

FUTURE
CLIMATES



BUSINESS
AS USUAL



WORKLIFE
LIFEWOR

PRODUCING
CONSUMING



Play&Co(nversations)
Insight Report
Issue 02 | 2023 Q3



Hello. We are Play&Co.

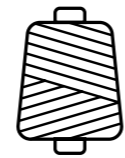
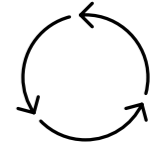
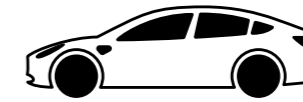
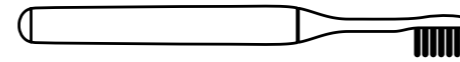
We are a strategic industrial design agency that delivers world-class design services for start-ups through to global organizations.

Founded in 2015 with offices based in Portland, Oregon and Melbourne, Australia, our products have won iF, Red Dot, Good Design, and Edison Awards. Our work has been featured in Fast Company, Core77, and other related media channels. Clients include Blokable, Philips, HP, Reckitt, and Thyssenkrupp.

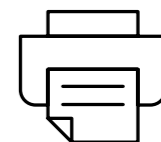
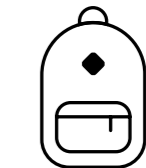
We launched Play&Co(nversations) because we care. If design is to have a future, it must solve critical issues in an inspiring way.

Put simply - We Take Play Seriously™

Learn more at www.playandco.com



We design award-winning meaningful experiences for visionary brands.





“

A global economic paradigm shift is in motion. Our collective awareness of the connection between human and planetary health is driving the evolution of business.

New organizational cultures, values, and motives are attracting talent and fueling meaningful innovation.

Connectivity advancements are empowering remote communities and facilitating “geography-agnostic” business models, granting flexibility to workers while broadening access to a global talent pool for companies.

Enter Artificial Intelligence, whose immense potential power has raised concerns among its creators and experts alike.

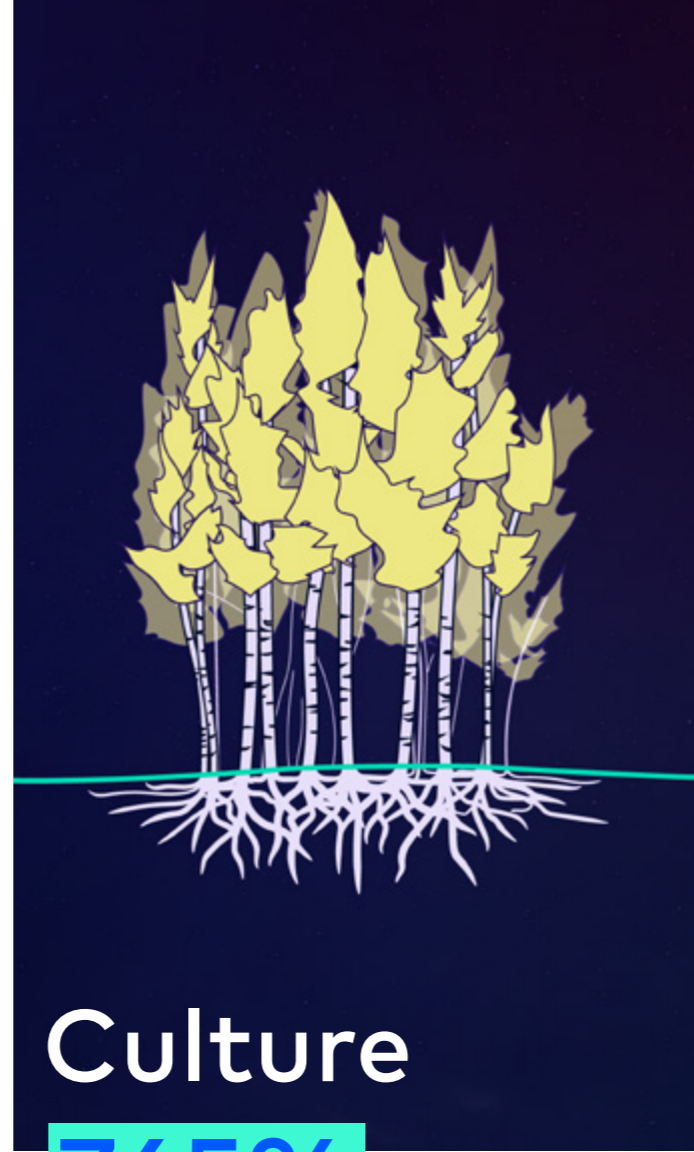
This convergence of culture and technology, human and machine, is ushering in a new era of business marked by transformation and disruption. Success will belong to those who can adapt and innovate, while others may find it challenging to keep up.

As Pixar’s John Lasseter once observed, “Art challenges technology, and technology inspires art.” We believe design lies at the intersection of art and technology, and has the potential to inspire this crazy new world.



Impact-driven innovation is driving a revolution in business.

Here are 3 drivers central to this change.



Culture

765%

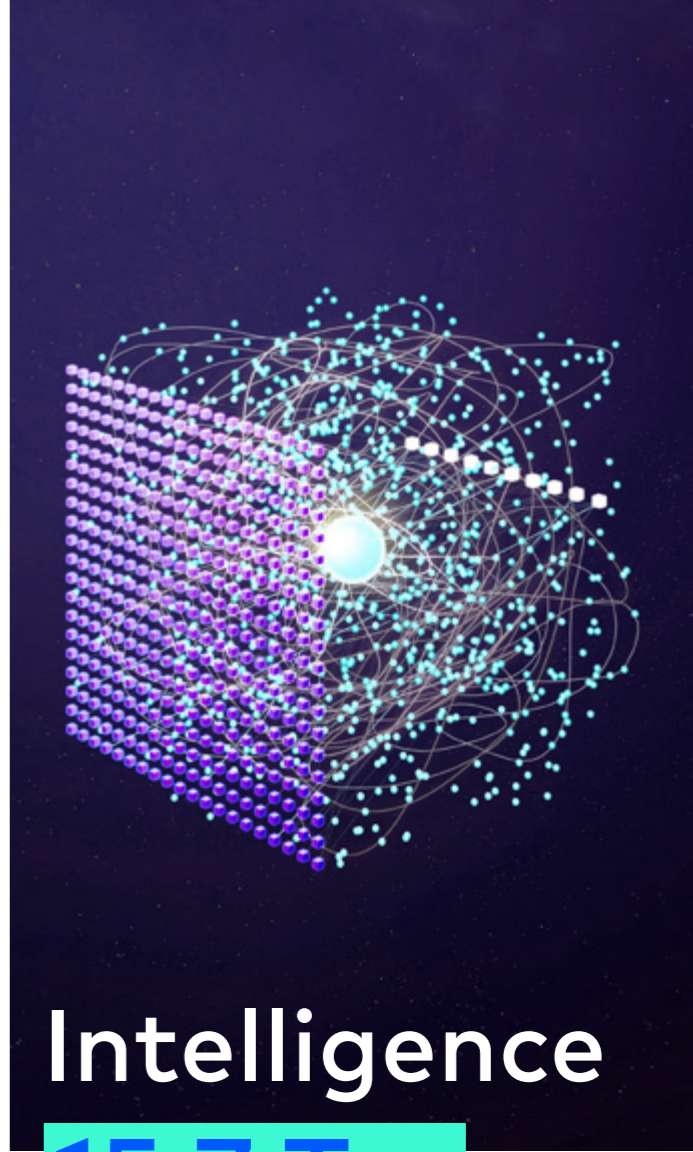
"A strong culture increases net income by 765% over 10 years according to a Harvard study of more than 200 companies." - Culture Code, Daniel Coyle



Connectivity

7.5 Bln

The predicted global number of internet users in 2030. This speaks to the immense growth of the internet and its ability to bring people together, regardless of geographical boundaries.



Intelligence

15.7 Trn

Estimated increase in global GDP by 2030, due to advances in AI technologies and implementation.

REIMAGINEERING BUSINESS

IR002 Business As Usual



Play&Co(versations)



Mira Murati
CTO @OpenAI

Patrick Brown
Founder @Impossible Foods

Timoni West
VP of Product @Unity

Everette Taylor
CEO @Kickstarter

Alex Rodrigues
CEO & Co-Founder
@Embark Trucks

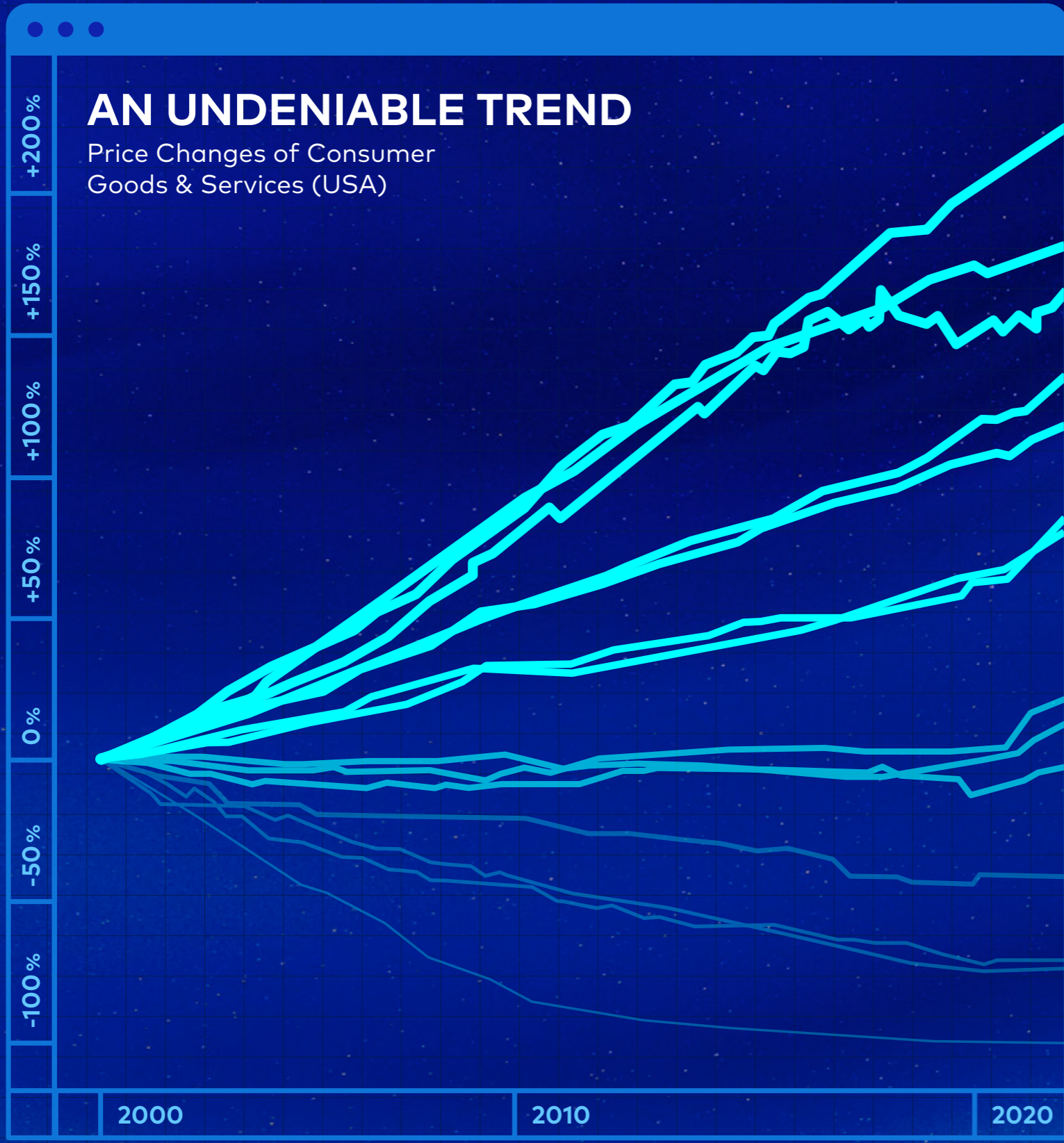
Liat Ben Zur
EiP @Storm Ventures

“Ever since I was a child, my mother always told me that there are three types of people in this world: those who make things happen, those who watch things happen, and those who wonder what just happened. When it comes to the business world, I can't help but think that rebel talent teams fall into the first category. You know, the **troublemakers, the misfits, the wicked stepchildren of corporate culture.**

_L Ben-Zur



Change Since Y2000 (%)



Source: Bureau of Labor Statistics (BLS) & Our World In Data

-  Hospital Services
-  College Fees
-  College Textbooks
-  Medical Care Services
-  Childcare
-  Food & Beverage
-  Housing
-  New Cars
-  Household Furnishings
-  Clothing
-  Cellphone Services
-  Software
-  Toys
-  Televisions



Over the past decade, there has been a rapid increase in the relative cost of essential products and services. The prices of healthcare, education, food, and housing have reached unprecedented levels.

However, as the saying goes, **"Necessity is the mother of invention."**

New business models are poised to revolutionize these industries by offering consumers more affordable, value-driven solutions.

Through the utilization of advanced technologies and the implementation of innovative user-centered business practices, disruptive companies will aim to deliver accessible options that meet both the planet and the people's needs.

TIME TO REDESIGN THE RULES

"We are drowning in information, while starving for wisdom. The world henceforth will be run by synthesizers, people able to put together the right information at the right time, think critically about it, and make important choices wisely"

- E.O. Wilson
Renowned American Socio-biologist

Impact-driven business innovation requires a reset and open-minded approach. We're at an inflection point driven by environmental and social challenges, urging new societal values. AI, the "gorilla in the room," makes us question work's nature and productivity.

Technological progress outpaces our comprehension. To create sustainable business value and redesign rules for the future, businesses must embrace:

1. Creative problem-solving frameworks.
2. Meaningful employee experience models.
3. Agile adoption of advanced technologies.
4. Harmonization of company culture with artificial intelligence.

Embracing design is essential for business — at the dawn of a new technological era, a clear mindset is essential. We have yet to write the rules, but the frameworks exist to shape our path.



THE OPPORTUNITY

01_CULTURE

02_CONNECTIVITY

03_INTELLIGENCE





Opportunity Space 01

CULTIVATE CULTURE

When it comes to business, internal culture equals external culture. The race to secure talent is in full swing as employees' values undergo a transformation. No longer are they content with working for well-known companies; instead, they seek fulfillment by aligning themselves with mission-driven organizations.

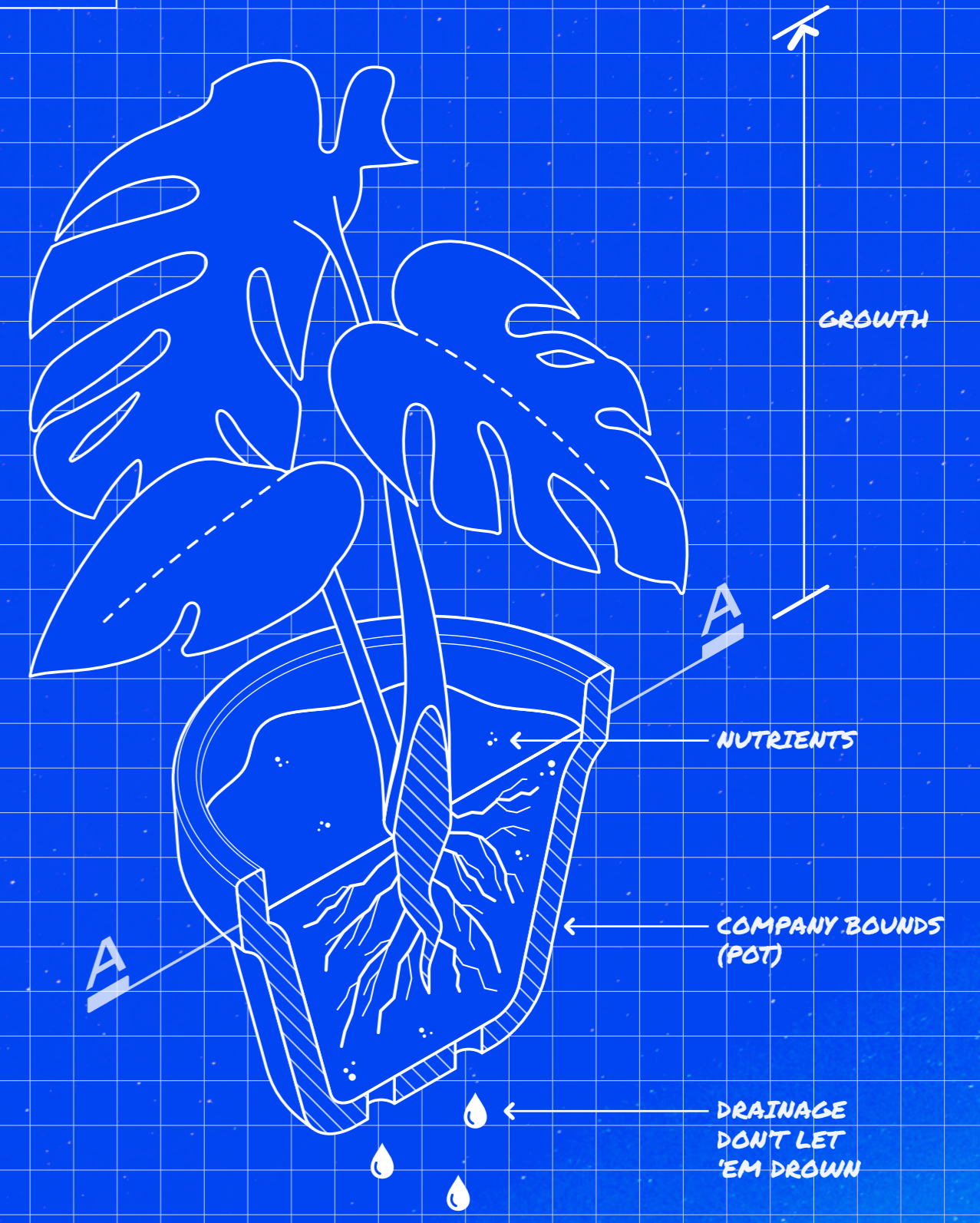
The "great resignation" and trends like "quiet quitting" reflect the shifting priorities and expectations of workers, as well as the profound impact of the pandemic on the workforce. This has resulted in a significant reshuffling of the job market and is expected to have long-term effects on people's perspectives on work and their careers.

Investing in company culture also yields tangible benefits for the bottom line. A Harvard study spanning ten years and involving over 200 companies demonstrated that a strong culture can lead to a 765% increase in net income.

The Opportunity:

Design a blueprint for your company's Employee Experience. Implement and nurture methods and tools that foster positive workplace culture, be it in person or virtual. Document and share the company journey, use it to inspire your team - give them the tools to champion your brand.

'Designing Company Culture'



Section A-A	Scale	Date	Designed by:
Designing culture is like planting a garden, except instead of flowers, you're growing office memes and team-building exercises.	N/A	MONDAY OCTOBER, 2030	21 PLAY & CO

People Culture & Values

The era of the ping-pong table as the cornerstone of company culture is a thing of the past. With hybrid working models becoming permanent, new types of workplace culture are emerging, built upon foundational values-driven principles.

Start-up As Usual

Q3 2022 VC funding was 33% lower than the previous quarter, and 53% less than the previous year.

Additionally, the collapse of Silicon Valley Bank and mass layoffs have dealt start-ups an unfavorable climate. However, analysts predict that a resilient new and more diverse generation of founders will emerge.



01

The Rise and Rise of Crowdfunding

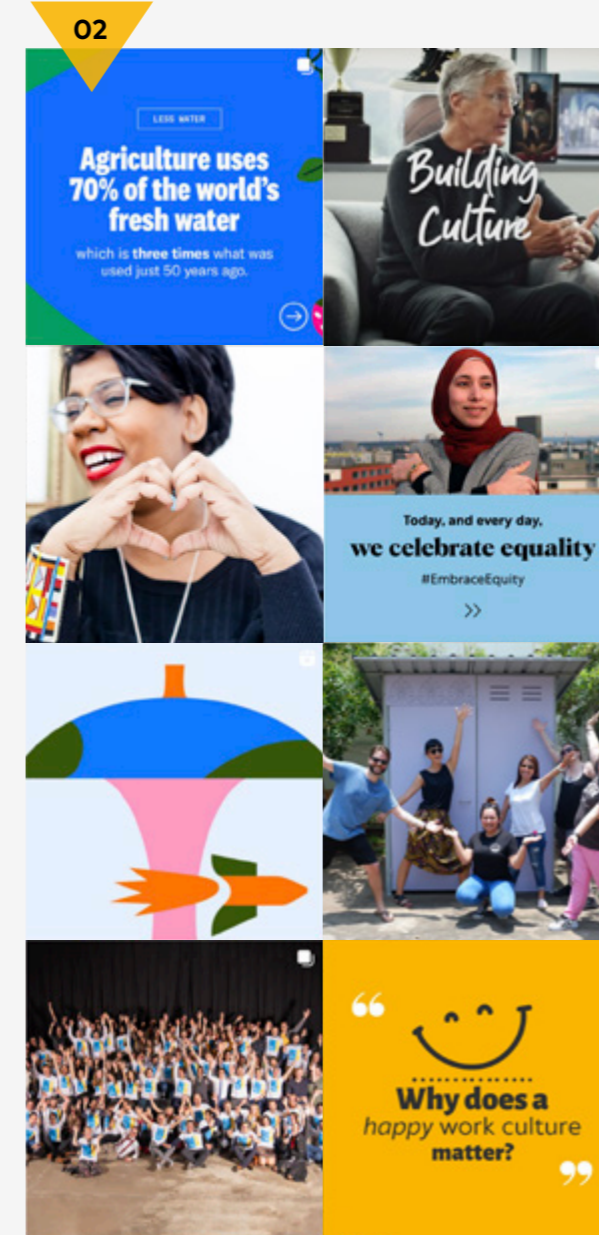
Crowdfunding platforms remain vital for start-ups to test ideas and connect globally. Everette Taylor, Kickstarter's new CEO, aims to enhance diversity and accessibility. The global Crowdfunding Market is valued at USD 17.39 Billion in 2021 and is projected to reach USD 43.48 Billion by 2028, with a CAGR of 16.5%.



03

Values-Driven Mindsets

A survey from LinkedIn found the vast majority, 87%, of Gen Z professionals would be prepared to quit their jobs to work elsewhere if the values of the new company were more closely aligned with their own.



02



Cisco is No. 1 for the third year in a row in this year's Fortune 100 Best Companies to Work For® List.

04

Adapting Giants

Successful companies know that productivity and supporting employees go hand in hand. Great company culture leads to a 7% increase in revenue per employee, 69% of employees willing to go the extra mile, and 51% committed to long-term employment.

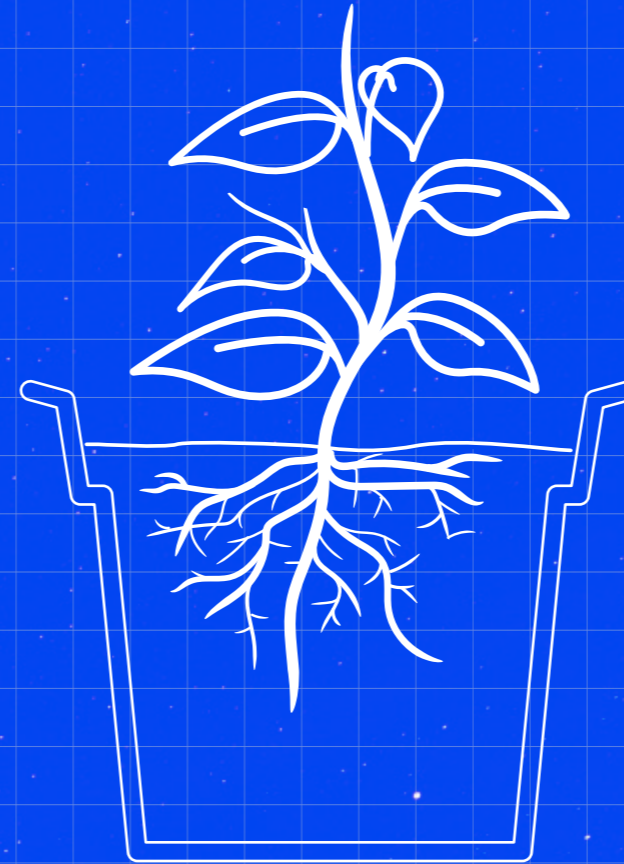
“ Why does a happy work culture matter? ”



TOO SMALL



JUST RIGHT



TOO BIG



In the garden of business, the seeds of a remarkable customer experience are sown through the care and attention given to the growth of employee engagement.

Section A-A

Designing culture is like planting a garden. You can only design the conditions in which the right culture can take root and thrive.

Scale

N/A

Date

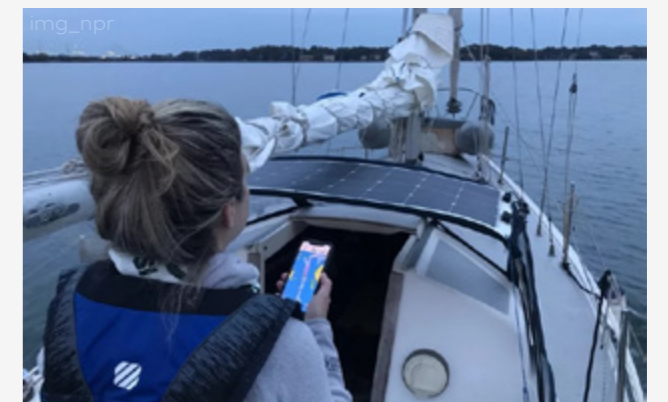
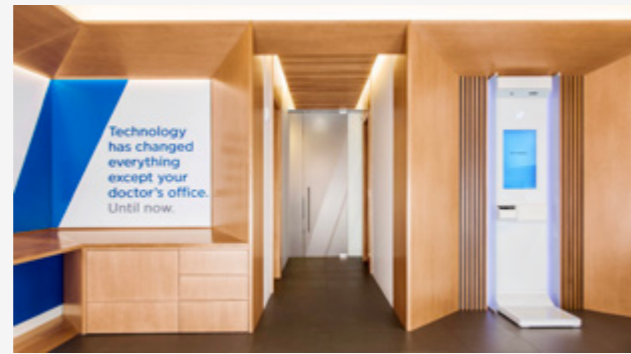
MONDAY

21

OCTOBER, 2030

Designed by:

PLAY&CO



01
COMMUNITY BRANDS, GLOBAL APPLICATIONS
SMALLHOLD

By collaborating with the [Standard Hotel, New York](#), [Smallhold](#) has exemplified how turning the perception of a dark and unappealing production method upside down can cultivate a brand that emphasizes community in all its endeavors.

Take-away: Synergize partnerships & product placements. Bring your internal culture to the outside world to demystify and inspire outside audiences. Foster 'craft' as a means of human expression to appeal to a world wary of robots & A.I.

02
VERTICALLY INTEGRATED SERVICES
FORWARD HEALTHCARE

Having raised \$225M from high-profile investors like Ashton Kutcher, [Forward](#) is a startup redesigning the way healthcare is delivered using all the technologies healthcare has neglected such as sensors, mobile, and AI.

Take-away: Design at the center of a disruptive new business model. Implement a holistic designed strategy; spanning spatial, digital and service design that addresses unmet user needs to deliver significant & meaningful value.

03
BREAK BRANDING RULES
POLARIUM

[Polarium](#) is a leading B2B energy storage developer built on lithium-ion battery technology. They believe that safe, smart and sustainable energy storage solutions will be key to empower the transition to a truly sustainable energy future.

Take-away: Designing 'purpose' into seemingly mundane business offerings. Fun, dynamic, expressive brand and product design to elevate your brand's image in a sea of monotony - serving to attract and engage talent, while resonating with clients.

04
BRICK&MORTAR 2.0
NIO

Electric car manufacturer [Nio](#) recently opened its first showroom in Rotterdam, the Netherlands. [Nio House Rotterdam](#) incorporates a café, lounge, children's play area, forum, work rooms and art exhibition on one of the city's most popular shopping streets.

Take-away: Community drives the retail experience. Position your brand as an enabler of community activities. Focus less on quantity of product to be displayed, and more on quality and memorability of customer experiences.

05
NURTURE THE TALENT
AIRBNB

In April 2022, [Airbnb](#) implemented a "work from anywhere" policy, enabling employees to work nationwide and travel globally. This led to enhanced performance, cost savings, and decreased attrition. "The best talent in the world is not all within a 50-mile radius of San Francisco." - Airbnb CFO Dave Stephenson

Take-away: Design the systems and set the expectations to allow employees to thrive on their terms.

COMMUNICATION & CONNECTIVITY

"Great communication begins with connection." _Oprah Winfrey

The internet has become omnipresent in North America, with 93.4% of the population utilizing it. This signifies the saturation of connectivity. However, in the upcoming decade, advancements in communications technology will further enhance our capacity to connect with one another, our products, vehicles, environments, and an ever-evolving virtual community.

Whether you love it, hate it, or remain ambivalent, we now exist in a post-pandemic world without a singular universal workplace paradigm. Some companies thrive on decentralized workplace structures, while others prefer hub and spoke models. Some embrace flexible working arrangements, while still others mandate 'back to the office' ultimatums.

Irrespective of the organizational blueprint, the ability to digitally connect, communicate, and collaborate will be fundamental to the daily operations of companies, regardless of their size, shape, or level of maturity.

The Opportunity:

Improve connections by removing redundancies in communication models for the benefit of employees and customers. People also need 'down-time' - design empathetic products, services, and systems that acknowledge constant connectivity, offering support for disconnection when necessary.



"Sustainable" Satellite Infrastructure

"Orbiting Now" lists 7,702 active satellites in various Earth orbits. Reusable rockets and other innovations have lowered LEO launch costs from \$65,000/kg to \$1,500/kg, sparking a global broadband boom. SpaceX leads the race, planning to launch 42,000 more satellites to meet increased demand.



01

img_starlink

Web3 - a Reboot

Although several Web3 technologies have encountered setbacks, blockchain continues to be a potent digital ledger that could revolutionize business. Decentralized Finance (DeFi) still holds credibility and may contribute to a fairer future for business owners by granting marginalized communities access to financial services, neutralizing discrimination, enabling cross-border transactions, funding community projects and beyond.



02

img_ethereum

Decentralized Physical & Digital Connectivity

Connective technologies are shifting from centralized systems towards distributed and interconnected networks.

Peer-to-peer networks and blockchain technology hold the promise of increased security, improved privacy, and system-wide resilience.

Electric vehicle infrastructure and renewable energy micro grids are enabling greater geographic autonomy for both people and businesses.



03

img_arup

Decentralized Data Centers

Arup recently won a World Architecture Festival (WAF) prize for their concept to repurpose decommissioned oil rigs as sustainable data centers that double as marine-life habitats. Dropbox's Magic Pocket is a 100% carbon neutral horizontally scalable exabyte-scale blob storage system which operates out of multiple regions. It maintains 99.99% availability with extremely high durability guarantees, while being more cost efficient than operating in the cloud.



04

img_skyway

Revitalizing Regional Communities

The total addressable market for passenger regional air mobility (RAM) could reach \$115Bln by 2035. Revolutionary propulsion (eVTOL & STOL) and navigation technologies hold the potential to connect regional communities, unlocking novel service and logistics models for a wide range of existing and new businesses.



Connected Communities: Asynchronous Geo-Agnostic Business Models

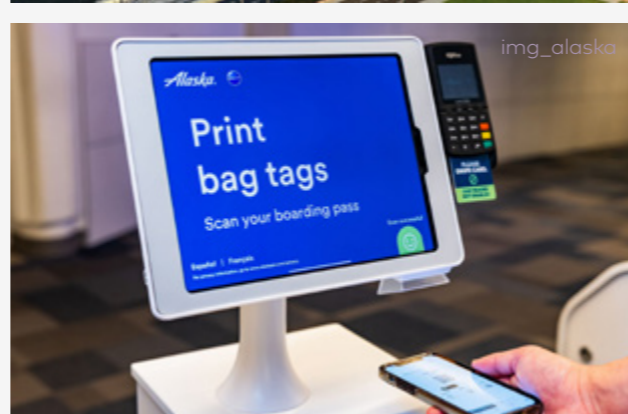
The swift advancement of physical and digital connectivity is empowering transformative lifestyles. Behaviors concerning work-life balance are shifting, as more individuals opt for remote or hybrid careers. An emerging trend of relocating to satellite and regional towns fosters decentralized economic growth. Forward-thinking companies and brands grasp this concept and cater to workers and customers in their chosen locations. Consequently, dormant business models undergo revitalization, while new ones sprout to serve these decentralized communities.



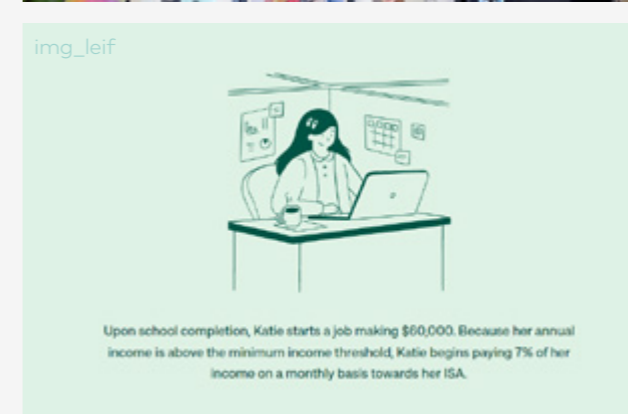
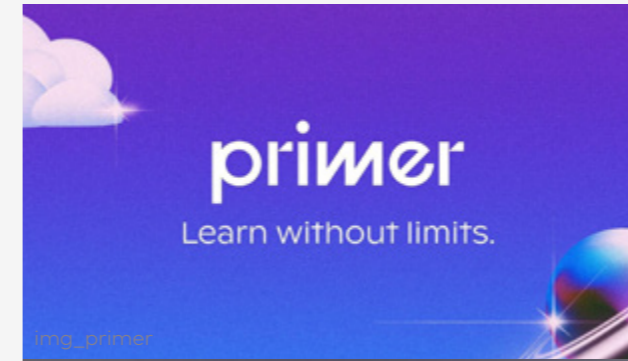
Digital Networks



Physical Networks



New Connectivity Platforms



01

THE TECHNOLOGICAL ENABLER STARLINK

SpaceX has ushered in a new era of low-cost space travel and satellite delivery with reusable rockets. This has in-turn opened the door for Low Earth Orbit satellite constellations that are poised to transform communication and connectivity as we know it. [Starlink](#) is leading the way, with competitors like [Amazon's Project Kuiper](#) rapidly attempting to keep pace.

Take-away: Your next smart phone may be a satellite phone. Global internet access will drive massive innovation in communication, data management, commerce, travel, and agriculture to name a few.

02

NOT THE BRANDS YOU'D EXPECT SUBWAY | WALMART | 7/11

The shift to electric ground transportation has passed the tipping point. This transition is creating new behaviors and experiences. New infrastructure is needed to support this change, interestingly - unexpected companies like Subway & 7Eleven are exploring new opportunities for designed experiences to maintain relevance and build value for the future.

Take-away: Think your brand doesn't need to adapt? Think again. Brands that embrace change early and create innovative new experience models stand to gain the most influence.

03

PRIVATIZED AIR TRAFFIC CONTROL UNITED AIRLINES x ARCHER | SKYWAY | ALASKA

Advances in connectivity systems and electric aviation are opening the door for privatized air traffic control. United Airlines has partnered with [Archer](#) to begin eVTOL services in NY and Chicago. Start-ups like [Skyway](#) are developing air-traffic technology to simulate safer, more reliable, and efficient business models. [Alaska recently eliminated check-in counters](#) on their way to a full self-service airline experience.

Take-away: Time is of the essence. Airport terminal passenger flows will improve through innovations in processing technologies, how might this be adapted to other industries?

04

NEW EDUCATION PLATFORMS PRIMER | LEIF

[Primer micro-schools](#) prioritize real-world learning and problem-solving... not passing tests. Their goal is to free future generations to be more ambitious, more creative and independent thinkers. [Leif](#) is a horizontal platform that allows learners to easily create and finance an Income Share Agreement (ISA) - freeing them to focus on their education and only begin payment once they've parlayed those skills into a well-paying job.

Take-away: Traditional education models are outdated and ripe for innovation - new platforms are empowering individuals of any age to connect and access world-class education.

05

BREAKING DOWN BORDERS JOHN DEERE STARFIRE NETWORK

[John Deere](#) is no stranger to satellite technology. They began developing their StarFire network all the way back in 1998. "When you look at the sharing of big data that needs to happen quickly, the LEOs could become very popular in this space, particularly in filling connection gaps in rural areas. We are on the doorstep of creating a lot of the same features for our customers today." - Al Savage, Manager of the StarFire Network.

Take-away: Satellite technology has the power to help many regional industries connect to global networks and leverage real-time data to optimize business practices.

AUGMENTING INTELLIGENCE

Artificial Intelligence and Machine Learning are the source of much debate and speculation across the global business community. How do we seize the opportunity of potential advancements? How will AI make our organization more efficient? What are the risks? What about our employees? And ethics... where do we even begin?

Advances in AI are outpacing our ability to understand and meaningfully apply it. This has catalyzed a wave of AI-centric start-ups, to the tune of almost \$92Bln global corporate investment in 2022. While this is an important marker of economic focus, it doesn't ensure success - one AI software engineer predicts that 70-80% of AI start-ups will die.

But for the vast majority of us not planning of launching an AI start-up, the future shows more promise. Creatives, business leaders and innovators must always focus on creating value for customers and the planet. We need to learn and understand the benefits of AI and strategically apply it in pursuit of the broader company mission, culture, and values.

The Opportunity:

Time is the most valuable resource in business today. Inefficient and monotonous business practices decimate it, on the other hand - scalable systems and workflows leverage it. Learn about, trial and prototype AI-enabled processes in your business. Use it to free up the intellectual capital of your team to focus on designing and delivering meaningful experiences for your customers and the planet.

State of Intellect & Intelligence

Artificial general intelligence has the potential to benefit nearly every aspect of our lives, responsible development & deployment is paramount. At the same time, business has the ability to innovate faster and more effectively than ever before.

Research & Development Frontiers

AI has accelerated our ability to simulate and predict real-life behavior, but we'll soon need more powerful computers. [Google's Quantum AI lab](#) in Santa Barbara recently announced that their Sycamore quantum computer takes mere seconds to run computations that take the Frontier supercomputer (currently the world's most powerful) over 47 years to process.



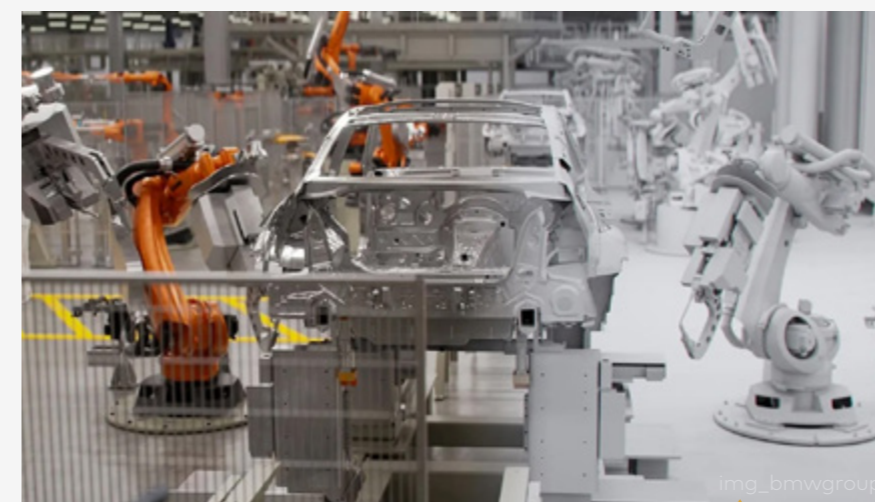
The New Creators

Designers are rapidly adopting personalized suites of AI-based tools to augment their creative process. This is enabling new forms of creative expression, spawning exciting new aesthetic languages, and personalized product, graphic, user interface & service-design. It is also intuitively automating repetitive tasks - allowing designers to focus on strategic problem-solving and innovation work.



Catalyzing Medicine 3.0

The global healthcare AI market will grow to almost 188 billion U.S. dollars by 2030, increasing at a GAGR of 37% from 2022 to 2030. AI is enabling bespoke 'healthcare' plans based on unique individual biological profiles. It also shows promise for universal healthcare and emotional applications for autistic, the depressed, & people with dementia.



Digital Twins & Cobots

The rise of digital twins is being facilitated by platforms like [NVIDIA's Omniverse](#). BMW is using this technology to simulate a factory set to open in 2025. GE has introduced [Lifespan](#), a platform for Wind Farms that optimizes turbine design and placement to maximize power yields. Additionally, the concept of collaborative robots, or cobots, is gaining momentum in various industries.



Equitable Education

20% to 40% of the current workload of teachers can be automated using current technology. AI tutors, AI-guided lesson planning, personalized learning plans and dashboards are just a few tools with the potential to provide greater access to better education.

a no-line cinema film

MIMXXIII

THE LORD OF THE RINGS

BY WES ANDERSON

journey into middle-earth

link_curious_refuge
link_reason.com



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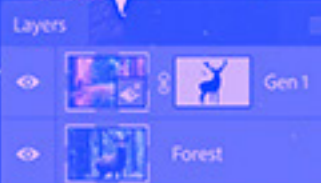


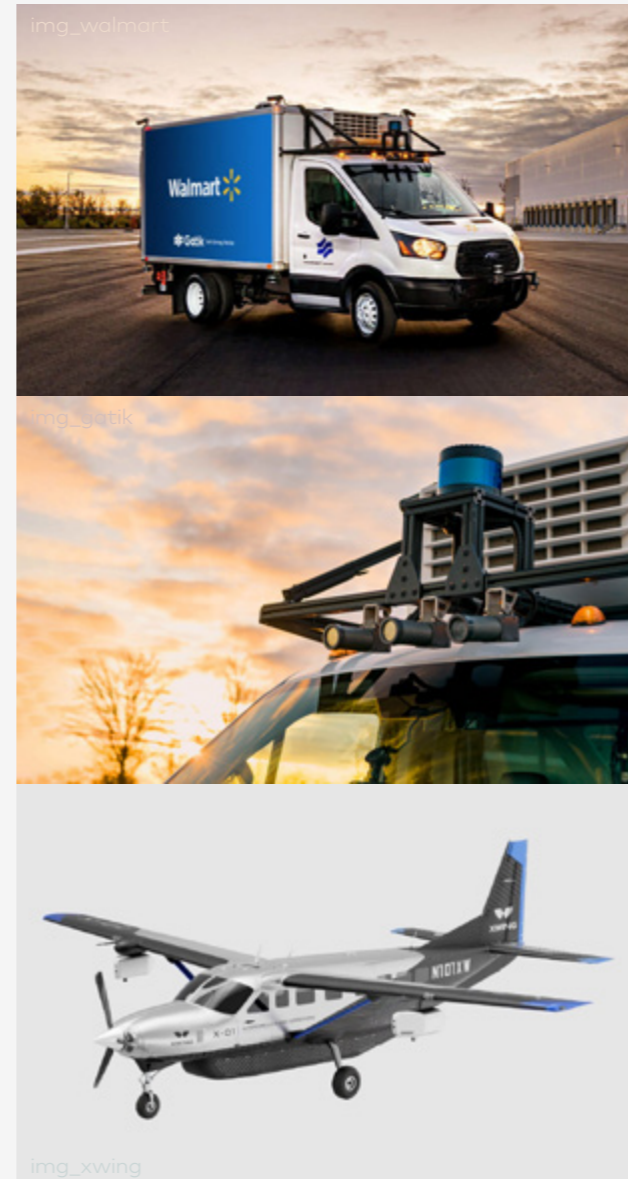
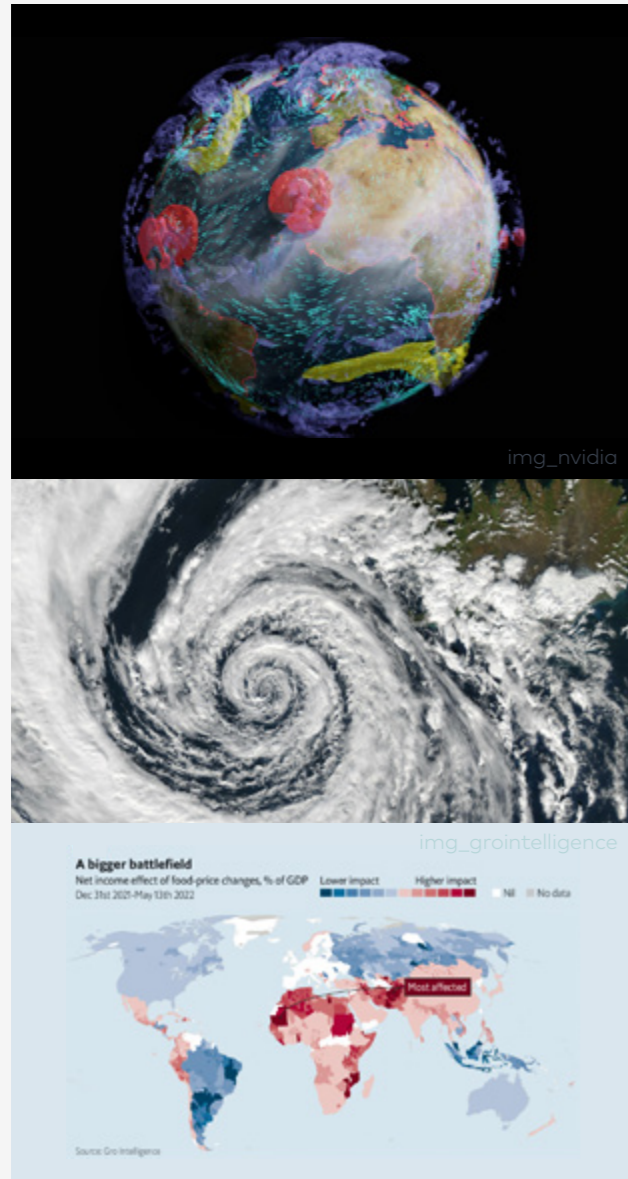
Art vs Tech: A Battle for Creative Ownership

Once upon a time, Napster paved the way for companies like Apple & Spotify to create digital streaming platforms that radically changed the economic landscape of the music industry. Initially, this created instability for artists but has since matured into a dynamic global model. Today, AI presents a host of new questions for creators including who owns the IP, how will revenue and profits be distributed, will AI take my job? Watch this space.

link_zdnet
link_adobe

Generate





01 INSTANT & IMPACTFUL DATA VISUALIZATION
NVIDIA | GRO INTELLIGENCE
 Real-time digital twins of Earth are now possible with advanced Machine Learning models like NVIDIA's FourCastNet, which accurately predicts extreme weather patterns. Gro Intelligence offers AI-based valuable insights for agriculture, the climate, and the wider economy. Digital twins also allow businesses to test and validate new product and service models in low-risk virtual environments.
Take-aways: New learning-model tools are unlocking useful new simulation platforms, impactful forms of visual communication and infographic data for more effective and immediate communication.

02 THE NIGHT SHIFT | SILICON VALLEY GOES RURAL
NEXUS | KILTER SYSTEMS | CARBON ROBOTICS
 Top silicon valley talent has turned their experience and engineering chops toward the agriculture sector. Engineers and designers that once worked at the forefront of consumer technology (read iPhone) are joining the likes of [Nexus Robotics](#), [Kilter Systems](#), and [Carbon Robotics](#) Ag Tech start-ups.
Take-away: Experienced designers and engineers will bring established product development models to these nascent industries. Design will play a key role in company success.

03 EVERYDAY AUTONOMY
GATIK | XWING
 Autonomous passenger transportation is still a distant reality, but the cargo sector is actively deploying autonomous vehicles. [Gatik](#) has commercial agreements with Georgia-Pacific, Kroger, and Walmart, and has removed safety drivers from some of their autonomous box trucks for Walmart. In 2021, [Xwing](#) achieved the world's first autonomous cargo flight.
Take-away: Good design doesn't need to be built from the ground up. Leverage existing products and platforms to develop viable business solutions. Build your brand around this approach.

04 SCALABLE PLATFORMS
NORDIC HARVEST | IRON OX | PLENTY
[Plenty](#) claims the world's most technologically advanced indoor vertical farm, designed to grow up to 4.5 million pounds of leafy greens annually in a single city block in Compton, California - up to 350x the yield per acre of a conventional farm.
[Nordic Harvest](#), Europe's largest vertical farm, uses renewable energy and robotic technology to recycle water, nutrients and fertilizers.
Take-away: AI, automation & robotics can now commercially scale data-driven production practices that were once confined to boutique case-studies.

05 AUGMENTING CLINICAL CARE
HEALX | K HEALTH | NUANCE DAX
31% of Americans think using AI in healthcare would improve care quality, 30% think it would make care worse, and 38% think it won't make much difference. [Healx](#) uses AI drug discovery to develop new treatments for rare diseases. [K Health](#) pairs clinicians with AI to provide data-driven, personalized care around the clock. The [Nuance Dragon Ambient eXperience \(DAX\)](#) is an AI-powered, voice-enabled solution that automatically documents patient encounters at the point of care.
Take-away: Design for empathy, trust, and clarity by presenting data unambiguously and helping new technologies seem relatable and reliable.

IRO02 Business As Usual
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Cultivate Culture

Nurture teams to deliver meaningful brand impressions.

Communication & Connectivity

Design for decentralized connectivity to strengthen business relationships.

Augmenting Intelligence

Explore creative strategies for AI to elevate business value.

AI technologies offer opportunities for innovation across all industries. Start-ups are developing AI-driven solutions to address complex ecological challenges. Established companies are implementing AI to optimize operations, enhance workplace culture, and improve customer relationships.

How will your business embrace autonomous and asynchronous workstreams while balancing company culture with employee perceptions of AI?

Over the coming 3-5 years, leading companies will invest in advanced technologies that facilitate their mission, culture, and values. AI will free-up creative potential, allowing talented employees to focus on valuable problem-solving and brand experiences. The future holds the promise of transformative 'super-companies' reshaping the rules of business, signaling an exciting era of possibilities for people and the planet.

HOW WILL YOU EMBRACE THIS TRANSFORMATIVE POTENTIAL?

FUTURE CLIMATES



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2022Q3

BUSINESS AS USUAL

REPORT 02
2023Q3

WORKLIFE LIFEWORX

REPORT 03
2023Q4

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REPORT 04
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Play&Co mixes trends analysis with extensive industry-specific knowledge to help our clients create clarity from the chaos. We pull from our creative toolkit and apply Design Thinking to cross-pollinate insights from seemingly unrelated domains to add value and unlock opportunities for our clients' success.

Put simply, 'We Take Play Seriously'

Ways to action on this:

1. Innovation Workshop
2. Experience Design
3. Design Research & Strategy

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