Beyond Today's Trends: Future Consumer Economies

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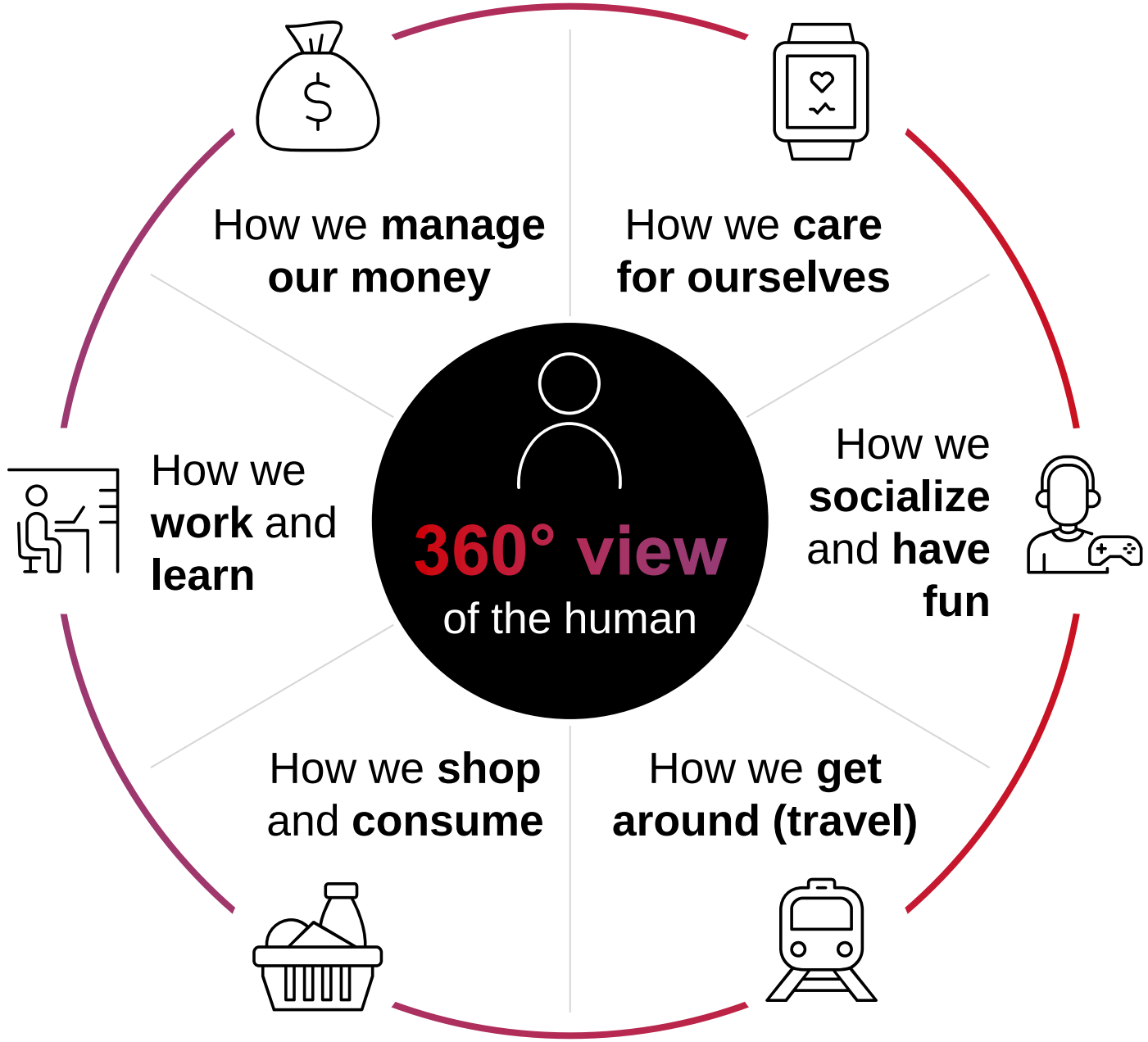
CONSUMER LAB


Uber
9:41
Scanning your list...
Milk
Eggs
Bread
ssistant
Cart Assistant
Done




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We detect early signals across different **‘spheres of life’** to understand the way people will consume, exchange or buy in the future



Global macro forces

AI applications
Ageing population
Automation
Regulations
Tech advancements
Migration & movement of people
Declining birth rates
Climate change
Rising single population
De-urbanization
Gen Alpha on the rise
Polarization of wealth
Geo-political instability

New economies

New products, services, and business models for Future Consumers

Consumer behaviours

Increased emphasis on wellness
Demand for diverse & equitable options
Destigmatizing mental health
Hyper-personalization
Local consumption
Religion decline
Biohacking
Social isolation
Ultra-convenience
Activist mindset

New economies

New products, services, and business models for Future Consumers

Redefined Family



Autonomous Agent



Conscious and Slow



Originator



Re-Routed



2 billion Shades of Grey



Emotional Support



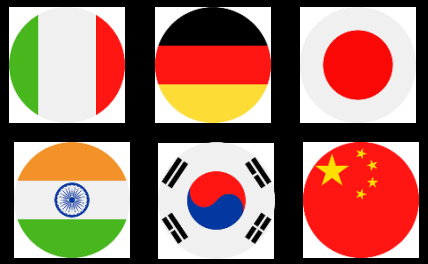
Superhuman



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“After all, we are all immigrants to the future”
Margaret Mead
Re-Routed
BAIN & COMPANY

Populations shifts



1 in 5

People in 2050 will be Sub-Saharan Africans

Economic imbalance

54x

Higher wages in wealthy nations vs. low-income

135

…years to close wage gap

Climate change

1.2B

Displaced due to global climate by 2050



Normalised remote & hybrid work



1 billion

"Location independent workers" by 2035

91%

Of businesses offering one kind of flexible work policy









Solutions



Globalised palates





Unlocking rural demand



Built-in VPN access



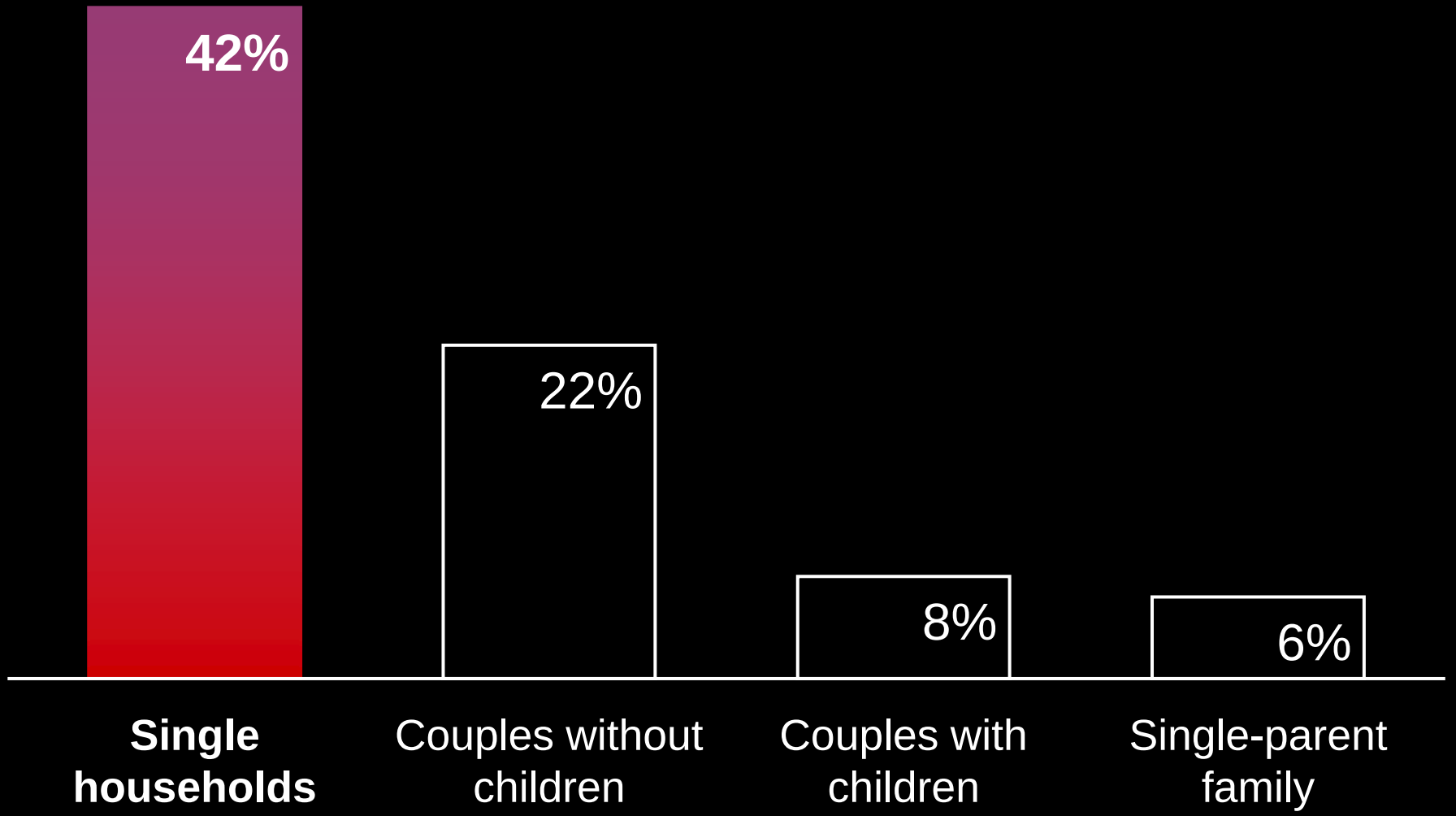
Global hiring services


Create spaces and offerings for re-routed people to thrive


“
Call it clan, network, tribe, or family: Whatever you call it, whoever you are, you need one
”
Jane Howard
Redefined Family
BAIN & COMPANY

REDEFINED FAMILY

Growth in number of households (2025-2040)

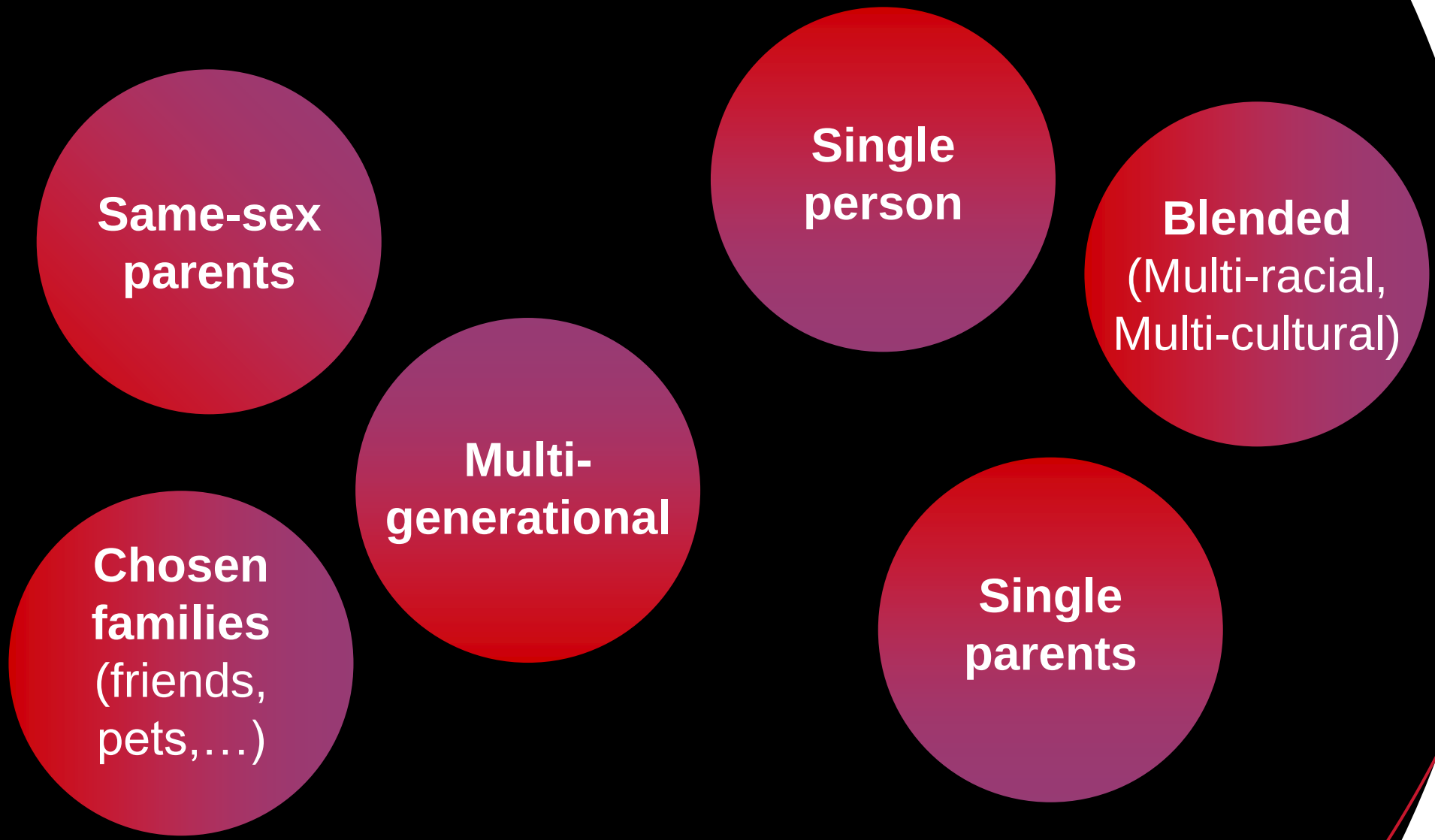


REDEFINED FAMILY



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REDEFINED FAMILY



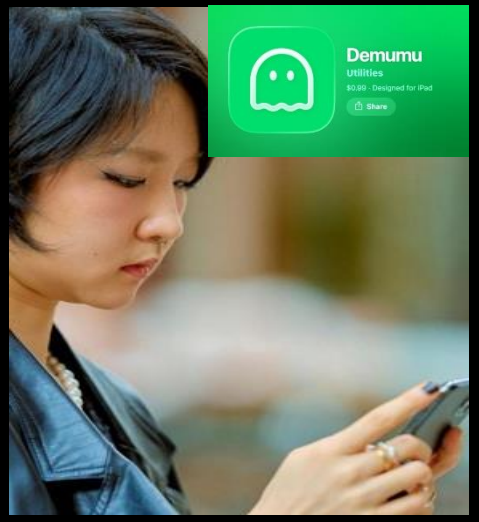
Solutions



Small kitchen appliances



Multigenerational ‘grandymoons’ holidays



Solo dwellers check-in app



Festive Jackets for pets



Rituals for all family structures

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2 billion Shades of Grey



“We don't stop playing because we grow old; we grow old because we stop playing”

George Bernard Shaw

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2B

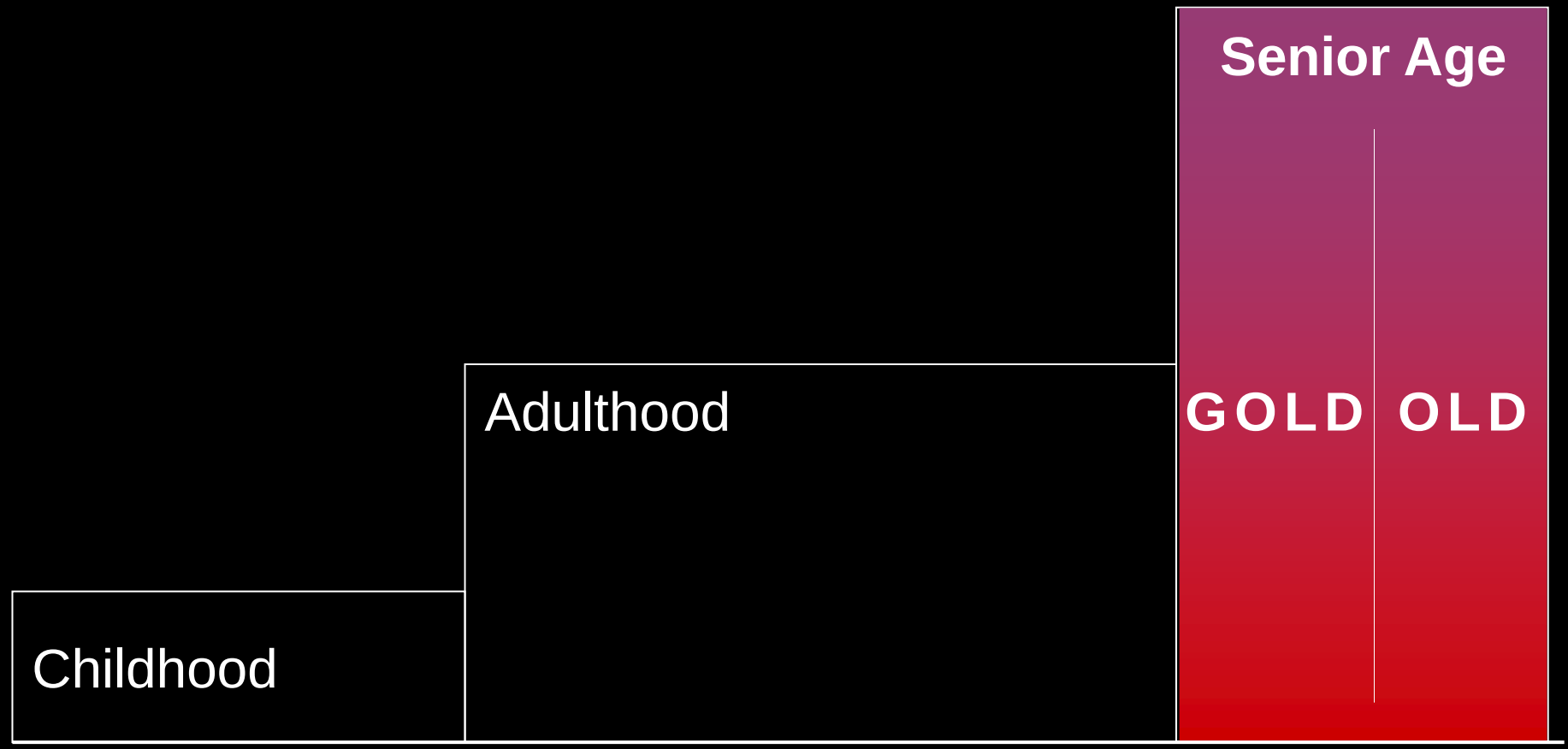
Population
60+ by 2050

25%

Workforce will be
55+ by 2031



Division in Senior Age



Paradox of aging



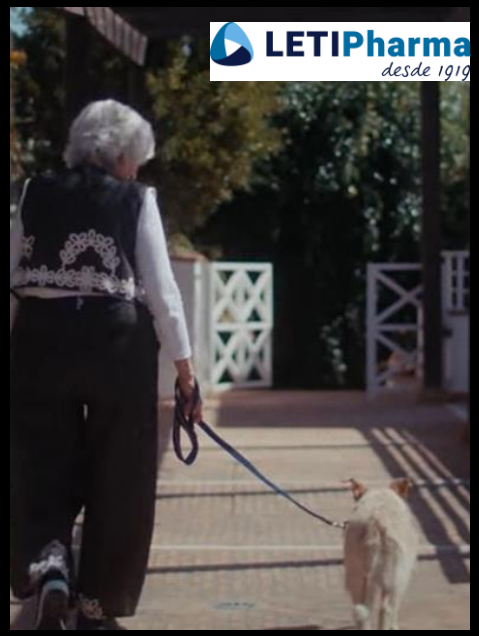
Solutions



Longevity products



Co-living with younger people



Fostering companionship



Family Health monitoring App for caregivers

Solutions examples

80%

Women die single

80%

Men die married

Women-only focused wealth platforms



ELLEVEST

fin:marie

$124t

Of wealth transfer by ~2050 in US

43%

Will go to women

No one-size-fits-all approach to aging



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Conscious and Slow



“Times are urgent.
Let’s slow down”

Bayo Akomolafe

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Sustainability, a rising concern

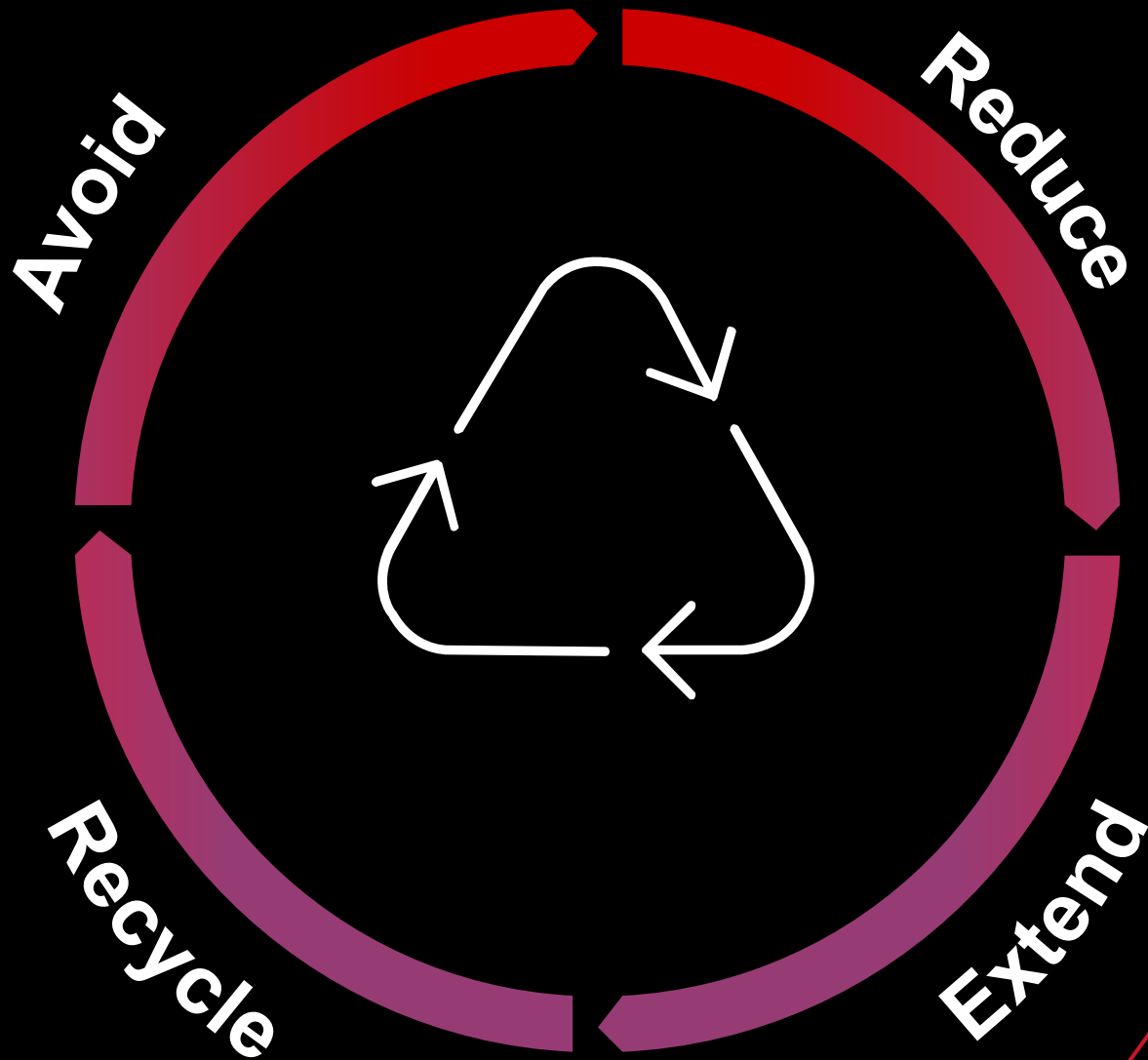


66%

People extremely or very concerned about environmental sustainability

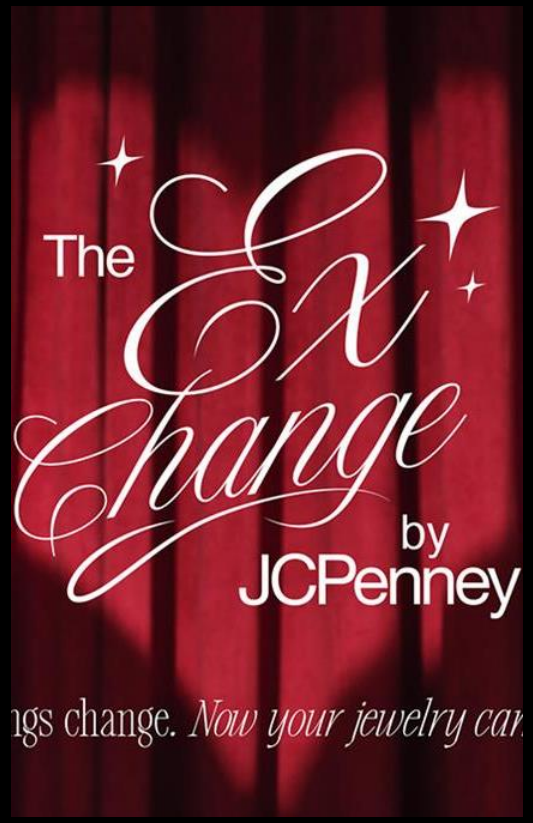
CONSCIOUS & SLOW

Dimensions of conscious living



Solutions

Avoid



Jewelry product swap

Recycle



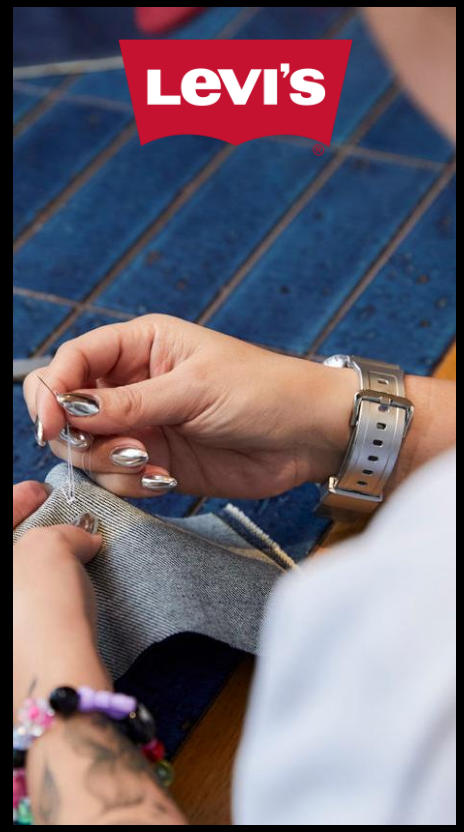
Emissions capturing & recycling

Reduce



Plant-based edible spoons

Extend



Repair & alteration training


Turn consumption models on their head



Autonomous Agent

"Embrace tech and make time your ally to humanize your life"

ChatGPT

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Time scarcity



40% Globally feel they have no free time for leisure

Rapid AI evolution



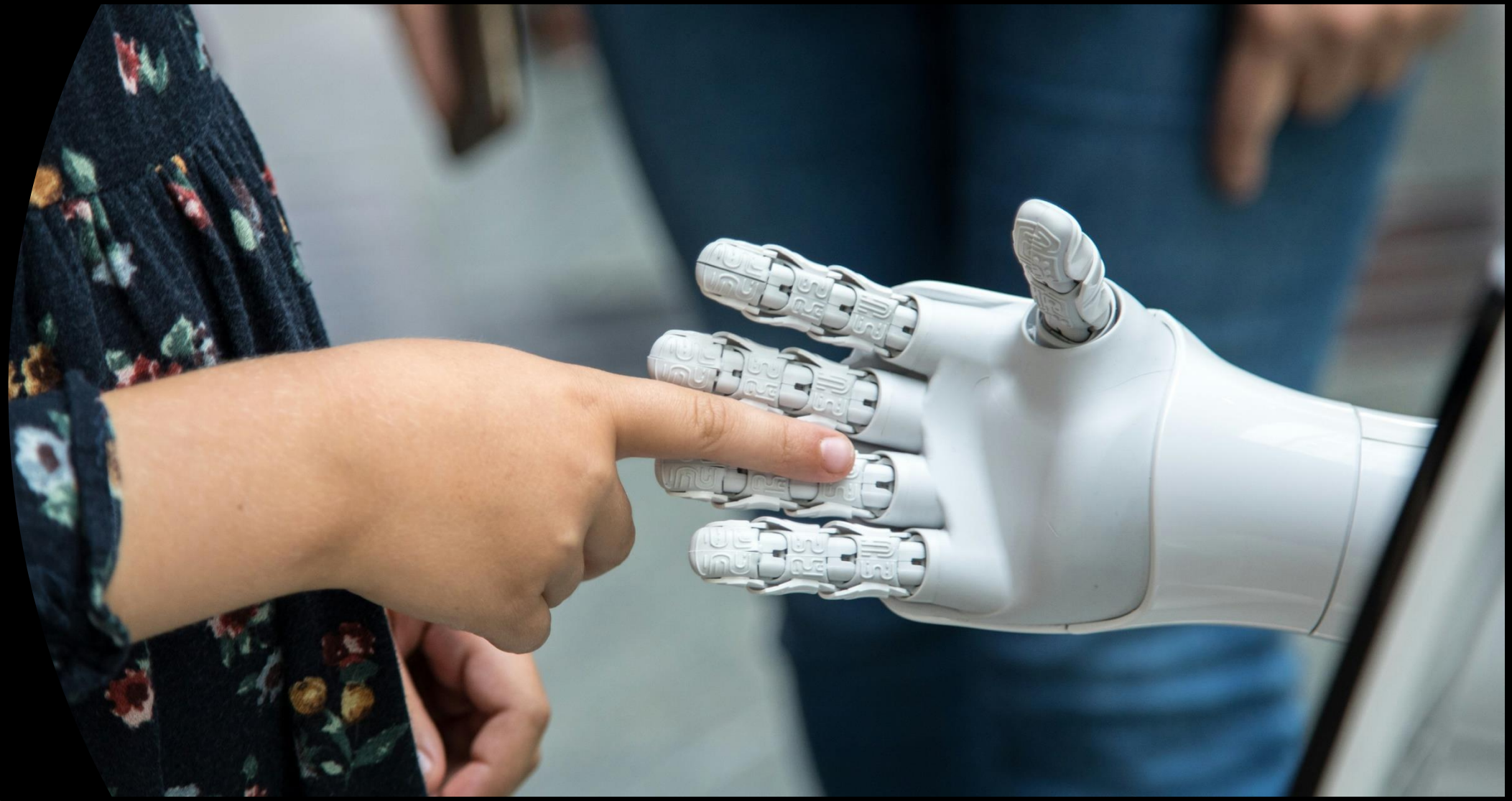
70% Americans used Gen AI

65% Are zero – click searches

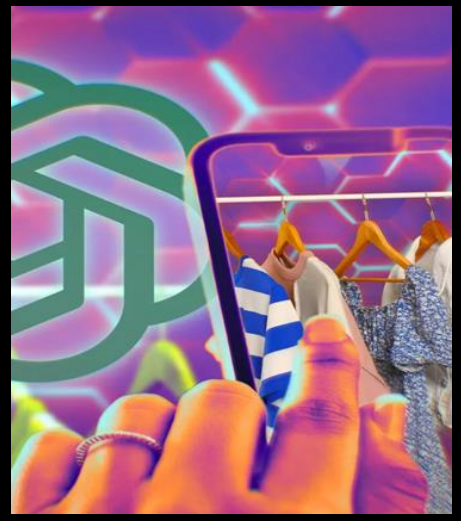
Tech omnipresence



21 Average household connected devices

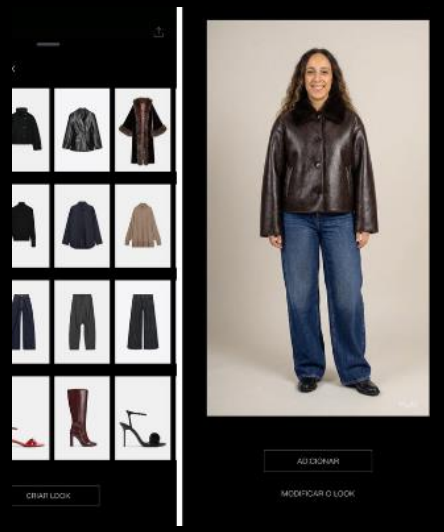


AI Agents | solutions



PayPal ChatGPT

AI Instant Checkout



ZARA

AI virtual try-on



GAMBIT ROBOTICS

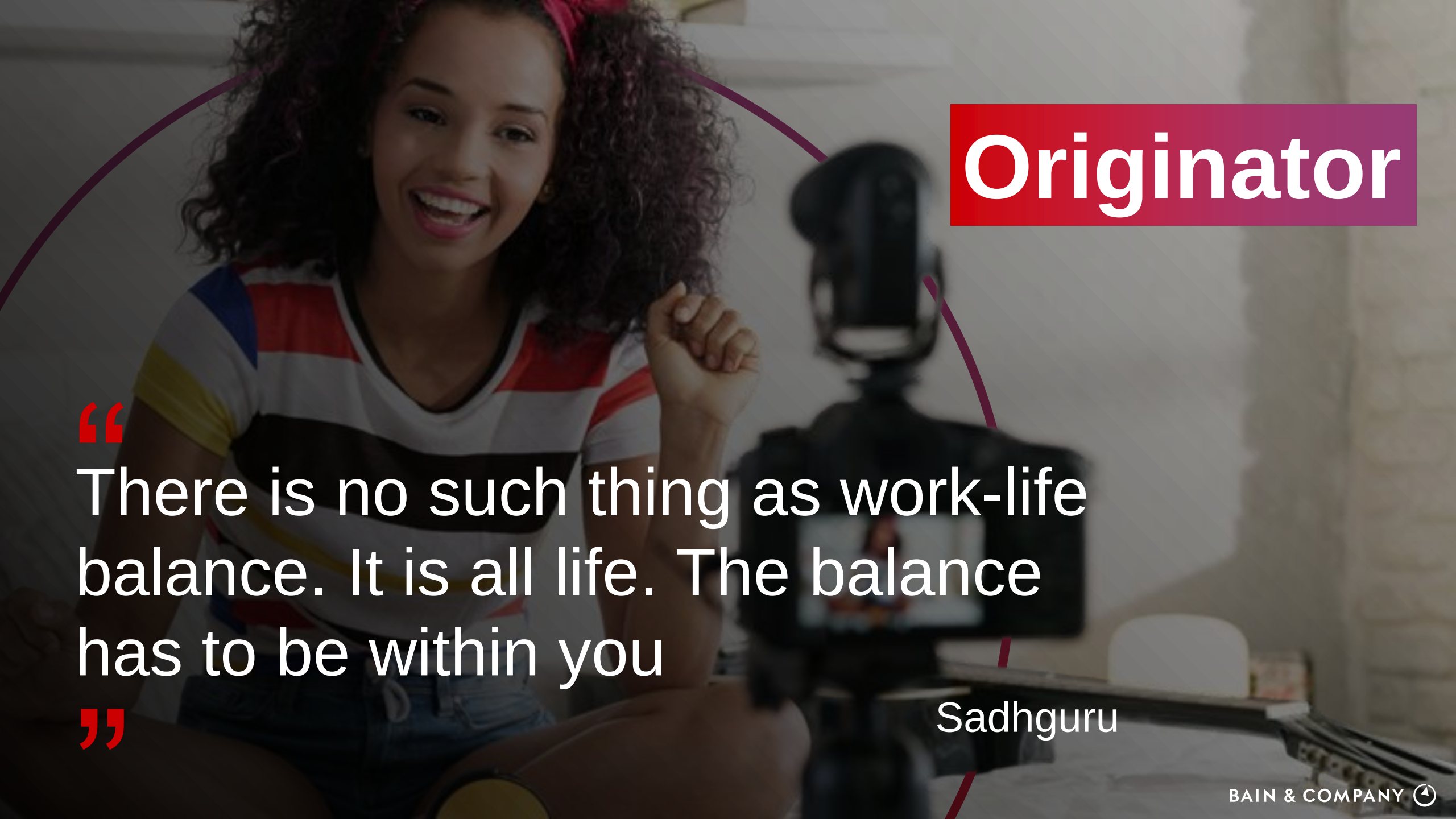
AI sous chef



JUST EAT

AI Choice Concierge


Use tech to humanize your life
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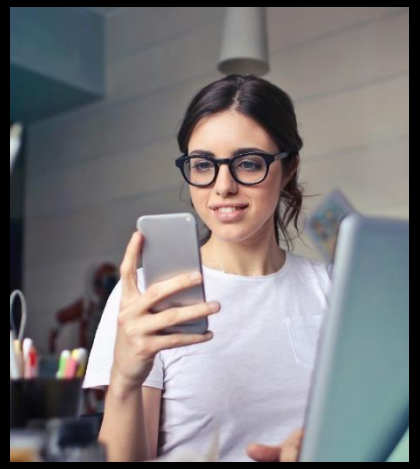
Originator

“There is no such thing as work-life balance. It is all life. The balance has to be within you”

Sadhguru

ORIGINATOR

New working models



1 in 5

Gen Z are poly-employed

~65%

of the jobs that Gen Alpha will have do not even exist today

Become your own business



50M

Consider themselves “Creators”

ORIGINATOR

Solutions



Consumers as co-creators



Gamified hiring process



Experts as creative contributors

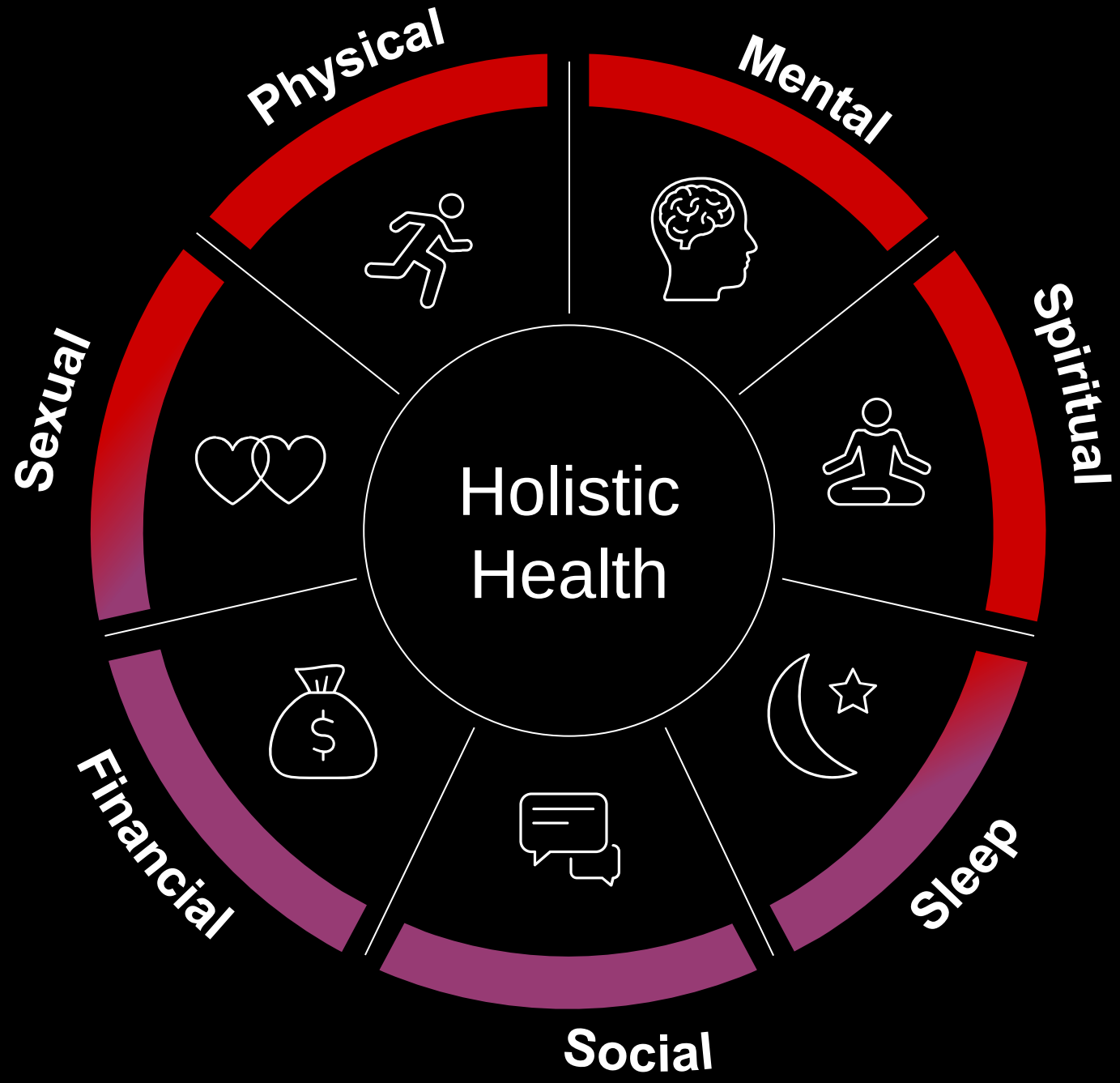

Design unique lifelong journeys
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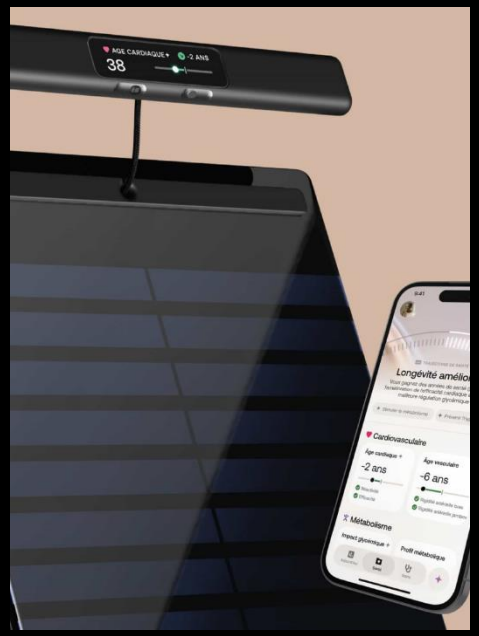
“Dying young as late as possible”

Ashley Montagu

Superhuman


Physical
Mental
Spiritual
Sleep
Social
Financial
Sexual
Holistic Health

Preventative Solutions



Predictive AI smart scale



Migraine prevention



Hormone tracker from fertility to menopause

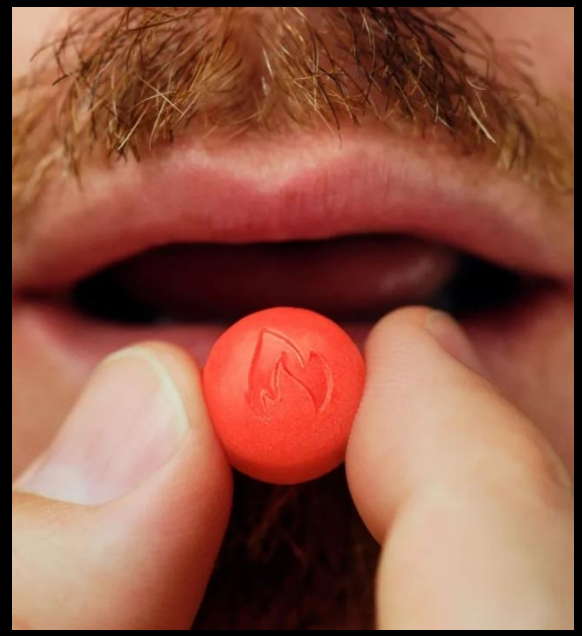


Breast cancer screening

Solutions



Physical health



Next-gen ED treatment



Sleep tourism

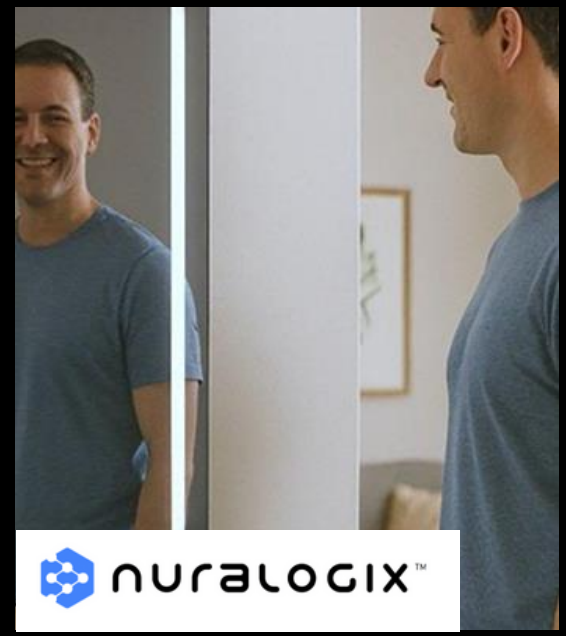
Solutions



Mind enhancement



Financial therapy



Longevity smart device




Democratize health for everyone

Emotional Support



“To friendship every burden's light”

Aesop

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EMOTIONAL SUPPORT

Loneliness



1 in 6

people is affected by loneliness

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EMOTIONAL SUPPORT

Technology & Social media



70%

social media users reported feelings of loneliness

1 in 3

people have used AI for emotional support in the UK

EMOTIONAL SUPPORT

Decline in shared moments and rituals



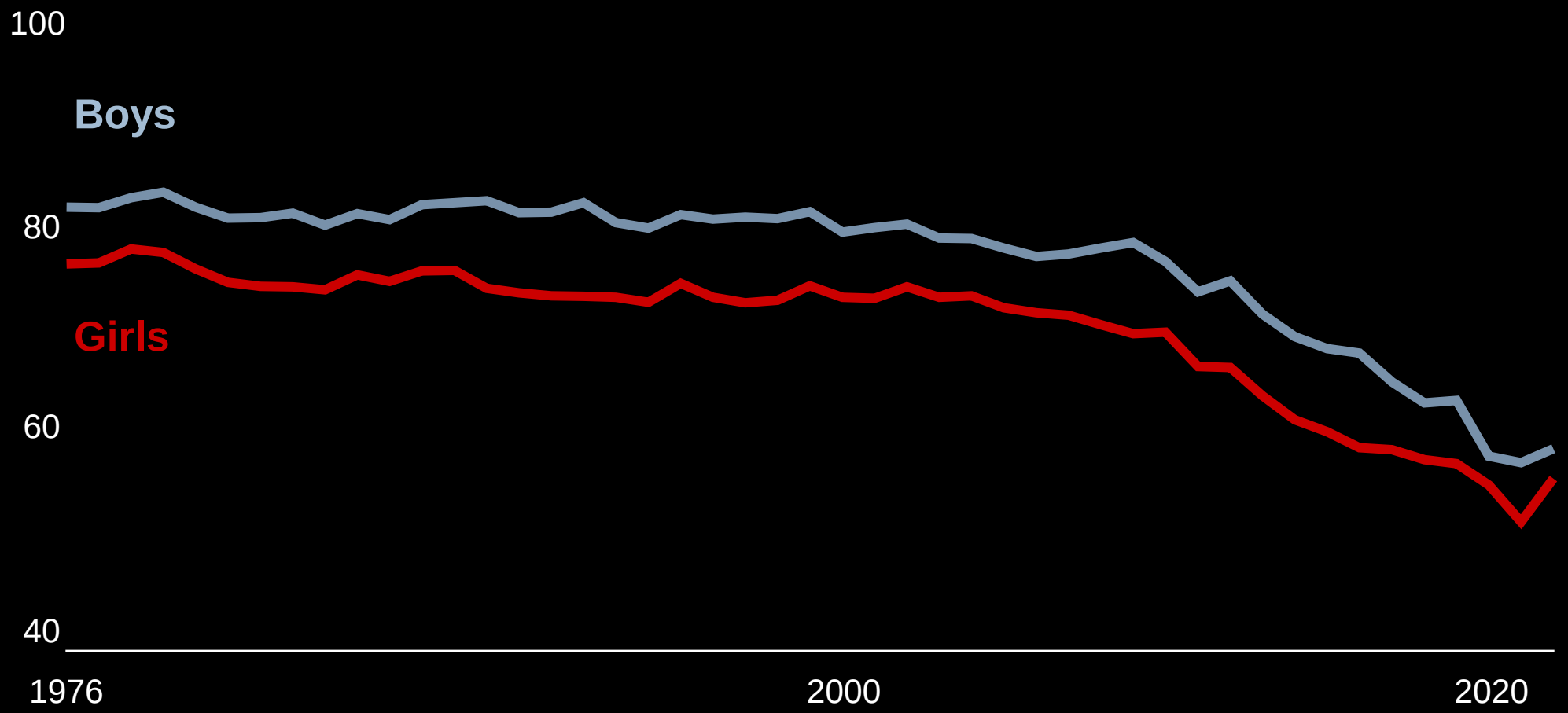
45%

people who never attend church feel lonely vs. 23% who attend church regularly

EMOTIONAL SUPPORT

Decline in hanging out

% of teens socializing with friends every week



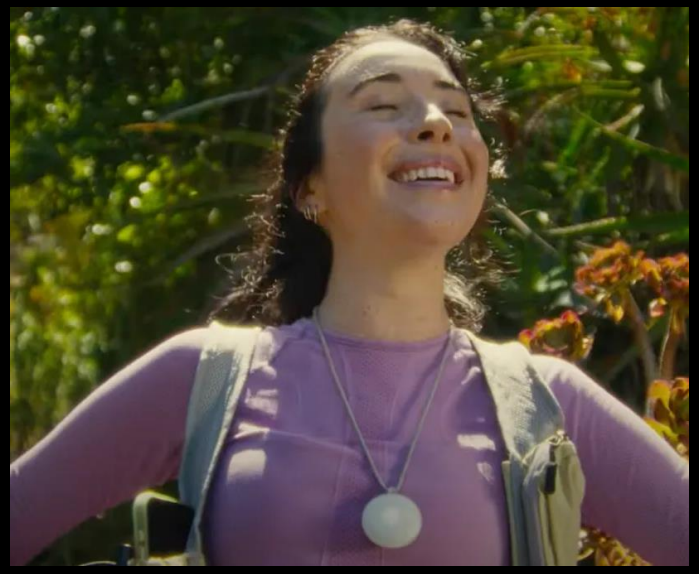
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EMOTIONAL SUPPORT

Unfavourable AI solutions



AI dating café



AI Friend necklace



Lifelong AI relatives

EMOTIONAL SUPPORT

Solutions



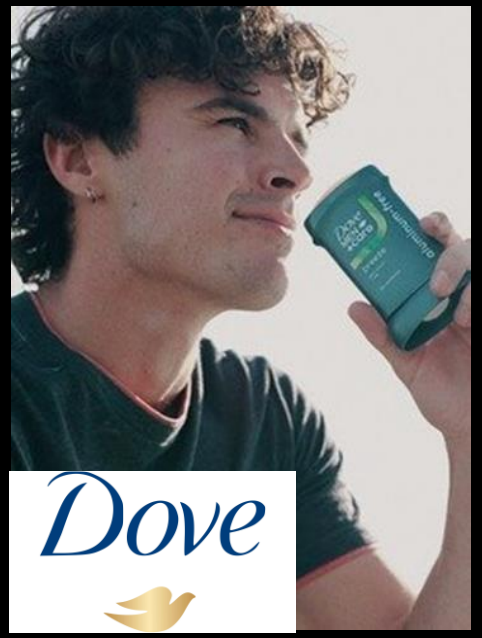
Governments intervening

EMOTIONAL SUPPORT

Sources of comfort and support



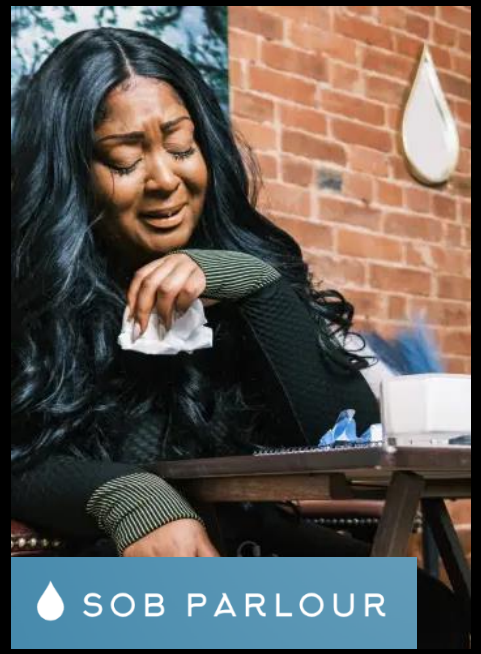
Comfort Collectables



Deodorants to boost moods



AI-powered social therapy



Cry spa

Re-create the social town square



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New economies

New products, services, and business models for Future Consumers

Redefined Family



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2 billion Shades of Grey



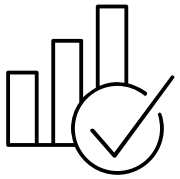
Emotional Support



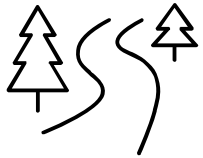
Superhuman



Let’s take a moment to reflect & discuss



Which of the **future economies resonate** the most?



Do any of these future economies **challenge your business strategy?**



Do your portfolio companies have the **right network, footprint and capabilities** to play and win in these future economies?



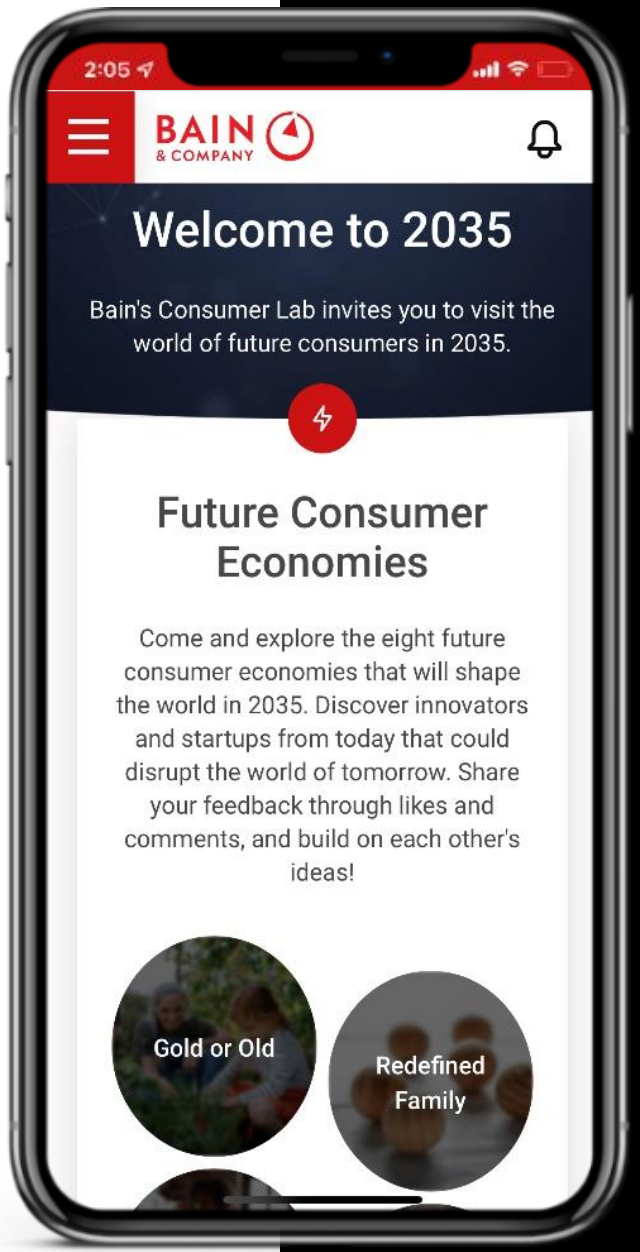
What **new business models** could be potential opportunities in the future?



Do you have the **right talent and operating model** to face the transformation ahead?

Scan to learn more about future consumer economies…

Access code: 12345



Get in touch



Joëlle de Montgolfier



Leah Johns

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Thank you.