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: : BEST NIGHTS 2030
: : THE FUTURE OF NIGHTLIFE

BEST NIGHTS
VC



Best Nights VC

Contact: Lia Schmökel (Investment Manager)

Website: bestnights.vc

Email: lia.schmoekel@bestnights.vc

The Future Laboratory

Co-founder : Chris Sanderson Co-founder : Martin Raymond
Managing director : Cliff Bunting Head of foresight : Tim Noakes Head of strategy : Rachele Simms Head of marketing : Rodrigo Tobal

Foresight editor : Kathryn Bishop Senior foresight writer : Holly Friend Foresight writer : Abi Buller
Senior creative researcher : Olivia Houghton Creative researcher : Savannah Scott Creative researcher : Emily Rhodes

Strategic foresight editor : Adam Steel Senior strategic foresight writer : Darian Nugent Presentations editor : Tilly Thorns

Strategy director : Louise French Futures director : Victoria Buchanan Futures analyst : Rachael Stott
Senior strategic researcher : Maryam Amjad Strategist : Tamara Hoogeweegen Junior strategist : Sophie Boldog Junior futures analyst : Gursharan Panesar

Art director : Britt Berden Designer : Samuel Davies Senior sub-editor : Ian Gill
Senior production planner : Madeleine Watts Senior events manager : Philip Franklin-Slattery

Brand and content marketing manager : Louise Lee Marketing assistant : Emily Kelly

The Future Laboratory
26 Elder Street, London E1 6BT, UK Phone: +44 20 7791 2020
Email: office@thefuturelaboratory.com

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‘This is a moment that is causing people to recalibrate’

Chris Sanderson, co-founder, The Future Laboratory

Part One: A New Horizon - Redefining Best Nights

By 2030, reformed attitudes to the world and our place within it will fundamentally transform the pursuit of Best Nights and nightlife.

The world is in a state of flux, with young people at the centre. In the face of mass youth unemployment rates, educational catastrophes, social injustice and a spiralling global climate emergency, traditional systems and institutions have not been agile enough to cope with seismic change. As we move from a period of inertia to one of great transformation, the Covid-19 pandemic is accelerating a great re-assembly of life, work and play.

It's a disruptive moment, but one that innovators and early adopters are already harnessing by building back better and placing emphasis on human emotion and connection – tenets that were being left behind pre-pandemic. 'This is a moment that is causing people to recalibrate,' says Chris Sanderson, co-founder of The Future Laboratory. 'As we adapt, the need to unwind is still there, but with a greater appreciation of kinship and authenticity.'

This will fundamentally transform consumers' pursuit of Best Nights – the outstanding, multi-sensory nightlife experiences defined by a natural flow and positive energy. With these experiences already able to help people find escapism, fight loneliness, combat stress and develop self-control, in the next decade Best Nights will empower people to achieve even more.

In this report, strategic foresight consultancy The Future Laboratory, in partnership with Best Nights VC, the investment unit of Mast-Jägermeister SE, explores how the next decade of nightlife will inform future trends and key investment opportunities. Using a series of expert interviews and network insights, combined with quantitative research from key markets in the US, Germany and China, we outline the global cultural, social and technological shifts that are recalibrating the values of tomorrow's consumers. We investigate how this new set of needs are manifesting across six key trends, each set to redefine the how, what, where and why of Best Nights.

Part Two: New Nightlife Needs

: From Experience to Transformation

The experience economy is moving towards personal transformation as public imagination looks inwards, with consumers trading in mass consumption and throwaway interactions for meaningful moments.

Driven by digitisation, a booming leisure market and low-cost travel, in the last two decades there has been a transition from materialism to experientialism, with experiences slowly superseding objects in consumers' minds.

But with a recent survey finding that 46% of Generation Z rate new experiences as one of the three most important things in their lives, the experience economy's superficiality is becoming palpable (source: [Boiler Room](#)). The advent of social media, contrived photo opportunities and cynical marketing have led the market to be saturated and experience fatigue to set in.

'Across generations and across the world, people are now looking for experiences, services and products that help them to become better versions of themselves'

Chris Sanderson, co-founder, The Future Laboratory

Now, however, horizons are changing. Caught in a state of constant social, political and economic flux, consumers and brands are recalibrating amid the impact of Covid-19, creating a new era in which personal transformation trumps consumption and throwaway interactions are traded for more meaningful, contemplative moments.

'This mission to be healthier, wealthier and happier is leading to the rise of the Transformation Economy.'

In response, in the next decade the concept of experience as medicine will take root in the nightlife sector. The focus will shift to places, processes and practices that cultivate intimacy and introspection – all with a view to rebalancing our emotional, physical and spiritual states.

The consumers of 2030 will seek nightlife experiences that facilitate transformation by meeting a new **ABC of Nightlife Needs**: Actualisation, Betterment and Community. By meeting these needs across the entirety of consumers' night out journeys, brands, start-ups and investors can help people better themselves and deliver the all-important layers of difference between the ordinary and the Best Nights.

: Actualisation

Future consumers are swapping self-promotion for self-realisation, seeking experiences that help them understand who they are.

With promises of limitless online identities, young people once used social media to claim their individuality. But a feedback loop of visual-first content has made people more homogeneous than ever.

Rather than using platforms to promote and define their own identities, however, Gen Z are increasingly using the digital world to enrich them: be it through finding their moral voice or by pursuing new routes to education. By 2030, this will lead this generation to explore multiple self-directed personas in the faceless serenity of the digital space.

'The critical distinction is to recognise the difference between the persona they project in bits of information versus their complex, constantly growing selves,' says Julie Weitz, a visual artist who explores the psychological impact of digital media on selfhood.

To this group, offline and online worlds exist in harmony, as hybrid digital and in-real-life (IRL) events allow them to express their multi-faceted identities – research from Best Nights VC shows that 31% of Gen Z consumers claim the best nights allow them to connect with themselves. The authenticity of peer-to-peer education, branding or events, meanwhile, means they rely on kinfolk networks that have a global footprint. And instead of an uninhibited departure from their everyday values and life, for this generation hedonism represents a way to work those values into a more conscious and purposeful pursuit of nightlife.

: Betterment

As future consumers establish their place in the world, they are demonstrating new attitudes, such as cleaner lifestyles, altruistic actions, improved self-care solutions and spiritual healing practices.

Coming of age in a global crisis, young consumers are acutely aware of the global issues of sustainability, health and wellness, and equality. While anxiety and angst remain as widespread among this group as in previous generations, they remain staunch in their view of a better world, and one that starts with themselves.

With 41% of 18–25-year-olds citing global warming as the most important issue the world is facing, according to Amnesty International, younger demographics are looking for brands and leaders



ISH Premixed Spritz

‘While hedonism and recreational pursuits are important, mindless escapism isn’t an option, with consumers turning emotions into actions, challenging existing societal structures and not accepting brands, events or experiences that fall short of their expectations’

Darian Nugent, senior strategic foresight writer, The Future Laboratory

to make real-world impact, not mission statements. Ethical and conscious mindsets are commonplace – and for them the problems don’t need explaining, they need solving. As Hadi Ahmadzadeh, founder and CEO of UK-based sustainable nightlife consultancy EcoDisco, explains: ‘Sustainability is simply about protecting the future from the present.’

Beyond the world around them, betterment extends to their own wellbeing too, as they understand where outside structures often fall short on caretaking responsibilities. Research from Best Nights VC reveals that 60% of German Gen Z and Millennial consumers are actively trying to reduce their alcohol consumption, while according to GlobalWebIndex, Gen Z are more conscious than other generations: in the US, 15% say they drink alcohol at least once a week, compared to 28% of Millennials and 36% of Baby Boomers.

: Community

Largely abandoning hope that leaders and policies will safeguard their experiences, future consumers will look to community kinship for recreation, freedom and empowerment.

At a time when their independent growth was just beginning, the pandemic put the educational, employment and recreational futures of Gen Z on hold. Over-represented in precarious jobs, research from the Pew Research Center outlines how this group were unfairly hit by the global upheaval, with 50% of the oldest Gen Z members in the US reporting that they or someone in their household lost a job or took a pay cut during this time, compared to 40% of Millennials, 36% of Gen Xers and 25% of Baby Boomers.

While government policies and leadership weren’t there to protect their freedoms, Gen Z found solace in grassroots organisations, and digital and offline communities that flourished during the pandemic.

With the many structural and existential repercussions of the pandemic only just coming to light, this group will continue to seek connections with like-minded individuals for solace. And with a new generation coming of age in the era of self-isolation, the evolution of online groups into fully fledged real-life communities is widespread, bringing with it elevated consumer expectations for nightlife experiences that empower and protect communities.

Data from Best Nights VC indicates that going out at night to have fun with friends is a key way that Millennials and Gen Z combat feelings of stress and loneliness, with 44% of Chinese, 36% of German and 27% of US consumers listing this among their top answers – ahead of options like yoga & meditation, favoured by just 16% in China, 11% in Germany and 20% in the US.

‘It’s become more and more apparent that we really do need each other,’ says Paul Bui, co-founder of queer-owned, New York-based live-stream and resource platform Community Bread. ‘Maybe it’s not shoulder to shoulder on a crowded dance floor. Perhaps it’s re-uniting in a Twitch chat room or hopefully going nuts at a warehouse rave soon. Whatever the case, whatever format or whatever distance we’re apart, we all need each other more than we realise.’

*'It's become more and more
apparent that we really do
need each other'*

*Paul Bui, co-founder of queer-owned, New York-based livestream and
resource platform Community Bread*



Part Three: Nightlife futures

Over the next decade, the **ABC of Nightlife Needs** will drive new directions in the physical structures, social interests and disparate communities that comprise the future of Best Nights.

A wave of innovation, prompted by shifting consumer sentiment, will spring brands into action as they seek to harness people's desire for transformation.

As The Future Laboratory's Chris Sanderson says: 'Brands will need to reconsider their role in the lives of consumers. Looking beyond their traditionally transactional relationships, they will be required to refresh their experiential offering in order to promote personal purpose and meaning.'

From immersive virtual spaces, digital playgrounds and DIY attitudes to new communities, revived offline rituals and responsible recreation, we have identified six macro-trends that will define the next decade of nightlife and transform how 2030's Best Nights will be experienced.

: Digital Facilitators

By 2030, digital acceleration will unlock new nightlife frontiers, as ground-breaking immersive technologies reframe virtual and augmented spaces as bona fide alternatives to real-life experiences.

Despite its game-changing potential, mass adoption of XR – advanced augmented and virtual reality (AR and VR) – has been a long time coming. But now the stage is rapidly being set for a new digital era.

According to McKinsey & Co, five years of digital progress was made in the first eight weeks of the pandemic alone across all industries – with the events sector key among them. And with up to 65% of the world's population forecast to be serviced by 5G connectivity in 2025, according to a report by Ericsson, a new world of digital possibility is emerging.

Whereas XR apps on 4G networks suffered from stilted experiences, the low latency, incredible speed and massive capacity of 5G will enable new and enhanced experiences in XR, providing ubiquitous, all-pervasive connectivity. In doing so, the true possibilities of XR will finally be realised and new value created; PwC forecasts that XR technologies will add €1.3 trillion (£1.1 trillion, \$1.5 trillion) to the global economy by the end of the decade.

Future-facing technologies are emerging in tandem with refreshed outlooks and expectations on identity, inclusivity and accessibility, with consumers set to harness the power of XR to help others and

themselves carve out authentic identities free from practical or safety constraints – and this only represents the beginning.

'Digital integration is already happening all along the consumer journey,' says Matt Djokovic, regional director Asia at Jägermeister. 'But we're only just on the cusp of how these technologies will seamlessly impact moments of bonding and gathering.'

Egalitarian Experiences

Powering the rise of immersive XR entertainment across the next decade is its inclusive potential, with everything from live-streamed shows to interactive events and VR clubs appealing to the community-led mindsets of Gen Z and their own preoccupation with inclusivity across the board.

Quick to utilise the captive audiences afforded by global lockdowns, a number of brands are paving the way forward when it comes to the creation of inclusive virtual events open to anyone, anywhere.

Berlin Club Qu is one example. Founded by a group of music industry creatives, the gamified virtual clubbing space replicated a typical night out – from hanging out by the toilets to grabbing a drink at the bar – while also giving each attendee 5,000 clicks per session to control various environmental factors within the club. Fractal Fantasy's 3D-rendered club space, Virtua, meanwhile, represents an equally life-imitating offering, combining immersive installations and spatial audio systems with vending machines and lockers designed to provoke the meaningful interactions found in IRL spaces.

With their first-person perspective and self-determining avatars, the growth of AR and VR spaces can return power and focus back to the crowd and nightlife talent. London-based Sweat is another brand making this future happen, using lockdown to code its own 3D club space from scratch in preparation for a month-long VR festival, complete with hologram performance, simulated mosh pits and merchandise stands.

'For communities where safety or accessibility has always been a concern, they are looking to clubs or promoters to lead by example,' says Luis-Manuel Garcia, popular music studies lecturer and member of Berlin-based queer/non-binary collective Room 4 Resistance. 'They are already thinking about

'Brands will need to reconsider their role in the life of consumers. Looking beyond their traditionally transactional relationships, they will be required to refresh their experiential offering in order to promote personal purpose and meaning'

Chris Sanderson, co-founder, The Future Laboratory



Otherworld is a chromatic arcade and bar that transforms virtual reality gaming into a social experience

how to make it work for themselves without the infrastructure, and brands have a key opportunity to be proactive in maintaining and evolving these virtual spaces.'

Data from Best Nights VC indicates that 59% of consumers aged 18–35 are more, or just as, likely to attend virtual concerts after lockdown restrictions are lifted, suggesting digital options are more than just a temporary stand-in across the board. Looking further ahead, these immersive VR and AR concepts could mean brands offering fully customisable 3D spaces for collectives or artists to programme and curate their own club and line-up, forgoing inflated ticket prices, licensing regulations or discriminatory door policies.

Global Communities

Harnessing cross-cultural and global communities is another key win for brands entering the VR space, pointing to a future when the limit of a club's physical location will no longer apply to acts and attendees alike. Sidestepping the sustainable concerns of nightlife tourism or internationally mobile talent, these events also have the potential to provide a more interactive and collaborative experience for clubbers, while granting performers access to a global audience.

The numbers illustrate an exciting picture. In 2020, London-based LWE's Junction 2 Festival ranked up 3.2m unique views and more than 20m page impressions, while a similar event hosted by London's super-venue Tobacco Dock attracted more than 3m people – the capacity of the physical space is just 7,000.

The venue's plans to hybridise point to an enhanced nightlife landscape. In the coming years, physical and virtual events will be held at the same time, with a VR café allowing in-person clubbers to book slots to meet and chat with virtual attendees across the globe.

China's e-commerce behemoth JD.com was quick to harness this easy access point for food and beverage brand integration, and teamed up with Budweiser, Carlsberg and Pernod Ricard to allow attendees to order advertised products during its three-hour clubbing events. With the partnership resulting in sales increases of 70% for a promoted liquor brand and 40% for a promoted beer brand during sessions – the market represents a seamless, yet significant opportunity for future-facing brands.

Multi-sensory Moments

As well as inclusivity, in the next decade brands will harness the post-pandemic consumer's appetite for multi-sensory experiences by creating hyper-immersive virtual concepts that target all the senses.

Pioneering events are already striving to meet the multi-sensory demands of the new nightlife consumers. In 2020, musician Azekel launched a virtual experience, ALL1, that riffed on the themes of his new EP. Extending beyond the typical limitations of digital interfaces, the visual and audio showcase used olfactory triggers to create a scent that translated into the virtual realm.

Beyond sight, sound and smell, a new wave of tactile tech is pointing to the next frontier for digital nightlife experiences: touch. Concepts like fingernail-mounted haptic interface Fulu, from London-based designer Ryo Tada, are evolving, allowing users to send and receive touch, as well as feel textures remotely through an accessible interface. Developments like the multi-layered soft 'skin' from Hong Kong's Polytechnic University, meanwhile, enable physical sensations to be transmitted by tapping areas on a touchscreen.

In the future, concepts like Fulu will replicate the sensation of dancing in a crowd or bumping shoulders at the bar. For Luis-Manuel Garcia, the potential to humanise digital interactions in this way has the power to drive even ardent nightclub devotees to the online nightlife space. 'It's the physical presence of bodies in a room that matters to people, especially young people or regular ravers,' says Garcia. 'Even those sorts of sensory things that are not necessarily appealing or attractive as they are, it's all part of the full immersion.'

Importantly, these concepts won't just target consumers during their night out, but also at the end of it, with XR able to provide intimate closing rituals that give consumers a feeling of finality and closure.

London-based collective Marshmallow Laser Feast's We Live in an Ocean of Air, for example, is a multi-sensory VR installation that helps users experience a new form of consciousness through synaesthetic stimulation. Visitors to the installation wear sensors that monitor both their heart and breathing rate in real time. With each exhalation, oxygen and carbon dioxide particles are made visible within the VR eco-system, becoming vibrant illustrative clusters – an immersive, meditative experience that could enhance people's controlled come-down as a night out comes to an end.

Key Takeaway: Digital Facilitators

As digital nightlife futures unlock new, transformative possibilities, 2030's consumers will achieve authentic self-actualisation through immersive, virtual nightlife experiences that extend far beyond the traditional constraints of physical events.

: Beyond Brands

With post-purpose outlooks, anti-establishment ideals and DIY attitudes in tow, in the next decade consumers will rip up outmoded digital and aesthetic-first brand rulebooks and engage only with businesses that understand their needs.

Like their influence, Gen Z's spending power far exceeds their wealth of experience. In 2019, they became the largest generation on the planet, comprising almost a third (32%) of the global population, with their contribution to US retail sales a massive €707bn (£606.6bn, \$830bn), according to Piper Jaffray.

Digital natives, with the power to force sustainability pledges, build social justice movements and influence global trends, Gen Z may seem like a captive audience for proactive mission statements or attractive lifestyle marketing – but they aren't looking to be led by brands or defined by purchases.

Rather than be told who they are, a majority (53%) of Gen Z say they will choose brands that understand them as individuals, favouring a 'for us, by us' attitude. Research from IBM highlights this shift, revealing that 60% of Gen Z have either submitted an idea to a brand or said they would do so given the opportunity, while 77% would like to or have already been involved in a brand campaign – either contributing ideas or starring in promotional visuals.

In response, nightlife brands will transform engagement in the next decade, inviting consumers in as partners and equals, encouraging honesty and embracing transparency. Free from constraints and legacy issues, direct-to-consumer (DTC) brands will pave the way.

Direct Messaging

Already harnessing the opportunity for honest, open dialogue is Gen Z entrepreneur Matthew Choon, who's community-focused brand Potion CBD is celebrating and supporting a new Gen Z pastime, with the demographic contributing to a 127% surge in legal cannabis sales in the US over the past year, according to cannabis data brand Headset.

Understanding Gen Z's needs, Choon's New York-based start-up offers everything in CBD, from gummies to roll-ons and bath bombs that celebrate the transformative solo and social qualities of the recreational ritual. 'We would not be where we are today without the support of our community,' writes Potion. 'We're here to clear the air on CBD while bringing our community together.'

SOUNDBOKS, the world's first wireless Bluetooth performance speaker, is another brand building a community through an organic, authentic approach. Created by three high school friends in Denmark, its speakers are designed to connect and bring

people together. SOUNDBOKS is defined by a DIY attitude – the founders relied on friends to help build the brand. The connection-coveting proposition is gaining traction, selling over 100,000 speakers globally and securing £6m (\$8m, €7m) in its latest capital investment round.

Elsewhere, a wave of post-party supplements are successfully bridging the gap between wellness-focused mindsets and the honest realities of party-going and alcohol consumption. Think start-ups like Happy Tuesdays. Its post-rave wellness pack combines a curated blend of nutrients with matter-of-fact messaging. Similarly, US-based RaveBox bills itself as simply 'all about harm reduction' – comprising pre-party, sleep aid and recovery supplements that are clear and up front about their purpose.

These independent brand models are providing honest solutions to the needs and necessities of Gen Z ravers. Looking to 2030, spaces or alcohol brands themselves will offer the same no-judgement add-ons to their products or events. 'It's something that would be a really progressive thing to do if a brand took the mantle and said we understand what the product we sell can lead to,' says EcoDisco's Ahmazadeh.

'We would not be where we are today without the support of our community. We're here to clear the air on CBD while bringing our community together'

Matthew Choon, CEO, Potion Cannabis

New Anti-Socials

As we move through the decade, brands also have an opportunity to create digital platforms and spaces centred around authenticity, transparency and honesty, nurturing the needs of consumers who are increasingly turning away from narcissistic social media platforms and seeking unfiltered alternatives.

A new survey by YEO messaging, for example, has revealed a WhatsApp mass exodus, with 12.6m Britons either having deleted the messaging app or planning to do so, while news that more than 39% of Instagram accounts now belong to influencers with over 15,000 followers has marked its long-awaited transition from a social sharing to a shopping app.

Recognising a shift in the market, Los Angeles-based Poparazzi is preparing for the next generation of social capital. The social media app encourages users to take pictures of other people, differentiating itself from the pervasive selfie culture on platforms such as Instagram. 'Poparazzi is all about capturing life's most authentic moments, instead of the staged ones,' reads a blog post. 'It's about hyping up your friends, instead of competing against them.' In 2021,





'It's something that would be a really progressive thing to do if a brand took the mantle and said we understand what the product we sell can lead to'

Hadi Ahmadzadeh, founder/CEO, EcoDisco

TTYL, the social start-up behind the app, raised €17m (£14.6m, \$20m) in series A funding, leading to a projected €115m (£98.7m, \$135m) valuation just days after its launch.

Dive Chat, meanwhile, is a group messaging app that revolutionises how students manage their social life. Co-founded by Michelle Fang, a US-based Gen Z digital strategy consultant, Dive Chat features everything from student clubs to private friendship groups. Streamlining access to Gen Z's various social commitments, the app creates a space for people to nurture existing friendships as well as discover new events on campus.

60% of Gen Z have either submitted an idea to a brand or said they would do so given the opportunity

Source: IBM

Tapping into the fact that this group are highly social creatures, Dive Chat facilitates the need to be part of multiple communities, rather than restricting themselves to one binary identity – a key tenet of Gen Z-focused offerings. Brands that build a presence on these platforms – or indeed create their own – can win the loyalty of consumers who want to be understood.

Hangout Hubs

It's not just the 'what', but the 'how' of product creation that needs reframing in light of Gen Z's new brand needs. Despite their digital leanings, recent research from IBM found that 98% of global Gen Z respondents typically make purchases in a store some or most of the time, with 56% shopping in-store for a fun experience.

In response, brands will transform retail hubs into community-first assembly points that offer more diverse activities for wider audiences. 'Brand spaces of the future won't just be places to buy,' says The Future Laboratory's Sanderson. 'They will be spaces to play, work, eat, discover and learn, with transactions a by-product of this engagement.'

Once again utilising their kinship credentials, Matthew Choon's New York space Bowery Showroom is a case in point. The space functions as a TikTok-driven thrift shop-cum-CBD store, and serves as a community and cultural hangout spot, owned and operated by Gen Z.

Key Takeaway: Beyond Brands
Future-facing D2C brands are creating a new blueprint for consumer engagement, offering Gen Z inclusive, imperfect and unfiltered experiences.





: Enhanced Play

As consumers increasingly look to the digital playground to interact, socialise and carve out their own identity, the metaverse offers untapped potential for brands and companies to enhance party and play.

Accelerated by the inter-Covid reach of cloud gaming, the metaverse – a digital space where people can gather and interact with millions of virtual experiences at once – is becoming a hub in which the future of socialising, entertainment and creativity is already at play.

Gaming represents a new frontier for brand exploration. In China, 40% of gamers are part of a gaming organisation or community, while 52% are keen to attend online or offline gaming events. In the US meanwhile, 36% of gamers are looking to join a gaming community or attend an organised gaming event

SOURCE: BEST NIGHTS VC

According to Newzoo, the global gaming market will exceed €170bn (£146bn, \$200bn) by 2024, while the cloud gaming market is expected to reach €5.5bn (£4.7bn, \$6.5bn) in yearly revenues by 2024 – up from €129.5m (£112.2m, \$152m) pre-pandemic. As consumers flock to digital arenas in the post-pandemic era, the metaverse is rife with branding and community-building opportunities that extend way beyond its gaming roots.

‘The metaverse is arguably as big a shift in online communication as the telephone or the internet,’ says David Baszucki, CEO of online gaming platform Roblox. ‘Within the next few decades its applications will exceed our wildest imaginations.’

Users aren’t simply extending their real-life identities into the digital spaces, but instead viewing the gaming world as a utopian medium to explore and express themselves and alternative identities. Global communication agency Havas reports that just half of

18–20-year-old consumers in the UK believe their online persona represents their real self, while 35% have multiple profiles within the same platform and 28% say their online profiles show a completely different person.

As the pandemic forced party-goers to socialise alone or look inwards, a generation of clubbers have come of age moving seamlessly through the real and virtual worlds. The technology is there for individuals to connect as they want with whoever they want, beyond the limitations of a physical realm. As we move through the decade, this generation will view these tenets as vital parts of their recreational experiences.

In-game Access

Of all the opportunities the metaverse offers, connection and social experiences are particularly prevalent, with brands able to mimic real-life offerings with an in-game presence. Research from Best Nights VC indicates that in China, 34.2% of consumers aged 18–25 have attended online or offline gaming events, while over half (52%) would like to attend in the future.

Epic Games’ Fortnite is becoming a leader in bringing the social and digital together, with a virtual in-game concert held in collaboration with Ariana Grande in August 2021 expected to break Travis Scott’s record-breaking 27.7m viewership set in 2020. Its non-violent Party Royale zone was launched last year, allowing friends to enjoy mini-games, movies and concerts together.

Singapore bank DBS has been quick to use this access to a captive audience across gaming and clubbing sectors, creating a re-imagined version of the defunct Zouk nightclub inside the Fortnite infrastructure to attract younger consumers to their online-incentivising credit card. ‘We wanted to bring a differentiated experience to both clubbers and gamers,’ says executive director at DBS, Bee Bee Lim. ‘We’re excited to be breaking ground in the gaming arena.’

Hong Kong start-up Kre8Lab, meanwhile, took to Minecraft in August 2020 to launch The Show Must Go On, a digital project in which musicians performed in Asia’s first live virtual concert. The event took place in a venue built to resemble the Hong Kong Coliseum, and included simulations of tickets, temperature checks and help finding your seat. Food and retail brands were able to fit seamlessly into this offering – setting up virtual booths where fans could buy street food and merchandise.

Game on Venture-backed companies are leading the way in the gaming space

- : Industry behemoth Epic Games completed an €852m (£732m, \$1bn) round of funding in April 2021, leading to an equity valuation of €24.4bn (£20.5bn, \$28.7bn)
- : In January 2021, user-generated platform Roblox completed a €443m (£380.7m, \$520m) round of funding
- : In September 2020, virtual cycling game Zwift raised €383.4m (£329.5m, \$450m) in funding, bringing its valuation to €852m (£732m, \$1bn)

Multi-story Metaverse

With so many metaverse experiences set to be social, it makes sense that they should also be shoppable. While the introduction of food and retail brands at virtual concerts presents marked opportunities for brands, fashion e-commerce also offers significant potential.

Generation Play

Consumers are devoting substantial amounts of time to mobile and video gaming. In China, 37% of consumers spend 5–10 hours playing per week, while 28% do the same in Germany and the US

SOURCE: BEST NIGHTS VC

UK-based market researcher Juniper Research notes that the video game industry is expected to exceed €170bn (£146bn, \$200bn) by 2023, with in-game micro-transactions driving this growth. 'Many new consumer brands emerged over the past decade,' says Matthew Ball, a start-up adviser who has written about the metaverse. 'If you want to stand out or build a new brand today, virtual spaces seem like the new frontier.'

Leading luxury retailer Net-a-Porter has been quick to embrace this future, partnering with blockbuster game Animal Crossing to create the luxury retailer's first digital island within the game. On the island, players were able to meet in the Net-a-Cafe or fit themselves out in virtual looks from an exclusive capsule collection. As e-commerce brands tap into the gaming world for visibility, there is further potential to gain customer loyalty by introducing offline rewards for online activity.

US/German-founded Aglet, an app designed to democratise and gamify the sneaker market, is already doing this. Users are given digital sneakers when they sign up, which can be used to earn Aglet – the app's virtual currency – while walking around in the real world. Reflecting real-life product experiences, the in-game sneakers deteriorate over time and the app encourages users to visit repair or deadstock stations. The gamification element extends to bonuses in bricks-and-mortar sneaker stores, a key tenet of the phygital future.

US-based FlickPlay is another case in point, a mobile game that enables users to discover and unlock digital experiences in their favourite, real-world city spots. The phygital experience encourages users to re-discover their city and get moving, collecting digital coins and collectibles as they go, with a collections feature recording their journeys.

The cloud gaming boom offers increased possibilities for brands, events or physical spaces to tap the coveted audience by coding their own video game environments away from established structures. In 2020, ComplexCon demonstrated the potential of such a proposition, creating a mobile- and desktop- accessible video gaming environment that combined streetwear marketplaces, live performances and artist showcases with digital food trucks that led to local restaurant delivery platforms.

Esports Experiences

Buoyed by the rush of pandemic-era streamers, the esports market has experienced exponential growth with an increasingly high production value, and the numbers paint a clear picture. Figures from Newzoo suggest that the entire esports audience reached 495m at the end of 2020, while research from DotEsports notes that The League of Legends World Championships in 2020 brought in a record-breaking 139m hours of viewing and peaked at about 3.8m viewers.

In 2020, sponsorship investments made into esports rose by 17.2% compared to the previous year to reach €531.5m (£456.4m, \$623.9m), according to Newzoo. As the economics of ad revenue paint a more flattering picture, gaming championships will become increasingly covetable events akin to traditional sports – with tickets, sponsorships and artist performances transforming esports into the Super Bowl for the next generation. In addition, with its digital categorisation, an added bonus will be the ability for brands to personalise offerings for different localities and consumer groups.

Key Takeaway: Enhanced Play

Empowered by brands that understand the multi-purpose possibilities of the metaverse, the consumer of 2030 will look to the world of gaming to fulfil the community connection and evolving experiential touchpoints not afforded by IRL spaces.

'The metaverse is arguably as big a shift in online communication as the telephone or the internet. Within the next few decades its applications will exceed our wildest imaginations'

David Baszucki, CEO, Roblox



: Communities Unlocked

As the pandemic reshapes our understanding of culture and community, in the future consumers will self-direct their own best nights through shared interests.

For younger generations who define themselves by mindset not geography, digital acceleration is creating new places for people to find themselves. Research from Hulu suggests that 59% of US streamers are part of an online community based around a passion of theirs, while Deutsche Telekom finds that 86% of Gen Z in Europe say that connected technology enables them to connect with online communities through shared passions.

In the next decade, brands will facilitate these communities both online and offline, tying themselves to niche interests outside of their traditional area of expertise. US skatewear brand Vans is already on this journey, having launched a live broadcast platform, Channel 66, to activate its influence in the worlds of music, art, sports and street culture. Looking ahead, brands will follow suit, but take more niche lines, homing in on singular groups and empowering the communities they are part of.

Music Matters

Connected activations such as Sprite's Live From The Label series are indicative of the niche community reach afforded by the digital world. Honing in on US hip hop fans, the drinks company directed customers to a live concert series via a QR code on its bottle labels.

An unexplored area is the radio and broadcast sector. In the UK, average weekly listeners on commercial radio reached a record 36.3m in the first quarter of 2020, according to research from Rajar.

Once a lo-fi community format, the pandemic brought music-lovers back to their proverbial home, with youth favourites Balamii and NTS holding space for seamless brand activations, and popular formats like No Signal's NS10V10 boasting a captive audience of 200,000 listeners in a single evening, with viral social media debates a mainstay of each event.

New formats are also facilitating music-loving communities, with Dutch start-up Woov creating the world's first digital hangout dedicated to live music – Woov Live. Using top-level sound engineering that enables voice and audio spatialisation, the platform enables users to feel immersed in the crowd, while connecting and engaging with people around them.

Culinary Clubs

Innovative start-ups are striving to bring communities together in the most traditional way: around the dinner table. Research from Best Nights VC shows that 29% of consumers rank supper clubs and dinner with friends as one of their most popular pastimes, taking part in the activity multiple times a month. EatWith boasts the world's largest

community for food experiences with locals, with its online platform connecting hand-selected hosts with consumers seeking unique immersive experiences. From home cooks in private homes to Michelin-starred chefs in private dining rooms, the Paris-based start-up promotes new discoveries in food, culture and communities.

Striving to re-empower traditional dining experiences with something new, London-based supper club MamSham merges comedy and dining. Three-course meals are accompanied with, and informed by, comedy performances – serving up an irreverent combination of flavours, props and design that ensure every event is unique.

Differentiated Dating

With research from YouGov showing that 50% of American 18–24-year-olds are nervous about socialising post-pandemic, dating apps are increasingly embracing natural, non-committal mindsets to lure in hesitant Gen Z and Millennials.

US-based dating app Lolly is one example. The Gen Z-designed brand categorises itself not as a dating app, but as a social dating platform. 'We've completely got rid of the old swiping mechanism, which I think has almost corroded our ability to build intimate relationships with other people,' says co-founder Marc Baghadjian. 'When has dating ever been that binary? For Lolly, we looked at social networks. We want to emulate a bar-type situation where you see someone that's cool and want to meet them. So, you clap for their content.'

Millennial-focused UK start-up Thursday takes a similar approach to mimicking IRL sociability. Rather than fostering a habitual group of swipers and phone-users, the UK start-up works by allowing users just 24 hours in which to connect, chat and organise a date. 'We envisaged the idea of the world's first micro-dating app,' says co-founder George Rawlings. 'It was about encouraging people not to give up their whole evening, but instead about having short encounters with a person you might or might not get along with.'

Beyond catering for the non-committal mindsets of consumers – 28% of all living accommodation in the UK comprises single-person households, according to research from the Office for National Statistics – these social-focused apps pose an opportunity for brands to support people with dating ideas and event plug-ins beyond the traditional drinks format. In future, potential matches could connect by matching with shared upcoming concerts, gaming events or theatre shows alongside user profiles.

Key Takeaway: Communities Unlocked

Driven by multiple routes to self-actualisation, Best Nights seekers of 2030 will look to explore community connection via shared interests and recalibrated values.

: IRL Revitalised

Alongside a digital nightlife uprising, in the next decade consumers will revive offline experiences with refocused perspectives on hedonism, quality and intimacy.

The pandemic decimated the real-life events industry. According to trade publication [Pollstar](#), the global live events industry lost over €25.5bn (£22bn, \$30bn) worldwide in 2020 due to restrictions and lockdowns, with a less stark but similar picture forecast for 2021. But despite post-Covid hesitancy, pent-up demand for IRL experiences will fuel a new era of physical events, as consumers seek the benefits of real-world community once again.

In Germany, the US and China, consumers are raring to return to IRL events after lockdown restrictions are lifted. Some 47% are more keen to attend outdoor day parties, 43% are more likely to visit bars, while 39% and 37% are more likely to visit nightclubs and festivals post-pandemic.

SOURCE: BEST NIGHTS VC

According to a recent government-commissioned report in the UK, physical festival-goers say the qualities they valued most during the pandemic were the benefits to their mental health, the opportunity to forge wider friendship groups and the feelings of being surrounded by like-minded people. These qualities will drive and define the next decade of IRL events across the board, from club nights to cultural experiences.

Niche Nights

While the return to IRL events and traditional clubbing is a coveted one, the sense of doing less but better will pervade the return to the scene. 'Pre-Covid, people were more about big clubs to solidify their status,' says Kathleen Schied, head of marketing at Jägermeister Germany. 'But clubs are expensive. Now, consumers are more about enjoying themselves – they prefer smaller clubs and bars that are more about finding a niche.'

Niche clubbing collectives aren't a new phenomenon, but as consumers demand more than hegemonic programming, they will seek out like-minded individuals to share experiences and interests. In Germany, 63% of consumers claim the best nights allow them to connect with their friends, according to Best Nights VC.

Take South London-based community-turned-club night Touching Bass. Its shared love of soul-inflected beats and dance brings club-goers together via monthly SMS invitations, while Daytimers celebrates South Asian identities through diasporic nightlife events. Elsewhere, communities like Pxsy Palace, BBZ and Room 4 Resistance carve out safe dance spaces that prioritise marginalised backgrounds including refugees, trans, queer and non-binary people.

'There's a definitive feeling that these kinds of collectives need to hold spaces offline,' says Luis-Manuel Garcia from Room 4 Resistance. 'It's extremely obsolete to see this long-term horizon where clubs no longer exist. Even before the pandemic, we found young people were restricting their social media presence and were hard to reach beyond their already-established communities.'

Savvy brands are already navigating their own role in supporting community spaces. A recently launched project from Jägermeister is designed to support LGBTQ+ spaces with a short film that gives a voice to bar owners, activists and archivists to discuss the positive impact of lesbian bars amid record closures. The documentary also expands on the brand's #SaveTheNight campaign, which is set to support nightlife professionals during the pandemic and far beyond.

'Pre-Covid, people were more about big clubs to solidify their status, but clubs are expensive. Now, consumers are more about enjoying themselves – they prefer smaller clubs and bars that are more about finding a niche'

Kathleen Schied, head of marketing, Jägermeister Germany



Connected Cohorts

Connecting with a community is a key driver for nightlife-seekers. In Germany, 63% of consumers list community as a facet of Best Nights, while in China 24% of consumers state that Best Nights allow them to connect with strangers

SOURCE: BEST NIGHTS VC

Enlightened Experiences

With younger generations increasingly jaded by the internet's superficiality, they are seeking new experiences to enrich their offline cultural capital. According to Nielsen BookScan, 41% of UK poetry book buyers in 2018 were aged 13–22, with Insta-poets such as Rupi Kaur and Suli Breaks responsible for fuelling this renewed interest.

Taking the lead from young people's interest and their desire to seek new thrills away from hedonistic rituals, spontaneous poetry and spoken word nights could be integrated into traditional bars in the future.

Arts-themed start-up events are also gaining momentum, with UK-based Undone Theatre presenting reworked versions of traditional productions. Berlin-based ArtNight, meanwhile, encourages consumers to acquire new skills through social activity, with ArtNight artists guiding attendees as they create their own artwork and meet fellow guests for an immersive, creative and edifying art experience.

Beyond local discovery, consumers are also rethinking their attitudes to national and international travel and tourism. In a survey by IHG Hotels & Resorts of 9,000 people across the US, the UK, Germany, Greater China, the UAE and Australia, 60% of respondents agreed that they want to be more environmentally and socially conscious on their travels, with Gen Z travellers feeling the most strongly about this.

As the world opens up post-pandemic, the consumers of 2030 will seek conscious and enlightening travel experiences that chime with their values, unlock new experiences and forge community ties. London-founded Trippin World is already catering for these mindsets, with the independent travel platform producing local-friendly guides, collaborative stories and community-led tips and tricks to comprise a progressive tourism eco-system.

Conscious Hedonism

With realigned ideals and progressive attitudes, in the next decade Gen Z will pursue freedom and adolescence with a more cognisant outlook. There are already glimpses of this future unfolding, as Gen Z swap pursuits such as clubbing for activities deemed more intellectually stimulating.

The nightlife industry will undergo a transformation in response, integrating health-conscious drinking like Nowadays in New York or merging dancing with CBD and yoga, as found at the Weed Rave in Los Angeles.

Those dedicated to boosting their mental resilience will choose to say goodbye to their inhibitions at community events such as Special Guest, in which audience members are invited to take to the stage and share a thought, idea, story or party trick for just 60 seconds. The format inspires a positive form of voyeurism in which self-indulgence and vulnerability among strangers is encouraged.

Re-inventing the concept of hedonism for a more virtuous generation, Hedoné Berlin is a collective designed to serve the growing ethical hedonist community. Its recent seminar in Poland used performance, poetry and guided workshops to encourage 'a loving (re)connection of the participants with a more harmonious, freer version of themselves – as well as with one another'.

Key Takeaway: IRL Revitalised

The special nature of IRL experiences will not be emboldened by their scarcity, but by their ability to target a distinctive set of needs, as the consumer of 2030 approaches the nightlife arena because of their preoccupation with betterment and community, not despite it.

: Generation Moderation

As the mindful drinking movement matures and sustainability becomes canon, brands will bring choice and flexibility to responsible consumers – without compromise.

Our understanding of wellbeing is changing. For many consumers, wellbeing no longer equates to an ideal health goal, but instead represents an expression of a balanced life. In the quest to achieve this, consumers are driving a global wellness market now worth €2.9 trillion (£2.5 trillion, \$3.4 trillion), according to the Global Wellness Institute.

As we move through the decade, consumers will intertwine their own personal wellbeing with that of the surrounding environment, as people not only seek personal transformation but also strive to have a positive impact on the planet too, driving new directions in the nightlife sector.

‘Sustainability is important to consumers, but it’s up to brands and companies to rouse and meet these emerging values with exciting options,’ says Rebecca Roecher, head of sustainability at Jägermeister. ‘As consumers become more aware of their health, as well as of the overall state of our planet, we will need to create new occasions where people can come together in a safe and sustainable environment to have fun.’

Faces of the Future

Eco-attitudes, especially among Gen Z and Millennial consumers, are well documented. Research from EY indicates that 62% of UK energy consumers are more likely to purchase a product with sustainable credentials, while according to data from Garnier, 81% of global respondents plan to be more sustainable.

When it comes to introducing seismic change in the nightlife field, niche consultancies and independent venues are leading the way. Sustainable nightlife consultancy EcoDisco hosted the first plastic-free club night, while in 2021, Glasgow club SWG3 became the first venue in the world to test the BODYHEAT system – a technology that harnesses the heat generated from those on the dance floor to help power the venue, in turn reducing emissions.

While cleverly marketed events or revolutionary one-off technologies do well to draw attention to sustainable causes and opportunities, EcoDisco’s

Ahmadzadeh admits these schemes have little effect on the future of nightlife in a way that maintains its essence and is scalable: ‘You have to bring green solutions to nightlife without being gimmicky or educational,’ he says. ‘It’s a bubble, and if you burst it, you lose the escapism. That’s why our tone of voice has always been nightlife first, sustainability second.’

Over the next decade, brands will seamlessly embed sustainable nightlife solutions into existing offerings, harnessing a captive audience of consumers willing to pay a premium for a brand’s sustainability actions, rather than its outward eco-ethos. Research from YouGov reveals that 60% of German grocery consumers would pay a green premium for products, while data from EcoDisco reports that 89% of its UK event attendees would pay €1.16 (£1, \$1.36) extra in order to make a re-usable cup system affordable for music venues.

Clean Psychedelics

Alcohol is woven into our many social interactions and occasions, yet the mindful drinking movement continues to mature. While low-proof drinkers have been embracing and experimenting with lower-alcohol lifestyles, others are seeking alternative forms of intoxication.

‘The more time, money and energy people are putting into their overall wellbeing, the harder it becomes to justify the overall toxicity and health risks, particularly mental health risks, of drinking,’ says Ruby Warrington, author of the book *Sober Curious*. Social relationships, however, are equally important for our health, suggesting the need for alternative socially lubricative methods and a more conscious drinking culture. Now, demand for compelling alcohol alternatives, rather than simple replacements, is combining with wider wellness aspirations.

Pioneering brands like Wavepaths are taking a new approach to psychedelics that champion the notion of experience as medicine. The UK-based start-up offers meditative journeys using generative music and light art, designed to help people come to a greater understanding of themselves. The technology has garnered a captive fan base, with a sold-out pop-up space in 2019 and collaborations between Brian Eno, Jon Hopkins, Greg Haines and L-Acoustics that have resulted in waiting lists of thousands of people.

The science of psychedelics has been steadily gaining ground. Building on the Silicon Valley trend for micro-dosing to sharpen focus and creativity, [MindMed](#) is developing hallucinogenic and non-hallucinogenic categories of psychedelics. The first of these will offer hallucinogenic therapies as an in-clinic treatment while the second will be [a new drug](#) that boasts the upsides of psychedelics while cutting out the downsides of tripping.

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Hadi Ahmadzadeh, founder/CEO, EcoDisco



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Green Premium
Consumers in Germany, the US and China are increasingly willing to pay more for sustainable nightlife offerings, including:

- : Festivals and clubs with eco-friendly energy and water solutions: 39.2%
- : Locally sourced food and drinks: 41.5%
- : Festivals and clubs that offset carbon emissions: 26.5%
- : Festivals and clubs that require personal carbon offsetting: 22.4% (£329.5m, \$450m) in funding, bringing its valuation to €852m (£732m, \$1bn)

SOURCE: BEST NIGHTS VC

'NOLO beverages are perfectly capturing the future consumer's approach to mindful consumption'

Lia Schmökel, Investment Manager, Best Nights VC



New-gen Alternatives

The NOLO (no- and low-alcohol) category is booming, and dominated by spirit and ready-to-drink options, with research from Best Nights VC illustrating a market share of 50% and 34%, respectively. But next-generation winemakers are experimenting with innovation set to shake up the category through to 2030.

Mindful Youth

Across China, Germany and the US, 47% of 18–25-year-olds watch their alcohol consumption in order to maintain a healthy lifestyle, while 42% purposefully seek non-alcoholic drink alternatives when they go out

SOURCE: BEST NIGHTS VC

As more people reconsider their relationship with drinking alcohol, brands are increasingly turning to wine to hit key consumer moments in getting ready, winding down after work and attending social dinners. A handful of sophisticated alternatives are pairing high standards of taste with healthier living, fuelling a non-alcoholic wine market, which according to research by Fact.MR, is forecast to be worth €8.5bn (£7.3bn, \$10bn) by 2027.

As the alternative spirits market grows in size and popularity, an experimental mindset is reigning supreme. Rather than mimicking the tastes and pairings of its full alcohol counterparts, category-defying beverages are capturing the wellness-minded principles of the NOLO consumer with natural ingredients and rule-breaking flavour combinations. US aperitif start-up Haus is already heeding the change. It offers low-abv (under 24% alcohol) 'real ingredient' drinks in fruity and herbaceous flavour combinations – think Grapefruit Jalapeño, Ginger Yuzu and Lemon Lavender.

'NOLO beverages are perfectly capturing the future consumer's approach to mindful consumption,' says Lia Schmökel, Investment manager at Best Nights VC and founder of leading nutritionist network Nutrition Hub. 'They're taking the focus away from drinking, or indeed not drinking, alcohol and instead focusing on new flavours, new feelings and positive enjoyment. For many people, it's not a binary choice, it's about finding options that nurture our mental, emotional, physical and social wellbeing.'

Functional Elixirs

Research from [GlobalData](#) notes that by 2022, British consumers are forecast to spend €566 (£487, \$665) per head annually on wellness, while

[McKinsey & Co](#) has reported that 35% of German consumers list wellness as a greater priority than 2–3 years ago.

Alongside this new frontier of health consciousness, consumers are looking away from abstention to embrace a more mindful attitude that demands thoughtful alternatives without a personal or social sacrifice.

While flavour has been essential to unlocking the appeal of the non-alcoholic category, function is the next frontier for drinks brands. 'People drink for many reasons,' says Tatiana Mercer, co-founder of non-alcoholic beverage brand [Three Spirit](#). 'Flavour is just one, which is why we believe the future of non-alcoholic drinks is functional.'

With consumers reframing best nights to include moments of elevation and relaxation, solitude and sociability, beverage brands are smartly integrating nootropics into their offerings to cater for the many stages of the consumer journey. According to [Market Watch](#), the global nootropics market is forecast to reach €5.3bn (£4.5bn, \$6.2bn) by 2027, a growth rate of 12.5% in the next six years.

Bonbuz is one brand already catering for a fertile market and consumer demands. It's an alcohol-free liquor that is designed to give drinkers a positive mental high rather than a boozy crash. Its ingredients, including amino acids, adaptogens and nootropics, are selected to deliver the same potent hit as an alcoholic spirit, such as 5-HTP, a substance that stimulates the production of happy hormone serotonin in the brain.

As today's consumers approach their best nights looking to achieve a mix of feelings, future-facing drinks brands will create multi-purpose ranges that aren't only free from alcohol, but also cater for specific moods and moments.

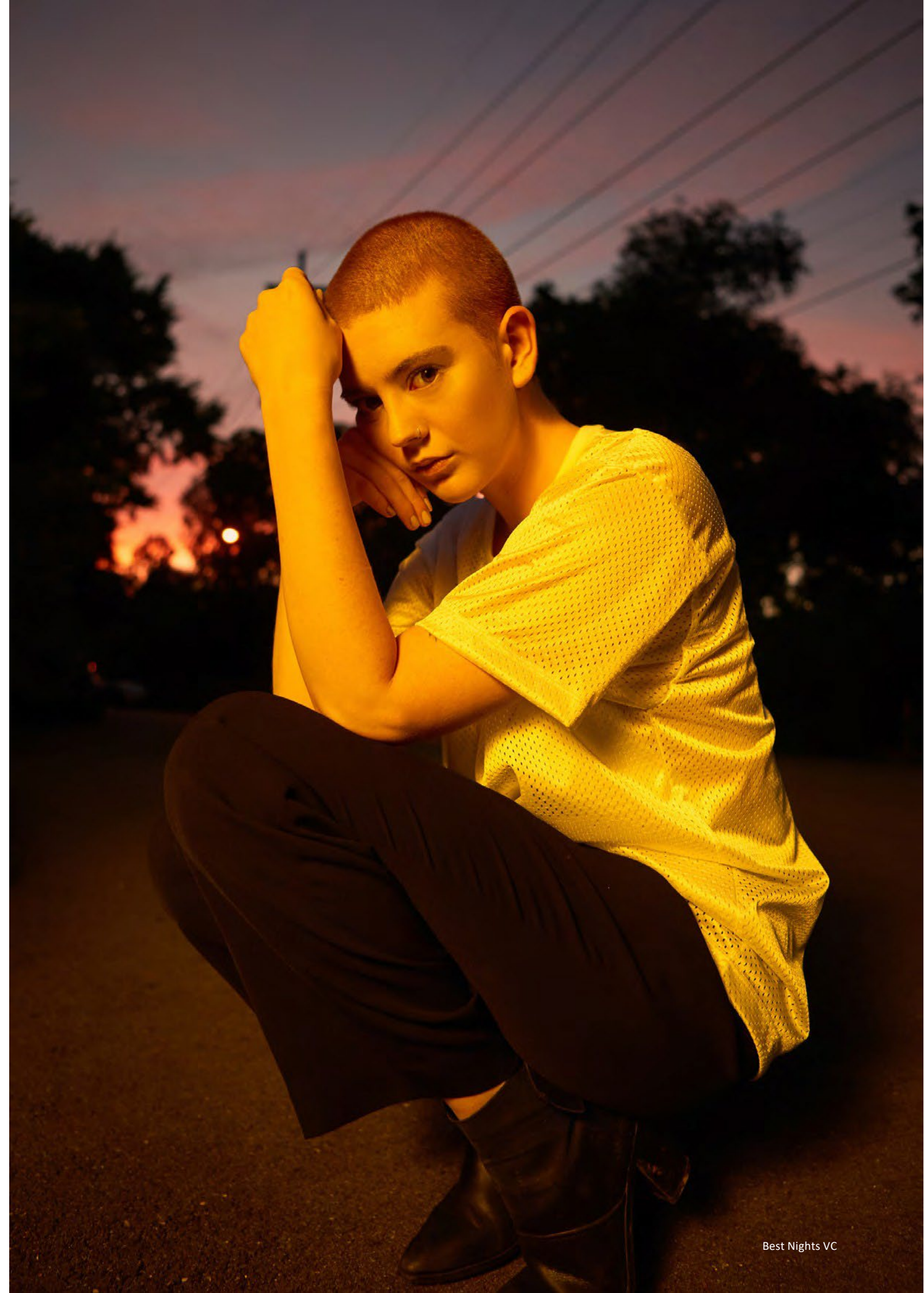
Already heeding this demand is nootropics-infused soft drink Peak, which is designed to help young people relax and improve focus while navigating social situations. Similarly, Gen Z-founded Confidence drink is a teen-targeting brand aiming to plug a gap in the functional drinks sector: boosting confidence. The brand's founders identified elements that make up confidence – relaxation, focus, natural energy, a good mood and tension release – before compiling a mix of six adaptogens and nootropics to fulfil each element.

Key Takeaway: Generation Moderation

By 2030, moderation will evolve from an ideal to a holistic mindset, with future consumers able to explore multiple routes to personal and planetary betterment.

‘In order to ensure innovations, concepts and strategies are still relevant when they are realised, we must look beyond the next few years, and think in terms of decades instead’

Chris Sanderson, co-founder of The Future Laboratory





**#SAVE
THE NIGHT**



Part Four: Conclusion

By 2030, the nightlife landscape will have been transformed, as new consumer needs shift the markers of Best Nights.

The ability to achieve transformation will be key to future nightlife-seekers as they look to recreational brands, spaces and innovators to support, sustain and enhance people, place and planet. These values will sit at the heart of 2030 experiences, as attendees move authentically from digital to physical spaces, and from sociability to solitude.

As global disruption continues and future consumers navigate political upheaval, employment uncertainty and the climate crisis, finding solace in a multitude of self-directed identities or amid a safe community will prove paramount. Brands, start-ups and companies will have to display agility, compassion and realism in their approaches to catering for the nightlife needs of tomorrow – meeting the expectations of consumers who are in flux.

This represents the major challenge for nightlife facilitators in the 2020s, as consumers search for more than experiential moments. To help future consumers achieve the transformation they seek, future-facing brands should:

: Embrace digital options beyond a novelty appeal, building them with purpose to drive inclusivity and embrace the multi-faceted identities of tomorrow's nightlife-seekers

: Enable and encourage a culture of transparency and realism – embracing mistakes, championing honesty and welcoming an open dialogue with target consumers and attendees

: Offer alternatives not replacements, creating nightlife experiences and products that embrace moderate and sustainable lifestyles as an entirely different movement to be celebrated, not endured

: Reclaim offline experiences, and provide rich and thoughtful cultural programming that benefits existing, and creates new, communities

For The Future Laboratory's Chris Sanderson, it's never been more important to look towards the future. 'Society continues to evolve – and the rate of change is exponential,' he says. 'In order to ensure innovations, concepts and strategies are still relevant when they are realised, we must look beyond the next few years, and think in terms of decades instead.'

Innovators that do this, creating the new experiences, products and concepts that become the vital touchpoints of tomorrow's nightlife-seekers in 2030 and beyond, will help define the future not only of Best Nights, but of identity and of human connection itself.

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