences crave while keeping the brand commercially effective. It's strategic absurdism that seems to be working.

VML



Storytelling universes

Content is spawning entire commercial ecosystems.

The Bear on Hulu and Hulu on Disney+. Courtesy of FX Networks and Hulu



Severance on Apple TV+

Content owners are building out ecosystems for fans—worlds that offer continuous immersion in narratives amplified by interconnected experiences, events, merchandise, and more, in the latest evolution of "brand fandoms" (as reported in "The Future 100: 2025"). Fans no longer simply watch these stories; they live and breathe them.

This is partly driven by the need to maximize revenues. In the film and TV industry, the burden of production costs coupled with declining theater revenues and a highly competitive streaming market mean that turning a profit is not guaranteed, even with a highly successful release. Now companies are finding new ways to build and monetize IP beyond the screen.



The White Lotus x World of Wellness themed retreats. Courtesy of Four Seasons

In 2025 alone, fans could visit Lumon Industries' company headquarters featured in *Severance*, don the same white T-shirt as chef Sydney in *The Bear*, and step into Steve Harrington's Air Max 1 '87s from the *Stranger Things* x Nike collection, all while spritzed in *Nosferatu* Eau de Macabre created by Heretic Parfum and Focus Features.

At the Cannes Lions festival in 2025, Shondaland CEO Shonda Rhimes likened her television shows to brands, and fans of those shows to "communities." Rhimes shared how fans want to deeply connect with Shondaland shows: "Those communities are hungry for anything that we are putting out there and giving them. For me it's stories, but they also want to live inside those stories."



The White Lotus Season 3. Courtesy of Four Seasons

Mike White, showrunner for HBO Max's *The White Lotus*, channeled a similar sentiment when he told the *New York Times*, "There's something about vacationing in other people's realities." The show famously teamed with the luxury resort Four Seasons, which offered themed retreats for fans. The company says online interest in its Maui location jumped 425% after it appeared in the first season of show. HBO Max also partnered on a flurry of merchandise collaborations in beauty, fashion, homewares, and food with brands including Supergoop, Kiehl's, Banana Republic, and Compartés allowing fans to taste the *White Lotus* lifestyle. Sales of Thai brand Jim Thompson's Slipper Orchid kimono dress, worn by Parker Posey's character in the latest season, increased by 671% in four days, according to *Women's Wear Daily*.



Stranger Things X Nike Air Max sneaker. Courtesy of Nike

With a wealth of opportunities for brands to tap passionate fan properties, any missteps risk alienating people so authenticity is non-negotiable (see "The Future 100: 2024," World-building brands, for more).

Beyond the role of experience or merchandise partners, brands might build their own storytelling universes, and are already dabbling in narrative content (see Micro-dramas, page 121). James Crane, director of business development at Sugar23, says: "Brands are going to start producing, investing in movies, television, and docs. So the next *White Lotus* might actually be produced by the Four Seasons."

The shift from partner to producer is also taking shape. In a landmark move, Gap Inc. appointed its first-ever chief entertainment officer from February 2026, tasked with building an entertainment and content platform to champion "innovative storytelling."

Why it's interesting

Content is becoming a commercial channel, not just a media buy. Brands can form integral parts of narrative worlds, creating ongoing touchpoints with engaged audiences. The opportunity is to provide tangible ways for fans to "live inside" stories or build storyworlds of their own and have a sense of belonging. Sixty-one percent of people say they like the idea of brand fandom because it offers a sense of community.

38

New-wave activism

Brands face a reckoning as values-driven consumers hold them to account.

Citizens are increasingly flexing their collective muscles, holding governments and businesses to account, and pushing brands to align with their values or face economic repercussions.

From Indonesia and the Philippines to Nepal and Madagascar, a wave of youth-led protests decrying corruption, poverty, and inequality has sparked movements and even ousted political leaders across multiple nations, demonstrating the impact of collective action. Brands are also finding themselves in the firing line as consumers use their buying power to penalize brands whose views don't align with their own.

American brands faced "le boycott" in France in response to President Trump's trade tariffs and his staunchly anti-European rhetoric, while consumers in the Arab world turned their backs on Western brands because of tensions arising from the war in Gaza. In Jordan, Oman, Kuwait, and Bahrain, French-owned Carrefour supermarkets were closed. They subsequently reopened under the banner HyperMax, which was claimed as a victory for pro-Palestinian protesters demanding more local brands and produce. Net profits of the Middle East's largest fast-food franchise Americana, which operates KFC and Krispy Kreme in the region, also fell by nearly 40% amid local boycotts.

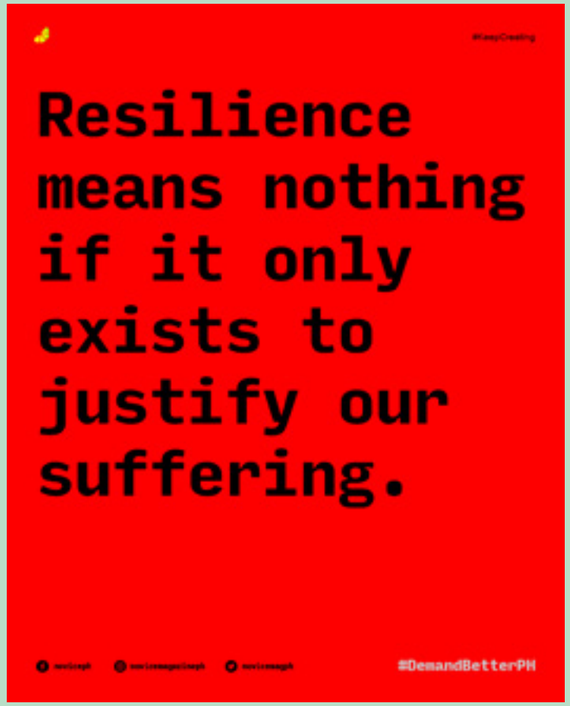
In the United States, more than 250,000 people signed a pledge to boycott Target after it rolled back its diversity, equity, and inclusion (DEI) programs, contributing to the poor performance that led to the resignation of CEO Brian Cornell. McDonald's and Amazon also faced boycotts in 2025 related to their stance on DEI. We Ain't Buying It, a US economic action movement, invited consumers to spend more consciously over the Thanksgiving holiday, pausing spending with companies who don't share their values and redirecting it to small, local businesses instead. Most prominently, talk show host Jimmy

Kimmel was reinstated to his show after a reported 1.7 million subscribers cancelled their Disney+ plans in the week after his firing—a 436% increase on the usual churn rate. Others threatened to cancel their Disney cruises, holidays, and weddings.

Brands have shied away from taking a stance on political issues in recent years, but in this environment, they may feel they need to pick a side. Seventy-nine percent of consumers globally now say they want their money to go to brands that reflect their values.

Author and futurist Sean Pillot de Chenecey tells VML Intelligence that brands must "react to the level of uncertainty and risk that we see around us." He recommends building their political intelligence, even carving out a role for a chief political officer to better navigate the issues, and then proactively developing a playbook for every potential risk.

As for taking a stance, he says that consumers will see through anything self-serving, so any position taken must be authentic, sincere, and aligned to the brand: "Is it of direct relevance to what the brand is about? Is it of interest to our customer base? Why should they care that we're doing this?" Next, actions must be integrated into the business, not just its marketing: "Acts, not ads. It's do it and then tell me." Crucially, businesses must commit for the long haul and be prepared to tackle pushback. Pillot de Chenecey says, "Organizations have to think, 'Are we doing this because we genuinely believe it? And if we genuinely believe it, is it relevant to what we're about? And so, therefore, if we get a load of flack for it, do we just keep on going because it's who we are?' You're either all in or not at all."



Protest poster from the Philippines. Courtesy of Novice



Poster for the We Ain't Buying It movement

Why it's interesting

Brand activism could be on the upswing as people power makes its mark—according to Statista, 53% of gen Z in the United States have taken part in brand boycotts. This makes it more important than ever for brands to have clear and consistent values, to ensure they don't end up on the wrong side of the barricades.

39

Micro-dramas

Branded mini-dramas offer a route to emotional engagement.



Café con el Abuelo series. Courtesy of Oatly

Micro-dramas—quick shots of storytelling told over multiple episodes, often in vertical format—are the latest way for brands to engage consumers, blending social media's immediacy with the emotional pull of drama.

While some brands (such as Amazon and Walmart) are partnering with creators on episodic content, others are now creating their own, producing snackable narratives for Instagram and TikTok, with episodes running a few minutes on average. Tower28 rolled out its first series, *The Blush Lives of Sensitive Girls*, in 2025 to showcase its new GetSet Blush product, while Bratz aired the second season of its *Always Bratz* miniseries on TikTok, bringing dolls to life with fashion and drama. Oatly released *Café con el Abuelo* on YouTube—a nine-



Maybelline's Maybe This Christmas micro-drama. Courtesy of Maybelline New York

episode series featuring Luis, a grandfather experimenting with new drinks in the coffee shops of Chicago. For the 2025 holiday season, Maybelline New York released a five-part romcom mystery, *Maybe This Christmas*, which incorporated the brand's Instant Eraser Concealer in the storyline.

Branded micro-dramas offer some compelling advantages: low production costs and high completion rates in a smartphone-native, snackable format for on-the-go consumption. Embedded in commerce-enabled social platforms, they create a seamless path to purchase. And brands are getting results. Chinese skincare brand Kans registered 5 billion views and measurable sales growth from its micro-dramas, according to Storyboard18. The challenge will be to maintain narrative quality while keeping brand integration subtle enough to avoid consumer skepticism.

In China micro-dramas are a force, clocking up billions of views.

Micro-dramas are also taking off in a broader sense. Omdia forecasted the market would be worth $11 billion by the end of 2025. In China, which accounts for the vast majority (83%) of that, micro-dramas are a force, clocking up billions of views on platforms including Douyin. Dong Haining, founder of Haidong Films, told *Jing Daily* that "over 60% of the teams entering the space are now from professional film and TV backgrounds."

Now other countries are set to follow suit. According to media consultancy Owl & Co, the market was on track to reach $3 billion outside China in 2025, triple its value in 2024. While platforms such as ReelShort and DramaBox have built audiences in the United States with soapy storylines, big studios are now entering the fray, with Fox Entertainment taking a stake in Ukraine-based Holywater, which owns the MyDrama app, and Miramax unveiling its Gamma Time venture.

Why it's interesting

Brands want to be the story, not interrupt it, becoming entertainment producers. The rise of micro-dramas offers opportunities for rich, emotional, and sticky storytelling that also collapses the barriers between content and commerce. (See also Substack strategies, page 161.)

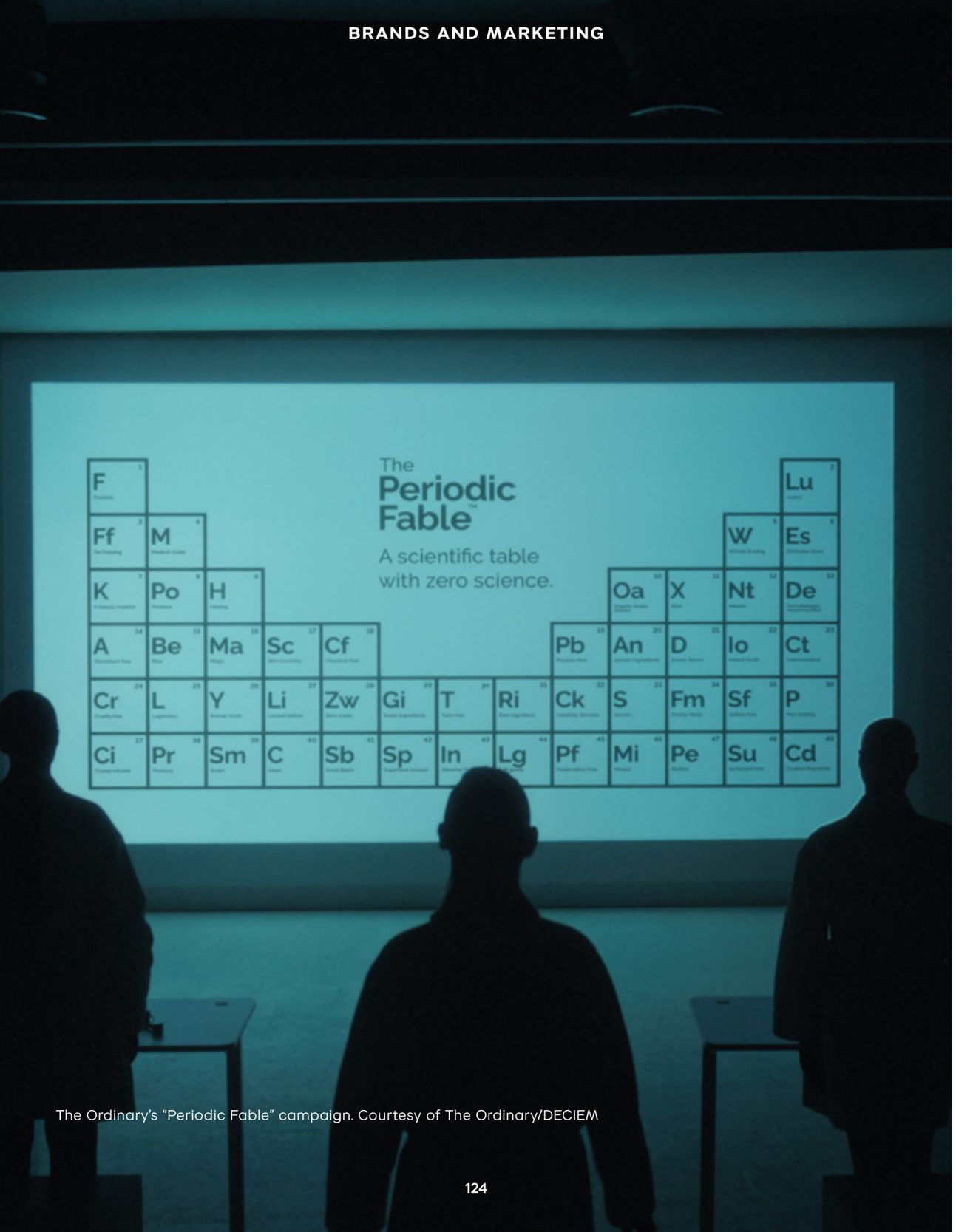
40

Brand bastions

For brands, unflinching honesty is now paramount.



The Wikileaks of Beauty digital archive. Courtesy of The Ordinary/DECIEM



The Ordinary's "Periodic Fable" campaign. Courtesy of The Ordinary/DECIEM

In the post-truth era, brands are addressing consumer skepticism head-on by rooting radical honesty in their branding and actions.

Author and futurist Sean Pillot de Chenecey tells VML Intelligence that amid a climate of political untrustworthiness and AI manipulation, "truth itself is obviously under duress" and this is affecting the very "underpinning of society." With less than half of people (44%) strongly trusting the brands they use to share accurate information, some are proactively working to build their credibility.

The streaming industry offers some examples. In September 2025, music platform Spotify announced an effort to stem the tide of AI content that may degrade listener experience and divert royalties. The company will implement stricter rules for impersonated vocals (requiring artist authorization); introduce a new music spam filter to identify and block problematic uploads; and mandate AI disclosures with industry-standard credits, developed with DDEX, an organization that establishes digital value chain standards. Spotify frames the move as supporting "a more trustworthy music ecosystem for artists, for rightsholders, and for listeners." Fellow music platform Deezer is also committed to transparency for music fans and uniquely promises to detect and clearly tag 100% AI-generated content and exclude it from playlists and algorithmic recommendations.

The move to prioritize transparency extends beyond music. In beauty, The Ordinary unveiled The Wikileaks of Beauty in early 2025, a free digital archive which simplified complex scientific papers to address common beauty myths. In October, the brand followed up with a campaign called "The Periodic Fable," saying that "for too long, our industry has taught beauty wrong." The campaign features a revised periodic table that spotlights beauty jargon instead of elements.

Under “Healing,” the brand’s definition is: “If skin needs healing, it needs medication, not a shimmering face mask.” Similarly, for “Surfactant-Free,” it explains that surfactants are “simply molecules that bring unmixable substances together. Generating blanket fear of them is unfounded.”

In a more playful vein, Ryanair’s social media openly acknowledges its shortcomings as a budget airline. The brand’s Instagram bio reads “Catch flights, not feelings,” and its posts humorously highlight its famously small baggage allowance and no-frills experience. While tongue-in-cheek, it shows another kind of honesty, openly acknowledging limitations rather than over-promising. Eighty-six percent of global consumers say they prefer advertising that is humble and doesn’t make over-the-top claims.

Pillot de Chenecey emphasizes that brands are now proactively pre-empting concerns. “As opposed to just saying, ‘We’re a nice organization,’ which may well have been OK in the past, now you get ahead of the story, by saying, ‘This is what we’re about. This is why you should believe us’.” However, drawing on Aristotle’s principles, he underlines that brand intent is crucial for gaining consumer trust: “The good act needs to be done just because you believe it needs to be done. If we think, ‘Oh, if I do this good thing, that’ll get me some praise,’ that is not an authentic act.”

Why it’s interesting

With truth at a premium, and consumer skepticism high, honesty is a competitive advantage. According to Salsify’s “2025 Consumer Research” report, 87% of customers will pay more for products from trusted brands. Cultivating authentic values and trust is not just an ethical imperative, it’s a powerful business strategy.



The Ordinary’s “Periodic Fable” campaign. Courtesy of The Ordinary/DECIEM

41

Food and drink

50

VML

41

Elemental dining

From charred miso to cocktails inspired by ancient philosophy, restaurants are turning to natural elements for inspiration.



Yun Summer Lounge in Beijing, China

In September 2025, Gogyo—an offshoot of the Ippudo ramen chain—opened in New York serving burnt miso ramen and a cocktail menu designed around the five elements. The dish has gained popularity for its uniquely smoky broth, a flavor attained by charring a blend of miso pastes at 572F, a technique invented by the founder of the Japanese restaurant group.

The trend goes beyond singular menu items. In Dubai, in fall 2025, a cohort of high-end restaurants collaborated on The Elemental Series, a month-long culinary event where head chefs from Tabū at The St Regis Downtown Dubai, Akira Back at W Dubai The Palm, and Tamoka at The Ritz-Carlton JBR created menus inspired by fire, earth, and water.

In Bangkok, The Standard hotel hosted a three-month bar crawl across its four venues, each offering a cocktail inspired by earth, water, fire, and air. Guests could wander from The Parlor, where water manifested as an Aqua Bloom cocktail made from seaweed-washed gin, elderflower, cucumber, saline, and tonic water, to the Double Standard, where a fire-themed menu featured Ash and Spark, a drink concocted from peated whisky, spiced honey, yuzu, and soda water.

Beijing's Yun Summer Lounge delves into cultural tradition with cocktails rooted in the ancient Chinese Five Elements theory. The Qing Zhu drink embodies wood, specifically green bamboo, representing positive ambition and unwavering perseverance. Northeast sorghum liquor is mixed with bamboo leaf liquor, kiwi puree, and ginger water, and served in a bamboo cup.

More than a novelty, menus inspired by natural elements give diners an immersive, meditative escape in fast-paced urban environments.



Yun Summer Lounge in Beijing, China

Why it's interesting

Restaurants are crafting narrative-driven menus, drawing inspiration from nature's elements to elevate engagement and to attract new audiences seeking a sensory and meditative experience.

42

Carnivore cuisine

Meat is making a comeback as a nutritional hero in a wellness war against ultra-processed foods.



By Jakob Trost. Courtesy of Unsplash

In August 2025, plant-forward chef Daniel Humm, who famously champions vegan cuisine, announced that, as of October, meat would return to the menu at New York's three-Michelin-starred Eleven Madison Park. Earlier in the year, Kismet in Los Angeles, a self-proclaimed "vegetable-loving restaurant," ran a pop-up steakhouse. With rising public anxiety around ultra-processed foods, meat has become culturally repositioned as a counterweight to industrial food systems—a return to unprocessed, primal nutrition that has never felt more modern.

The shift has coincided with a growing interest in protein, particularly among those who have experienced muscle loss from GLP-1 drugs. A food that comes directly from the land, and denotes status because of its high price point, meat embodies an aspirationally wholesome way of life and an active rejection of ingredient lists heavy on chemicals. Gen Zers are also behind the boost in meat: 67% say they have either eaten more meat in the past six months or have consumed the same amount as before.

Meat has even spawned a movement of social media evangelists. "Carnivore MD" Paul Saladino, who had 2.9 million Instagram followers as of January 2026, proselytizes organ meats, and films himself eating tomahawk steaks straight from bloodied wooden chopping boards. Some mothers are even choosing to raise babies and toddlers on meat-heavy and sometimes meat-exclusive diets, the *Wall Street Journal* reported.

The global meat market was valued at $1.3 trillion in 2024 by Virtue Market Research, which predicts a value of $1.8 trillion by 2030. Although nutritional experts remain cautious about the promotion of meat-based diets, some acknowledge its benefits over ultra-processed foods, which have been increasingly linked to obesity.

When it comes to incorporating meat into diets, "we tend to see improvements in blood glucose, weight loss, and initial insulin resistance," Dr Richie Kirwan PhD RNutr., senior lecturer in nutrition and exercise physiology at Liverpool John Moores University in the United Kingdom, tells VML Intelligence. "People often see improvements in mobility because they've lost weight too." However, Kirwan warns about the lack of fiber in meat-only diets and meat's contribution to unhealthily high levels of cholesterol.

> "We tend to see improvements in blood glucose, weight loss, and initial insulin resistance."

Dr Richie Kirwan PhD RNutr.

SENIOR LECTURER IN NUTRITION AND EXERCISE PHYSIOLOGY, LIVERPOOL JOHN MOORES UNIVERSITY

In a bid to protect the meat category, in October 2025 the European Parliament voted to restrict traditionally meat-related terms such as "burger" and "sausage" to animal products only—a victory for farming lobbies but a source of contention from plant-based food producers, which fear their industries will take the hit.

The resurgence of meat will likely reignite debate over its environmental footprint, but in an era defined by hyper-processed foods and ingredient opacity, consumers are enticed by its primal appeal and its promise of simplicity.

Why it's interesting

While plant-based diets and foods remain popular, meat is making a mighty return, highlighting its benefits to overall health and offering more choice to diners and chefs.



Forgotten flavors

Historic recipes are back on the table.

Bygone flavors are being resurrected as chefs whip up the past for creative invention. From diving into archival recipe books to reinvigorating flavors lost to modern cuisine, chefs are eager to rediscover and preserve neglected tastes, ingredients, and cooking techniques. As Kathleen Adams, professorial research associate at SOAS, explains to VML Intelligence, “In our current era, where industrialized food production is the norm and mistrust in food safety is on the rise, reviving past food techniques, ancient recipes, and flavors speaks to our desires to return to a time of purer, less industrially tainted food.”

Turkish chef Necati Yilmaz is reviving dishes from the Bronze Age, concocting an 11-course menu inspired by the Hittites, an Indo-European civilization from the early second millennium. At his Istanbul restaurant Deraliye, traditional Turkish and Ottoman cuisine spearheads the gastronomic journey for diners. Yilmaz introduced his Hittite menu in September 2025, which invites guests to sample an offal dish of fresh lamb liver and heart mixed with rock salt and sumac, or a beef stew slow-cooked for five hours in a cauldron with rice grown in the region formerly inhabited by the Hittites.

British chef Heston Blumenthal, a contemporary pioneer of historic gastronomic research, launched Dinner by Heston Blumenthal back in 2011, propelling cuisine last seen in royal cookbooks to the fine-dining scene at the Mandarin Oriental in London. The restaurant menu is inspired by dishes dating back as far as the 14th century, and it has consistently retained a two-Michelin-star rating. Blumenthal’s second eponymous restaurant, located at the Atlantis The Royal in Dubai and led by chef de cuisine Chris Malone, introduced a new menu in August 2025. Featured dishes include buttered crab loaf, based on a recipe from around 1714, turbot and green sauce (around 1440), and “compost tart” (around 1390).

43



Dinner By Heston Blumenthal at Atlantis the Royal in Dubai, UAE



Above and opposite: Dinner By Heston Blumenthal at Atlantis the Royal in Dubai, UAE

One reason for the revival of historic foods is reconnection with culinary heritage. As part of Marriott International's 2025 Luxury Dining Series, the Forgotten Flavors theme celebrates "ancient ingredients reimagined for the modern palate," explains Oriol Montal, regional vice president, luxury Asia Pacific at Marriott International. Chefs across its Asia Pacific portfolio interpreted the theme in their own way, inviting diners at Yan Ting restaurant at the St Regis Singapore to sample creative Cantonese dishes featuring Indigenous ingredients, for example, while St Regis Osaka chefs explored heritage culinary techniques.

Also tackling the theme is the first Forgotten Food Festival in New York City led by the Chef Driven Hospitality group. From 28 March to 6 April 2025, 16 restaurants participated in the festival. Chef Loi Benitez of French Roast restaurant dived into the history books to create a menu inspired by the opulent court of Louis XIV of France, and chef Juan Juarez of Nizza took his cues from the ancient Roman cookbook of Apicius.



"Factors particularly evident in the current trend of recreating recipes from the ancient world include the desire for novel experiences and interest in acquiring new forms of cultural capital," explains Adams. "This can be understood as part of the quest to signal one's individual distinctiveness, cultural class, and status."

Why it's interesting

As palates evolve, chefs are delving into historical cookbooks for both inspiration and the preservation of culinary heritage. This exploration not only fuels innovation but also offers exciting new experiences for modern tastes.

44

Downsized dining

Restaurants reinvent menus for shrinking appetites.



The Mindful Experience tasting menu. Courtesy of The Fat Duck



The Mindful Experience tasting menu. Courtesy of The Fat Duck

Small plates are replacing multicourse meals for diners with intentional appetites. Nichola Ludlam-Raine, dietician and author of *How Not to Eat Ultra-Processed*, tells VML Intelligence that her "weight loss and bariatric clients have mentioned wanting smaller, higher-quality portions when eating out, as their appetites are significantly reduced."

The behavior shift is already reshaping restaurant menus. In fall 2025, chef Heston Blumenthal's three-Michelin-starred restaurant The Fat Duck introduced a scaled-down tasting menu, The Mindful Experience. Blumenthal was influenced by his own experience with GLP-1s Mounjaro and Wegovy, telling the *Caterer*, that, "This new version of the Fat Duck menu is carefully tailored to a growing demand for a different restaurant experience."

In parallel, Dubai-based Mediterranean restaurant The Banc introduced a small-portion, high-protein menu for its "more intentional" clients. "People are still dining out—they're just arriving less hungry," The Banc cofounder Mazlum Topcu told the *National*. "What this new guest really wants is the chance to eat less without drawing attention to it in front of the whole restaurant."

Restaurants in the United States are also shrinking their plates. Popular NYC sports restaurant Clinton Hall began offering a "teeny-weeny mini meal," including a bite-sized burger, in April 2025, and Italian hotspot Lulla in Chelsea, New York, offers an "aperitivo box" of snack-sized portions intended to be shared among four diners.

Closely following the small-portion streak, the market for specialized hydration is expanding with brands like Unwell Hydration and Punchy Drinks offering solutions that can help address the needs of GLP-1 users. According to SoWell, a brand that creates health solutions for GLP-1 users, including their own electrolyte sachets, electrolytes can combat the suppression in thirst that can come with GLP-1 drugs.

UBS Investment Bank predicts approximately 40 million people will be taking GLP-1s by 2029, driving a market with a projected value of $126 billion in sales. VML data reveals that 17% of people have taken or are taking GLP-1s (up from 12% last year) and 25% say they know someone who is taking or has taken the weight-loss drugs. Of those who have taken GLP-1s, 54% say they have experienced a positive impact on their appetite.

“The Future 100: 2025” identified GLP-1s as a major gamechanger in the healthcare industry. That impact now extends to other categories, including food and drink.

Why it’s interesting

Shrinking appetites mean that establishments must get creative to retain intentional eaters, crafting inclusive menus for those wanting to dine out, but consume less, or risk losing a significant chunk of their audience.



Punchy hydration range

45

Beernovation

Alternative brews are raising the bar in beer innovation.

Quinoa is the surprising grain alternative in a new brew from startup Meli's founder Samara Oster, a Massachusetts Institute of Technology (MIT) and Harvard graduate whose scientific background underpins the product. Meli, which hit shelves in 2025, is brewed entirely with quinoa, has 4.4% alcohol by volume (ABV), and tastes sweet despite having no added sugar. "We are excited to provide a thoughtful beer for the growing number of drinkers who are going gluten free, reducing sugar, and looking for products that have less of an impact on the planet," Oster tells VML Intelligence.

Also catering to the growing cohort opting to consume no- or low-alcohol beers, UK brand Collider Brew Co's 0.5% ABV adaptogenic beer made of mushrooms offers an alternative way to socialize with a drink in hand. Collider's growth momentum was boosted by £720,000 (about $975,000) in pre-seed funding in 2024. At a time when 32% of people say they have drunk less alcohol in the past six months, alternative beverages are growing in popularity.

Beyond novel ingredients and alcohol alternatives, brands are also working on sustainable offerings. Carlsberg is taking a more conscious approach to brewing, launching Grobund, its first beer made with regenerative barley, in 2025. The beer giant aims to use 100% regenerative grains by 2040 and expand its eco-friendly line globally in the years to come. "We at Carlsberg see a future in brewing with regenerative grain and that we want to contribute to the development of regenerative agriculture. Not just in Denmark, but worldwide," says Peter Haahr Nielsen, managing director of Carlsberg Denmark.

45



Meli beer. Courtesy of Grant Legan

Ancient grains such as sorghum and fonio are attracting growing attention as the basis for sustainable brewing due to their natural climate resilience. Fonio, a traditional African grain that requires little water to grow and is good for soil quality, has been used by a small number of brewers including Brooklyn Brewery. The 2025 African Beer Cup winner Wild African Soul is a traditional South African umqombothi beer based on sorghum that blends indigenous African flavors and brewing tradition with modern craft brewing. Carlsberg's innovation lab in Denmark has also experimented with sorghum-based brews, with scientists reportedly struck by its flavor potential, according to *The Times*.

> "Today's consumer is seeking healthier, more sustainable options in every aisle of the grocery store, and beer is no exception."
>
> Samara Oster
> **FOUNDER, MELI**



Grobund by Carlsberg

Why it's interesting

As Oster notes, "Today's consumer is seeking healthier, more sustainable options in every aisle of the grocery store, and beer is no exception." Brewers are now innovating with novel ingredients and sustainable practices to meet multifaceted demands for health, environmental responsibility, flavor, and functional benefits, redefining the very essence of what a beer can be.

VML

46

Apocalypse-proof dining

The climate crisis is prompting a renewed focus on resilient food practices.



Hunter Gather Cook courses in East Sussex, UK. Copyright of UnitedUs Ltd and Luke Taylor

From education to innovation, the food industry is building resilience for the future. For instance, at North House Folk School in Grand Marais, Minnesota, students are learning traditional crafts, including those vital for survival. Among the food-related courses is Meat Preservation: The Basics and Beyond, which revives traditional skills for processing and preserving meat at home. Another, Skin Three Ways, is a class that teaches students how to make three traditional dishes made with animal skins, like chicharrónes, a dish made from pork rinds (For more on meat dining habits, see Carnivore Cuisine, page 129).

For more than a decade, the United Kingdom's Hunter Gather Cook has offered courses set in a shepherd's barn on East Sussex's Firle estate, which cover techniques like cooking with flame, smoking and butchery and may include wild food foraging walks. The courses aim to enable students to forage and prepare wild animals and plants "to a high culinary standard."

The European Parliament noted in 2025 that "climate change remains the most common driver of food insecurity," so startups and brands are moving to make crops themselves more future-proof. In August, it was announced that Mars has licensed Pairwise's Fulcrum® CRISPR gene-editing tools for cacao research and development. Pairwise claims that its Fulcrum® platform accelerates the development of climate-resilient, nutritious, and sustainable crops. "The ultimate goal is to help address the pressures cacao faces globally from climate variability, plant diseases, and environmental stresses," the company said.



Hunter Gather Cook courses in East Sussex, UK. Copyright of UnitedUs Ltd and Luke Taylor



Compound Foods platform

Addressing vulnerability of coffee and cocoa crops, in April 2025 US food tech startup Compound Foods launched its "beanless coffee and cocoa ingredient platform." This process involves mapping the molecular compounds that "define the sensory experience of coffee and cocoa." It then draws on underutilized ingredients such as seeds, cereals, and fibers, to build a whole-food base, and applies fermentation and roasting techniques to unlock optimal flavor profiles. Maricel Saenz, Compound's founder and CEO, said the company's goal "isn't to replace the specialty coffee or craft cacao we love. It's to offer a sustainable, cost-effective alternative to the part of the industry that's most vulnerable, commodity crops grown at scale, traded anonymously, and increasingly exposed to environmental and economic risk."

London's Science Museum's Future of Food exhibition, which ran through January 2026, explored techniques for future-proofing crops. Clean Food Group's experimentation with a fermentation bioreactor was among the initiatives on display. The company feeds the bioreactor with used coffee grounds and surplus bread to produce a sustainable alternative to palm oil, which has been associated with the destruction of forests. The museum adds that "these prototype foods may soon appear on supermarket shelves and could help reduce demand for palm oil."

Climate change is already having a detrimental impact on global agriculture, and forecasts are bleak. According to a study published in *Nature* and reported by *CarbonBrief*, "average global yields of six staple crops could fall by more than 11% under a moderate warming scenario by the end of the century." As the need to develop new ways of guarding against an unstable climate becomes more urgent, experimental crops—and even traditional foraging and cooking skills—are set to become more important than ever.

Why it's interesting

With 87% of people saying we should all be doing a lot more to tackle the problem of climate change, institutions and companies are finding innovative ways to seek out long-term solutions to maintain supplies of essential and much-loved food products.

47

Three hot ingredients

Chefs are celebrating their roots by introducing traditional, unique flavors to a global audience.



Arrack cocktails at Smoke & Bitters's sister venue, Raa, in Hiriketiya, Sri Lanka

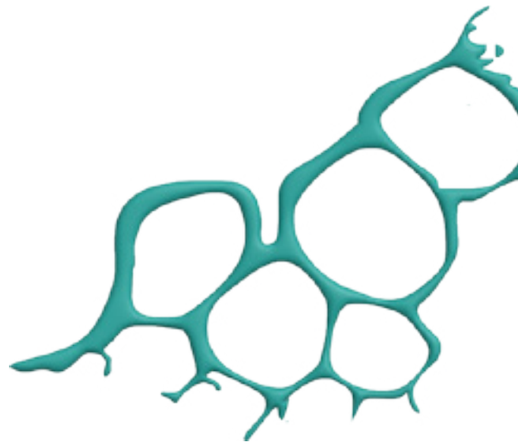
Arrack

Aligning with a growing global appetite for bold flavors, this native Sri Lankan spirit is a smoky, floral, spicy liquor that brings complexity to mixed cocktails and is smooth enough to sip on its own. A hit with mezcal lovers, arrack is at the heart of the cocktail menu of Smoke & Bitters, located in Hiriketiya, Sri Lanka, which was ranked 14th on the 2025 Asia Top 50 Best Bars list, and named top bar in Sri Lanka.

Arrack is distilled from coconut palm sap, acquired through a process called toddy tapping. This is a traditional craft that Smoke & Bitters and several other mixologists in Sri Lanka, India, and South East Asia are passionate about preserving.



SOL restaurant in Hong Kong. Courtesy of Nicholas Wong



Siraegi

Made with dried radish leaves and stems, this common Korean ingredient is underrepresented and underappreciated, according to Michelin-starred chef Gwanju Kim. Sol, his newest restaurant in Hong Kong, opened in July 2025 and aims to spotlight siraegi and maesaengi (a delicate seaweed), as well as other ingredients Koreans often take for granted, to introduce them to a global audience.

Palm pollen

Tala Bashmi, celebrated as the best female chef in the Middle East and North Africa, and recipient of the prestigious Estrella Damm NA Chefs' Choice Award in 2025, champions a unique native ingredient: palm pollen. "Palm pollen is my favorite native ingredient to Bahrain," she says, praising its versatility as a tender snack and a distinctive addition to flavored water, and for the simplicity of its preparation when cooked or smoked.

VML



Culinary collaborations

Eclectic and global partnerships bring novelty and innovation into restaurants.

At a time when almost half (49%) of people say they are cutting back on dining out, chef and restaurant collaborations are bringing some originality and allure. Unique or limited experiences offer something diners cannot afford to miss, while also bringing a blend of community, creative inspiration, and shared resilience.

These partnerships, sometimes called “four-hands dinners,” are not a new idea, but they are proliferating in a challenging environment for the industry. Serving as both headline-worthy marketing to attract more diners to the table and valuable inspiration for staff, they can be a win-win for diners and restaurant teams alike.

2025 brought a flurry of global chef collaborations. Anne-Sophie Pic of Maison Pic guested at Monaco’s Blue Bay with Marcel Ravin, and Kanji Kobayashi of Villa Aida in Wakayama, Japan, took the helm alongside Merlin Labron-Johnson at Osip in Somerset, in the United Kingdom. Such tie-ups afford restaurants diverse benefits, cross-pollinating their audiences, driving footfall, supporting premium pricing, or boosting revenue during slow periods. For instance, London’s Quality Wines & Friends series welcomes guest chefs on Sundays when the restaurant is normally closed, and hosted Alevi Kurdish cook and writer Melek Erdal in October 2025.

Partnerships are not just about driving revenue; they also boost innovation and staff morale. They offer kitchen teams exposure to new menus and techniques, reigniting enthusiasm in an industry that is notorious for its grueling conditions. For chefs, they are a route to creative stimulus and skills exchange, and a way to test new dishes, techniques, or ingredients. VML’s survey reveals unique or boundary-pushing flavors are one of the most important attributes sought by food consumers, and this can be achieved through novel collaborations.



Dante residency at Claridge's in London, UK. Courtesy of Claridge's

Luxury London hotel Claridge's has a popular collaboration with New York restaurant Dante. Jim Lyons, global head of food and beverage operations at the Maybourne Hotel Group, which owns Claridge's, tells VML Intelligence, "We had a 10-day program induction introducing the culture and philosophy of Dante, which is less formal and more approachable. It brought a new and invigorating energy and dynamic to the team." Originally slated for a month-long residency from 13 May 2025, the collaboration was extended to a year due to popular demand.

Similarly, in October 2025, when Daniel Humm, the chef behind New York's three-Michelin-starred Eleven Madison Park, commenced a year-long residency at Charleston Place in Charleston, he brought along his climate-conscious, plant-forward philosophy. The residency includes a chef apprenticeship program alongside his tenure. Investing in the next generation of chefs can also be a benefit of collaborations, giving upcoming chefs a valuable showcase—the Youkoso guest chef series at the Mandarin Oriental in London spotlights emerging female chefs.

In a tough economy, collaborations are trending and offering an array of benefits from financial to motivational. As food writer and industry expert Andy Wang told culinary platform Fine Dining Lovers, "I think chefs are more in the weeds than ever, for many not-so-great reasons, so they appreciate the opportunity to collab with friends and feel a sense of community."



Dante residency at Claridge's in London. Courtesy of Claridge's

Why it's interesting

Restaurants are rallying together to form communities that educate, inspire, and survive, proving that novel collaborations can deliver creative inspiration and an economic boost. This offers brands a blueprint for building partnerships that foster innovation, resilience, and community.

49

Water sommeliers

Curated water menus elevate the experience for discerning and health-conscious diners.



Crag Spring Water at Popote in Cheshire, UK

A growing interest in water pairings coincides with almost half (48%) of people saying they are spending less on alcoholic beverages and many are limiting their alcohol consumption. Instead, water is being elevated into an experience akin to fine wines or spirits.

Restaurants and hotels are curating water menus to entice customers with discerning palates, as well as tapping into the growing trend away from alcohol. French fine-dining restaurant La Popote in Cheshire introduced the United Kingdom's first water menu in summer 2025. The menu details the water's country of origin, flavor, and mouthfeel.

In Los Angeles, California, Michelin-starred restaurant Gwen offers a water menu akin to a wine list, featuring bottles from around the world. Bartenders and sommeliers describe the waters as acidic, smooth, full-bodied, or even bitter to customers looking for a pairing to complement their meal. Gwen's head chef and co-owner Curtis Stone was initially skeptical that a water menu was necessary, but Gwen's water sommelier Martin Riese convinced him. "Once you start learning about the different tastes of water sourced from natural regions around the world, it becomes surprisingly fascinating," Stone tells VML Intelligence. "I went through the education and was blown away. The mineral content, the terroir, the texture—it all changes how a water tastes and how it pairs with food, just like wine does."

In spring 2025, sommeliers at the Fine Water Summit in Atlanta, Georgia, tasted and judged water from around the world. In the most extreme examples, flavors were derived from water taken not



FineWaters water-tasting and food-pairing event in Quito, Ecuador. Image courtesy of FineWaters

> The terroir, the texture—it all changes how a water tastes and how it pairs with food, just like wine does.

Martin Riese

WATER SOMMELIER, GWEN

from a spring, but from volcanic rock, pine forests, and the deep sea. "FineWaters is the story of a natural product with terroir that holds experiences and gives wellness," Michael Mascha, founder of FineWaters, tells VML Intelligence. The summit takes a holistic approach to water, looking at sustainable practices, terroirs, taste, and the health of the potential consumer.

Why it's interesting

From still, low-mineral sips to naturally carbonated sparkling varieties, water is having its fine-dining moment. "It's a beautiful thing to see that same sense of exploration we've long had for wine or spirits now being applied to something as elemental as water," Stone says.

50

AI gastronomy

From reimagining the culinary experience to refining the art of service, AI is ushering in a new dining era.



AI health scanner at Que Tang Yu Fang in Kuala Lumpur, Malaysia

AI may struggle with recipe creations, earning it the label of a "lousy chef" from Joe Ray in *Wired*, but still, over half (56%) of people are curious to try AI recipes that cannot be found elsewhere. Beyond generating menus, AI is donning the toque blanche and carving its place in the world of gastronomy in other novel ways.

Personalized wellness drinks are made easy thanks to the first ASEAN AI-powered health and wellness tea store, Que Tang Yu Fang, which opened in Kuala Lumpur, Malaysia, in September 2025. Thirsty health enthusiasts can access traditional Chinese medicine diagnoses via an AI scanner at the store that analyzes a client's face and tongue to suggest herbs for a drink tailored to their wellness needs.

In another first, Woohoo, which also opened in September 2025, is billed as "Dubai's first AI-themed restaurant," where menu and ambience are curated by AI. In the kitchen, staff work alongside Chef Aiman, an AI creation by software company UMAI. In an interview with the *Independent*, Ahmet Oytun Cakir, a cofounder of Woohoo, explained reassuringly that "human cooking will not be replaced," adding "we believe it will elevate the ideas, creativity."

Boston-based startup Menu—Order AI aims to make it easy to instantly identify nutritious meals. The company launched its AI app in October 2025, aiming to support its clients on their wellness journeys via technology that scans restaurant and delivery menus, and provides an assessment on how aligned they are to the individual's health goals "in a matter of seconds."

According to Deloitte's 2025 "How AI is Revolutionizing Restaurants" report, 82% of restaurant executives plan to increase their investments in AI over the next fiscal year. Leading the charge is Major Food



AI health scanner at Que Tang Yu Fang in Kuala Lumpur, Malaysia

Group, the luxury hospitality powerhouse behind Carbone, Dirty French, and Sadelle's. Major Food Group was among investors who contributed $10 million in seed funding to the AI hospitality operator Magic. Magic's debut product, Loyalist, is designed to streamline restaurant operations from reservations and point-of-sale systems to marketing strategies, signaling a new era of tech-driven dining.

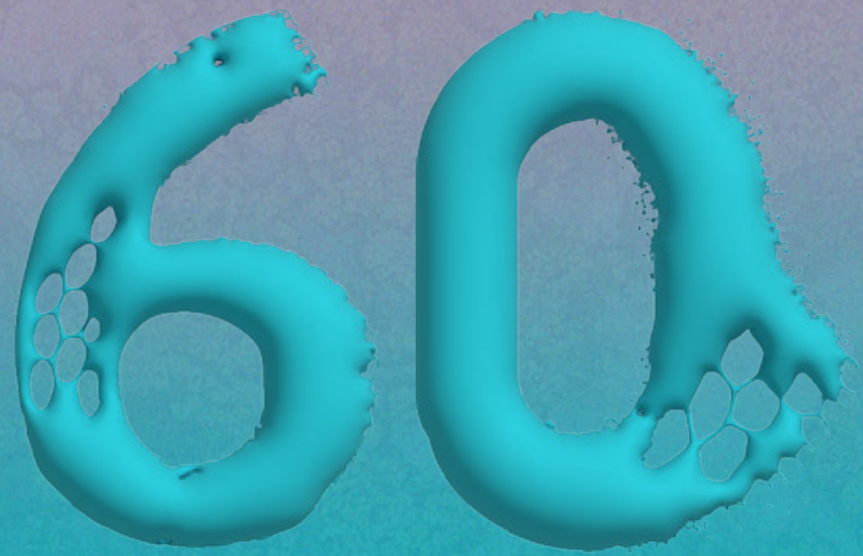
Mario Carbone, chef and cofounder of Major Food Group, believes backing AI will enable better human experiences. "One of the things that makes our restaurants special is our deeply personal relationships with our top regulars and friends," he said. "Loyalist allows us to scale that personal relationship with every guest who dines with us."

Why it's interesting

From optimization to creativity, AI is driving the future of restaurants in more ways than one, aiming to elevate the overall human dining experience.



Beauty



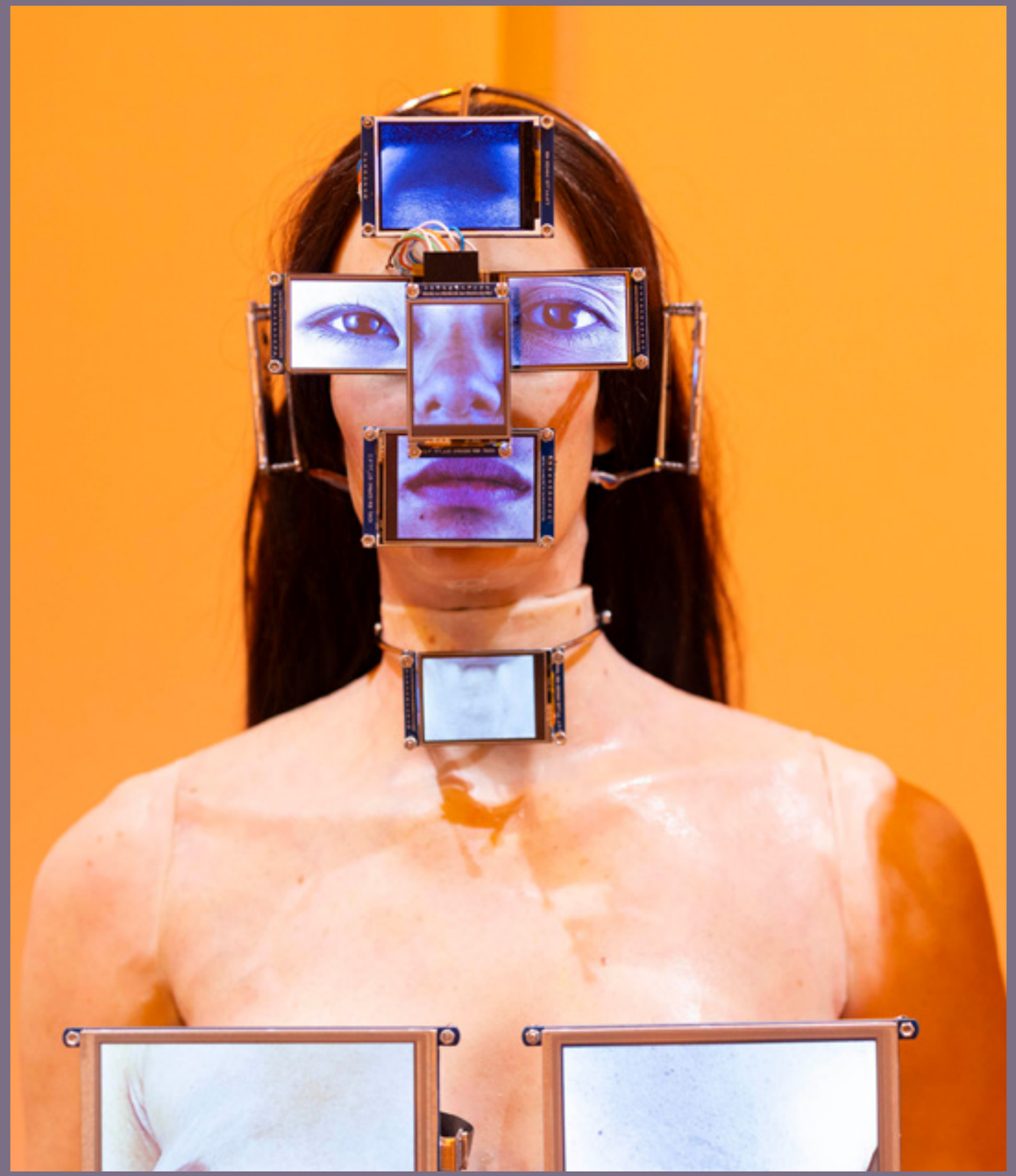
51

Speculative beauty

Creative, otherworldly, and transformative—beauty's expression has no limits.



Isamaya Ffrench's The Face of 2050. Courtesy of Westfield Days—The Future Studio



Pi(x)el by Filip Custic, part of Virtual Beauty at Somerset House in London, UK. © filipcustic, courtesy of Onkaos

The beauty toolbox has expanded over the years, from physical makeup to digital filters and AI-generated looks, bringing opportunities for people to express themselves in ways that transcend the physical world.

"When we say speculative beauty, we mean the fantastic, imaginative potential of transformation through beauty," Bunny Kinney, global executive creative director at Dazed Studio, tells VML Intelligence. Whether it's with "digital, physical, or hybrid mediums," the aim is to utilize these tools "to realize that transformation," he says.

Kinney's latest curation at London's Somerset House is the Virtual Beauty exhibition, which ran from July to September 2025. The show featured over 20 international artists and examined technology's contribution to the evolving beauty landscape. Featured works included *Past Life*, Ben Cullen Williams's three-channel film displaying portraits of people who have undergone a digital beauty makeover with generative adversarial networks (GANs), resulting in distorted and warped faces; and *Virtual Embalming*, Frederik Heyman's film inspired by funeral embalming rituals from Puerto Rico, illustrating beauty in the afterlife.

Virtual Beauty portrays the infinite forms of self-expression that technology allows, and Kinney further observes it has changed the way people can share beauty in the world. "Now we have all these new avenues and new places in which we can not only exhibit or share who we are through imagery, our identities *are* imagery," he says. This can be edited and manipulated, allowing us to "create other versions of ourselves," which could be represented in various forms such as digital avatars or social media personas. Kinney

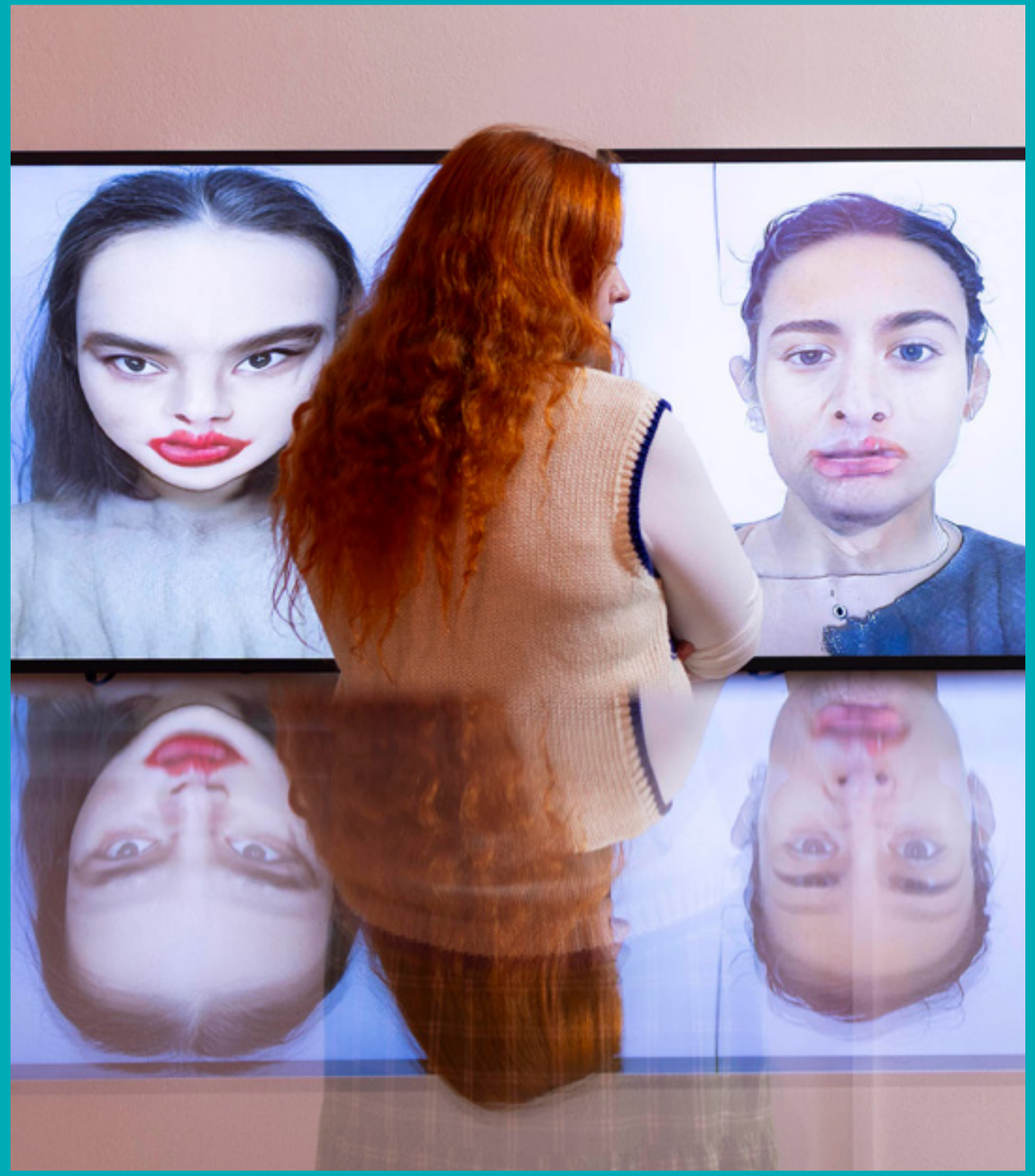
explains, “We’re looking at the advent of a highly curated version of self, or series of selves, where it gets interesting,” and, in turn, moves beauty into the “speculative space.”

Swedish artist Arvida Byström featured her work *A Daughter Without a Mother* at Virtual Beauty, portraying an abandoned female sex doll with AI integration. The intention is to delve into the intricacies of identity and intimacy between humans and human-like creations. In a September 2025 interview with *Dazed* magazine, Byström said: “There’s a push and pull between our technologies and us, and we’re shaped by that.” She concluded that “it’s very human to be post-human,” as people evolve alongside machines. This is reflected in VML Intelligence data: 74% agree that, in the future, concepts of beauty may extend beyond traditional human features.

Visionary makeup artist Isamaya Ffrench teamed up with London shopping mall Westfield to unpack the future of beauty in The Face of 2050 experiences. Some predictions Ffrench makes include “iridescent ‘mirror skin’,” a look that reflects extreme climate shifts, and “absence of brows,” which alludes to “the fluidity of identity and post-digital expression.” The collaboration illustrates the breadth of possibilities to further represent identity and values through beauty.

Why it’s interesting

Beauty remains a crucial outlet for self-expression and representation of human identity—even if the result is post-human. As new tools such as AI join the makeup box, broader forms of expression will empower people to speculate what beauty means to them. Sixty-seven percent of gen Z believe AI tools will allow us to be more creative and progressive in imagining the future of beauty.



Past Life by Ben Cullen Williams in collaboration with Isamaya Ffrench, part of Virtual Beauty at Somerset House in London, UK. © David Parry, PA Media Assignments

52

Edible allure

When food loses its appeal, beauty steps in to satisfy the senses.



Vaseline Cera-Glow, by Ogilvy PR&I South Africa



Native x Dunkin' collaboration. Courtesy of Native

Beauty's flirtation with food has evolved from novelty to necessity. Once defined by dessert-themed packaging and flavor-led products, food-infused beauty now answers a more profound craving: for sensory pleasure in an era of appetite suppression (17% globally have previously or are currently taking GLP-1 medications, up from 12% last year).

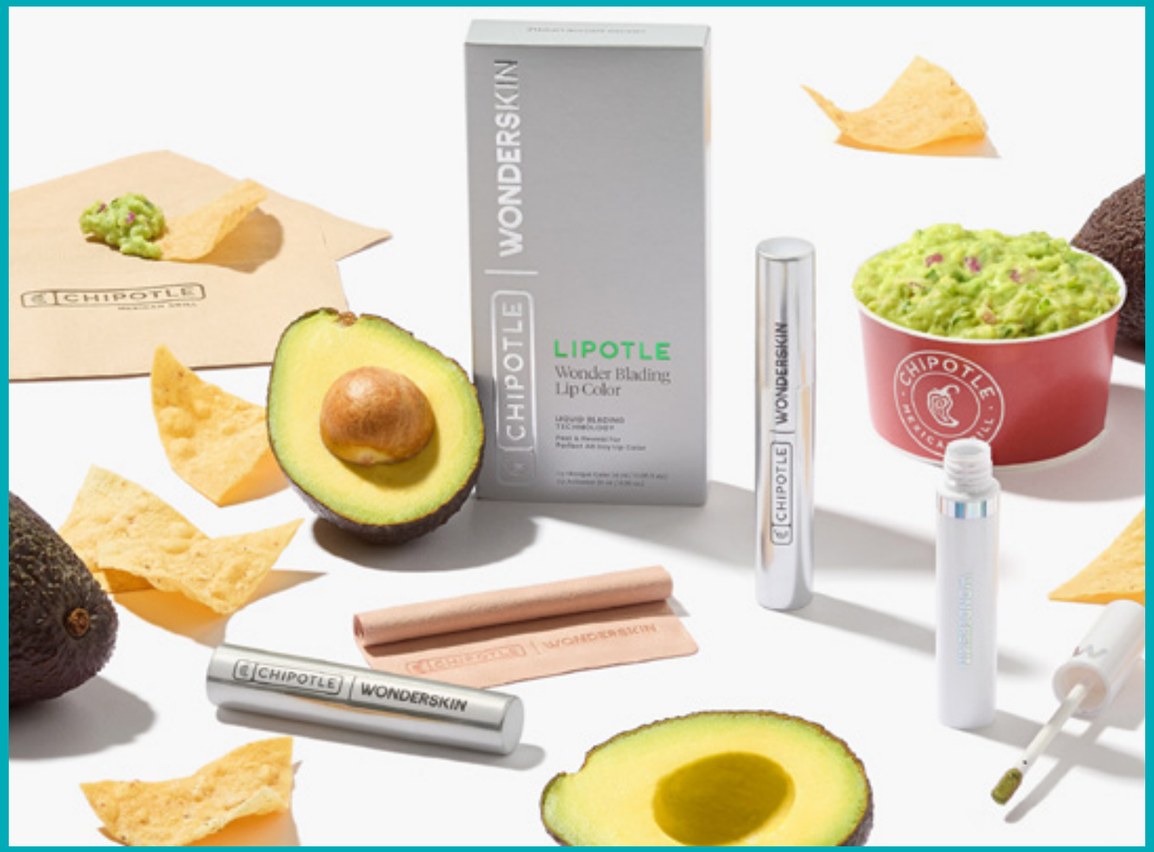
As GLP-1 drugs reshape how—and how often—people eat, fragrance and beauty brands are filling the gap, offering indulgence beyond the plate. Brands are borrowing from food to create tactile, fragrant moments that trigger dopamine hits just like dessert—without having to eat it.

Beauty's food fixation spans playful launches to full-on collaborations. TikTok chef Cassie Yeung whipped up a blackberry sorbet to launch Elf's Glow Reviver Melting Lip Balm, while Rhode's Lemontini lip tint and Glossier's Banana Pudding Balm Dotcom lip balm have turned skincare into a dessert course. A slew of brand collaborations push the food-beauty crossover even further, including Native's limited-edition partnership with Dunkin' that brings the sweet aroma of donuts to body care; Dove's limited edition range with viral dessert brand Crumbl; and Laneige's partnership with ice cream brand Baskin-Robbins, which resulted in the Rainbow Sherbet Lip Treatment mask.

Other launches have alluded to the texture or look of food, like Wonderskin's sell-out Lipotle lip stain inspired by the "iconic guac and foil" experience of Chipotle or Vaseline South Africa's tie-up with Krispy Kreme, which compared skin moisturized with its Cera-Glow range to the shiny glaze of a donut.

Perfume sales to GLP-1 users in the United States rose by 23% in 2025 as people chase sensory inputs that are no longer being satisfied by food, according to NielsenIQ. Gourmet fragrances—with sugary notes of biscuits, cherries, and desserts—are also on the rise, with launches up 24%, according to Mintel. As GLP-1 drug use grows, beauty is stepping into the sensory void.

"The appetite is silenced, but the desire for pleasure is not," Dr Eleonora Fedonenko, dermatologist and medical director at Your Laser Skin Care, tells VML Intelligence. "That gap is filled with sweet, dessert-like scents. I've seen patients turn skincare into a ritual—using a sugar scrub before bed feels indulgent without the guilt. Brands have been quick to catch up: one in three new products now has edible cues like caramel, honey, or whipped cream."



Wonderskin x Chipotle's Lipotle lip stain. Courtesy of Wonderskin

Franck Barrière, CEO of Lean, an AI metabolic- and calorie-tracking app, calls this the rise of the "sensory calorie," noting that GLP-1 drugs tackle physical hunger, but not the desire for the experience of food. He says, "brands aren't just selling a fragrance—they're selling a guilt-free indulgence that satisfies the brain's craving without the calories."

Why it's interesting

As consumers look to soothe the senses, not the stomach, brands should create products that quench cravings without consumption, turning beauty into the source of guilt-free pleasure.

Vaseline Cera-Glow, by Ogilvy PR&I South Africa

53

Skincarewear

Skincare is breaking free of the jar.



Sylva clothing

Beauty's new frontier is the closet, as beauty brands and fashion labels alike embed skincare ingredients into textiles, turning garments into all-day treatments.

Parisian ready-to-wear brand Coperni wants to nourish skin with its new C+ athleisure spring/summer 2026 collection. A blend of prebiotics and probiotics is embedded into every gram of fabric of the brand's "carewear." The clothing line promises the same results as premium skincare products: a rebalanced microbiome, a supported skin barrier, and rejuvenation and repair benefits, lasting for 40 washes. An October 2025 *Business of Fashion* article reported that Coperni CEO Arnaud Vaillant saw the line as "a bridge between fashion and beauty, comparing it to a mashup of Skims and Augustinus Bader." Speaking of Skims, the Kardashian-owned brand launched its own collagen-infused textile face wraps in 2025 too (see Sleeping beauty, page 165).



Sylva clothing

Other clothing brands are integrating skincare benefits in apparel. David Gandy Wellwear, the British model's menswear brand, treats textiles with aloe vera for softness and a skin-soothing wear. In October 2025, the brand added a men's underwear line treated with its own anti-bacterial, anti-odor nanotechnology.

In China, where sun protection is a priority, sunwear is a staple for skincare aficionados. UV-protective garments are popping up for officewear, casual dress, and year-round accessories, according to *Jing Daily*. Brands from Bosideng to Uniqlo launched 2025 collections with UPF protection (the clothing equivalent of SPF protection) of up to 50+.

These concepts build on previous moisture-focused innovations. Under Armour introduced its HydraFuse fabric in 2020 to battle dry skin in winter, while Ph5 launched HydraKnit technology in 2021 with clothing that moisturizes the wearer's body. Ph5's 2025 collection expanded on this with UV-reactive clothing that changes color in sunlight. Similarly, luxury skin-first clothing brand Sylva launched late in 2024 with a focus on skin-balancing fabric technology designed especially for consumers with sensitive skin.

Why it's interesting

Skincarewear opens new categories and revenue streams for beauty and fashion brands alike, while meeting the consumer expectation for multitasking solutions. Expect beauty industry standards such as clinical claims and ingredient transparency to migrate from product packaging to clothing tags.



Substack strategies

Storytelling is in, as beauty brands use Substack to build connections that are more than skin deep.

Social media rewards brevity, but some brands want space to elaborate. Substack—the platform built for deeper storytelling—is becoming a quiet favorite, with beauty brands among those leading the shift away from other platforms.

Saie's *From the Saie Office* Substack gives subscribers a backstage pass to the brand, with podcasts and articles that blend daily life, team inspirations, and even shopping tips. Rare Beauty's *Rare Beauty Secrets* shares everything from the stories behind new makeup shades to the mental health mission of founder Selena Gomez. Another beauty founder, Colette Laxton of The Inkey List, launched her newsletter *Mind the BS* in fall 2025, offering a personal take on the world of beauty and beyond.

Saie tells VML Intelligence that the brand "wanted a space for real conversations and something deeper than other platforms allow. Substack brings back the early 2000s blogging energy—personal, dynamic, and free-flowing." For Saie, that means prioritizing storytelling over scrolls, sharing what's inspiring its team, and creating a genuine, ongoing dialog with readers. "We wanted it to feel like a window into our world," the brand adds. "A place to share more of our personality and the things that matter to our team and our community."

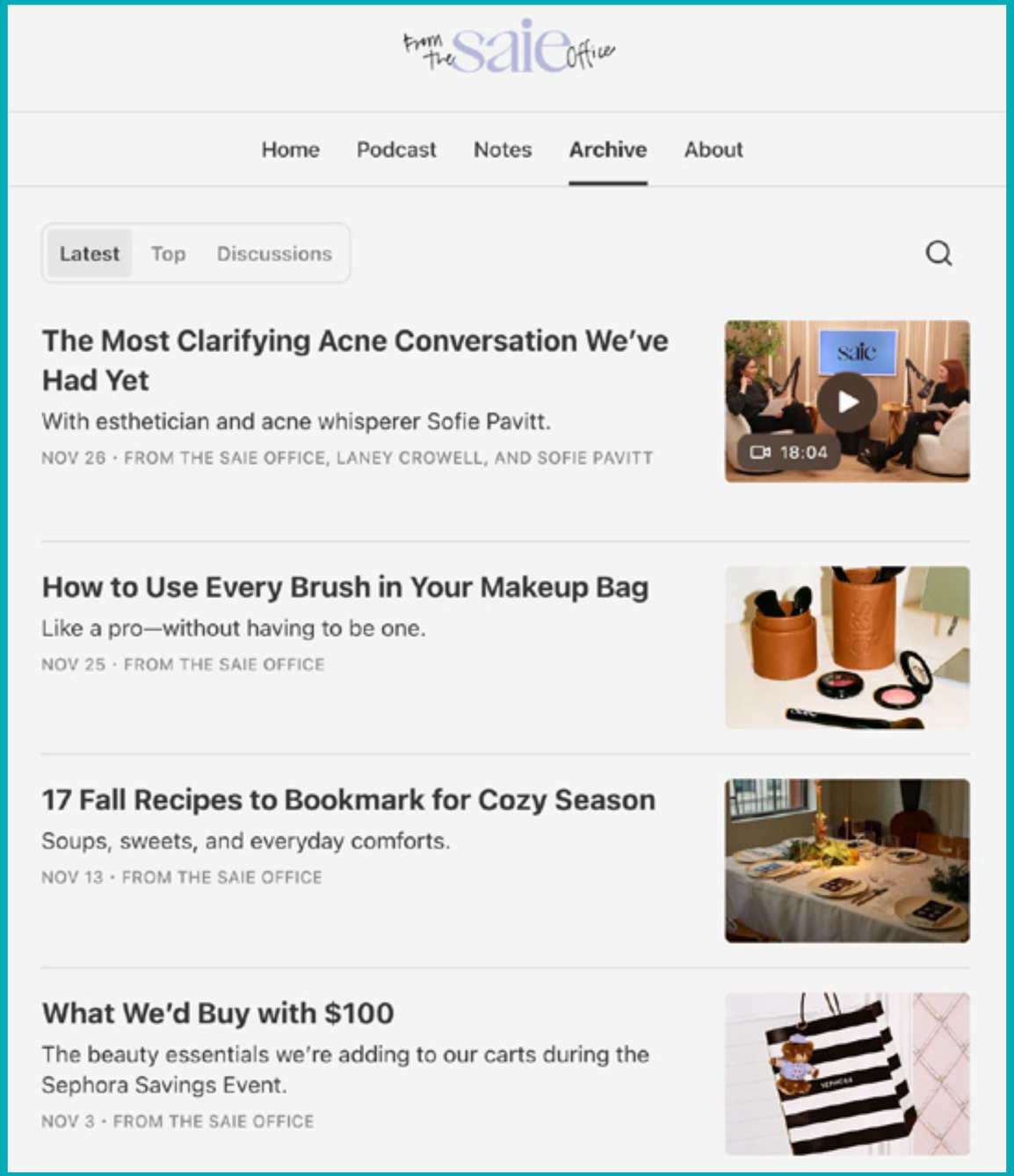
Although still a small corner of Substack, beauty brands are discovering that slow content works: *Business of Fashion* reported that investing in this kind of storytelling can drive deeper audience engagement if brands are committed.

"Substack provides creators with a unique advantage: full ownership of their content—written, video or audio—and a direct link to an engaged audience," a Substack spokesperson explains. "This emphasis on authentic, personal connection is increasingly attractive to brands, who see value in a platform that encourages a more intentional relationship between creators and their audiences."

> "[Saie] wanted a space for real conversations and something deeper than other platforms allow."

Why it's interesting

We've hit peak scroll fatigue, and consumers are craving slower, more genuine ways to connect. Substack gives beauty labels such as Saie the space to open up—to talk less about what they're selling and more about what they stand for. It's less marketing, more meaning, where authenticity and shared joy build lasting loyalty.



From the Saie Office on Substack

55

Seditious beauty

Unconventional looks might feel rebellious,
but they are part of an expansive beauty spectrum.



Karolina Biloshenko via Pexels

From gen Z's passion for Crocs to TikTok trends such as #weirdcore, a revolt against the refined is under way. In his summer 2025 essay *The Vulgar Image*, cultural commentator Dean Kissick says, "Beauty is boring, so we turn to the grotesque."

Beauty looks are also dabbling in the provocative, with bleached brows (as seen on Miley Cyrus and Jenna Ortega), unconventional dermal and facial piercings (Willow Smith and Halsey), and campy, maximalist makeup (Chappell Roan and Doja Cat). Even Prada sent models down the Milan runways for its fall/winter 2025/2026 show with unkempt, bedhead hair.

For the mainstream gaze, these looks read as a rebellion against airbrushed ideals. Yet Bunny Kinney, global executive creative director at Dazed Studio, tells VML Intelligence that what feels like dissent is rooted in identity: "Fundamentally, it's a desire to express one's identity in some way, and that identity still sits within a spectrum of social perceptions and beauty."

In other words, it's another choice, but one that expands the borders of beauty. This chimes with VML's data, which finds that 72% of people believe being seen as beautiful is about expressing your authentic self. "We want to fit in, or we don't want to fit in," says Kinney, "but they're all things that inform our choices for how we design ourselves."

An array of creators are championing unconventional beauty, from the otherworldly looks of fashion label Matières Fécales and the flesh-contorting corsetry of Michaela Stark to the anti-beauty philosophy of makeup artist Roscino, who embraces asymmetry and messiness.



Mac Cosmetics x Chappell Roan. Courtesy of Mac Cosmetics.

Brands such as Mac, Nars, and Isamaya Ffrench have long promoted this expansive view of beauty, and there are opportunities to further normalize a broader palette of aesthetic choices.

Writer and brand consultant Ellen Atlanta is enthused by this expansion in what beauty can be. She tells VML Intelligence, "It's been a breath of fresh air to have people rejecting the homogenized beauty standards we have now, but also taking that further and saying, 'What can we create? How can we use prosthetics? How can we use color cosmetics? How can we really push the boundaries of what it means to be a woman?' If people can take elements of that, I think that's really empowering."

Why it's interesting

Digital tools and subcultural currents are widening the spectrum for beauty (see Speculative beauty, page 153). For brands there is an opportunity to welcome in the unconventional. Rooted in identity and diversity, seditious beauty is still beauty.



Sleeping beauty

Overnight beauty routines show an “ugly” side.

Over 9,800 videos have been posted under the hashtag #morningshed on TikTok, as of January 2026, which sees creators document the unraveling of the various masks, patches, mouth tapes, and facial straps that they’ve worn overnight as beauty treatments. The trend even reached the pages of the *Wall Street Journal* in May 2025, with a piece titled, “To achieve daytime beauty, these women look like monsters at night.”

Kim Kardashian’s Skims entered the fray in summer 2025, when it unveiled its Seamless Sculpt Face Wrap. The overnight face wrap is made from “signature sculpting fabric and infused with collagen yarns for ultra-soft jaw support,” and claim “strong, targeted compression for shaping and sculpting.” (For more on beauty-infused textiles, see Skincarewear, page 159.)

Yet professionals are skeptical. Speaking to the BBC, Dr Anna Andrienko, an aesthetic doctor, notes that “face wraps do not deliver lasting contouring or skin-tightening results.” She warns, “At best, they can reduce fluid retention short term. At worst, overuse may lead to skin irritation, breakouts, or circulation issues if worn too tightly or for prolonged periods.”

Beyond face wraps, overnight mouth taping, touted for benefits including a sculpted jawline and improved oxygen levels, also face skepticism. Sleep specialists warn of breathing difficulties, anxiety, and even asphyxiation, highlighting the dangers of social media beauty hacks.

The extreme aesthetic has also drawn consumer backlash, pointing to a tension between the desire for self-improvement and self-acceptance. One commentator on Skims’s Instagram launch post



Pixel Flesh by Ellen Atlanta. Courtesy of Ellenor Betts

wrote: "If by innovation, you mean oppression, then yeah. Never ends. How about you just let us BE." Another said: "Who needs this? Stop inventing new products just to unlock other insecurities and sell more." Seventy-one percent of consumers globally now agree that "beauty standards today are impossible for anyone to achieve."

Ellen Atlanta, a writer and brand consultant specializing in gen Z and millennial culture, published the 2024 book *Pixel Flesh: How Toxic Beauty Culture Harms Women*. She tells VML Intelligence that, on one hand, the #morningshed trend does point to "something quite ritualistic and emotional. I think people are seeking ways to connect with themselves, to feel connected to something more, to feel like they're moving toward something that feels optimistic, and toward a better future for themselves."

At the same time, Atlanta argues that this preoccupation with erasing signs of aging and expression is a form of control. "There's something quite interesting there in terms of how dystopian it looks, but also when we think about dulling down those expressions," she says. "If we can't frown, and you can't smile, and you can't express anger, and you can't express disobedience, and you can't express joy, what are women?" She points out the irony of brands using the language of empowerment to promote these products when women's autonomy is under threat: "You can have all these choices and be beautiful, when your very real powers are being kind of quietly stripped away in the background. But you just focus on your 17-step skincare routine, tape your mouth shut, and that's fine."

Why it's interesting

Consumer fatigue with overly elaborate beauty routines points to a powerful opportunity for brands to offer simplicity, while celebrating authentic, natural beauty. Shifting the narrative from fixing flaws to empowering genuine confidence and acceptance will resonate with those who are over the artifice of extreme beauty narratives.

57

Next-gen gamer glow

Beauty brands are leveling up into gamer culture with new fluency and flair.



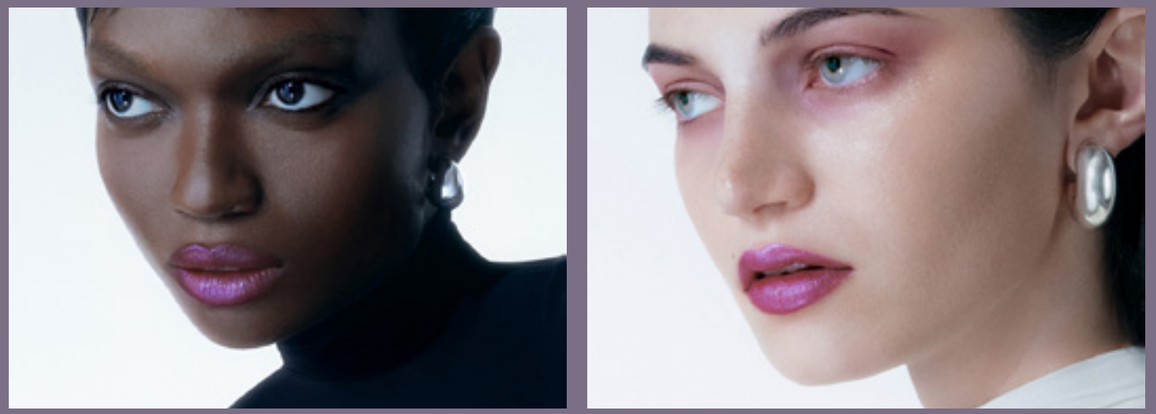
Hyrular beauty brand. Courtesy of Maxime Poiblanc

Beauty's relationship with gaming is entering its next phase. Gaming and beauty have overlapped digitally for years, and now a new wave of brands is taking the crossover from novelty to authentic immersion.

Recently launched Godmode, cofounded by actor Chloë Grace Moretz and musician Rina Sawayama, is a cyberpunk-inspired brand built at the intersection of gaming and self-expression. Framed as "a tool, a lucky charm, and armor for whatever lies ahead," its debut drop, Genesis, features a highlighter that mimics the blue light cast by screens. Rather than borrowing from gaming aesthetics, Godmode has built a whole narrative universe, teasing unlock codes, developing lore, and positioning beauty as an immersive world to explore. Unlike brands dabbling in *Roblox* for younger audiences, Godmode targets female gamers as cultural leaders. It's a sign that gaming-inspired beauty is maturing.

In another nod to beauty's growing integration with gaming culture, Hyrular, a US brand that launched in October 2025, takes the visual language of video games and sci-fi as its inspiration. Its first product to market is a chrome-pigmented lipstick, with more makeup, skincare, and fragrance in the works. The brand's founders, who include Grimes's cocreative director Bryan Huynh, hope to collaborate with gaming companies and streamers in the future.

Elf has steadily earned its place in gaming culture, launching its own Twitch channel (*ElfYou*) in 2020 with a mission to empower female gamers and amplify their voices. By embracing the native culture and partnering with popular Twitch streamers such as Loserfruit, it gradually built its connection with fans. In October 2025, it became the first brand to launch an in-stream shoppable feature, in partnership with Amazon Ads, allowing gamers to shop Elf beauty in livestreams.



Hyrular beauty brand. Courtesy of Maxime Poiblanc

Creators such as TikTokker Pinkiysensei bridge both worlds, celebrating brands that understand gamer culture from the inside. In April 2025, she said in a TikTok video, "We're not niche, we're necessary. We are the beauty consumers. We know which makeup survives a cosplay, we know the makeup products that survive a long convention weekend, we know what makeup products survive long streams under very hot lights without a filter. We know performance because we live it."

Charlotte Tilbury is meeting the demand, launching a *Genshin Impact* collaboration and running a Twitch channel to connect directly with beauty-loving gamers. "I feel like Charlotte Tilbury understands that, as gamer girls, our expertise, our loyalty, and our community matters," said Pinkiysensei.

Why it's interesting

Gamer beauty is entering its power-up era. It's not about pixel filters or gimmicks, it's about meeting real players on their own terms, with products that perform, a culture that respects them, and a relevance that lasts beyond the screen.

58

Fragrance layering

Gen Z are creatively combining fragrances to concoct their own signature scents.

Seventy percent of gen Z believe the scent they use reflects their identity, highlighting this generation's appetite for self-expression. In last year's "The Future 100" report, Fine fragrances explored the younger generation's willingness to spend more on perfume. This year, gen Z are crafting unique smells by layering multiple fragrances for aromatic depth and personalization. Online platforms are catching on: #perfumelayering is trending on BeautyTok, with over 48,000 posts as of January 2026, and *Elle* magazine published an article in April 2025 offering tips on how to best layer different perfumes. Sephora beauty director Myiesha Sewell told *Elle* that fragrance layering can "push and pull scent stories in different directions" and offers personalization. "If you really love an ultra-popular fragrance but aren't so keen on the idea of smelling like everyone else, layering your perfume is the key to creating something unique to you," she said.

Brands are responding to the desire for bespoke scents. Celebrity beauty brand Rare Beauty launched its first perfume in August 2025, but Selena Gomez's newest product did not debut solo: an accompanying suite of fragrance layering balms were also revealed, ready to pair with her new signature scent. Consumers can mix and match Rare Eau de Parfum with any combination of the balm variations: Woody, Amber, Floral, or Fresh. Each complements the perfume in a unique way, and consumers can select which undertone they would like to enhance every time they spray.

Established fragrance houses are also responding to the trend. In September 2025, fragrance powerhouse Jo Malone London introduced a playful, fresh campaign for gen Zers who are "curious about scent layering." The "Uniquely You" campaign celebrates "individuality, self-expression, and modern British style," global brand president Jo Dancey told *Cosmetics Business*.

VML

58



Uniquely You campaign by Jo Malone. Courtesy of Jo Malone

VML

70%
of gen Z believe the scent they use reflects their identity.

Alongside ranges, dedicated layering products are also emerging. DS & Durga sells a fragrance enhancer called I Don't Know What, a play on the popular French phrase, intentionally formulated with ingredients that draw attention to different scents in a perfume. The brand advertises that this product has a "transparent radiance" that adds depth to fragrances it's layered with.

Why it's interesting

Personalization is a key priority for gen Zers. For them, fragrance layering is not just a trend–it's a tool of self-expression that allows them to reflect their identity, moving beyond mass market scents to create something uniquely their own.



I Don't Know What fragrance enhancer by DS & Durga

59

Rhythmic beauty

Beauty brands are crafting experiences rooted in nature’s ancient rhythms.



Commune beauty brand

VML

An elemental approach to beauty is on the rise, as brands fuse ancestral wisdom with modern techniques, following the natural rhythms of nature.

The British fragrance brand Ffern weaves together tradition, folklore, and ritual to craft perfumes attuned to the changing seasons, releasing four scents annually to mark the solstice and the equinox. The brand's podcast, *As the Season Turns*, tracks the rhythms of the seasons and focuses on what it calls "found sounds": sounds of nature that align with and reflect that season's scent. For its fall 2025 release, the brand captured the scent of ancient rural orchards laden with fruit. A companion perfumer's candle featured a bespoke seasonal artwork adorned with a tree of life, a sacred symbol drawn from Celtic tradition that symbolizes connection with the Otherworld or Tír Na nÓg. Its next release, for winter 2026, evokes the glow of a lighthouse on the dark seashore of the Isle of Skye.

In a similar vein, UK skincare brand Wildsmith launched Treescape in May 2025, a bespoke soundscape that gives voice to nature, specifically the arboretum at its native Heckfield Estate in Hampshire. The brand, whose vision is rooted in caring for nature and the soil, collaborated with British sound artist Justin Wiggan, whose work explores biosonification, a technique that translates the electrical signals of living organisms such as trees and plants into sounds. The soundtrack, which was designed to accompany Wildsmith experiences and is also available on Soundcloud, features a range of frequencies that change throughout the listener's journey. Inspired by trees and their adaptability, the range of products works with the body's natural cycles and needs, offering balance and nourishment. The brand hopes the soundscape will offer a deeper sense of connection, "to place. To self. To something older than language."



The Seymour range by Commune

> Everything that we do, we look to the ancient, and then we reimagine it in a modern way.

Kate Neal
COFOUNDER, COMMUNE



UK beauty brand Commune also aims to foster connections "to self, our shared world, and each other," and is inspired by the changing seasons, ancient folklore, and pastoral rituals and traditions. Based in Somerset, its approach draws heavily on ancient herbalism or "herb-lore," making use of plants such as hiba wood and galbanum that have long been used in healing. "Everything that we do, we look to the ancient, and then we reimagine it in a modern way," said cofounder Kate Neal, explaining the brand's philosophy to *Business of Fashion*. "There's a whole mysticism in Somerset—this real kind of universal energy that just flows through the land there."

In Canada, Cheekbone Beauty is informed by Indigenous teachings for minimal environmental impact. For National Indigenous Peoples Day in 2025, it launched the Powwow Kit, composed of four best-selling, naturally derived cosmetics and a frameable, limited-edition print of *Giants Walk the Earth* by Cree artist Kent Monkman. The brand and accompanying artwork honor the Indigenous traditions of storytelling and respect for the Earth.

Why it's interesting

Rhythmic beauty grounds consumers in nature-led experiences rooted in ancient wisdom. By harking back to traditions and practices that connect us deeply to nature, they offer a reassuring sense of timelessness.

VML

60

Apocalyptic glamor

Beauty becomes a conduit for strength and resilience.



Dilara FIndikoğlu SS26 London. Credit: Ik Aldama



Dilara FIndikoğlu SS26 London. Credit: Ik Aldama

Beauty is becoming a vehicle for resilience. Drawing on warrior queens and dystopian survivors, this new aesthetic is less about conventional prettiness and more about endurance. It uses stark, unsettling makeup and metallic, armor-like adornments to project defiance and power. It's a statement of survival and liberation in challenging times.

At Maison Margiela's spring/summer 2026 show for Paris Fashion Week, every model wore a restrictive silver mouth guard, alluding to the label's four white stitch marks but nevertheless disturbing. Similarly, Turkish-British designer Dilara Findikoğlu referred to liberation from confinement, dressing models in elaborate metallic facial adornments sourced from Istanbul's Grand Bazaar, one even with a horse's bit in their mouth, for her spring/summer 2026 show at London Fashion Week. In her show notes, she described "the rooms, walls, and cages that have confined women, physically, socially, and spiritually," but added, "we come out of this cage today." In Tokyo, armor-inspired details were on show at Mukcyen's spring/summer 2026 debut show, where young designer Yuka Kimura draped models in chainmail.

Extreme aesthetics like these may not be for the mainstream, but as Bunny Kinney, global executive creative director at Dazed Studio, explains to VML Intelligence, they wield influence. "When people experiment in ways that would have previously been perceived as forbidden or wrong or ridiculous, it starts to expand into the collective unconscious," he says. "It starts to be a little bit less ridiculous, a little bit less impossible to experiment with these ideas, even if they become diluted."

At Rick Owens's spring/summer 2026 show at Paris Fashion Week, dubbed the "Temple of Love," the veteran American designer channeled an end-of-times aesthetic, with models sporting black contact lenses with stark, minimal makeup and slicked-down hair. Owens told *Women's Wear Daily* that he was inspired by endurance: "We're living through kind of grotesque times, and a steely tenacity is not the worst thing."

Beauty looks channeled imperfection at Kim Shui's spring/summer 2026 show in New York, with brushed-up brows and erased lips, but the goal was defiance. "In a world where everyone feels broken right now, and almost like shattered pieces of glass, [the look] is coming together and having it be a disco ball," hairstylist Jaylin Seng, who worked on the show, told *Essence*.

Even scents are leaning into troubled times. Created by Chilean artist Agustine Zegers, Speculative Scent Lab is a platform that offers olfactory education and programming. In October 2025, it hosted the Olfactory Meditation for End Times, which offered participants "dedicated space to breathe and smell into this troubled moment." The lab's fragrance line, Agar Olfactory, includes a series of scents that invite users to engage with ecological and technological collapse and, ultimately, human extinction.

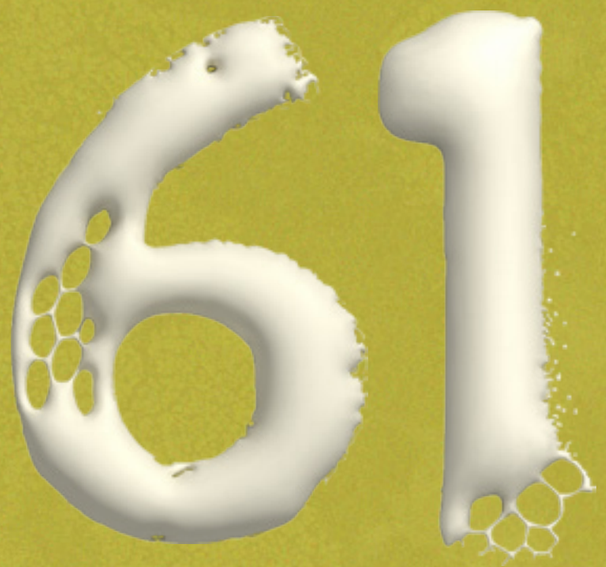
Behavioral psychologist Jo Hemmings tells VML Intelligence that in challenging times, "we're forced to think differently, to adapt and find beauty in unexpected places. That's why we're seeing dystopian or apocalyptic aesthetics resonate so strongly. It's not about celebrating darkness, it's about confronting it, responding to it, and finding allure and strength within the unsettling. It's a form of emotional honesty."



Agar Olfactory fragrance line by Speculative Scent Lab

Why it's interesting

At a time when many feel embattled—by social or political constraints, or collective anxiety—this aesthetic reflects an undercurrent of defiance that brands can also respond to. Beauty can be a canvas for resilience, projecting strength, and empowerment.



Retail



61

Treatonomics

Joy-focused spending is providing consumers with precious moments of uplift.



Jellycat Airline experience at Harrods in London, UK. Courtesy of Jellycat

Consumers are embracing small splurges, prioritizing treats in their budgets that offer short-term dopamine hits and lasting memories. “A treat that feels just for you offers comfort, control, and a sense of normality when everything else feels uncertain,” behavioral psychologist Jo Hemmings tells VML Intelligence. “It makes people feel valued and uplifted, a reminder they still deserve joy and choice, even when they’re cutting back elsewhere.”

This desire for a joyful boost is evidenced by 38% of gen Z saying they are spending more on themselves, while 30% are shelling out more on little treats, compared to 14% of gen Xers. This has created demand for small collectibles. Small Labubu figures are a prime illustration of modestly priced little treats with the thrill of blind-box



Jellycat Space experience in Seoul, Korea. Courtesy of Jellycat

anticipation, and over half (55%) of gen Z enjoy the experience of buying blind boxes. In the United States in June 2025, Labubu sales were up 5,000% on the previous year, according to estimates by equity research firm M Science, as consumers embraced the dolls' retail-therapy benefits. Brands have joined in on the cultural joy, with Godiva Hong Kong collaborating with Labubu on the Dubai-chocolate-inspired Icy Delights Collection of soft-serve ice cream and milkshakes in summer 2025. And in November 2025, *Variety* reported that Sony Pictures has acquired the screen rights to develop a Labubu movie.

> "At times when people can't spend extravagantly, you've got to have those little uplifts of joy."
>
> Jo Hemmings
> **BEHAVIORAL PSYCHOLOGIST**

Some commentators predict that Labubu's appeal may drop in 2026, and a new wave of plush toys and accessories is waiting in the wings to pick up the mantle. British soft-toy brand Jellycat packed moments of joy into its Space experience in Seoul during November and December 2025, while in October, London's Harrods hosted the Jellycat Airlines pop-up in the United Kingdom, and the brand also dropped its Yum and Sum dumpling-shaped plushies exclusively for the Chinese market. *South China Morning Post* called the brand's rise the "'Jellycatification' of everything," and companies from Chinese condiment brand Lee Kum Kee to KitKat have introduced their own cute collectibles. Even luxury fashion's bag-charm trend feeds into this mindset, promoting purchases that double as an expression of joy, such as Loewe's mushroom and corgi charms (see Luxury adaptation, page 221).

Edible indulgences offer a similar emotional payoff. Status snacks have global consumers queueing around the block. From K-bakes—beautifully designed Korean pastries and cakes sold at bakeries such as Buttered in Sydney—to the viral Instagrammable donuts at London's Greedy Cow Bakes and the moreish cinnamon rolls at Sunday Morning in New York, consumers are prioritizing these moments of regular indulgence. Dove tapped into this trend by partnering with emerging status-snack dessert brand Crumbl on a range of bath products featuring its viral sweet treats. The result was 3.2 billion social media impressions, with Dove revealing that 52% of sales were made by first-time Dove buyers as the personal care brand hit a six-month sales target in one month (see Edible allure, page 156).

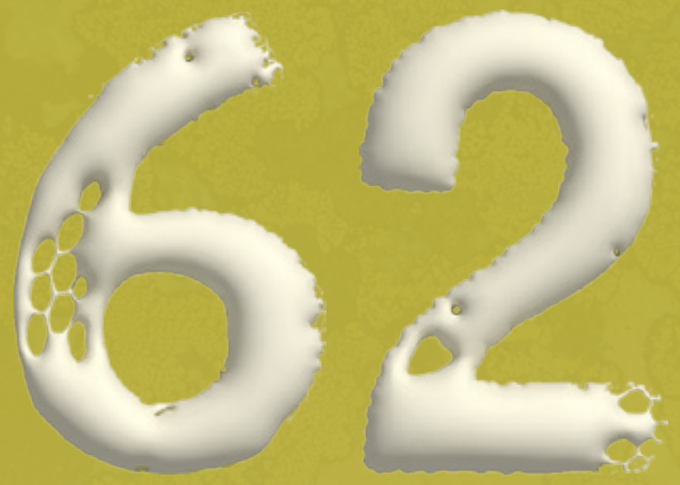
The scale of a "small treat" may vary from those splashing out on small indulgences to micro-upgrades (see page 97) or even bucket-list experiences such as Michelin-starred dinners, live entertainment, and luxury getaways. Ultimately, however, for many it's the little rewards that offer respite and may link to health benefits. "At times when people can't spend extravagantly, you've got to have those little uplifts of joy," Hemmings explains. "They are important to our wellbeing."

Why it's interesting

Small treats are going a long way, especially for people willing to splash out for the positive anticipation and emotional uplift they provide. Gen Z are most likely to partake, with the highest-ranked treat being a meal or takeaway, followed by a fun experience in second place, and a snack in third.



Buttered bakery and cafe in Sydney, Australia



Gen alpha influence

Generation alpha's burgeoning influence and spending power are forcing brands to sit up and take notice.

Gen alpha, born between 2010 and 2024 with its oldest members now in their teens, are "more influential than any other tween generation," according to Razorfish's third report on the generational cohort.

A report by PR firm DKC showed that 42% of household spending by US families is now influenced by gen alpha's opinions, rising to 49% among households earning more than $100,000 per year. It also revealed that gen alpha have inspired their parents to try new food (66%), travel to new destinations (52%), try new beauty products (49%), and pay for premium subscriptions (40%). Razorfish confirmed the influence extends to big-ticket items too, finding that 61% of gen alpha parents say their kids even have the final say on which car they purchase.

DKC concludes that gen alpha's spending power is now in excess of $100 billion every year, making it essential for brands to understand the generation's behaviors and what matters to them.

Alphas are born gamers: almost all (93%) gen alphas play video games at least weekly, according to GWI. UBS reports that three in five (60%) gen alphas have discovered new brands in the gaming worlds they inhabit and, crucially, say they are more likely to buy from brands featured in a game. This is why brands such as Elf, Nike, and Walmart engage with gen alpha in *Roblox*, meeting their desire to mix creativity and competition with social connection and gaming.

YouTube is consistently voted gen alpha's favorite brand, according to Beano Brain research, while *SQ Magazine* reported that 64% of US gen alphas aged eight to 12 are on YouTube or TikTok every day. This speaks to the importance of short-form video content, with gen alphas embracing it for entertainment, learning, and self-expression.



Elf on Roblox

Brands can use this format to win over this generation by highlighting constant innovation and proving their cultural fluency, such as understanding the latest gen alpha memes including “6-7,” which was prominent in the second half of 2025. Pinkie Pads, period pads designed specifically for tweens and teens, shows how it’s done with a mixture of informative and humorous TikTok content that engages and educates young consumers about their bodies during puberty.

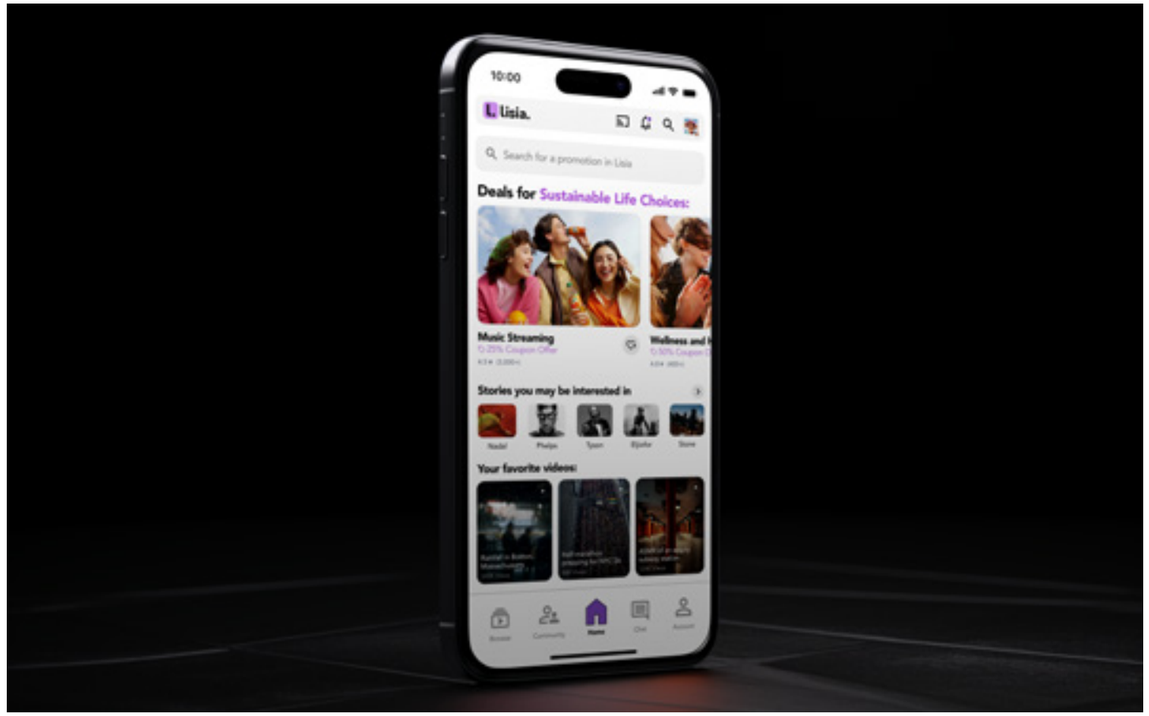
Why it’s interesting

The influence of gen alpha is already real—and it is only going to grow, with McCrindle predicting their spending power will reach $5.46 trillion by the end of the decade. It’s imperative for brands to get to know gen alphas and build strategies that responsibly harness their desire to learn, have agency, be creative, and be heard.



Living loyalty

It’s no longer about loyalty points—new innovations are rewarding people for how they live.



Lisia app

Lisia, a new Harvard Innovation Labs-backed super app, is rethinking loyalty. Cofounder Yessenia Vila describes it as “the first AI-powered [super app] that connects wellness and sustainability in one rewarding experience.”

In the Lisia app, user behavior contributes to a personal wellness score. This could include communities joined, influencer subscriptions paid for, marketplaces used (such as Mindvalley, Udemy, Calm, or Forbes), and interactions with the app’s chatbot. This unlocks access to a loyalty program that rewards lifestyle choices—the incentives include discounts or free products from fitness brands, a month’s free subscription to a meditation app, free lifelong learning events, and private sessions with an influencer in the space.

VML

"In the mid to long term, we aim to offer financial and insurance services tied to your wellness behavior," Vila tells VML Intelligence. "Benefits may include lower interest rates on loans [or] free home accident insurance."

She adds that, "Younger consumers are rewriting the rules of loyalty. Gen Z and millennials are digital natives with unlimited choices. They abandon brands that don't align with their values and remain loyal to those that do. Loyalty today is becoming a way to express identity and values, not just a tool to stretch spending power."

Actress Suki Waterhouse and podcaster Poppy Jamie, founders of the gratitude-sharing app With Gratitude, expressed a similar wish to connect behavior to rewards. Speaking to the *Times* in October 2025, Jamie shared how the app is looking at creating "tangible rewards such as free coffees for regular users. We're talking to some brands at the moment. I love this idea of, 'How do we reward people for looking after themselves?'"

Similarly, Copenhagen's CopenPay initiative rewards tourists for sustainable actions, as highlighted in the Incentivized good behavior trend in "The Future 100: 2025." Taking the train instead of flying or staying longer at a destination sees tourists earn rewards such as "a free lunch, a free boat tour, free bike rental, excursions or museum discounts," Visit Copenhagen says.

Retailers are rewarding behavior, too. In February 2025, UK luxury department store Selfridges unveiled the latest iteration of Selfridges Unlocked, described by the store as a membership program that "unlocks access to products, experiences, and services." The program is free to join, and sees the customer earn Keys not just when they



CopenPay initiative



Selfridges Unlocked membership program

spend money in store but also when they spend time, such as when they check in to certain in-store activities such as restaurants and concierge experiences. Selfridges chief operating officer Leonie Foster describes the program as "a globally unique membership proposition that rewards customers the more they shop and spend time with us."

> In the mid to long term, we aim to offer financial and insurance services tied to your wellness behavior.

Yessenia Vila

COFOUNDER, LISIA

Why it's interesting

The "2025 EY Loyalty Market Study" reported that of the 1,600 US consumers it surveyed, most (33%) feel only "moderately" engaged in the loyalty programs they participate in. These new behavior-first forms of loyalty create a compelling new way for brands to connect with consumers, based on the values that matter to them.

VML

64

Livestreamed shopping

Where entertainment meets instant gratification, a new generation is redefining how to buy.



TikTok Shop

Born out of lockdown boredom, livestreamed shopping has evolved into one of the most dynamic intersections of commerce and entertainment—TV shopping reimagined for the TikTok age. What began as a pandemic-era stopgap for isolated consumers has become a thriving format that's shaping how gen Z (and soon gen alpha) discovers, connects, and spends.

"The Future 100: 2021" spotlighted the rise of live commerce as part of the quarantine economy. Now that impulse has matured into a mainstream digital behavior, woven into everyday entertainment. The formula: a host or influencer broadcasts in real time, chats with viewers, and offers exclusive deals or product demos, creating a blend of intimacy, urgency, and authenticity that static ecommerce can't replicate.

VML

According to the *Wall Street Journal*, livestream shopping is attracting women across age groups who enjoy the "warm, chatty vibe of an actual boutique" while browsing from home. The appeal lies not just in convenience, but in connection; the sense of hanging out with a trusted friend rather than scrolling through a sterile product grid.

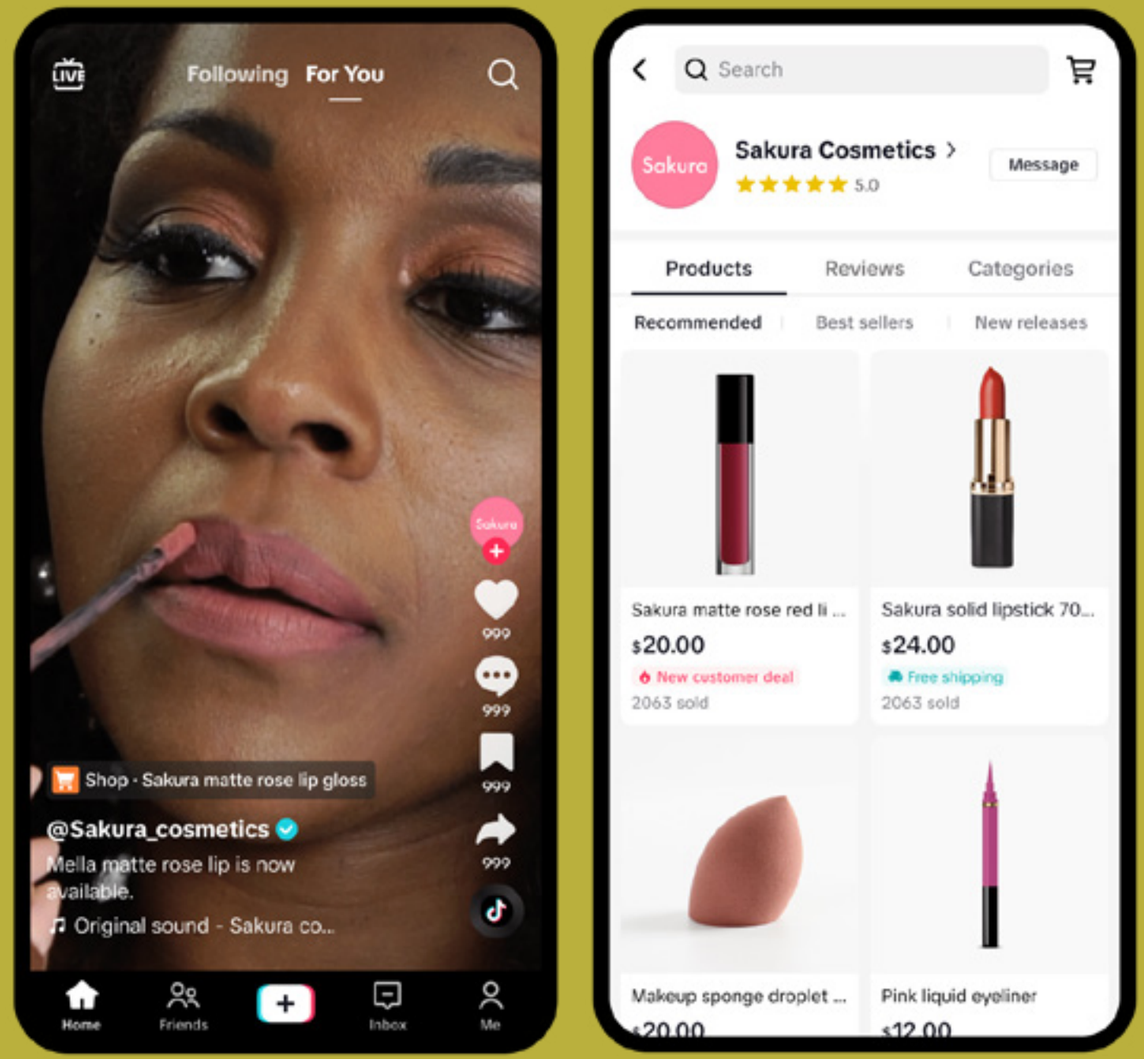
Platforms are racing to claim this next frontier. The *New York Times* reported that YouTube is aggressively expanding its livestreaming capabilities, aiming to turn its 2.74 billion monthly users into a shopping audience. TikTok has doubled down on its TikTok Shop model, integrating checkout and real-time promotions, while Xiaohongshu (Red) in China continues to dominate the "social-first retail" space, where livestreamers double as style icons and community leaders.

In China, the world's most advanced livestream market, Taobao and Douyin (China's TikTok) continue to pioneer hybrid formats, where creators host variety-show-style shopping streams complete with music performances, behind-the-scenes segments, and AR-powered try-ons. The efforts result in shopping as spectacle, where engagement drives conversion and charisma becomes currency.

However, as Chu Chen, head of Taobao Live's IP Operations, points out to VML Intelligence, livestreamed shopping has entered "an era of quality, where consumers are beginning to return to rationality and have clearer expectations for product quality and service."

Why it's interesting

For brands, it's no longer about selling products; it's about staging experiences that are as entertaining as they are shoppable, redefining how retail looks in a culture built on connection and immediacy.



TikTok Shop

65

Next-gen malls

Malls morph into cultural playgrounds for lifestyle and wellbeing.

House of Hype at Dubai Mall, UAE

VML



House of Hype at Dubai Mall, UAE

65

VML

Forget muzak, tired old food courts, and monotonous halls that all look the same. A new generation of destination malls is emerging, transforming vast spaces into cultural playgrounds where lifestyle and wellbeing experiences take center stage. There's latent appetite for this: 74% of global consumers say that "stores need to offer more than just products—they should strive to engage and entertain too."

Mall operators in the Middle East are pioneering this experiential approach, reducing transactional space in favor of community and experience zones that inspire visitors to dwell and return. This bodes well with the 86% of people who say "the great thing about physical stores is that they can engage all of my senses" and the 69% who see shopping as a social occasion. At least eight new malls will open in the United Arab Emirates and Saudi Arabia over the next couple of years, with lifestyle retail space in Riyadh and Jedda alone set to grow to more than 1.3 million square meters, according to Knight Frank.

At Dubai Mall, said to be the most visited destination on Earth, with over 111 million visitors in 2024, shoppers can get up close with sharks and other marine life at the Dubai Aquarium and Underwater Zoo, before skating in an Olympic-sized ice rink or immersing themselves in the 18 gaming, art, or content experiences at the House of Hype.

Naturally there is shopping too: Dubai Mall's Fashion Avenue hosts 150 global luxury brands, exclusive hospitality spaces, and branded cafés. Retailers such as the Chalhoub Group offer upscale services, including VIP spaces with concierge service, AI styling and try-on tools, and rapid delivery services. Alongside these fixtures, there are regular cultural festivals, live performances, and shopping events that serve up a continual roster of new reasons to visit. In October 2025, the mall hosted a world-class art exhibition featuring works by Picasso, Dalí, Warhol, Banksy, and Gus Van Sant.

In April 2025, Mall of the Emirates, also in Dubai, announced an AED 5 billion ($1.4 billion) investment to transform it into "a next-generation lifestyle destination." This upgrade will include the Seven Wellness Club, offering premium fitness, a spa, and recovery experiences. Culture forms part of the mix too, via the New Covent Garden cultural hub and 600-seat theatre, developed in partnership with Dubai Performing Arts Academy. "It's about creating new ways for people to connect, unwind, and be inspired, all in one destination," says Khalifa Bin Braik, CEO of mall owner Majid Al Futtaim Asset Management.

Lifestyle and wellbeing are also key to new malls in Saudi Arabia, a growing destination for luxury shopping. The Solitaire mall in Riyadh opened in March 2025 with a dedicated wellness wing featuring a gym, spa, and wellness center. Jawharat Riyadh Mall (which means "the jewel of Riyadh") followed in late 2025, featuring an artificial indoor volcano. With The Avenues (made up of nine districts covering an area the size of 50 soccer fields) expected to open in Riyadh in 2026, the era of Gulf malls is just getting started.

Why it's interesting

The mall is being reimagined as a destination that is less retail, more lifestyle. Brands and retailers must consider how experience, wellbeing, culture, and community-focused spaces that are non-transactional could be leveraged as part of a strategy to enhance their overall impact, sales, and growth.

66

Branded financial literacy

Brands tap playfulness and star power to close the financial literacy gap.



Timothée Chalamet for CashApp

From celebrity-fronted campaigns to gamified lessons, brands are getting creative in a mission to boost global financial literacy.

There is a significant unmet need for education. According to data from finance-focused digital media platform CoinLaw, only 27% of adults globally were considered financially literate in 2025, while 35% of gen Z self-reported low confidence in managing day-to-day finances. Accenture's "Banking Consumer Study 2025" found that 88% of gen Z and millennials want to deepen their financial knowledge. Yet a study from youth-focused credit card company Greenlight found that US working parents rank financial literacy as the hardest life skill to teach their children.

VML



Starling Bank's partnership with Arsenal FC

In recent years, so-called finfluencers on TikTok and Instagram have stepped in to fill the gap, but a 2025 crackdown by the UK's Financial Conduct Authority (resulting in the shutdown of 650 social media accounts and 50 websites offering unauthorized advice) highlights the importance of dependable, trustworthy advice.

Acknowledging that financial literacy is a crucial tool for resilience in tough times, brands are stepping up to offer education, with many borrowing some celebrity stardust to drive interest. In July 2025, Oscar-nominated actor Timothée Chalamet fronted an ad for financial services platform CashApp, which comedically highlights how its services have benefits for all generations. Similarly, Brazilian digital bank C6 invited supermodel turned businesswoman Gisele Bündchen to promote its C6 Yellow digital account for children and

teens, which includes a suite of educational tools aimed at families. We could even see the first celebrity-led financial venture, with YouTuber MrBeast filing a trademark application for his own financial services app in October 2025.

Other financial brands are tapping unexpected and playful partnerships to help demystify money. Starling Bank, for example, is working with Arsenal FC to use football analogies to explain financial concepts in a video series, while, in Peru, Banco de Crédito del Perú launched the Magic Guinea Pig Circus, where youngsters learn about budgeting from circus performers.

This trend also offers opportunities for non-financial brands to educate their younger consumers. Global beauty brand Elf has launched its own financial literacy game on *Roblox*. "Gen Z would rather talk about literally anything other than money or debt—so we flipped the script," says Patrick O'Keefe, the brand's chief integrated marketing officer. "We created *Fortune Island: Earn. Learn. Flex.* to equip our community with the skills and swagger to be their best Elf selves."

Why it's interesting

Amid a widening financial literacy gap, brands are stepping up as educators, using playful approaches to demystify a daunting topic for a wary public. More than just a public service, this is a route to brand trust and loyalty via collective financial resilience.



Ephemeral retail

Short-lived spaces, long-lasting impact.

A new wave of retailers is embracing ephemeral retail—highly curated, short-lived physical spaces designed not to sell inventory, but to shape meaning. Unlike traditional pop-ups, these are aesthetic, conceptual environments that last weeks or months, not days, and operate as cultural showcases where brands can explore narratives, experiment with form, and cultivate emotional resonance. Ephemeral stores are temporary by design but intentional in execution: part gallery, part laboratory, part theatre.

Architectural studio Snøhetta's new 113 Spring concept in New York exemplifies the shift. Conceived as a "retail lab" rather than a store, the SoHo space features modular walls, customizable lighting, and sculptural display plinths that allow brands to completely reinvent the environment with each residency. Snøhetta calls it "a platform for storytelling," a place where experimentation is the product. Launched in November 2025, the space will feature rotating themes that change every three to six months.

In Shanghai during the 2025 May Day holidays, Ugg transformed Tank art center into an open-air Solar Human Charging Station, with a week-long sensory installation that blended relaxation zones, motion-activated solar panels, and sun-powered product displays. Designed as a wellness-meets-retail experience, it recast the brand's California warmth into an architectural mood.

Italian designer Antonio Marras created a poetic, dream-like "ephemeral house" during Milan Design Week in April 2025, filled with handcrafted objects, textiles, and one-of-a-kind garments arranged as living tableaux rather than on merchandise racks. In New York,

Louis Vuitton opened a temporary ephemeral store on Greene Street while renovating its flagship. Rather than feeling like a placeholder, the space serves as a narrative extension of the brand, with curated edits, archival pieces, and scenographic installations.

These experiences are landing at a moment when physical retail must do more than display products. Seventy-four percent of global shoppers say stores should "entertain and engage," 86% say the power of physical retail lies in engaging all five senses, and 76% still prefer shopping in person despite advances in digital commerce. Fleeting, artistic, and sensory, ephemeral stores speak directly to that desire.

As Ghalia Boustani, an ephemeral retailing specialist, told *Retail Focus*, "Today's luxury brands are not just selling handbags, fragrances, or tailored jackets. They're offering moments—short-lived but highly curated experiences that leave a long-lasting impression."

Why it's interesting

Ephemeral retail gives brands a low-risk, high-impact way to build culture: testing new aesthetics, dramatizing product worlds, and deepening emotional loyalty without long-term real-estate commitments. These temporary spaces generate urgency, scarcity, and storytelling power, proving that sometimes the most unforgettable retail is the kind that disappears.

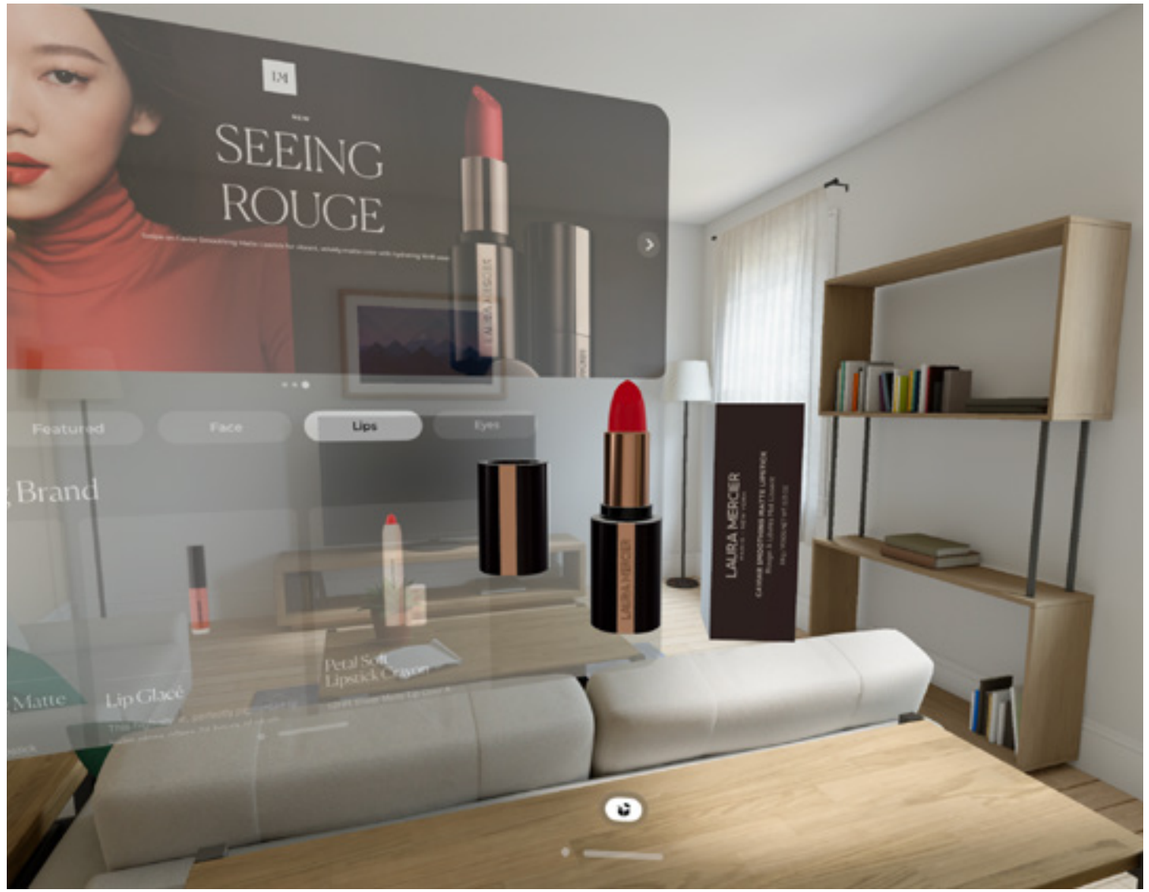


113 Spring concept by Snøhetta. Courtesy of Hanna Grankvist

68

Acommerce

AI wants to be your shopping assistant.



Obsess 3D shopping platform. Courtesy of Napster

Consumers are getting comfortable using AI assistants to streamline tasks and receive personalized recommendations. According to PWC's 2025 CPG survey, 40% of consumers expect to use AI for comparison shopping by 2030. But when it comes making purchases, there are still some barriers. While 33% globally are comfortable with an AI agent planning their grocery shopping, only 25% would let AI place the order, and just 22% would allow it to make a purchase, suggesting many may need reassurance on safety or that AI is prioritizing their interests.

VML

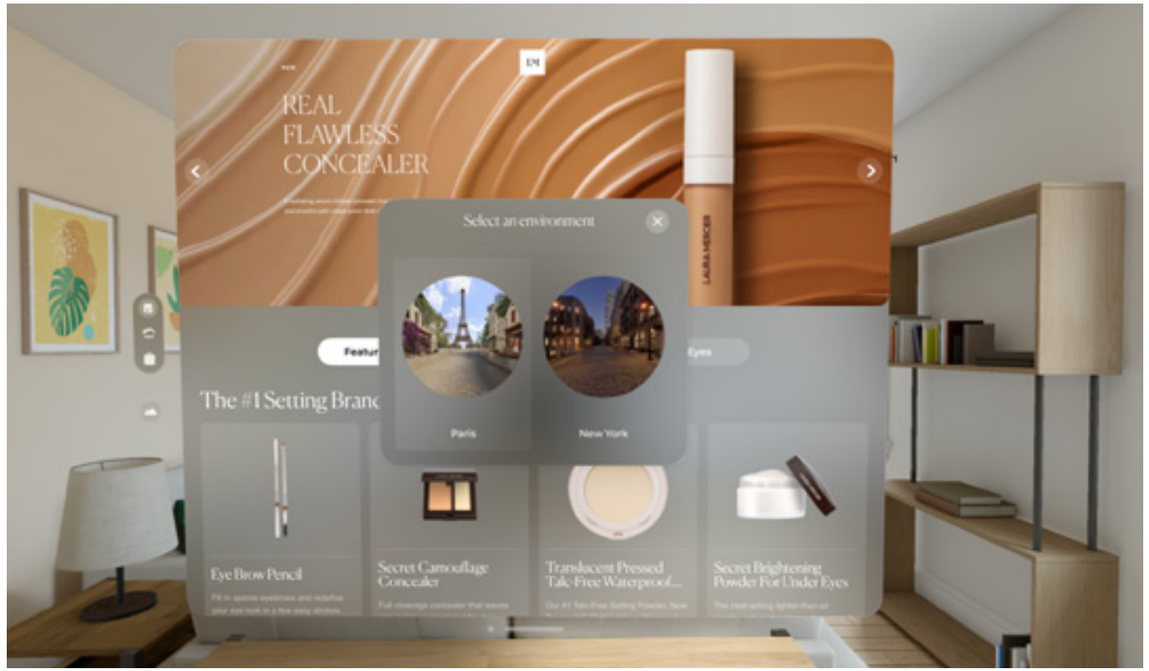
Currently the shift is toward agents that can make intelligent recommendations—AI-powered chat interfaces that guide discovery and product selection but leave the final decision and payment to the consumer. Agentic commerce (acommerce) takes this one step further, placing orders and making payments. Sam Huber, global president of Napster, the innovation company that acquired 3D shopping platform Obsess, tells VML Intelligence that the AI agent will be a differentiator, which "is going to get better, and it's actually going to help you as a retailer sell more products by asking the customers the right question at the right time."

Tech companies are closing the gap between discovery and purchase, with OpenAI leading the charge. Its Instant Checkout feature allows shoppers to buy directly within ChatGPT, turning inspiration into transactions. Early rollouts include Etsy listings, with Shopify merchants next in line. To power a seamless experience, OpenAI is partnering with PayPal and Stripe, with in-chat payments slated to go live in 2026.

Behind the scenes, OpenAI has open-sourced its Agentic Commerce Protocol (ACP). A universal language for shopping, ACP allows merchants to make their products visible inside AI apps, meaning millions of items could be discoverable and purchasable through AI assistants, rather than ecommerce sites. Building on this, ChatGPT is getting a new suite of agentic skills, which will enable it to build recipe plans and shopping lists or craft detailed trip itineraries. For now, the assistant asks for permission before taking meaningful action, but as users grow more comfortable with delegation, greater autonomy will follow.



Obsess 3D shopping platform. Courtesy of Napster



Obsess 3D shopping platform. Courtesy of Napster

These tools are also appearing in physical stores. You can now chat with your grocery cart, for instance. Instacart's AI Cart Assistant, adopted by Kroger in November 2025, allows shoppers to build lists and meal plans, and track budgets by chatting with its bot. Similarly, FairPrice in Singapore has partnered with Google Cloud to offer recipe suggestions and ingredient pairings via shopping carts.

Brands are also launching their own shopping assistants. Ralph Lauren's AI styling companion Ask Ralph makes personalized outfit recommendations for consumers based on preferences and occasion. LVMH announced at Cannes Lions 2025 that it is developing agents in partnership with Google. Third-party tools such as fashion agent Daydream are also providing inspiration and, for the most part, the final decision is up to the shopper.

Amazon is testing features that go further, such as its Buy for Me tool, which completes purchases on the shopper's behalf. But so far, autonomous shopping remains the exception. On a recent earnings call, Pinterest CEO Bill Ready suggested that "this notion of an agent just going and buying all the things for you, without you doing anything, I think that's going to be a very, very long cycle for that to play out."

Still, the payment infrastructure is being built for the autonomous future. Mastercard has unveiled Agent Pay, which allows "verified AI shopping agents to make transactions on behalf of consumers and businesses," while Google's Agent Payments Protocol launched with more than 60 merchants and financial institutions.

Looking ahead, AI agents could do more than just eliminate friction, according to Huber, who envisions personalized, virtual 3D shopping experiences for every customer—which could ultimately make traditional ecommerce sites obsolete. "Just like you've seen AI-generated videos, you can now generate an entire store tailored to you," Huber says. "In the future they will be fully generated by AI, which means that the concept of an ecommerce website actually disappears completely." (See Generative realities, page 46)

Why it's interesting

Acommerce represents a significant shift in the customer journey, changing how consumers interact with brands and make purchases. On the path towards autonomous or anticipatory commerce, brands will need to ensure that their products are not just surfaced but recommended by AI, as well as consider building their own agents.



Heritage reboot

Brands are discovering that their most powerful asset isn't the future—it's the past.



Le Dix fragrance. Courtesy of Balenciaga

Brands are mining their pasts, celebrating their heritages, and returning to their archives with strategic clarity. Kathleen Adams, professorial research associate at SOAS, tells VML Intelligence that, "nostalgia for simpler times enhances the appeal of brands with a long heritage."

Balenciaga made a deliberate pivot under the helm of its new creative director Pierpaolo Piccioli, reviving its original 1947 Le Dix fragrance by Cristóbal Balenciaga to retell its rich history. Similarly, Bottega Veneta's new creative director also looked to the past to appeal to



GapStudio campaign by Mario Sorrenti. Courtesy of GapStudio

a contemporary audience. Louise Trotter re-emphasized the Italian brand's legacy for exceptional craftsmanship by highlighting Bottega Veneta's signature 1975 Intrecciato weave in her debut spring/summer 2026 collection.

Jing Zhang, founder and editor-in-chief of luxury magazine *Luxe/Detour*, tells VML Intelligence: "It's only natural, since this is one rare and immutable part of their luxury brand story that is impossible or very difficult to replicate." She notes that brand heritage "becomes a key selling factor, value indicator, and competitor differentiator."

The archival impulse is part of a wider cultural current acknowledging heritage as a vital source of inspiration for the future. The Metropolitan Museum of Art's Costume Institute launches its Costume Art exhibition in spring 2026, with an inaugural show exploring 5,000 years of "the dressed body" at its new Condé M Nast galleries.

Under the creative direction of Zac Posen, Gap is re-embracing cultural relevance with stars such as *Adolescence* actor Owen Cooper sporting a custom premium-label GapStudio suit on the red carpet at the Emmy Awards. The brand is also making a push to expand into beauty and accessories in an evolution that remains faithful to its core DNA.

In the beauty sector, Revlon, following its 2023 emergence from bankruptcy, has started to revitalize Elizabeth Arden—prioritizing this brand in its portfolio first because the gravitas of its storied history will garner customers in the present. Iconic heritage brands synonymous with quality and longevity are newly resonating with a

> “In an age of disposable trends and digital sameness, a brand’s heritage has become its greatest superpower. It’s the one story that can’t be copied, the one source of genuine authenticity.”

Bas Korsten

GLOBAL CHIEF CREATIVE OFFICER FOR INNOVATION AND COCHIEF CREATIVE OFFICER FOR EMEA, VML

young audience. “In an age of disposable trends and digital sameness, a brand’s heritage has become its greatest superpower. It’s the one story that can’t be copied, the one source of genuine authenticity,” Bas Korsten, VML’s global chief creative officer for innovation and cochief creative officer for EMEA, tells VML Intelligence. “The trick is to treat your history not like a museum piece, but like a debut album on vinyl: a reminder of the raw, unfiltered magic that made people fall in love with you in the first place.”



GapStudio campaign by Mario Sorrenti. Courtesy of Gap Studio

Why it’s interesting

Brands are discovering their own histories are their competitive advantage—stories that cannot be replicated by competitors or algorithms.

VML



Three thriving store formats

Tough trading conditions and the cost-of-living squeeze are prompting a radical rethink of the retail landscape. While shoppers seek value, retailers experiment with more agile formats to reach the prudent customer.

Off-price retail

The thrill of the treasure hunt is on as off-price retail graduates from fallback option to mainstream choice for savvy shoppers. According to the "Business of Fashion-McKinsey State of Fashion 2025" report, almost three-quarters (70%) of customers plan to purchase from outlets or off-price retailers in the next 12 months, even if their budget increases. TJX, the parent company of TJ Maxx and Marshalls, enjoyed a 7% net sale increase in the second quarter of 2025 and now plans to open 130 new stores. Department stores are leaning more heavily into off-price as traditional offerings falter. Macy's announced it would be increasing the presence of its Backstage off-price brand at a time when it will also close 150 underperforming stores. Similarly, in June 2025 Nordstrom opened its 277th off-price Rack store, with CEO Erik Nordstrom referring to the format as "a growth engine for the company."

Warehouse stores

The humble bulk buy is having a major moment. Driven by the desire for value and a need for resilience, shoppers are flocking to American-style warehouse stores. In the United States, where 56% of consumers hold a warehouse club membership according to Mintel, Costco, BJ's, and Sam's Club have made revenue gains of around 50% from 2020 to 2024, with the latter doing so without opening any additional stores. According to Mintel's research, a key driver is "bulk savings on essentials," but beyond the perks, the process of stocking up can be reassuring—a tangible act of resilience in tough times. The surge is also notable in China, where Walmart-owned Sam's Club is one of the fastest growing foreign retailers in the country, and membership income is soaring (up by more than 40% in the first quarter of 2025, according to the *Financial Times*).



Above and opposite: Warby Parker at Target shop-in-shops

Agile retail

For brands looking to expand into new geographic markets, a new store lease can be costly and finding the right space can take time. A more agile approach is emerging that allows for quicker, less risky expansion. Ikea is experimenting with a shop-in-shop model in complementary retail locations, starting with kitchen-planning studios in 10 Best Buy consumer electronics stores in Florida and Texas. Tolga Öncü, retail manager at Ikea operator Ingka, says the strategy will allow Ikea to "accelerate our reach, especially in big mature countries." For the host retailer, it can drive buzz, help attract new customers, and maximize revenue from floor space. Eyewear brand Warby Parker has taken a similar approach, opening five shop-in-shop locations in Target stores, with more to follow in 2026. And Space NK has plans to bring K-beauty to its UK offer, with 30 shop-in-shops in the works from etailer Soko Glam.



71

Luxury

80

VML

71

Monumental luxury

Luxury goes beyond awe to command entire worlds of its own.



Louis Vuitton's The Louis store in Shanghai, China. Courtesy of Amor Mao

After a decade of experience-led retail, luxury is entering a new phase: monumental luxury. No longer content to simply impress, brands are now building physical worlds of scale and spectacle; spaces that merge architecture, art, and commerce into cultural landmarks. Building on Awesperiential retail in "The Future 100: 2025," the next evolution amplifies awe into architecture-as-brand—destinations so grand they redefine how luxury feels, not just how it looks. "Monumental luxury lies in immersion, experience, emotion, and differentiation," Jing Zhang, founder and editor-in-chief of luxury magazine *Luxe/Detour*, explains to VML Intelligence.

At Cannes Lions 2025, LVMH's global chief brand officer Mathilde Delhoume-Debreu articulated the group's ambition: "We must

delight at every experience, with events we could not even imagine are possible. If we just meet customer needs, we are dead." It's a philosophy visible across the conglomerate's expanding footprint.

Following the latest Louis Vuitton flagship in New York, which featured a temporary façade designed to resemble giant LV travel trunks, the brand's The Louis store in Shanghai merges high fashion with maritime fantasy, turning shopping into an odyssey. Shaped like a ship, the 1,600-square-meter, three-story space has become a local landmark. According to *People's Daily Online*, in the month after the store opened in June 2025, the HKRI Taikoo Hui shopping area, where The Louis is located, attracted an average of 80,000 to 100,000 visitors per day, with up to 170,000 visitors on weekends. The sales of surrounding commercial entities have increased by an average of 20% to 30%.

In Seoul, eyewear and lifestyle brand Gentle Monster is redefining what a flagship can be. Its 14-story Haus Nowhere complex in Seongsu-dong is both headquarters and experiential museum, complete with a 13-meter animatronic dachshund named Sunshine that breathes and stirs as visitors enter. Designed to feel like a living organism, the space hosts installations by artist Max Siedentopf, an AI-powered photo booth that mirrors guests' faces onto digital creatures, and a Nudake dessert teahouse where pastries resemble sculptures. Opened in September 2025, the store's architecture fuses brutalist concrete with futuristic motion, embodying the brand's ambition to turn physical space into story and myth.



Haus Nowhere in Seoul, Korea. Courtesy of Gentle Monster



Haus Nowhere in Seoul, Korea. Courtesy of Gentle Monster



Haus Nowhere in Seoul, Korea. Courtesy of Gentle Monster

In the Middle East, Chalhoub Group's Solitaire Mall in Riyadh pushes this ethos to civic scale. Shaped like a geode, the mall's crystalline interior features a chandelier of over 44,000 crystals, skylights, waterfalls, and landscaped courtyards. Part retail destination, part sensory journey, it opened to the public in February 2025. The ambition, as CEO Michael Chalhoub says on the group's official website, is "creating bespoke, immersive, and world-class shopping experiences."

Zhang believes that today it takes a lot more for brands to impress: "Alongside the rise of the experience economy in luxury, brands have needed to offer an immersive brand world to their clients. Today, brand worlds trump brand logos." Companies such as Louis Vuitton "are going bigger, bolder, to stand out with these installations," she adds.

This new wave of monumental luxury isn't just about grandeur; it's about permanence. As physical retail competes with digital convenience, luxury brands are reasserting their presence in stone, light, and spectacle. Their stores are no longer points of sale; they are temples of identity, designed to inspire awe, pilgrimage, and digital virality.

Why it's interesting

Monumental luxury signals a bold countertrend to minimalism: excess reimagined as art and architecture. As global consumers seek emotional resonance over ownership, brands are investing in spaces that deliver wonder at a civic scale, blurring the lines between flagship, gallery, and monument to embody the new grandeur of the luxury experience.

72

Decadent dining

Regal restaurant experiences blend opulence, theater, and nostalgia for an elaborate feast.



Cakes and Cocktails Fit For a Queen at The Berkeley in London, UK. Courtesy of The Berkeley

The dining room glitz and glamor of bygone days are making a comeback as restaurants double down on the razzle dazzle. Whisking diners into 18th-century decadence is the UK's Berkeley hotel in London, which marries cake, cocktails, and couture in its Marie Antoinette-inspired menu, Cakes and Cocktails Fit For a Queen. In a collab with luxury shoemaker Manolo Blahnik, the menu includes the Chocolate Flower dessert and the Versailles Spritz cocktail in homage to the last queen of France, who may or may not have said "let them eat cake." Running until March 22, 2026, the experience is set in The Snug, an intimate blush-pink hideaway within the hotel bar.

In South Delhi, Vinci Ristorante channels old-school cinematic glam, with *Elle Gourmet* likening the restaurant's elegantly designed interiors to "a scene out of an Italian movie." Fitted with vintage lamps, emerald and ivory accents, and strategically placed palm trees, the space radiates sophistication. New York's celebrity favorite Italian-American restaurant Carbone made its UK debut in London's Mayfair in September 2025, giving guests a reason to dress up for dinner. The venue's marble entrances and opulent American mid-century interiors set the stage for diners, with *Vogue* describing the aesthetic as "old-world glamour and bolshy decadence." Guests can expect to be courted by tuxedo-clad captains who theatrically add the final touches to dishes as they arrive at the table.

Across the Atlantic, luxury hotel Faena New York features the lavish La Boca By Francis Mallmann restaurant. Located on the ground floor, the maximalist dining room is filled with art, a centerpiece chandelier by the late Alberto Garutti, and red velvet banquettes. The restaurant "invites guests to slow down, savor, and step into a world where every detail is touched by memory, myth, and meaning." Close by, in the heart of Greenwich Village, Chateau Royale exemplifies

> "Nostalgia spikes upwards during times of uncertainty and crisis."

Jing Zhang
FOUNDER AND EDITOR-IN-CHIEF, LUXE/DETOUR

classic French dining. Opened in July 2025, it is co-owned by Cody Pruitt, who summed up the chic approach in an interview with *Resy*. "I wanted to do something a little more soigné, buttoned up, and elegant," he said, adding that the premise was "to emphasize a certain elegance in dining that's been forgotten."

Jing Zhang, founder and editor-in-chief of *Luxe/Detour*, tells VML Intelligence that she has noticed "nostalgia spikes upwards during times of uncertainty and crisis." She adds that "particularly in luxury or for special events, there's this real desire to be transported to bygone eras right now," offering an outlet of escape and respite.

Why it's interesting

Restaurants are transporting old-world fine dining glamor to the modern-day dining room. Adding theatrics, a decadent menu, and gilded interior design, the stage is set for a meal to remember.



Beauty longevity tech

The sweet spot between beauty tech and wellness is empowering consumers to optimize their skin at a cellular level.

Advances in longevity tech are upending how we approach aging, offering an alternative to reliance on miracle skincare products.

"We're understanding the concept of longevity better and where it fits into how we talk about anti-aging," beauty journalist and expert Caroline Brien shares with VML Intelligence. "Rather than using beauty tools to try and undo aging, we're embracing where we are in life and optimizing it on every level."

Unveiled at CES 2025, L'Oréal Groupe's Cell BioPrint is at the forefront of a revolution in skin intelligence. The portable device analyses skin in five minutes to reveal the user's biological age and predict ingredient reactivity to products such as retinol, as well as identify potential issues such as enlarged pores even before they appear.

"Our Longevity AI Cloud™ analyzes over 260 skin aging biomarkers to predict the impact of active ingredients and create the most potent solutions," Guive Balooch, global managing director of augmented beauty and open innovation at L'Oréal Groupe, tells VML Intelligence. "This represents a fundamental shift from chasing youth to enhancing the quality of life. We deliberately partner across industries—water tech, light science, biotech—to combine our beauty expertise with outside capabilities to solve tensions beauty alone couldn't."

The beauty conglomerate's corporate venture fund Bold was among investors in a $20 million cash injection secured by biotech company Debut, which will enhance its capability to screen over 50 billion ingredients and 99.999% of unknown molecules, thereby rapidly progressing skin longevity research. Able to predict better ingredients faster, thanks to Debut, beauty brands will be able to outsource formulation innovation at scale and cut heavy costs in R&D investment.



L'Oréal Cell BioPrint. Copyright L'Oréal Groupe

Spanish brand System Skin has developed proprietary technology resulting in a product that promotes DNA repair while optimizing the entire skin system, including mitochondria and adipose tissue. Balooch says that "the real game-changers will be those who can combine deep longevity science with technology."

"We deliberately partner across industries—water tech, light science, biotech—to combine our beauty expertise with outside capabilities to solve tensions beauty alone couldn't."

Guive Balooch

GLOBAL MANAGING DIRECTOR OF AUGMENTED BEAUTY AND OPEN INNOVATION, L'ORÉAL GROUPE

Why it's interesting

Increasingly personalized technologies are enabling consumers to take a proactive and preventative approach to optimizing skincare and overall longevity.

VML

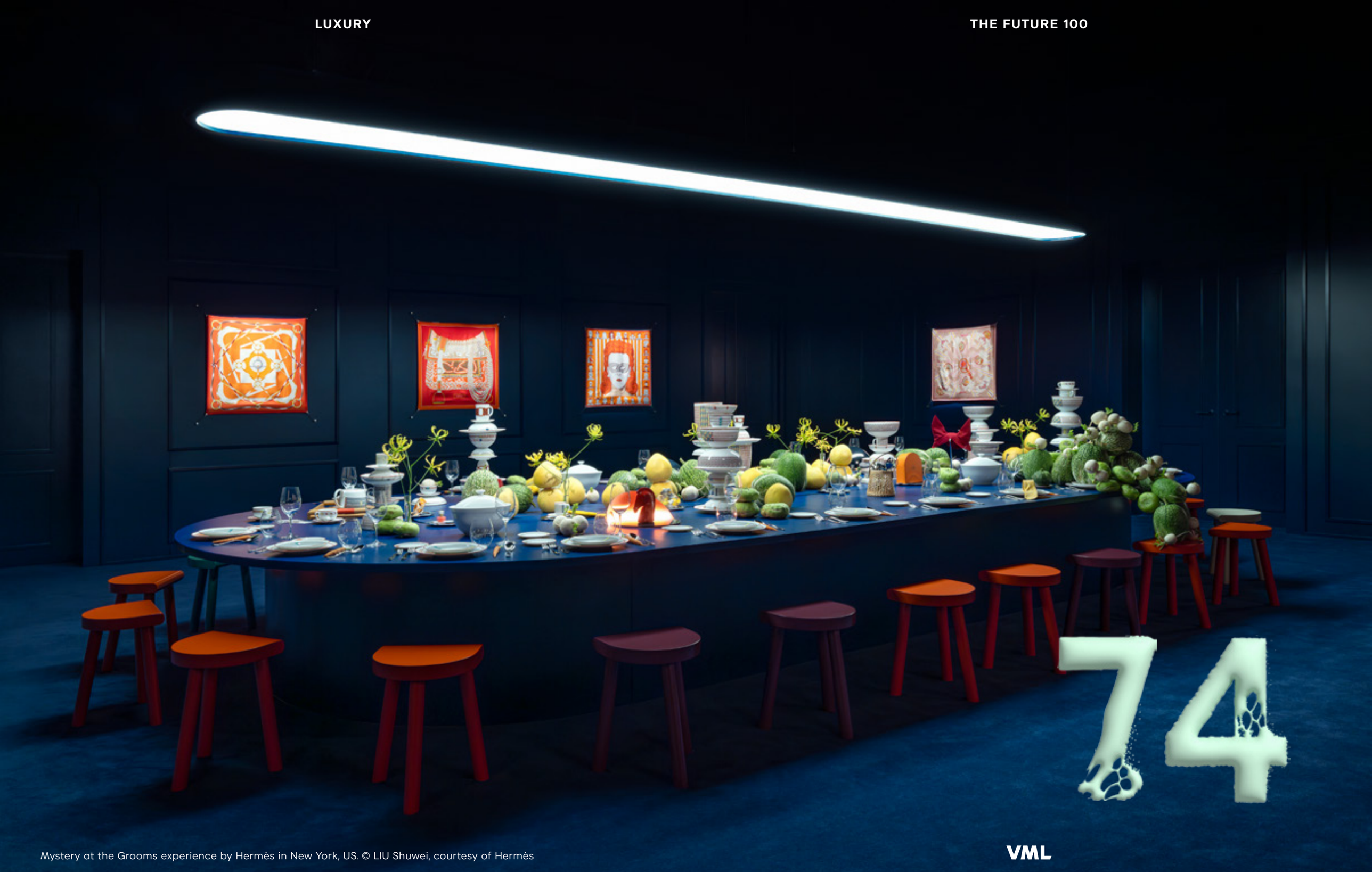
74

Luxury scavenger hunts

Brands blend mystery, adventure,
and challenge in their latest luxe experiences.



Mystery at the Grooms experience by Hermès in New York, US. © LIU Shuwei, courtesy of Hermès



Mystery at the Grooms experience by Hermès in New York, US. © LIU Shuwei, courtesy of Hermès

Hermès rallied stylish detectives for its latest experience, Mystery at the Grooms, in an installation on New York's Pier 36 in June 2025. Designed as a series of immersive rooms to spotlight the brand's designs, the space was conceived as a home where equestrian grooms lived with their horses, who had all gone missing, with the task being to find them. A cross between an escape room and treasure hunt, the experience was woven together by Hermès' chic touch. Having debuted in Shanghai, the experience is due to appear in Tokyo, Singapore, and Paris after New York.

Luxury travel creation company Ariodante uses a real historical mystery as the starting point for The Queen's Lost Diamonds—its fully immersive, player-led "anti-game." Due to take place in Paris in spring 2026, it promises to be a one-of-a-kind experience where each player writes their own story based on their own choices. The site asks would-be protagonists to "forget everything you think you know about games and even immersive experiences," and embrace the idea they can only count on themselves. To take part in the game, prospective players must apply and undergo a selection process. "The real luxury here is the creation, the uniqueness, and the transformative experience," Ricardo Araújo, founder and CEO of Ariodante, tells VML Intelligence. "The luxury is living an experience that has been in the making for over three years, that no one will ever experience again."

Offering immersive and unique experiences for those on yachts, Luxury Treasure Hunts was created by TV producer Charlie Moretti in 2021. Among the latest experiences the company has crafted are a quest through Florence's historic streets; a treasure hunt in Antigua; and a Viking-inspired experience that the company will debut in Norway.



Luxury Treasure Hunts experiences. Courtesy of George Diakos

Moretti tells VML Intelligence that what lies behind the appeal of these experiences for a luxury clientele is "a quest for authentic feelings. And I think from a young age, the idea of treasure, pirates… it's a simple idea of, 'You follow the map, you follow the riddles, and then you get the reward'." He also notes that the immersive nature of the experience is what draws the brand's clientele, who disconnect from digital devices. The treasure hunt encourages teamwork where adults and children both have their hero moments in the narrative. Moretti adds that the company works with psychologists "to get the family dynamic working."

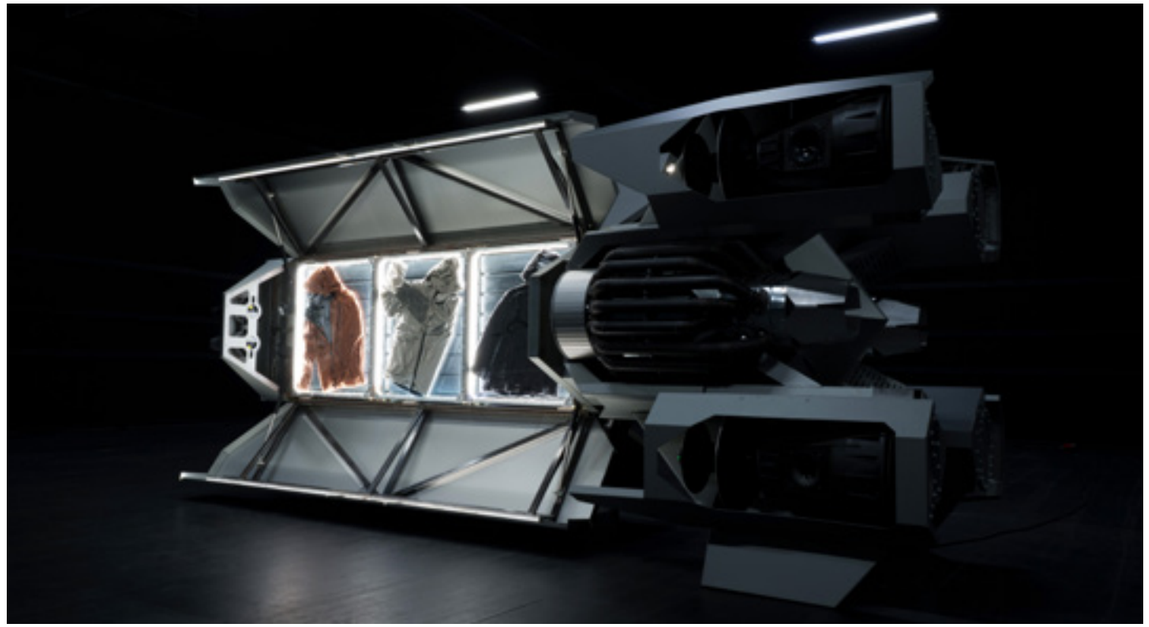
Why it's interesting

Sixty-one percent of people agree luxury brands are better at creating one-of-a-kind brand experiences. Now more than ever, luxury is about money-can't-buy experiences rather than showing off goods, and the stage is set for luxury houses to leverage their heritage to create memorable and interactive storytelling experiences.

75

Dystopic luxe

As global anxieties persist,
affluent consumers invest in reassurance.



Vollebak Spaceshop pop-up. Courtesy of Vollebak

In recent years, several TV shows and movies have depicted subterranean societies that have escaped apocalyptic scenarios, from nuclear war (*Fallout, Silo*) to climate catastrophe (*The End We Start From*) or both (*Paradise*). Yet survival facilities like these are anything but fictional and their construction is on the rise, driven by growing demand from the super-wealthy, from CEOs to celebrities.

Deluxe survival structures—dubbed "apocalypse insurance" by some—are designed to protect against every imaginable threat, from geopolitical disruption and natural disaster to pandemics, societal unrest, and even risks from AI. As highlighted in Disaster-proof destinations, in "The Future 100: 2020," the numbers prepping for cataclysmic scenarios are rising. In October 2025, Ron Hubbard, CEO of US-based Atlas Survival Shelters, told *The Week* that spiraling fears of unrest have tripled sales of his bunkers since 2020.

Luxury architect-designed bunkers go way beyond basic needs, ensuring that residents survive in style with every amenity at their disposal. Think wine cellars, gallery spaces, private cinema suites, and spa facilities. US company Safe, which creates bespoke fortified environments, is building a luxurious, state-of-the-art fortress complex in Virginia, near Washington, DC as part of its global collection of shelters under the Aerie brand. The shelter will be able to accommodate more than 600 of the country's wealthiest individuals in the event of disaster. Residents who can afford the price tag of up to $20 million will have access to upscale amenities including fine dining, swimming pools, rock climbing, and healthcare facilities.

Survival Condo is a former missile silo in Kansas that has been converted into a luxurious space appointed with a swimming pool, climbing wall, movie theater, and bar. Units cost up to $3 million. Founder Larry Hall, an ex-government contractor, tells VML Intelligence that clients' concerns center on possible conflicts, terror attacks, or pandemics. "We see periodic increases in interest in our bunkers that mirror global concerns," he explains. "Covid was a good example and, during the past nine months, the election and specific global hot spots support that observation." Typical clients tend to be "very successful people" with families, but Hall is now observing rising interest from business owners seeking "a hybrid, nuclear-hardened bunker with several floors, a backup data center, and luxury living quarters for the company owners."

A mindset of preparedness is also fueling innovation in the clothing space. Cult fashion brand Vollebak uses ultra-advanced materials to craft technical garments for an unpredictable future, on Earth and beyond. In June 2025, the brand launched Spaceshop, a hybrid pop-up store and space delivery vehicle that brought to life the brand's





Above and above top: Safe bespoke fortified environments



Vollebak Electromagnetic Shielding Bomber. Courtesy of Vollebak

mission to design for extreme environments, including those humans are yet to inhabit. A selection of Vollebak's gear could be found onboard, including the Electromagnetic Shielding Bomber, a luxury anti-surveillance jacket crafted from the same NASA-developed EMC shielding technology used in the Mars Rover.

A waiting list is now open for the piece, which is not only antibacterial due to embedded silver, but can also block radio waves and microwaves, and includes a Faraday cage pocket to protect devices. It represents a first step toward radiation-blocking clothing and perfectly embodies a fusion of tech, luxury, and preparedness.

Luxury for future survival was also on display at Milan Design Week in April 2025, where British design studio Layer unveiled six futuristic concepts. These included Collect, a sculptural rain catchment tower that gathers and purifies water, and Keep, an elegant glass vessel for preserving food. Layer's collaboration with Scandinavian brand Muuto yielded an ingenious lamp powered by abundant algae oil, while its partnership with British fashion brand Raeburn produced the Shield jacket, designed to flex in the face of environmental extremes, and including a face mask for protection against dust storms.

Why it's interesting

The definition of luxury is evolving to encompass safety and security as the ultra-rich shore up protection in an uncertain world. Brands that can deliver a sense of reassurance and control will appeal to affluent consumers who are willing to invest in self-sufficiency and preparedness.



Deluxe dating

Haute matchmakers are making
the dating process seamless—at a price.

The June 2025 release of zeitgeisty studio A24's film *Materialists*, in which Dakota Johnson plays a high-end New York matchmaker, writ large how one of the oldest forms of dating is getting reimagined for a new era.

Eschewing the instant gratification, often ultimately disappointing, of the dating app experience, elite matchmaking services are instead offering a slow-burn, curated approach.

One such service, Berkeley International, has seen a 35% rise in membership over the past year. The company's global director, Mairéad Molloy, tells VML Intelligence that her clients are turning to matchmakers as they're "looking for something that feels real again, something thoughtful, human, and respectful," adding that people are "exhausted by apps, endless messaging, ghosting, and surface-level connections." The agency is seeing "a very real shift" toward people "wanting meaningful relationships again. They want to feel genuinely seen and understood, and they're realizing that relying on technology to find love often leaves them more disconnected than ever."

A service dedicated to finding such a connection comes at a price. Berkeley International's fees start at £15,000 (around $20,300) for a standard membership, while for complex or international searches the company offers a tailored service for which fees are "bespoke." Molloy's clients, she says, see the cost as "a personal investment not just in meeting someone, but in doing it the right way. Our clients aren't paying for volume or gimmicks; they are paying for professionalism, experience, and a service that is completely designed around them."

Other names among the growing number of elite matchmakers include Hamilton Rigg in London, founded by Olivia Rigg, with fees starting from around £60,000 ($80,400). *Tatler* writes that the company caters to "entrepreneurs who outsource many elements of their lives and see matchmaking as a logical way to manage their love lives." Jim Justice, CEO of US matchmaker The Standard Agency, told *Jetset* magazine that "a lot of services will introduce you to people and leave it at that. We're invested in making sure you're ready when the right person shows up. That means coaching, styling, even helping someone rebuild confidence. The introduction is just the beginning."

Among respondents to "The Future 100: 2025" survey, only 22% of those who are looking to date use a dating app to meet prospects, whereas 42% say they are doing so via friends or family—suggesting traditional matchmaking is set to permeate more widely. "People from all walks of life are realizing that the current dating landscape is not working," says Molloy. "Emotional intelligence—really understanding someone and what they need—is going to become the most valuable part of what we do."

Why it's interesting

People are finding value and meaning in connections made by humans and are willing to invest. Molloy believes that "we are going to see more and more people stepping away from the noise and turning to services that feel more human, more thoughtful."



The Materialists. Courtesy of Atsushi Nishijima/A24



Luxury adaptation

The new luxury strategy is accessibility.

Luxury brands are adapting to a challenging landscape by going broader: new products, lower barriers to entry, and a play for wider appeal.

The global luxury market is enduring its most challenging trading period for a decade. Bain & Co expected the market for personal luxury goods to shrink between 2% and 5% in 2025, its worst performance since the financial crisis of 2009, while the Chinese luxury market, a driver for global luxury sales in recent times, declined by 18% to 20% in 2024. Financial pressures are driving consolidation, as underlined by Prada's December 2025 acquisition of Versace at a discounted price. Consumers are even questioning luxury's inherent value: 81% globally say that "luxury goods are not always worth paying more for," and just 55% see luxury as "a guarantee of quality and durability."

The strategic response: lower-priced entry points that welcome a new generation of buyers. Chanel and Dior are among the brands offering logo-embossed eye masks, while Louis Vuitton has expanded its luxury chocolate line, all stamped with signature brand monograms. Even bag charms are getting the upscale treatment. Longchamp's $120 croissant keyring lets shoppers add a luxury flourish to their handbag without a four-figure price tag. And the uptick in luxury brands opening cafes provides people with an opportunity to get a taste of the brand through an experience, such as a visit to Le Café Louis Vuitton. The café, located in the LV maison in Seoul, Korea, opened in September 2025 under the culinary direction of chef Anthony Yoon.

77

Claridge's Bakery. Courtesy of Lateef Photography/Maybourne.

VML

In the United Kingdom, Claridge's London opened Claridge's Bakery in January 2026, led by acclaimed chef and baker Richard Hart as executive baker and creative director. The bakery centers around British classics including Jammie Dodger tarts, custard tarts, Belgian buns, and iced fingers. It is located next to Claridge's ArtSpace Café, which serves pastries, breakfast, lunch, and even champagne.

London's Michelin-starred Trinity restaurant launched Trinity Outside food van in spring 2025. It offers sandwiches and soft-serve ice cream, with chef Adam Byatt calling it "a completely accessible and fun dining experience."

Adapting to challenging market conditions makes good business sense. *Jing Daily* brand editor Sadie Bargeron sees it as a long-term strategy to maintain cultural relevance with aspirational customers without harming prestige. "There shouldn't be concerns for luxury houses expanding their lower-priced categories, because most of them are also expanding and raising prices in higher-tier categories like outerwear and leather goods," she tells VML Intelligence. "It has become apparent that price points cannot signify luxury anymore, with price sensitivity increasing, along with consumers drilling down on the quality of goods."

Why it's interesting

Luxury sales may be down, but brands are playing the long game. Accessible offerings aren't stopgaps, but a means to adapt to a new generation of luxury consumers, with products aligned with the lifestyle, aesthetics, and Treatonomics (page 179) mindset of generation Z.



Claridge's ArtSpace Café. Courtesy of Maybourne

78

Elevated textures

A new wave of high-end salons is transforming textured hair care.



Courtesy of The Steam Bar

Luxury salons have long overlooked textured hair, confining it to the suburbs or sidelining it in favor of Eurocentric practices. Now a new generation of founders are celebrating texture and transforming the high-end experience, redesigning it from the ground up.

Previous attempts at inclusivity in premium spaces haven't always succeeded. Fenty's Selfridges pop-up in London, for example, faced criticism for "texturism," a term for discrimination faced by those with tightly coiled or afro-textured hair. This leaves a gap new brands are eager to fill. This market shows significant potential, forecast to be worth $15 billion globally by 2030 by MarketResearch.biz.

Leading the movement is The Steam Bar, a recurring pop-up within Daniel Galvin at Selfridges that has become a blueprint for inclusive, premium retail collaborations. For founder Judy Koloko, the concept was born out of a personal need, creating what she describes as "a premium hair brand that meets a private members' club for people with curly, coily, and afro-textured hair."

"After years of using wigs, weaves, and relaxers, I recognized the trauma I had caused my own scalp and knew something had to change," she tells VML Intelligence. "I wanted to start paying real attention and love to my crown, and that became the foundation for The Steam Bar. Partnering with Daniel Galvin at Selfridges allowed us to merge expertise in scalp health with a luxury salon experience." By centering scalp health and steaming rituals, The Steam Bar bridges wellness and luxury, "proving that inclusivity and excellence can coexist beautifully at the highest level of beauty care," says Koloko.



Courtesy of The Steam Bar

Goodifferent, founded by beauty editor Funmi Fetto, is also tackling the lack of centrally located, upscale spaces for Black women's hair. Launching in Liberty London, it merges members' club intimacy with luxury salon polish, offering textured-hair clients an elevated experience.

Across the Channel, Studio Ana'e in Paris and Lyon offers a sanctuary-like experience for women with coiled and curly hair. Founded by Aude Livoreil-Djampou, the salons combine bespoke treatments, textured-hair expertise, and a minimalist design that rivals any high-end Parisian space. Their pioneering training program ensures stylists can care expertly for every hair type.

Seventy-nine percent of people say they want their money to go to brands that reflect their values and 74% say "brands should make more effort to speak to people like me"—now companies are tailoring services to specific groups.

Black women's purchasing power has long been underestimated, despite the fact that they reportedly spend disproportionately more on their hair compared to women from other ethnic backgrounds, a fact often attributed to systemically racialized hair discrimination (see "The Future 100: 2022," Inclusive haircare).

Why it's interesting

These ventures underline that premium care for women with textured hair is finally becoming integral to luxury. The inclusive salon isn't about adding diversity to an old model; it's about rewriting how "premium" looks and feels, from the ground up.



Courtesy of The Steam Bar

79

Wellbeing status

In the quest for longevity, competitive and collaborative wellness emerges as the latest status symbol.



Forget the Rolex watch and the Ferrari, material possessions come secondary to optimal wellness—in a true sign that "health is wealth." VML data shows that, when asked to select attributes that define status, respondents rank positive health metrics third after creativity and environmental responsibility. The badge of honor now goes to those with the most robust biometric measurements, from sleep quality and mindfulness minutes to VO2 max results and glucose levels. Powering wellness one-upmanship: a proliferating array of devices and services that screen, track, and share health data.

In a savvy strategic move, Huawei Technologies registered its D-Series smartwatches as medical devices, allowing consumers in China to charge the cost to medical insurance. The result, as *Bloomberg* reported, is a healthy increase in sales. In 2025, Huawei wearable devices outsold those of competitors Xiaomi, Apple, and Samsung. The Huawei Watch D2 is said to be the first watch to offer ambulatory blood pressure monitoring (ABPM). The latest Huawei watch, the GT 6, launched in September 2025, while not currently registered as a medical device in China, still wields a wide range of health metric abilities, including the measurement of heart rate variability, oxygen levels, and pulse wave arrhythmia.

Eighty-nine percent say individuals should be more responsible for their own health; smart health wearables allow for this independence and control. The global smart wearable technology market is booming and expected to be worth $186.14 billion by 2030, up from $84.2 billion in 2024, according to Grand View Research. Contributing to that sum is Finnish company Oura Health Ltd, producer of the Oura ring, which was recently valued at $11 billion. The ring was initially released in 2015 as a sleep tracker and, over the past decade, has added new features that measure stress levels, cardiovascular age, a meal-logging feature, and more. A handy "share status" function allows users to pit their sleep and resilience scores against those of others.

Hotels are upleveling their wellness game too, aware that guests want to better track and learn about their health. The Grand Hyatt Singapore reopened in August 2025 after a renovation that introduced the reimagined Damai wellness center. In fall 2025, Damai collaborated with bioscan company Evolt, providing guests with a 360 Body Health Analyzer body composition scanner. In just 60 seconds, guests receive a detailed analysis of over 40 health measurements, including muscle mass, internal age, and visceral fat percentage, allowing Damai staff members to suggest a wellness program in response to the results.

The next frontier for wellness status is genetics. *Dazed Digital* published an article in July 2025 titled "How displaying your DNA became a status symbol," reporting on the rise in genetics testing, where ancestry can reveal genetic disposition and overall health conditions. In addition, preventative healthcare clinics including Neko Health in London are gaining traction, offering a body scan starting at £299 ($399) that provides a robust health assessment, including symptoms of metabolic syndrome, blood fats, blood sugar levels, and pre-diabetes risk.



Oura ring



Oura ring

89%
agree that people should take more responsibility for their own health.

For the elite, there is a longevity leaderboard, dubbed the Rejuvenation Olympics, founded by entrepreneur Bryan Johnson and Dr Oliver Zolman. The premise is to better improve longevity by dialing back or slowing down biological aging through competition and collaboration with others on the same mission. Participation requires the completion of at least three biological age tests by health data lab TruDiagnostic in the past two years.

Why it's interesting

Having good health has become the ultimate signifier of status in the longevity era, and a little healthy competition can go a long way in prolonging healthspans. This will support the 74% of people who like the idea of living a long and healthy life beyond the age of 100.



Shared luxury

Luxury is no longer a solo pursuit;
it's becoming a collective experience.



Myne shared-ownership platform

A new generation of consumers is reshaping the meaning of exclusivity. For generation Z, luxury ownership doesn't need to mean individual ownership; it's increasingly about collective access, shared value, and smart consumption. From jewelry and jets to vacation homes, the world's wealthiest young consumers are rewriting the rules of aspiration, favoring access and connection over possession.

Jing Zhang, founder and editor-in-chief of *Luxe/Detour*, tells VML Intelligence that "gen Z are such different creatures when it comes to their luxury views and habits compared to older generations." She notes that they are "less brand loyal and accepting of status quos" and, as a result, "they are often the first to dismantle luxury's 'gate-keeping' modus operandi," making them more open to different approaches to luxury. This chimes with data revealing that 70% of gen Z say luxury brands no longer define status in the way they once

did, although 65% aspire to a lifestyle that feels luxurious. They are finding their own way to redefine luxury.

In China, *Jing Daily* reported that gen Z consumers are experimenting with "crowdsourced luxury," pooling money to copurchase high-end goods such as Tiffany & Co jewelry. On platforms such as Xiaohongshu (Red), users organize group buys where 20-plus participants each contribute a few hundred yuan to buy, for example, a single Tiffany bracelet, dividing its charms among the group. The practice allows young buyers to participate in the prestige of luxury brands without paying full price, a social and symbolic form of ownership that turns private indulgence into collective status signaling.

While playful and inclusive, the trend exposes faultlines in the luxury model. Critics note that it risks diluting exclusivity and undermining the full brand experience, from boutique service to after-sales care. Legal gray areas also emerge: shared purchases blur accountability for warranties, authenticity, and resale, leaving buyers with limited protection.

The same logic extends skyward, but with better warrants. Jet-sharing, once seen as a compromise, is now an elite statement of intelligence and sustainability. *Luxury Lifestyle Magazine* called it "private aviation, redefined for a collective generation." Companies such as Surf Air and Wheels Up now sell fractional memberships that allow passengers to co-own access to fleets, with high-tech scheduling, carbon transparency, and community networking built in.

Property, too, is undergoing a luxurious remix. Co-ownership might not be new, but platforms such as Myne and Pacaso have newly professionalized the sharing of second homes and resort villas, using digital management systems to allocate stays, maintain properties,

and streamline resale. Each property can have two to eight co-owners, turning what was once an idle, capital-heavy asset into a fluid, lifestyle-oriented investment.

Nikolaus Thomale, founder and managing director at Myne, believes shared ownership offers more options and shares his vision with VML Intelligence: "Shared luxury is not about reducing ownership, but about elevating it: more destinations, more experiences, more freedom, with none of the burden." The mission at Myne is to make holiday homes accessible, smarter and meaningful. Thomale adds, "People don't want more ownership—they want better ownership. Shared ownership delivers exactly that: access to exceptional properties, more variety, more freedom, less waste and significantly less hassle."

Beyond finances, shared luxury also aligns with gen Z's value system. This cohort is socially networked, sustainability minded, and accustomed to the logic of access over ownership, from Spotify to Airbnb. Seventy-four percent of gen Zers care more about a brand's values than whether it is considered "luxury" and 75% are willing to pay more for products or services that are regenerative or support the planet. Sharing, in this sense, isn't sacrifice; it's sustainable sophistication. It allows for ethical indulgence and a sense of belonging within a community of peers rather than a hierarchy of wealth.

Why it's interesting

Shared luxury signals a deep cultural shift from possession to participation. As luxury adapts to new social values, affordability, responsibility, and connection, the next era will belong to collective connoisseurs, for whom the greatest status symbol isn't ownership, but access shared beautifully.

81

Health

90

VML

81

Resilience wellness

The age of resilience has arrived.



Estelle Manor in Oxfordshire, UK

VML



Estelle Manor in Oxfordshire, UK

Forget the survival bag and fortified bunker, preparing for today's challenging times is about building emotional elasticity. But the new resilience is not about grit, it's something we can learn and practice. US-based licensed marriage and family therapist Anjuli Sherin is the author of *Joyful Resilience*. She explains to VML Intelligence, "Resilience is a way that we respond to ourselves or each other. The key traits of that are, we respond with nurturance, we respond with protection over healthy boundaries, and we respond with a very creative and soulful and playful expression. It's a way that we learn to attune to ourselves inside of difficult circumstances and actually lift ourselves up versus criticizing or neglecting ourselves."

At a time when almost half (48%) of gen Z and millennials say they plan to do more to take care of their mental health in the upcoming year, wellness-focused initiatives aim to help individuals build resilience.

"The motivation to seek resilience comes from a desire to withstand uncertainty, to grow as an individual, and find stability in an unpredictable world," Eiesha Bharti Pasricha, cofounder and artistic director at private members' club Maison Estelle, explains to VML Intelligence.

During June 2025, Maison Estelle's luxury UK hotel, Estelle Manor in Oxfordshire, teamed up with Thai wellness sanctuary Kamalaya Koh Samui for a four-day Cultivating Resilience retreat. Set within the 85-acre manor and its Eynsham Baths, a 3,000-square-meter Roman-inspired spa, the retreat consists of a series of workshops, classes, and treatments aimed to offer a "transformational" experience to "strengthen the body, mind, and spirit," according to the program.

"Our intention is that guests leave the retreat with a renewed sense of clarity and emotional resilience," Gopal Kumar, general manager and group director of wellness development at Kamalaya, tells VML Intelligence. "Now, more than ever, it is essential to cultivate resilience, drawing strength from within to maintain harmony in mind, body, and spirit."

Offering a similar program is social wellness club Remedy Place, which partnered with luxury hotel Scorpios Bodrum in Turkey for Aegean Awakening, a six-day retreat in September 2025 set by the sea. The program included meals that bolster cellular resilience and metabolic health, and treatments centered around strengthening physical and mental resilience, with prices starting from €11,500 ($13,300) per person.

Tailoring resilience for executives and business leaders is US wellness resort Canyon Ranch, which offers a four-day Beat Burnout program aimed to help guests reset, recharge, and build resilience for the long-term. The retreat runs between January and September 2026, with sessions priced at $7,950 per person.

Why it's interesting

"Resilience is more important than ever before," explains Pasricha. "It allows us to find ways within to maintain our mental, physical, and spiritual wellbeing." It has broader implications than just the self too, she says, helping to sustain relationships and contributing positively to communities. "In essence, the pursuit of resilience is not only about bouncing back but also about moving forward with purpose."



Aegean Awakening at Scorpios Bodrum in Turkey. Courtesy of Johannes Schwark



Social health

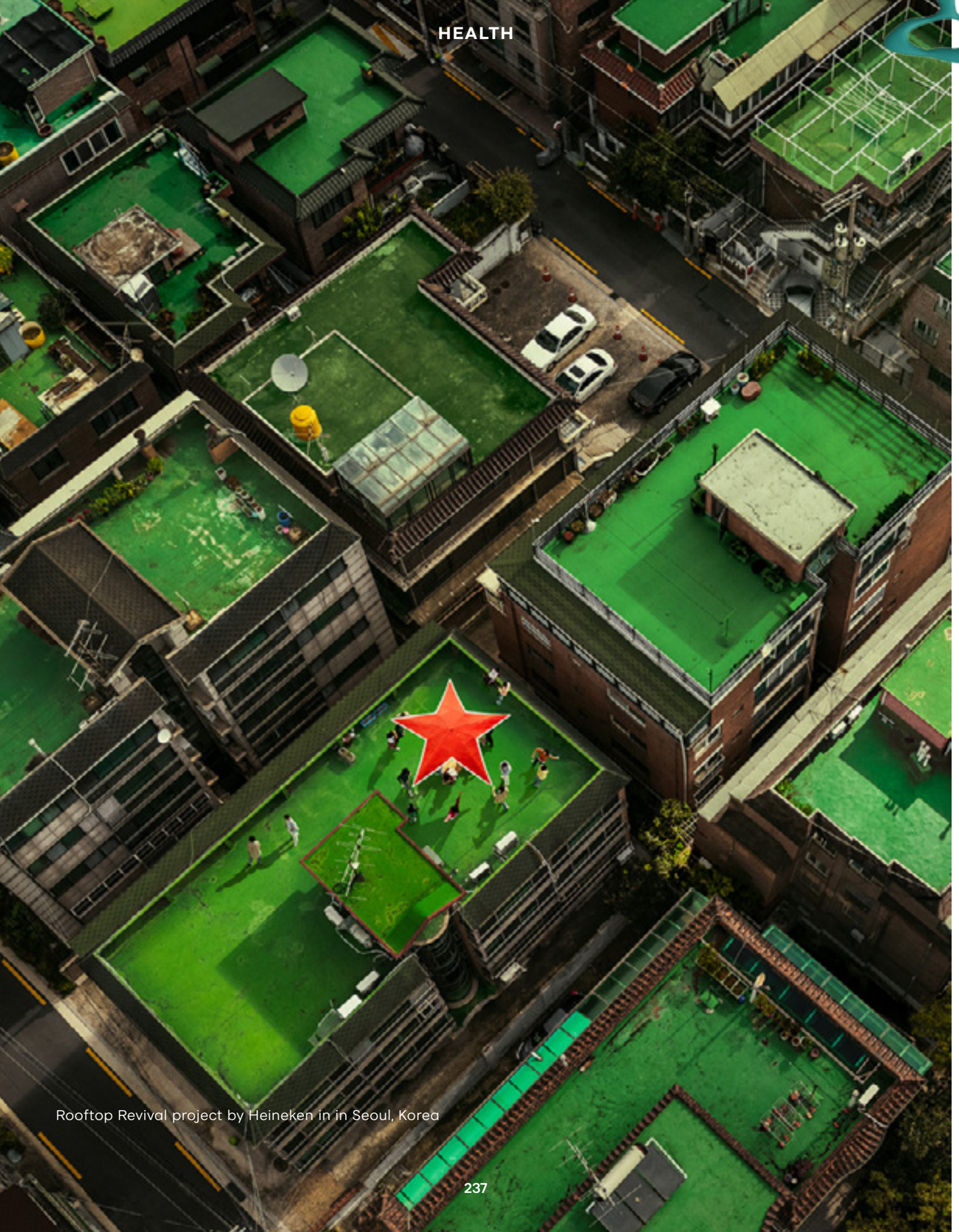
The next trillion-dollar wellness economy is built on connection.

Growing evidence underlines that the strength of our relationships and a sense of community are now vital components of health. Harvard-trained social scientist Kasley Killam asserts that social health has been a neglected pillar of the "temple of health," but that it's set to go mainstream as more of us crave human connection. "The industry around social health innovation is emerging to meet this demand and I expect it to boom in the years to come—much like mental health innovation did over the past decade," she tells VML Intelligence.

The evidence for social health is compelling. People with strong social connections have stronger immune systems, better cognitive function, lower rates of heart disease, and longer lifespans. Weak social ties are even associated with an increased risk of mortality. Connection, it seems, is a matter of life and death.

In June 2025, the World Health Organization (WHO) published "From loneliness to social connection: charting a path to healthier societies," which revealed that one in six people experienced loneliness between 2014 and 2023, affecting every cohort to some degree. According to VML data, 70% of people globally now see loneliness as an epidemic, up from 67% last year.

The WHO report underlined that this is a "whole-of-society" problem, noting that some governments are beginning to adopt social health strategies or policies. As highlighted in Brand belonging in "The Future 100: 2025," brands are also stepping up to champion social health by tackling some of the key barriers to interaction, from time pressures and the digital thrall to the cost of living and the decline of public spaces.



Rooftop Revival project by Heineken in in Seoul, Korea

Global beer brand Heineken continued its long-term strategy to forge better real-life connections with a series of 2025 initiatives, including its Rooftop Revival project in Seoul that transformed unused rooftop spaces into venues for social gatherings. The move was spurred by internal research that identified a problem of urban isolation. In the Netherlands, games venue operator Mooie Boules is also aiming to make cities more social by offering nine of its locations free of charge to local communities for use during daytime hours. During a 2024 pilot, the initiative successfully generated more than 5,500 new encounters. In Turkey, Unilever's OMO repurposed outdoor billboards into impromptu play spaces for children, adding basketball hoops, goals, or slides across several neighborhoods in Istanbul to address limited access to urban play areas.

Weak social ties are not just an issue for our social lives, however. Work has a significant impact on people's wellbeing, and the implications for businesses are stark.

"Connected employees are effective employees," explains Killam. "Studies have shown that when we have strong relationships, we're more collaborative, innovative, and resilient—and we produce higher-quality work. The flip side is that workplace loneliness doubles the likelihood of employee turnover and drives $150 billion in lost productivity each year through absenteeism. So the bottom line is that social health shapes the bottom line."

VML

> The industry around social health innovation is emerging to meet this demand and I expect it to boom in the years to come.

Kasley Killam
SOCIAL SCIENTIST



Unilever's OMO repurposed outdoor billboards

Fifty-eight percent globally note that workplaces are increasingly embracing wellbeing and balance for employees. Integrating social health into programs is the next step. For companies that want to focus on building organizational wellness, Killam suggests, "Start by setting the intention that social health is a core value to your business. Then weave connection opportunities and rituals into your culture: during onboarding, in meetings, at offsites."

Why it's interesting

From social prescribing in healthcare to connection-focused workplace design, every sector faces disruption. The question isn't whether social health will reshape industries, it's who will be leading the charge.

VML

83

New rave scene

Infectious rave energy makes a sober comeback.



Longevity Rave at Koko in London, UK. Courtesy of Longevity Rave

From morning coffee houses and wellness festivals to longevity events, fresh-faced ravers are taking a more mindful approach to dancing. One concept that draws on raves' health and wellbeing benefits is Longevity Rave, which was formed by "a group of longevity scientists and entrepreneurs who believe in the power of music, joy, and connection for a healthy, happy life," its founders say. London-based Tina Woods (also known by her DJ name of Tina Technotic) cofounded the event with DJ Yukari Takehisa.

"There's nothing like a good rave to bring everything back to what makes us human, to what really matters: feeling good about our lives, being with people, a sense of belonging, and great music," Woods tells VML Intelligence.



Longevity Rave at Koko in London, UK. Courtesy of Longevity Rave

British festival Lost Village is also tapping into the benefits of this collective energy with a "daytime-focused experience" set in a secluded forest dotted with "deserted junkyards" and music spaces. The experience ushers festivalgoers into "a kaleidoscopic dreamscape beyond the realms of comprehension," all while finishing before 2 a.m. at the latest (or earliest). The festival weaves in wellness experiences alongside sets from DJs including Four Tet, Kirollus, and Ewan McVicar, aiming to ensure "music spaces are full of energy from early in the day," and that "everyone gets to sleep and eat in a way that is conducive to feeling good."

Coffee raves are also popping up globally. In October 2025 during Paris Fashion Week, famed DJ Peggy Gou held a coffee rave at The French Bastards bakery, where she played alongside DJ Bambounou

to celebrate the launch of Peggy Goods, Gou's patisserie-themed range of merch. These caffeine-fueled gatherings are happening everywhere from South Korea to Argentina.

Beyond early morning vibes, food-themed raves are emerging. Examples include Mumbai restaurant Bang Bang Noodle, where noodle-pulling is set to EDM beats. Rahul Punjabi, the restaurant's chef and founder, told the *Indian Express* that the experience appeals to gen Z as it plays on food as "social currency. For gen Z, it's not enough to just eat; it has to feel memorable, Instagrammable, and in the moment."

Illustrating how established club experiences are adapting to rave's new era, in early 2025 London's Ministry of Sound launched a series of sober day parties with London electronic music artist Driia. "Dancing isn't something that should be mutually exclusive with drinking, and to offer a space where music and community take priority is important in this ever-growing sober-curious society we live in," Driia says.

As Woods says, "if you go back to our ancestors, the rituals and the things that we used to do around fires—music and singing—these are all things that humans have had for eons. It is about being human and connecting ourselves at a very human level." (See Social health, page 236.)

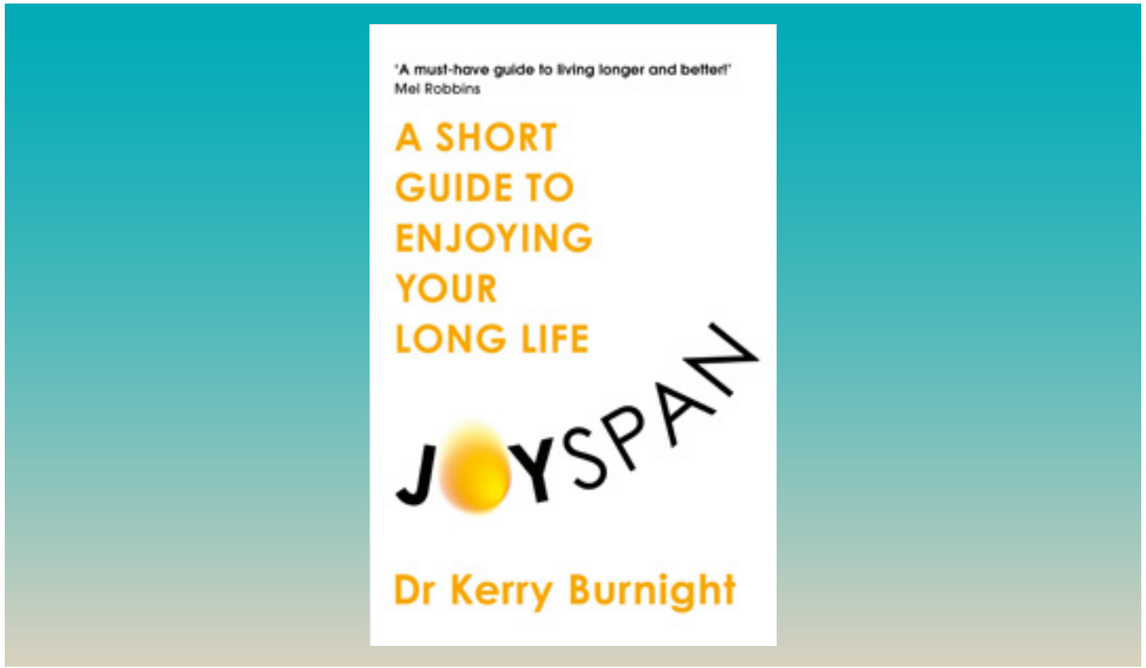
Why it's interesting

Eighty-seven percent value experiences that offer a sense of connection to oneself or others. The infiltration of rave's energy into different cultural experiences expresses how consumers are seeking joy, connection, and meaning.

84

Joyspans

Longevity goals are shifting from lifespan to joyspan—a long life that's a joy to live.



Joyspan by Dr Kerry Burnight

The World Health Organization states that between 2015 and 2050, the proportion of the world's population aged over 60 years will nearly double from 12% to 22%, and "all countries face major challenges to ensure that their health and social systems are ready to make the most of this demographic shift."

Dr Tamsin Lewis, founder of integrative health and performance company Wellgevity, mused on this question during a panel discussion titled "How to have a healthspan and not a lifespan," at SXSW London 2025. Lewis pointed to the importance of "emotional health in longevity," believing it is fundamental to "how we regulate ourselves" and ultimately determines "how well we age." She added that, "We've talked a lot about healthspans; I like to lean in to the concept of joyspans."

US gerontologist and author Dr Kerry Burnight coined the term "joyspan" and further explores the concept in her book *Joyspan: The Art and Science of Thriving in Life's Second Half*, published in August 2025. In the book, Burnight details the four psychological tenets that she believes are critical to aging well: grow, connect, adapt, and give. "We've talked about length of life, and now we're talking about quality of life and what makes quality of life," Burnight tells VML Intelligence. She also wants to dispel the traditional notion that aging inevitably means decline. "The old question was how not to age," says Burnight. "The new question is how to age with strength, vitality, purpose, meaning, and, frankly, joy."

Tapping into the wellness benefits of joy for women of all ages, in May 2025 former NBC News *Today* presenter Hoda Kotb launched Joy 101, a wellness platform for women that's billed as "a daily companion for lasting joy." The app encourages daily practices to cultivate joy and delivers expert-led courses on everything from breathwork to meditation to fostering a positive mindset. In September 2025, CapStone Holdings announced it had invested in the platform to "accelerate" the brand, which attracted over 5,000 paying subscribers and 40,000 sign-ups in the four months following its launch.

The Euphoria Retreat Wellbeing Festival is also exploring what it means to live well for longer. The festival, which debuted in 2025 in the pine forests of Mystras, Greece, embraces the Greek concept of macrozoe, which, founder Marina Efraimoglou says, "isn't just about lifespan. It's the art of living well, for longer. It's about balancing physical vitality, mental clarity, emotional resilience, spiritual depth, meaningful relationships, and a sense of purpose." This focus on emotional resilience is key. Licensed therapist and author Anjuli



Euphoria Retreat



Above and opposite: Euphoria Retreat

Sherin argues that resilience is precisely what unlocks joy. "The joy that we feel is the permission to actually feel all of what is occurring for us… the freedom to be who you are, to express all of who you are, without judgment… to be your whole messy, alive, and hence joyful self," she tells VML Intelligence.

Burnight argues that one's capacity for qualities such as those the Euphoria Retreat seeks to foster only get better with age. "You appreciate your connections more. You have a greater potential for spiritual depth, and appreciation of beauty, music, and art," she says. "I am seeing celebrities starting to send the messaging—and it's been very well received—which is, 'I don't want to be 20, I don't even want to be 30, 40, or 50. I am, let's say, 85, and the view from here is spectacular.'"

Why it's interesting

VML data reveals one-third of people say they would like to have more joy in their life. The concept of joyspan points to how people's experience of life is just as important as longevity. As Burnight says: "It's about how you are finding meaning, purpose, and connection, so that when you die—not if you die; it's when you die—you can think, 'I lived'."





Pet longevity

Petrents want to lengthen their pets' lifespans.

Pets are increasingly part of the family, and petrents—their owners—are turning to cutting-edge products with a new goal: a longer life. According to Ipsos's 2025 "What the Future: Pets" report, 72% of US owners say they will pay whatever they need to get the best care for their furry companions. And 91% say that "it is important for them to purchase pet foods and treats that promote specific health benefits, such as gut biome improvement or joint health."

Improved longevity is now powering innovation in pet foods and supplements. A September 2025 *New York Times* story reported on owners turning to everything from raw meat to ashwagandha to improve their pets' health. Brands are meeting the demand. US brand PawOrigins is making "holistic care more accessible and affordable" with supplements featuring taurine for heart health, enzymes for pancreatic wellness, and antioxidants and CoQ10 that "contribute to immune resilience and also to cellular energy and longevity." Another US brand Kayode's Collagen Puptides, claimed to "improve the quality of life in older dogs." The supplement is designed to "prevent the need for expensive medications or shots at the vet to deal with increasing joint pain."

The next frontier goes beyond supplements, as longevity startups and VCs step in to innovate products that could potentially extend pets' lifespans.

Startup Loyal, founded by Celine Halioua, aims to develop products that "extend lifespan and quality of life by reducing incidence or severity of age-related diseases," with the company currently developing these products for both senior dogs and large and giant dogs. Halioua has raised over $150 million in investment for Loyal and aims to launch the first longevity drug for dogs in 2026.



Loyal startup

Venture funds are dedicated to animal wellbeing, too. Debuting in 2024, Ani.VC described its mission as “to support innovative and passionate entrepreneurs dedicated to improving the lives of pets and their owners through groundbreaking products and services.” Among its portfolio is VetMab Bio, whose team of scientists and researchers is developing treatments for hard-to-treat conditions in both dogs and cats. And in 2025, Jane Lauder, former chief data officer and executive vice president of enterprise marketing at Estée Lauder Companies, announced that she was launching TAW Ventures to invest in pet wellness and healthspans. Early-stage VC firm 2048 Ventures put the call out for companies in the pet longevity space to pitch its team. It believes the next generation of veterinary startups will “move longevity care from niche to mainstream by integrating it into everyday veterinary practice.”

Why it’s interesting

Despite cost of living being top of mind, a quarter of pet owners are still spending more on their pets and Grand View Research forecasts that the global petcare market size will reach $236.16 billion by 2030. With cutting-edge technologies more within reach, these longevity propositions offer a compelling solution: to extend the emotional bond between humans and their pets.

86

Immersive wellness

Wellness experiences infused with digital art offer therapeutic impact.

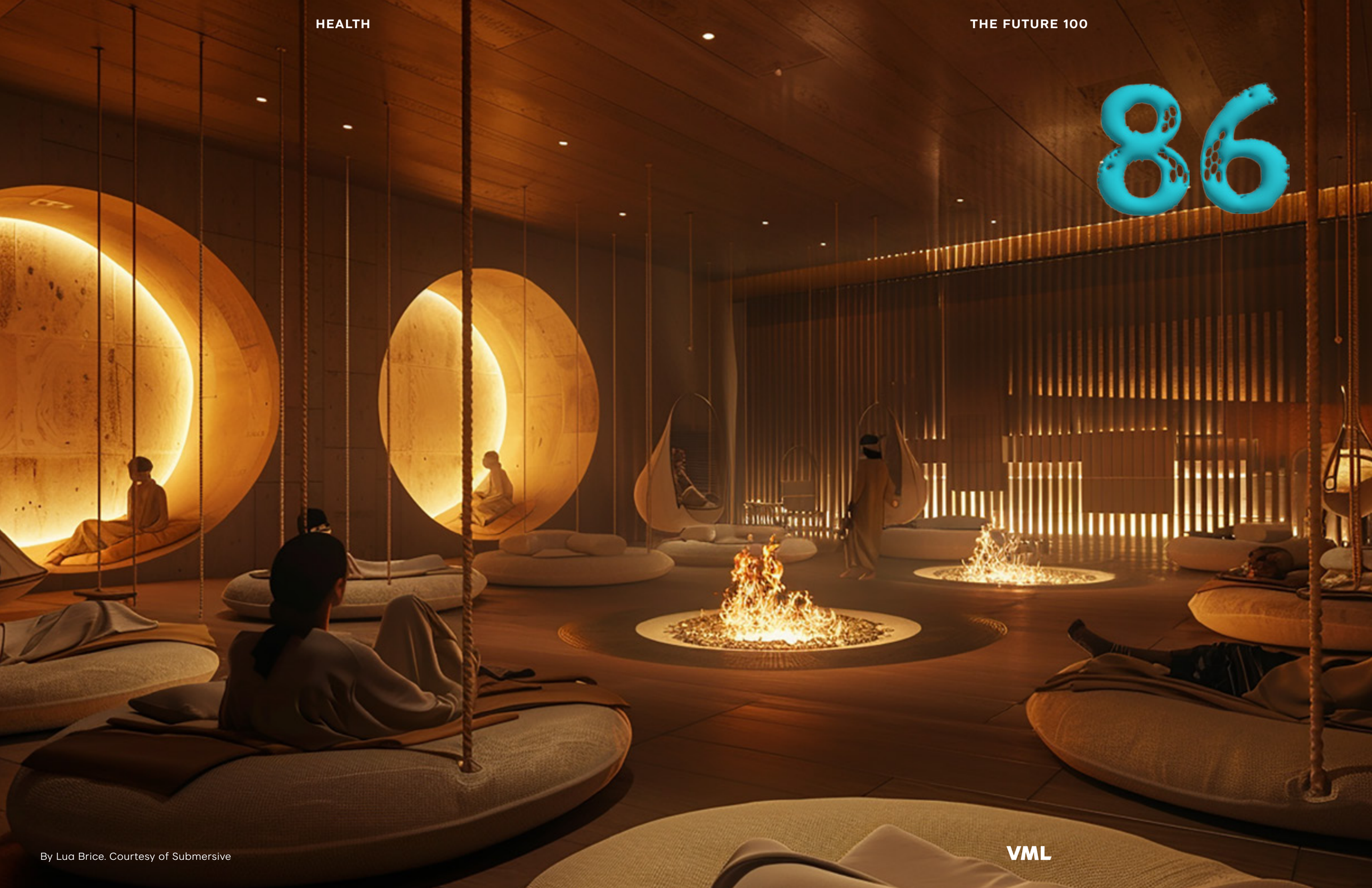


By Lua Brice. Courtesy of Submersive

From the intersection of immersive technology, neuroscience, and healing practice comes “immersive wellness,” multi-sensory environments and experiences that aim to unlock deeper states of connection, awareness, and wellbeing. This chimes with rising demand for profound experiences: 86% of people globally say they are drawn to experiences that inspire awe, wonder, or a new perspective.

VML

86



By Lua Brice. Courtesy of Submersive

VML

> Transporting experiences that take you out of who you are, give you awe, or get you into flow or a peak experience where you have such euphoria... those are the most likely [to be transformative].

Dr B Joseph Pine II
AUTHOR, SPEAKER, AND MANAGEMENT ADVISOR

At the forefront is Submersive, a startup founded by Corvas Brinkerhoff (formerly cofounder of art collective Meow Wolf). Part bathhouse, part art museum, and part wellness destination, the first location is due to launch in Austin, Texas in 2026. Speaking at SXSW 2025, Brinkerhoff described his vision for wellness spaces as catalysts for transformation. "You could think of Submersive as a kind of massive state change machine with a collection of rooms that are engineered to draw us into these high-value states: states like awe, wonder, euphoria, transcendence, unburdening, inspiration, connection," said Brinkerhoff.

Dr B Joseph Pine II, author, speaker, and management advisor, notes that experiences that provoke altered states are powerful. He tells VML Intelligence: "Transporting experiences that take you out of who you are, give you awe, or get you into flow or a peak experience where you have such euphoria... those are the most likely [to be transformative]." (For more, see Transformative experiences, page 102.)

Fusions of art and wellness are proliferating. In the Los Angeles Arts District in the United States, Chromasonic Field is a meditative walk-through installation that fuses wellness, art, and technology for a stimulating, psychedelic experience. Launched in late summer 2025, the exhibit "expands perception by making light audible and sound visible" to "deepen sensory awareness, foster connection, and ground you in presence," cofounder and artist Johannes Girardoni told *Blooloop*. Guests have reported powerful emotional experiences, according to the creators, including joy, catharsis, and transcendence.

An early pioneer in this space was Japan's TeamLab Reconnect – another supersensory art and wellness mashup from international art collective TeamLab, which paired digital art with hot and cold physical immersions. The experience induced a "sauna trance" in viewers—a neurological state of open-mindedness that is said to sharpen the senses and awareness.

Offering a playful spin on the same concept, the Mirai Ningen Sentakuki ("future human washing machine") was introduced at the 2025 Osaka Kansai Expo, offering a "gentle cycle" for mind and body. Created by Osaka-based Science Co and inspired by a 1970s prototype, the AI-powered bathing machine uses sensors to monitor the user's vital signs to calculate the perfect water temperature, then gently scrubs the user's body as they rest in the egg-shaped pod. An AI assistant analyzes the user's mood and projects calming imagery during the 15-minute rinse cycle, fostering a sense of calm, cleanliness, and revitalization.

Why it's interesting

Next-gen wellness fuses art and tech, not just to entertain, but also to deliver what Brinkerhoff calls "measurable, repeatable, therapeutic impact." By engineering environments that induce states of awe, joy, and connection, these experiences offer a new route to wellbeing. The future of feeling better may be less about fixing what's wrong and more about immersing ourselves in experiences that remind us of what it means to be human.

By Lua Brice. Courtesy of Submersive



Climate-resilient healthcare

Healthcare's new frontline isn't a disease, it's the climate.

As climate-related disasters, from floods and wildfires to heatwaves and power outages, become the new normal, healthcare systems are being pushed to the brink. Infrastructure failures, disease outbreaks, and resource shortages have revealed the sector's vulnerability to environmental volatility. In response, a new generation of innovations is helping hospitals and health agencies adapt, anticipate, and build resilience, addressing a powerful public mandate: 87% of people say, "we should all be doing more to tackle the problem of climate change" and 84% believe brands have a responsibility to take care of the planet and its people.

"Climate-resilient healthcare isn't a vague ideal. It is a design principle, and it's already being operationalized," states the World Economic Forum. In Bangladesh, monsoon-resilient maternity hospitals are built on raised platforms with solar power and independent water systems, ensuring safe births during floods. In Colombia, rural clinics are piloting microgrid-powered cold chains for vaccines, while UK biotech Stablepharma is trialing fridge-free vaccines that can remain stable for months at high temperatures—a breakthrough for regions where electricity is unreliable.

Across APAC, tech is accelerating the shift from reactive to predictive healthcare. In Singapore, Certis uses AI mosquito surveillance to detect dengue vectors with 98% accuracy, while India's Prism-H platform integrates weather, epidemiological, and environmental data to forecast dengue outbreaks up to two months in advance. Indonesia's ClimateSmart Digital Twin platform goes further, using AI dashboards to simulate real-time interactions between mobility, temperature, and disease patterns to help health authorities plan interventions before crises hit.



Lomawai community engagement. Courtesy of the World Health Organization

Resilience isn't just about high-tech fixes: low-tech and Indigenous approaches are equally vital. In Papua New Guinea, solar direct-drive fridges keep vaccines safe in remote areas. In Bangladesh, community-built raised walkways and latrines preserve sanitation access during floods, drawing on local knowledge of terrain and flood cycles. Together, these practices blend cutting-edge technology with centuries-old adaptation wisdom.

The urgency is echoed by leading institutions. A 2025 *Lancet Planetary Health* paper called for "climate-smart public health systems," infrastructure that monitors, assesses, and adapts dynamically to environmental change. With McKinsey identifying climate-resilience technology as a trillion-dollar growth sector, the next decade will see healthcare evolve not just to cure, but also to endure.

Why it's interesting

Resilience has become a brand differentiator. The companies that can position themselves as enablers of health security—designing systems that endure under climate stress—will define the next era of global health leadership.

88

Heartbreak healing

Broken hearts are getting dedicated healing spaces and strategies.



Dance Your Way Home. Courtesy of Southbank Centre

The therapeutic release of belting out Gloria Gaynor's "I Will Survive" to signify strength after a break-up is welcome at Sala de Despecho. The nightlife hotspot in Mexico City encourages people to mend their broken hearts with karaoke, community, and drinks, aided by a well-curated heartbreak song list. In May 2025, singer Ed Sheeran was spotted there with his guitar, rallying a crowd singalong to his song "Perfect." Sala de Despecho has had various pop-up locations over the years, including London and Washington DC. But its latest opening in May 2025, in Wynwood, Miami, is its first permanent location in the United States, creating a dedicated space to celebrate, mourn, or rage over heartbreak.



Dance Your Way Home. Courtesy of Southbank Centre

Dating app Tinder has a reported 75 million people swiping for prospective dates but the company is well aware that not all relationships end well. In response, it has launched novel ways to support people dealing with lost love. In September 2025, Tinder Tokyo hosted a four-day "breakup" shrine called Tinja, encouraging people to leave any heartache at the shrine as a symbol to cut ties and move on. Tinder India flipped the script on heartbreak with its "Move On" campaign throughout 2025, which included workouts and social activities such as pickleball. Anukool Kumar, head of marketing at Tinder India, says the company "has always been about embracing new possibilities, and our Move On campaign is all about making the next chapter exciting."

Heartbreak extends beyond the end of romantic relationships to the loss of someone meaningful and dear. In "The Future 100: 2021," Grief therapy charted the emergence of wellness practices focused on healing. Now dance parties are becoming a therapeutic outlet (see New rave scene, page 239), as evidenced by the UK's Southbank Centre in London hosting a Grief Rave in August 2025. Attendees were invited to "shake out their day" and dedicate music to someone or something they have lost.

To quote disco philosophers the Bee Gees: "In the words of a broken heart, it's just emotion that's taking me over," and finding outlets to express the full spectrum of emotions is critical to healing.

Why it's interesting

As recognition grows and dedicated venues and events spotlight heartbreak healing journeys, the distress caused by heartbreak can take a therapeutic turn through movement, community, and music.

VML

89

Contrast recovery

An ancient practice becomes a modern-day recovery must.



Arc communal contrast therapy club in London, UK

Arc, billed as the United Kingdom's first communal contrast therapy club, opened in London's Canary Wharf in January 2025 and embodies a new era of contrast therapy. Cofounded by Chris Miller and neuroscientist Alanna Kit, the 5,000-square-meter space is designed to optimize health benefits for the body and mind. "We focus a lot on mindfulness, breath work… just like coming out of the analytical mind and into the intuitive body," Kit tells VML Intelligence. "The neurochemicals that release after going through the extreme heat and the extreme cold feel almost like you've had alcohol. You have such euphoria, and your mood is so elevated."



89

VML

Arc communal contrast therapy club in London, UK



Hideaway contrast spa in Singapore

The guidance and ritual offered in Arc's classes include sound, music, and instructions that help people push through any discomfort from the heat and cold. "And when you push through discomfort, you have a reward circuitry... [that] boosts dopamine and norepinephrine and endorphins, and indirectly, serotonin," says Kit. "So a lot of people with anxiety or panic attacks, mood disorders, or inflammatory-related diseases religiously come to Arc, because they're finding such profound results with the thermal therapy." In addition, Kit emphasizes how hot and cold therapy can promote mental recovery and resilience, and says that, following the Canary Wharf opening, Arc is planning to open a central London site.

Other notable openings in the contrast therapy space include Lore, which opened in fall 2025 in New York's NoHo district. With the tagline "Hot. Cold. Human," the space encompasses Finnish and infrared saunas and a cold pool room, all designed with a spare yet inviting aesthetic by Ilse Crawford. In Singapore, the contrast spa Hideaway opened in late 2024 with infrared saunas to induce cellular repair and detoxification, and cold plunges to lower inflammation and bolster immunity.

The concept is making its way into home products too, with wellness and recovery brand Hyperice launching a range of contrast therapy electronic devices dubbed Hyperice 2 in August 2025. Designed for either the shoulder or the knee, the devices combine heat, deep cold, and compression therapy for muscle recovery. The brand says that the devices "bring elite-level warm-up and recovery contrast therapy solutions in a new, user-friendly device designed for everyday use."

Kit says, "People have shifted from the going-out culture and drinking, the repetitiveness, and how it doesn't actually serve people at their core." Instead, she says, people embracing wellness practices such as contrast therapy have the attitude of "I'm going to take autonomy over my own health, and it's up to me to stay healthy and live my best life."

Why it's interesting

Contrast therapy taps into recovery for both body and mind—promoting resilience, connection, and longevity. It's emerging as the latest form of social wellness, reflecting broader shifts towards health autonomy and experience-driven recovery (see also Resilience wellness, page 233).

90

Indigenous remedies

Ancient wisdom meets modern medicine in global healthcare.



Traditional medicine in Ethiopia. Courtesy of the World Health Organization

Long underrepresented in scientific and policy discussions, traditional medicine is experiencing a global re-evaluation, with growing momentum to integrate the knowledge systems practiced in 170 countries and relied upon by billions of people worldwide.

The shift is being driven at the highest levels, with the topic under the spotlight during the 78th World Health Assembly in May 2025, where member states agreed on a new World Health Organization (WHO) Global Traditional Medicine Strategy. The strategy will develop evidence-based practice of traditional, complementary, and integrative medicine into the next decade. In a landmark move, December 2025 saw the launch of WHO's Traditional Medicine Global Library, the world's most comprehensive resource for traditional, complementary, and Indigenous medicine.

Ayurveda and traditional Chinese medicine have long enjoyed widespread acceptance as complementary treatments. African traditional medicine—relied upon by up to 80% of the continent's population—is seeking equal recognition.

Formal integration raises challenges, however, particularly around funding. For instance, in 2025, international researchers published a letter in the *Journal of the American Medical Association* arguing that the Artemisia plant—traditionally used in Africa and Asia—could offer a low-cost, locally grown alternative to conventional anti-malaria treatments, resistance to which is a growing problem. They highlighted the scarcity of funding for trials, largely since plants cannot be patented, eliminating the incentive for companies.

The push to bridge ancient wisdom to modern science is also underway at the research level. At SXSW 2025, Brazilian

80%

of the African continent's population relies on traditional medicine.

World Health Organization

neuroscientist Alysson Muotri shared details of a project conducted by his lab at the University of California San Diego in partnership with Amazon shamans. The project aims to identify medicinal plants that could offer neuroactive ingredients to treat conditions such as Alzheimer's disease. If the project is successful, said Muotri, royalties will go back to the tribes and to the protection of the Amazon.

The same drive is embodied by individual trailblazers such as Adana Omágua Kambeba. The first Indigenous woman to graduate in medicine in Brazil, she is pioneering the integration of Indigenous shamanic practices with Western medical science.

Why it's interesting

In the future, healthcare is set to bridge ancient wisdom to modern science, harnessing the best clinical science and respecting traditional wisdom, while also building ethical and benefit-sharing partnerships with communities.

91

Innovation

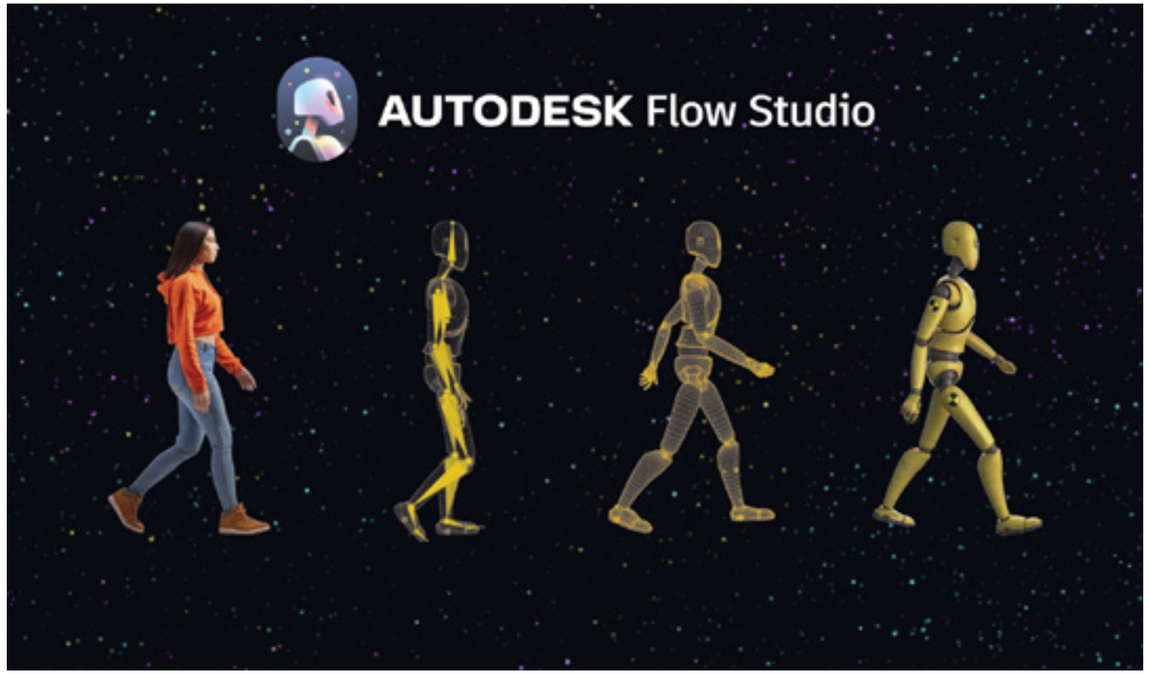
100

91

AI storyworlds

The world is the story, and it responds to you.





Autodesk Flow Studio

AI is revolutionizing storytelling, reshaping not just how stories are visualized, but also how they will be experienced. “AI will likely conjure realities no human has ever conceived,” near futurist Neil Redding tells VML Intelligence. “This shifts storytelling from telling to doing, experiencing, and embodying. Stories are no longer preconceived narratives; they unfold as we move through them, shaped by our presence and choices.” In the next era, the world is the story.

If Steven Spielberg were starting today, would he, perhaps, shoot *Jaws* on a laptop? AI is changing who can tell stories at the highest level, and it is arriving just in time. “AI is going to usher in a new golden era for media and entertainment,” says producer and author Charlie Fink. “It’s going to solve the industry’s fundamental problem: the economics are broken.”



Marey fully licensed AI video model by Moonvalley

The tools are arriving thick and fast, with a slew of startups exploring AI-native filmmaking. Autodesk’s Flow Studio automatically integrates and animates CGI characters in live-action scenes. In collaboration with artist Paul Flores, AI production studio Asteria has built custom AI trained on Flores’s work, which is able to rapidly generate assets in his style. Asteria also partnered with AI creative studio Moonvalley to launch their video generation model Marey, which has been trained ethically on consented and licensed HD footage, helping to solve the copyright conundrum.

With automation handling routine technical work, creators can focus on what machines can’t. The real shift isn’t about making movies faster or cheaper, but what they can become.



Luma AI

WPP head of human-AI strategy Laura Weis predicts "participatory stories" are what comes next, where "audiences will expect that these are adaptive and that they can participate." The entertainment industry is already taking note: at 2025's AI on the Lot conference, MGM Studios's Danae Kokenos identified this as the next problem to solve: "How do we allow people to have different experiences with their favorite characters and stories?"

AI startup Luma's cofounder Amit Jain shared his vision for personalized stories "generated for every human, every day" with the *Los Angeles Times*, a future the company is pursuing through its Dream Machine generative video platform. And Amazon-backed Fable describes its Showrunner platform as "movies that are playable, with millions of new scenes," all of which are ownable by the studio. In other words, these are stories that blur into gaming, where you're simultaneously creator, star, and audience, all in one.

"The fundamental relationship between story and world is dissolving," Redding explains. "Worlds we can now create are themselves emergent—part of the story, mutable as the story evolves." It's less Netflix, and more a personalized and adaptive content universe that the user inhabits, spanning a raft of different interactive experiences. Fink points to procedural gaming, where storylines, subplots, and character arcs are generated on the fly as one possible future template.

When it comes to what's next, Fink believes that "the real battle is whether content in the future is told by men or machines. Will synthetic media based on our psychological profile be more satisfying than media created by other humans?"

> "Stories are no longer preconceived narratives; they unfold as we move through them, shaped by our presence and choices."

Neil Redding
NEAR FUTURIST

The answer may depend on who shapes these tools. Artists and creators will need to be at the table, building guardrails, setting standards, and ensuring AI amplifies human creativity rather than replacing it. "I still think the best storytellers can make the best content," Fink concludes. "I don't think that's going to change."

Why it's interesting

A profound shift from passive consumption to interactive experience is taking place in the form of personalized storyworlds, where audiences don't just watch, but actively live within narratives. For brands, this will present an unparalleled opportunity to forge deeper connections by cocreating adaptive and responsive experiences that resonate on a personal level (see Generative realities, page 46).



Human engineering

Once the subject of science fiction, human eggs from skin cells and designer babies are becoming real possibilities.

As global fertility rates decline, scientific advances are changing the game for human reproduction. For the first time, scientists in the United States have created human eggs by extracting DNA from skin cells. The eggs were then fertilized with sperm to make early-stage human embryos, proving the concept works. In a September 2025 interview with the *Guardian*, Shoukhrat Mitalipov, who led the research at Oregon Health and Science University in Portland, said the study used female skin cells, but male skin cells can also be used. Although still in the early stages of experimentation, the process could be transformative for people with difficulty conceiving and same-sex couples. The process to ensure the method is safe could take another decade, but the results so far have been considered a huge breakthrough in reproductive science.

Another process taking over a decade to prove its viability is the "three-person baby." In summer 2025, eight babies in the United Kingdom were confirmed to have been born via mitochondrial donation—the method of using the DNA of three individuals. The objective is to prevent hereditary disease for the baby, and the process involves combining the egg and sperm from the mother and father with a second egg from a donor. While the genetic blueprint from the parents remains, roughly 0.1% of DNA from the donor is included. The method has been pioneered by UK scientists, and the first baby born from mitochondrial donation was to a Jordanian couple treated by US doctors in Mexico in 2016. According to the BBC, the child is understood to be healthy. The method was approved in the United Kingdom in 2015 and evidence of it working is now emerging.

Beyond enabling conception, advances also focus on the controversial field of genetic curation. The November/December 2025 edition of *MIT Technology Review* explores whether the perfect baby can be created. Companies are now offering genetic embryo testing, which allows for careful curation of the baby—from eye color and height to IQ and health. One article observes, "Embryo selection is less like a build-a-baby workshop and more akin to a store where parents can shop for their future children from several available models—complete with stat cards indicating their predispositions."

Orchid Health founder Noor Siddiqui stated in a July 2025 interview with the *Washington Post*, "For something as consequential as your child, I don't think people want to roll the dice," affirming her belief that everyone has the right to a healthy child. Also in the United States, biotech startup Heliospect Genomics offers genetic curation, and Preventive, launched at the end of October 2025, is dedicated to research around new gene editing technologies that could prevent disease before birth and ultimately lead to a healthier future generation.

Scientists at Children's Hospital of Philadelphia have been developing artificial wombs since 2017 to support extremely premature babies. The technology's potential captured public imagination in August 2025 as headlines, published in several outlets including *Vice*, *Newsweek*, and the *Economic Times*, falsely claimed a robot surrogate that could give birth to humans would hit the market in 2026. While it was quickly debunked as fake news, it did spotlight the growing fascination with reproductive innovation and the more plausible possibilities of artificial wombs.

> For something as consequential as your child, I don't think people want to roll the dice.

Noor Siddiqui
FOUNDER, ORCHID HEALTH

In previous editions of "The Future 100," VML Intelligence has shown the progression of how the parents of the future may look, from Mothers of ambition (2019) to Intentional communities (2024). Now science is illustrating that it could further evolve who gets to be a parent and how families could be formed.

Why it's interesting

With global fertility rates in a decline that is predicted to continue through to 2040 according to the United Nations, advances in reproductive science arrive at a critical moment—giving more people the opportunity to conceive and further allow for diversity in how the family of the future looks.

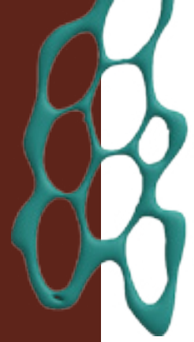
93

New capitals

Cities built from scratch are defining the future.



The New Capital in Egypt. Courtesy of @blafa_



Around the world, entire cities are being designed anew, imagined not as extensions of the past, but as blueprints for the future. These next-generation capitals blend high-density design, renewable infrastructure, autonomous mobility, and data-driven governance, creating urban systems that aspire to be cleaner, safer, and more resilient. But beyond their engineering ambition, these master-planned cities act as cultural artifacts, revealing how nations believe progress should look, and what they imagine themselves becoming.

In Egypt, The New Capital has officially become the country's capital. Sprawling across the desert, it embodies a monumental vision of national identity: Africa's tallest building, its biggest mosque, one of the world's largest cathedrals, and vast civic plazas intended to project stability and modernity. As *Dezeen* noted, its scale is symbolic, a physical assertion of a nation redefining itself on the global stage.

In the United States, billionaire Marc Lore's Telosa is shaping a radically different narrative. Conceived by Bjarke Ingels Group (BIG) and envisioned for 2050, the "city built from scratch" centers on equitable land ownership, autonomous transit, wooden megastructures, and a 15-minute-city ethos. Renderings show mobility hubs, sports villages, and vertical districts designed to model what BIG describes as a "techno-optimist future," where innovation and civic equity grow together.

In Paris, rather than building new, the city is reinventing itself. The *New York Times* reported that the Paris Smart City 2050 project expands the city into "Greater Paris," with bioclimatic towers, green corridors, social housing upgrades, and new transit systems. It's a European vision of the future city defined not by spectacle but by connection, community, and climate resilience.

Across Asia, fresh perspectives are emerging. In South Korea, plans for Busan Eco Delta City integrate robotics, smart-water management, and zero-energy housing into a living laboratory for urban tech. In Indonesia, the construction of Nusantara, the country's future capital, aims to relieve ecological pressure on Jakarta while modeling decentralized governance, forest conservation, and Indigenous land stewardship. These projects, unlike their Middle Eastern or American counterparts, root the future city in ecological repair and cultural continuity.

And at the conceptual edge, the Mars Hydrosphere installation at the Venice Biennale imagines an underwater urban network on Mars. Created by Clouds Architecture Office, it reframes the ultimate question: if we were to start cities from zero, what values would we encode?

Currently, over half (55%) of the global population live in urban areas and the United Nations predicts this will increase to 68% by 2050. (For more on the future urbanites, see Gen beta futures, page 283.) Together, these initiatives reflect a world no longer satisfied with upgrading the cities it has, and building the cities it hopes for.

Why it's interesting

New capitals act as brand statements for nations: each one crystallizes political ambition, cultural identity, and technological aspiration into physical form. For architects, urban planners, and global brands, these cities represent rare ground-zero opportunities, spaces where new systems, services, and cultural norms can be prototyped at scale.

93

Render of the central spine of the proposed city of Telosa by BIG. Courtesy of Telosa

VML



Metabolic futures

The future of obesity treatment will be personalized, multi-layered, science-led, and tech-powered.

Despite the game-changing impact of GLP-1 weight-loss drugs, obesity remains a formidable challenge, with one in eight people globally classified as obese according to the World Health Organization. Unchecked, the global cost burden of overweight and obesity could reach $3 trillion per year by 2030, and a staggering $18 trillion by 2060.

For decades, the weight loss playbook relied on diet and exercise, but that model is broken. In May 2025, weight-loss giant WeightWatchers filed for Chapter 11 bankruptcy in the United States. Later in the year, a Netflix documentary exposé, *Fit for TV: The Reality of The Biggest Loser*, laid bare the failure of extreme weight-loss regimens.

Now a revolutionary mindset shift is underway, starting with a move away from the one-size-fits-all approach. Recent research from MIT and Harvard identifies 11 distinct root causes of obesity—some genetic and some lifestyle-based. Medical journal *The Lancet*'s "Commission on the definition and diagnostic criteria of clinical obesity" has advocated for it to be defined and treated like any other chronic illness, concluding: "We now have the opportunity to transform obesity care, moving away from a system in which individuals are seen under one single label toward a system that recognizes the unique health and needs of each person."

In this new era, cutting-edge pharmaceutical and pharma-tech innovations promise to be more effective at tackling the individual needs of each patient, with fewer side effects. Chinese-based AI-powered drug discovery startup MindRank has used AI to develop an easier-to-use oral GLP-1 pill, while Myo4, a novel molecule from preclinical stage biotechnology company MitoRx Therapeutics, promises weight loss without reducing muscle or bone density.



New areas of research promise to unlock new obesity treatments by leveraging our own bodies. Researchers from the University of California are exploring how to turn fat storing cells into so-called “smart fat” that burns energy. In Japan, the Riken Center for Integrative Medical Sciences is studying how adding extra acetate to the gut can help reduce fat, hinting at a future where our microbiomes will be programmable to reduce the risk of obesity.

Looking further ahead, neuromodulation technology may offer a more permanent way to achieve the same appetite regulation as GLP-1 drugs. One avenue being explored is how deep brain stimulation could curb disordered eating, while professors at MIT are trialing implanted neuroprosthetics—similar to pacemakers—that provide feedback loops to the brain.

Why it’s interesting

The understanding of obesity is developing at pace, with science confirming there is no one-size-fits-all treatment. This should give brands pause over how they communicate about dieting and nutrition, and recognize a need to lead with empathy over preachiness, and a commitment to support consumers on their personalized weight-loss journeys.

“We now have the opportunity to transform obesity care, moving toward a system that recognizes the unique health and needs of each person.”

The Lancet

DIABETES & ENDOCRINOLOGY

95

Coded empathy

A messy and magnificent new frontier opens for brands as AI learns emotional intelligence.

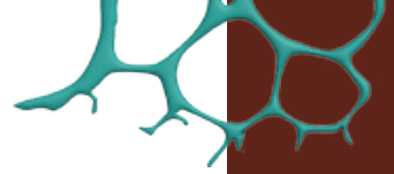


Kopernica AI system

AI systems are learning to sense and respond to emotion, paving the way for more humanlike interactions. For brands, the potential applications are vast, ranging from hyper-personalized customer-service agents to brand mascots with genuine personalities.

Chatbots have long approximated emotion by using scripted or keyword-based replies, but the field is developing quickly. Hume AI, a prominent player in affective technology, launched the third iteration of its empathic voice interface model EVI 3 in July 2025. The new release goes beyond text, processing the speaker's tune, rhythm, and timbre, and modulating its response for a more emotionally attuned interaction.

Emerging systems will go further, ultimately becoming multimodal. Spanish startup Neurologyca's Kopernica AI system combines visual, auditory, and psychological signals, and can infer complex states such as motivation, stress, and attention. Using 3D facial mapping to track over 790 reference points, it detects facial expressions and body gestures alongside vocal tone and rhythm. Over time, it can learn its users' emotional trends and preferences.



Enhancements like this offer potential for upgraded customer-service interactions, and the next step will see AI agents with personalities of their own, paving the way for smoother human-AI interactions (see RelAItionships evolved, page 70). Some bots already have a semblance of personality, with most leaning in to a perky, upbeat attitude. Yet studies have shown that while extroversion is generally appealing, people can get irritated or bored by robots that are too polite or sycophantic— just like that friend who can be a little too nice.

To address this, developers will likely code in more emotional nuance. A 2025 study led by Bin Han from the University of Southern California demonstrated that AI agents can assume different personality traits, dialing extroversion up or down to adapt to the communication needs and preferences of those they interact with. For brands, this points to the possibility of AI agents that channel their own brand identity. Technology companies Amdocs and Nvidia are already at work in the field of "personality engineering," developing agents that mirror brand persona and tone of voice, as well as adapting to customer needs in the moment.

At a broader level, as AI grows more empathetic, it's likely our intimacy with it will also grow (see Synthetic generation, page 50). Machine empathy may sound cold, but in some tests AI is already outperforming humans on emotional intelligence. As Laura Weis, head of human-AI strategy at WPP, tells VML Intelligence, the ultimate beneficiary could be human connection: "I think the opportunity is that if we design AI in a way that truly understands emotional context, it can actually create better conditions for humans to connect with each other, rather than it being a replacement."

Even so, there are risks. Jacy Reese Anthis, visiting scholar at Stanford University who researches human-AI interaction, tells VML Intelligence that we will likely find AI lacking. "AI is not a social creature," he says. "We can't learn about their life story and understand where they're coming from and empathize. I think that's missing many of the things that are most important to us." Weis agrees, explaining, "AI can simulate empathy through pattern recognition, but it can't feel it. The risk is that you mistake simulation for sincerity, which then erodes trust and weakens human connections."

Anthis does see potential for AI to act as a "first responder" in some contexts, before directing people to a professional who can provide genuine care. But, he points out, "You need someone who won't make hallucinations and mistakes, [or demonstrate bias]." There are other risks too, such as users getting overly attached or leaving themselves open to manipulation or exploitation.

On a deeper level, behavioral psychologist Jo Hemmings tells VML Intelligence that empathetic tech will "challenge one of our core human beliefs: that empathy is uniquely ours. For some, this can be comforting—an ever-present listener who never judges or tires—but for others, it evokes unease."

Why it's interesting

As Hemmings explains, "We're entering a new psychological landscape, where our relationships with technology are as emotionally charged as our relationships with people." For brands deploying AI, it will be crucial to uphold the real, messy contradictions of genuine human emotion. Hemmings says, "The key will be to ensure that, as AI grows more lifelike, we don't let it erode what makes us feel most alive."

96

Next-wave biomaterials

A new wave of commercially viable biomaterials is poised to tackle fashion's environmental impact.



Spiber biotech

VML

Backed by substantial investment, a new wave of biomaterials is starting to achieve the scale and price points needed to attain mass adoption, signaling that fashion's supply chain is ripe for disruption.

When Dutch couture designer Iris van Herpen showcased a gown made from bioluminescent algae, it marked a turning point in fashion—a "living" dress that was cultivated, not constructed. Van Herpen's Sympoiesis collection at Paris Haute Couture Week 2025 put the spotlight on the creative frontier of biomaterials, from her algae gown to a translucent bridal piece incorporating Brewed Protein™. This fermented sugar-derived fiber was developed by Japanese biotech firm Spiber, and its innovations have already seen commercial adoption by brands such as Sacai, Burberry, and The North Face.

"Most biomaterials use sugar from agricultural crops, requiring dedicated farmland that creates impact on the ecosystem," Kenji Higashi, president of Spiber Europe, tells VML Intelligence. "How can biomanufacturing reduce those impacts? This is why Spiber is using agricultural waste from sugar cane—bagasse—as a feedstock for our biomaterials."

Other innovators are tackling different waste streams. UK-based Arda Biomaterials transforms brewery and distillery waste into plastic-free leather alternatives. "Spent grain from a single brewery could make upwards of 5 million square meters," notes Arda cofounder Brett Cotton. "We're looking at 97% lower CO2 emissions than animal leather and 82% less than synthetics. Breweries, via Arda, will hold the key to decarbonizing materials." Now Arda is partnering with leading luxury brands in Europe and the United States to create "leather" accessories.

In the United States, Brooklyn biobased material developer TômTex debuted fully manufacturable textiles in designers Allina Liu and Gabe Gordon's New York Fashion Week collections, in September 2025. Seafood shell waste and mushroom enzymes were engineered into materials, with a prominent publication misidentifying one piece in Gordon's show as being made from genuine leather.

For Higashi, the ultimate goal is a fully circular system, but he admits there are challenges: "The future of the biomanufacturing industry will use agricultural, forestry, or even textile waste. Cotton and rayon are cellulose materials that can be converted but the problem is with garments that are not pure. How do we handle impurities in the waste streams?" To tackle this, Spiber founded the BioCircular Materials Alliance, which encompasses over 25 members as of January 2026, including Stella McCartney, Kering, and major textile manufacturers. "If we want to use huge piles of textile waste coming out of the industry in a useful way, we need to address the way we design and manufacture these products in the first place," Higashi says.

With global apparel consumption projected to rise by 63% to 102 million metric tons by 2030, according to McKinsey's "The State of Fashion 2025" report, these efforts feel increasingly urgent.

Why it's interesting

While previous biomaterial firms struggled to secure the investment needed to scale, this new wave of startups is proving that bio-led supply-chain disruption is finally possible.

Above and opposite: Sympoiesis by Iris van Herpen. Courtesy of Iris van Herpen.



AI legacy

A lifetime's legacy can last an eternity.

In "The Future 100: 2025," Digital immortality explored how technology can offer a form of eternal life. This next iteration sees AI enabling individuals and even companies to continue to wield influence and impact, long after they are gone.

Eighty-one-year-old advertising executive Sir John Hegarty sees huge potential in AI. At Cannes Lions 2025, he summoned an AI-generated younger version of himself for a brief onstage conversation. Hegarty used this example to highlight the creative possibilities AI has to offer—the prospect of digital immortality, where the founder never dies. He cited Coco Chanel as an example, suggesting AI could blend her philosophy with contemporary ideas, bringing her legacy into the modern age.

This vision is being put into practice. Fashion designer Norma Kamali, who has honed her signature sleek sportswear and swimwear over a 50-year career, is experimenting with AI to explore how it could carry on her ethos after she retires. The designer has teamed up with Maison Meta to create a custom AI Design CoPilot, which has been trained on Kamali's own designs and her copyrighted archive. In an interview with *Business of Fashion*, she likens the process to "downloading her brain" to continue the legacy of the brand and has already been integrating AI into her design process for months. Kamali believes AI is "the beginning of a new way to express creativity."

Jacy Reese Anthis, visiting scholar at Stanford University, believes technology will deliver the capabilities to render people immortal within our lifetime. "I think once we get AI that is self-reinforcing and can teach itself, we're going to get very powerful systems that can understand neuroscience to the degree that we're able to map our brain, in some sense, onto a digital substrate," he tells



Sir John Hegarty at Cannes Lions 2025. Courtesy of Cannes Lions

VML Intelligence. Although he would prefer experimentations with technology to stay within the realm of fictional characters rather than attempt to imperfectly emulate real people, Anthis predicts the creation of digitized versions of real people will happen and urges, "We should be preparing for it earlier."

Early versions of that future are beginning to take shape. Immortality AI startup Eternos allows people to preserve their voice, persona, and stories, to use for self-reflection and revisiting memories or share with others. Eternos is available for both individuals and organizations.

"Once we get AI that is self-reinforcing and can teach itself, we're going to get very powerful systems."

Jacy Reese Anthis

VISITING SCHOLAR, STANFORD UNIVERSITY

Why it's interesting

AI is promising ways to continue impact and legacy for an eternity. Prominent figures, idols, executives, and even brands can anticipate a future where they can upload their blueprint during their lifetime and then continue evolving in AI form, to be shared with generations to come.

VML

98

Sensory augmentation

Human senses are being extended and upgraded.



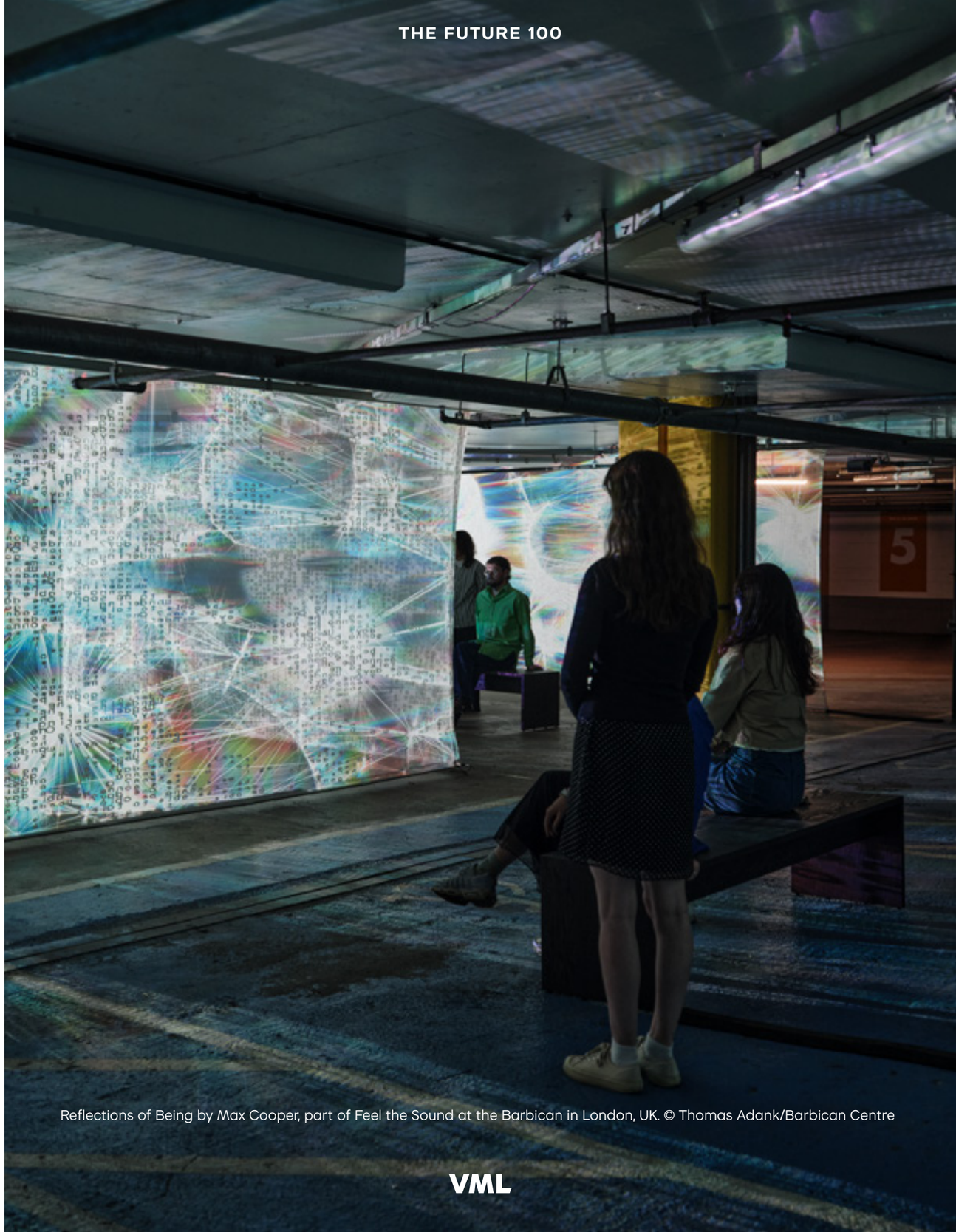
OMNI by Wayne McGregor and Industrial Light & Magic, part of Wayne McGregor: Infinite Bodies at Somerset House in London, UK. Courtesy of Ravi Deepres

The boundaries of human perception are dissolving, as science and technology extend, upgrade, and even discover new senses. This era of sensory augmentation promises to fundamentally reshape how we experience the world.

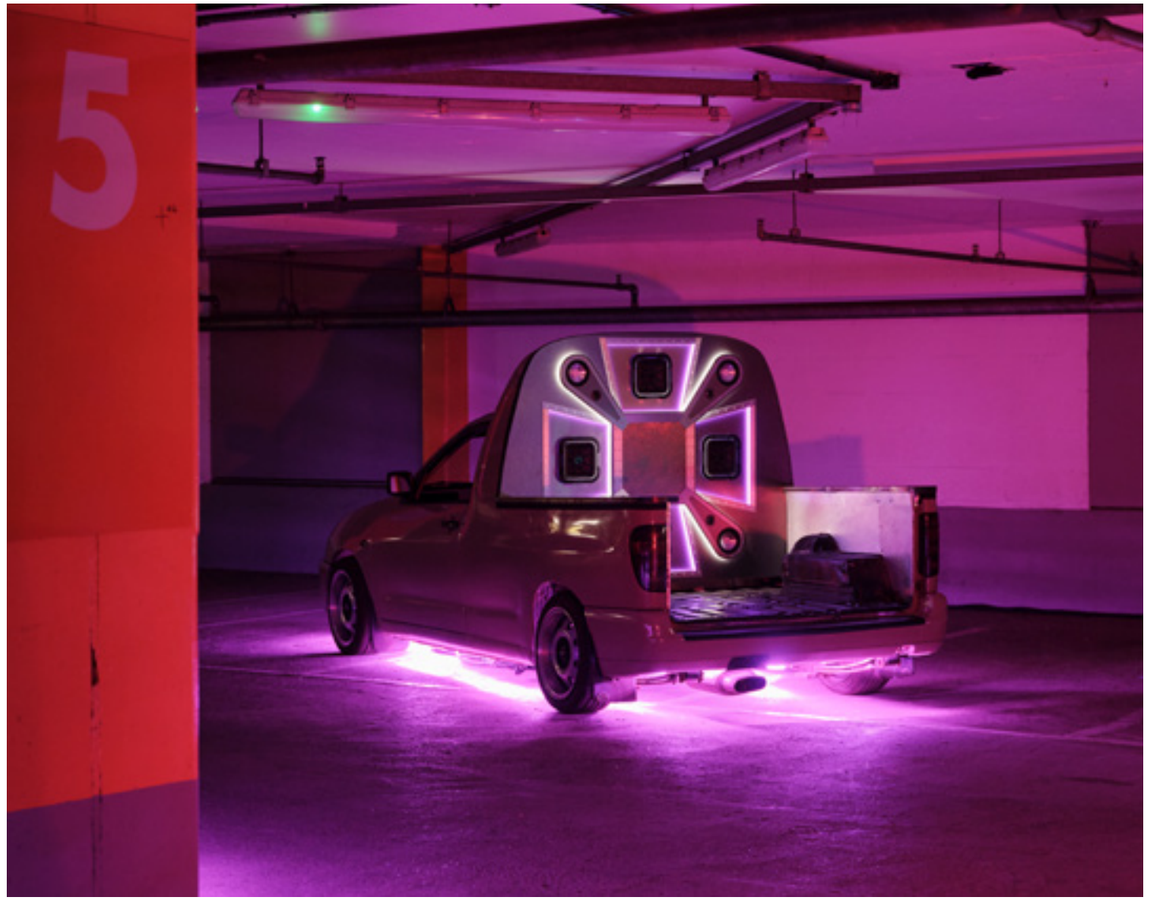
A breakthrough by scientists at the University of California, Berkeley could redefine the borders of human color perception, extending the spectrum we are able to see. By stimulating specific cells in the retina using laser pulses, scientists were able to send a color signal to the brain that never occurs in normal vision, enabling participants to see a new color. Five people took part in the experiment, which resulted in them witnessing a blue-green color that has been dubbed “olo.” Professor Ren Ng, who led the study, described it to BBC Radio 4 as “more saturated than any color that you can see in the real world.” While applications are currently theoretical, the discovery could unlock future display technologies that expand the visual experience or allow for new forms of artistic expression.

Another visual discovery from the University of Science and Technology in China has paved the way for contact lenses that allow people to see infrared light. Humans typically perceive less than a hundredth of a percent of existing light wavelengths, with night-vision goggles formerly the only way to extend this. As well as extending vision, the lenses, which are embedded with nanoparticles, could also help with color blindness.

The sensory revolution is not limited to sight. Our palates are also getting an upgrade, via a device called e-Taste, which is able to simulate and share the flavors of food and drink. An electronic tongue captures data about the concentration of five different taste chemicals, which are then recreated by a receiver component.



Reflections of Being by Max Cooper, part of Feel the Sound at the Barbican in London, UK. © Thomas Adank/Barbican Centre



Joyride by Temporary Pleasure, part of Feel the Sound at the Barbican in London, UK. © Thomas Adank/Barbican Centre

Researchers at the University of Ohio who developed the device say it has broad application in everything from immersive gaming and online shopping to weight management and sensory testing.

As digital folds into everyday reality there is a need to extend tactility. Researchers at Carnegie Mellon University's Soft Machines Lab are developing wearable electronics that augment the senses using "imperceptible technology," says Carmel Majidi, head of Soft Machines Lab. Eliminating the need for bulky vests and gloves, the ultra-thin,

flexible, skin-mounted haptic interfaces can generate 11 distinct touch sensations, allowing people to feel virtual objects, receive physical guidance, or detect real-world objects using haptic cues.

The evolution of sensory boundaries is also proving to be fertile ground for artists. The *Wayne McGregor: Infinite Bodies* exhibition (Somerset House, October 2025 to February 2026) examines the evolving boundaries of physical sensation and digital experience through a series of multisensory interactive works. Striking visual effects reframe our understanding of the body, acoustic soundscapes reshape auditory perception and robotic sculptures trigger a sense of kinaesthetic empathy. At the Barbican's Feel the Sound exhibition in summer 2025, artists explored the potential for the senses to cross-pollinate, with pieces such as Max Cooper's *Reflections of Being* and Temporary Pleasure's *Joyride* inviting audiences to experience sound as expression and feeling, rather than basic audio.

Pushing the frontiers yet further, research is even identifying entirely new sensory capabilities. One study purports to have uncovered a new sense called "remote touch," the ability to sense objects without direct contact. In the research, conducted by Queen Mary University of London and University College London, participants were able to locate a cube hidden in sand before touching it. Tapping the new sense, which is also exhibited by some shore birds, could prove helpful for the development of robotic systems.

Why it's interesting

As human perception expands, so do opportunities for brands to innovate. Moving beyond traditional senses, sensory augmentation allows for truly immersive, multisensory engagements, creating deeper connections.

99

Geoengineering

As the climate emergency intensifies, interest in geoengineering is building.



Courtesy of Planetary Technologies

Speaking ahead of November 2025's Cop30 Climate Summit, United Nations chief António Guterres warned that humanity's slim opportunity to cut rising emissions has been missed. "The truth is that we have failed to avoid an overshooting above 1.5C in the next few years," he declared. "And that has devastating consequences."

Renewed focus and investment are moving to pioneering but controversial geoengineering techniques that attempt to mitigate or reverse the effects of climate change.

Research programs and pilots around the world are trialing ambitious solutions that aim to lower CO2 levels and stem temperature rises. The UK government is one of the biggest investors, with its Advanced Research and Invention Agency ploughing £56.8 million into a selection of global trials to test their potential viability. These include attempts to thicken Arctic ice by pumping seawater onto its surface during winter, as well as solar radiation modification. This attempts to reflect some of the sun's rays away from the Earth to reduce temperatures by releasing sun-reflecting particles into the stratosphere, or by developing techniques to make clouds more reflective.

Despite misgivings from some scientists, commercial approaches are also on the rise with startups raising millions for their efforts. Canadian startup Planetary Technologies is focused on lowering the CO2 levels of the oceans by adding purified alkaline minerals—likened to antacids—to seawater, which neutralizes acidic CO2. As founder Mike Kelland told *Fast Company*, "This is literally Tums." Planetary Technologies has projects underway in Virginia's Elizabeth River and Nova Scotia, and boasts investors including Google and Shopify. In October 2025, American-Israeli startup Stardust Solutions announced $60 million in VC funding that it says will enable the development of technology that will make solar geoengineering a possibility by the end of this decade. Another startup, Sunscreen hopes to deploy aerosols in the lower atmosphere to drive a cooling effect.

While the potential results of geoengineering are appealing, the concept isn't without its controversies. Scientists are divided, with some fearing it could take momentum away from crucial emission-reduction strategies, while bigger concerns surround the unknown and unintended consequences of geoengineering projects, which some believe could further destabilize the climate.

Shaun Fitzgerald, director of the Centre for Climate Repair at the University of Cambridge, tells VML Intelligence that this underlines the need for thorough and robust trials. "Which is more risky—research on climate interventions potentially distracting attention from emissions reduction, or making a decision to remain ignorant about ways to keep a lid on temperatures while the underlying issue of greenhouse gas levels is addressed?" he asks. "Unpredictability can be reduced through research, and that is what is needed."

Why it's interesting

Geoengineering offers another avenue for climate action beyond emissions reduction and carbon credits, though organizations must weigh the implications carefully. With almost nine out of ten globally saying we should all be doing more to tackle climate change, pressure for innovative solutions will mount.



Gen beta futures

What will 2050 hold for generation beta?

The world is headed toward a future with more people, more megacities, longer lifespans, and, potentially, artificial superintelligence. Will generation beta, born between 2025 and 2038, be thriving or merely surviving in the decades to come?

Today, 86% of people worry about the state of the planet they are leaving for future generations. Their anxiety is warranted: the World Health Organization predicts climate change could cause approximately 250,000 additional deaths per year between 2030 and 2050. Younger generations, however, perceive a lifeline: 58% of gen Z and millennials (most likely to be parents of gen beta and, therefore, a formative influence on them) believe "technology like AI can solve our biggest challenges, like climate change or cancer." Amid this tension, three forces will define what gen beta's world looks like: unprecedented urbanization, an AI-native childhood, and a radically reimagined workplace.

Mega urbanites

According to the World Economic Forum, gen beta will make up 18% of the population by 2050, compared to gen Z, who currently make up 30% of the population. Although smaller in size, due to a global fertility decline, gen beta are predicted to be the most urban generation ever with 58% living in cities by 2040, higher than any previous generation at a comparable age. They will contribute to the almost 70% of humanity living in cities by 2050, driving growth in sustainable urban development. Cities including Amsterdam have already committed to becoming fully circular by 2050, while Singapore and Barranquilla in Colombia are incorporating more nature into city infrastructure to improve air quality, temperatures, health standards, and more.



Miko AI toys

Architecture students at the University of Panama were recently tasked with envisioning the future city. The results included the Modular City on Water project, illustrating adaptable architecture that can react to climate change, and Public Library Park, designed to foster social interaction and community.

Synthetic counterparts

Gen beta are growing up alongside smart toys, with Grand View Research forecasting the global smart toy market will double in size from 2023 to be worth $25.54 billion by 2030. Companies are eager for a slice. In June 2025, Mattel announced a collaboration with OpenAI to incorporate AI into its products and experiences. Startups from around the world are launching AI toys for kids, including the emotional companion AiMe by China-based TCL, expected to launch in the second half of 2026; and Mumbai's Miko, which says its mission is to "empower every child with a personalized learning companion." Today, almost half (48%) of gen Z and millennials say it would be OK for kids to be educated by AI, signaling openness to smart toys as educators—and, potentially, AI professors— not just playthings. (For more on the growing AI cohort, see Synthetic generation, page 50.)

Meaningful careers

Experts share their perspectives on gen beta futures with VML Intelligence. Johnny Sawyer, senior research manager at Ipsos, believes "one space that is likely going to affect gen beta more than their older counterparts is AI, because it's going to change the types of jobs they do or the jobs available for them to do." What those will be remains unclear but producer and author Charlie Fink says gen beta will be "natives to AI tools," which could allow them to "make and tell stories that are competitive with the best tools in the world."

> [Work will] become more fluid—more project-based and boundaryless.

Laura Weis

HEAD OF HUMAN-AI STRATEGY, WPP



AiMe by TLC

Laura Weis, head of human-AI strategy at WPP, says when it comes to the future of work, one can only speculate, and a lot depends on the systems we design today. She imagines work will "become more fluid—more project-based and boundaryless. I hope that we automate for non-human tasks or drudgery of work and if we do so, the future generation will have much more space—space to do work that really feels meaningful."

Why it's interesting

Generation beta will be the first fully AI-native generation—raised by AI companions, potentially educated by algorithms, and working in jobs that don't yet exist, all while inheriting a climate in crisis. The decisions brands, governments, and parents make in the next decade will determine whether they thrive in 2050 or merely survive it.

VML

Expert view 2026

A panel of more than 60 global experts helped to shape our 2026 trends.
Here, 10 selected contributors share their unique perspectives on the year ahead
and advice for brands.

VML



Transformative experiences

Dr B Joseph Pine II

AUTHOR, SPEAKER, AND MANAGEMENT ADVISOR

How can experiences be truly transformative?

What turns a transformative experience into a lasting transformation is that it is sustained through time… what I now call encapsulation. You encapsulate the experience by doing three things. First is preparation: to prime people for the experience, let them think about some things in their lives they would like to change, etc. Second is reflection: thinking about what the highlights were, how it made them feel, and how it made them see differently. The last phase is integration: where you help people integrate it into their lives.



Resilience for all

Anjuli Sherin

LICENSED MARRIAGE AND FAMILY THERAPIST, AND AUTHOR OF JOYOUS RESILIENCE

How can brands help foster resilience?

Resilience is about good for all–for the whole system. When a brand takes a stand and says, "We will put people above profit or above authoritarianism," there's a huge boost in resilience in terms of everybody feeling safer, more powerful, and cared for. Brands have a lot of power if they choose to exercise it toward resilience, but it needs to not be in name or show alone. It is to be at every level—they need to embody it.



Truth and trust

Sean Pillot de Chenecey

AUTHOR AND FUTURIST

How can brands build trust among consumers?

One builds trust by building a genuine relationship with consumers, which people love to think they have but most brands absolutely don't. And once one has it, it is even more difficult to retain—it's a great thing to strive for. If you're in this for the long run, if you're an organization that genuinely wants this brand to succeed over a long-term basis, you've got to be thinking about it seriously, and building, solidifying, and having a foundation of trust based on the brand truth.



Privacy

Tiffany Jenkins

AUTHOR OF STRANGERS AND INTIMATES: THE RISE AND FALL OF PRIVATE LIFE

How can people better preserve their privacy?

A very small thing is to stop looking at our lives through the eyes of strangers and start working on small acts of privacy in our own lives. This includes not broadcasting everything and treating our intimates as intimates—and not treating strangers as intimates. It's about working on your own private self as well as a public self. And the two things are slightly different.



The future of beauty

Bunny Kinney

GLOBAL EXECUTIVE CREATIVE DIRECTOR, DAZED STUDIO

How is the rise of speculative beauty shaping identity?

When we say speculative beauty, we mean the fantastic, imaginative potential of transformation through beauty and through different kinds of digital, physical hybrid mediums that we can utilize to realize that transformation.

We are constantly engaging with how we can curate and present our identity online in these digital spaces, whether that's creative, whether that's fantastic, or whether that's speculative—or whether that's rooted in the way in which we wish to be perceived.



New realities

Jo Hemmings

BEHAVIORAL PSYCHOLOGIST

How is reality being redefined through technological advancement?

Reality has become increasingly fluid. The boundaries between the digital and physical worlds are dissolving. We're living in a kind of hyperreality where online culture doesn't just reflect life, it reshapes it.



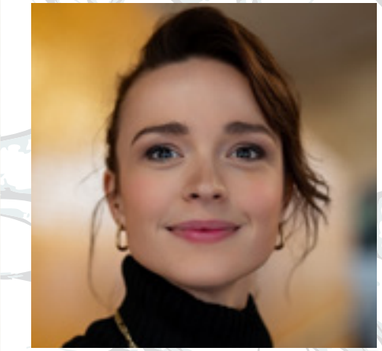
Augmented humans

Jacy Reese Anthis

VISITING SCHOLAR, STANFORD UNIVERSITY

What will the future look like for humans in a tech-driven world?

In the future, it's not going to be clear what humans are. We're going to have access to so much technological augmentation. Right now, we're able to augment ourselves physically with technology, but direct brain connections are in a very, very early stage. At some point, we're going to have to question what "humans" are, with a broader definition that includes augmenting ourselves, potentially mapping our brains, uploading them to computers... Maybe we need a quantum computer to fully replicate consciousness. Nobody can predict that, but I don't believe any biological brain function is utterly beyond technological replication.



The promise of AI

Laura Weis

HEAD OF HUMAN-AI STRATEGY, WPP

What opportunities can AI provide?

There is an opportunity to design AI systems that challenge us, that bring people together who usually wouldn't be talking to each other, that [give us] more ability to be creative and innovative.



Immersive storytelling

Refik Anadol

ARTIST AND COFOUNDER, DATALAND

What kind of future do you imagine for immersive art and storytelling?

I imagine a future where immersive environments are not escapist, but educational and communal. Spaces where storytelling adapts to the visitor; where architecture and AI blend into fluid, responsive ecosystems.



Heritage and brand story

Kathleen Adams

PROFESSORIAL RESEARCH ASSOCIATE, SOAS

How can heritage be a force for brands?

As humans, we are innately drawn to stories that connect to our past. In fact, storytelling is such a defining characteristic of humans that some anthropologists have dubbed us *homo narrens*. Brands with stories that reach back into the past can capture our attention and resonate in powerful ways. There is tremendous potential for using heritage as the foundation for a brand's story.

We would like to thank all the experts whose insights helped shape and strengthen this year's trends.

Kathleen Adams, professorial research associate, SOAS
Refik Anadol, artist and cofounder, Dataland
Jacy Reese Anthis, visiting scholar, Stanford University
Ricardo Araújo, founder and CEO, Ariodante
Ellen Atlanta, writer and brand consultant
Guive Balooch, global managing director of augmented beauty and open innovation, L'Oréal Groupe
Sadie Bargeron, brand editor, *Jing Daily*
Scott Berman, founder, Sky Cave Retreats
Caroline Brien, beauty journalist and expert
Dr Kerry Burnight, gerontologist and author
Jaspar Carmichael-Jack, founder and CEO, Artisan
Kevin Droniak, US travel influencer
Gina Farran, cofounder and CEO, Glaize
Dr Eleonora Fedonenko, dermatologist and medical director, Your Laser Skin Care
Angelica Ferrara, visiting fellow, The London School of Economics and Political Science
Charlie Fink, producer and author
Shaun Fitzgerald, director of the Centre for Climate Repair, University of Cambridge
Larry Hall, founder, Survival Condo
Jo Hemmings, behavioral psychologist
Kenji Higashi, president, Spiber Europe
Sam Huber, global president, Napster
Tiffany Jenkins, author of *Strangers and Intimates: The Rise and Fall of Private Life*
Feng Ji, CEO, Game Science
Thomas Stephan Juzek, assistant professor of computational linguistics, Florida State University
Maggie Kang, director and screenwriter, *K-Pop Demon Hunters*
Kasley Killam, social scientist
Bunny Kinney, global executive creative director, Dazed Studio
Dr Richie Kirwan PhD RNutr., senior lecturer in nutrition and exercise physiology, Liverpool John Moores University
Alanna Kit, neuroscientist and cofounder, Arc
Judy Koloko, founder, The Steam Bar
Bas Korsten, global chief creative officer for innovation and cochief creative officer for EMEA, VML
Gopal Kumar, general manager and group director of wellness development, Kamalaya
Wilfred Lee, AI filmmaker and actor
Nichola Ludlam-Raine, dietitian and author of *How Not to Eat Ultra-Processed*
Jim Lyons, global head of food and beverage operations, Maybourne Hotel Group
Magdalena Malm, director, Visual Arts Sweden
Michael Mascha, founder, FineWaters
Iminza Mbwaya, global program manager, Sounds Right
Brenda Milis, principal of consumer and creative insights, Adobe
Mairéad Molloy, global director, Berkeley International
Charlie Moretti, TV producer and creator, Luxury Treasure Hunts
Samara Oster, founder, Meli
Eiesha Bharti Pasricha, cofounder and artistic director, Maison Estelle
Sean Pillot de Chenecey, author and futurist
Dr B Joseph Pine II, author, speaker, and management advisor
Sreyna Rath, computer engineer and founder, Jaimee
Neil Redding, near futurist
Johnny Sawyer, senior research manager, Ipsos
Anjuli Sherin, licensed marriage and family therapist, and author of *Joyous Resilience*
Curtis Stone, head chef and co-owner, Gwen
Nikolaus Thomale, founder and managing director, Myne
Julian Togelius, associate professor of computer science and engineering, NYU
Mark Turner, founder, UltraSwim 33.3
Yessenia Vila, cofounder, Lisia
Li Wei, dean of the Institute of Urban Planning and Tourism Landscape Design, Northwest Normal University
Laura Weis, head of human-AI strategy, WPP
Liang Wenfeng, founder, DeepSeek
Adrian Westaway, cofounder, Special Projects
Tina Woods, cofounder, Longevity Rave
Samer Yammine, biomedical scientist with a PhD in genomics
Jing Zhang, founder and editor-in-chief, *Luxe/Detour*
Jiao Zi, director and screenwriter, *Ne Zha 2*

Acknowledgements

We would like to thank the following VML colleagues for their valued input and support contributing to our global trends and data:

Sophocles Alexopoulos
Marco Bandini
Sakila Banyen
Lisia Barnard
Pinaki Bhattacharya
Virgile Brodziak
Eric Campbell
Alex Cree
Efi Dikastopolou
Lionel Gomez
Raquel Gonçalves
Mona Hassanie
Rachel Hogan
Joyce Ling
Francesco Lucchetta
Faysal Abdul Malak
Sebastian Martínez
Hiroko Okita
Diana Orrico
Maria Paxton
Ernest Riba
Felipe Ritis
Nuno Santos
Lizzie Snell
Ricky Suzuki
Lydia Tamarat
Naomi Troni
Paz Ulloa
Catarina Venâncio
Darby Waligorski
Sarah Wong

The Future 100

About VML Intelligence

VML intelligence is VML's futurism, research, and innovation unit. It charts emerging and future global trends, consumer change, and innovation patterns—translating these into insight for brands. VML intelligence offers a suite of consultancy services, including bespoke trends presentations, futures reports, and workshops. It is also active in innovation, partnering with brands to activate future trends within their frameworks and execute new products and concepts. The division is led by Emma Chiu and Marie Stafford, Global Directors of VML Intelligence.
For more information visit: vml.com/expertise/intelligence

About "The Future 100"

VML Intelligence's annual forecast presents a snapshot of the year ahead and identifies the most compelling trends to keep on the radar. The report charts 100 trends across 10 sectors, spanning culture, technology, travel and hospitality, brands and marketing, food and drink, beauty, retail, luxury, health, and innovation.

About the data in this report

Unless otherwise stated, all findings in this report were collected by SONAR™, VML's research practice, from September to November 2025. The study fielded September 24–November 3, 2025, when we surveyed 15,639 adults across 16 markets (~1,000 participants per market). The markets covered in this research are Argentina, Brazil, China, Colombia, France, Greece, India, Italy, Japan, Mexico, Portugal, Saudi Arabia, Thailand, the United Arab Emirates, the United Kingdom, and the United States. Respondents are representative of their respective market in regard to age, gender, and income.

©2026 VML Intelligence. All rights reserved. The contents of this report cannot be replicated, extracted, or hosted without consent. Sharing of this report is permitted only via link to the original report download page on vml.com/expertise/intelligence, unless explicit consent is otherwise granted.

Contact

Emma Chiu emma.chiu@vml.com
Marie Stafford marie.stafford@vml.com

Report authors

Emma Chiu, Marie Stafford

Writers

Alicia Kirby, Amor Mao, Carla Calandra, John O'Sullivan, Laura Feasey, Nina Jones

Data

Darby Waligorski, Diana Orrico

Sub editors

Hester Lacey, Katie Myers

Picture research

Rhoneil Tiburcio

Creative director

Paz Ulloa

Graphic design

Marco Alfaro, Paz Ulloa

Cover

Paz Ulloa

Fonts used

The Seasons; Fira; Snowflake Sans

VML