

What's
Next

COMPLEX
NETWORKS

FUTURE OF EXPERIENCE

It's been nearly two years, and COVID-19's presence continues to influence how we live, work and connect with one another. In light of the pandemic, brands and creators are still questioning how Gen Z and Millennials feel about IRL and virtual experiences. Is the fear of standing shoulder-to-shoulder in a crowd of thousands still keeping them in? Has the fatigue of staring at a screen for the last two years created an unflappable apathy for logging in to another virtual experience?

Many trend reports on the future of experiences paint pictures of events and retail spaces that are powered by cutting-edge technology, data tracking for hyper-personalization, and new sustainable practices that reduce harmful footprints.

This study, however, offers a different perspective: one about the power of human connection. It's the driving force propelling Gen Z and Millennials into this new world as well as online — all in search of regaining what was abruptly taken from them in 2019. From live music and jet-setting, to going on dates and online gaming, they are craving ways to keep their connections with friends, family and loved ones thriving. They're even looking to spark something new with people they've never met before. If one thing is clear, they want to connect and feel something real again.

READ ON TO DISCOVER

Are they ready to go back out for IRL experiences?

Will they ever go back to live music, airports and gyms again?

Given the intense polarization around COVID-19, will they go out for IRL experiences if they don't trust others?

Will the trend of nostalgic comfort continue on?

Will they ever willingly log in to a virtual experience again?

THIS IS THE FUTURE OF EXPERIENCE.

Q: ARE THEY READY TO GO BACK OUT FOR IRL EXPERIENCES?

A: They're vaxxed and ready to go out.

The Pandemic Has Taken Over Their Lives.

While They're Slightly Less Likely To Have Had COVID-19 Personally, They're More Likely To Know Someone Who Was Hospitalized Or Died From The Virus Vs. The National Average.*

HAVE GOTTEN COVID-19

1 IN 4 

Community Respondents

1 IN 3 

Americans (By The End Of 2020)**

1:1 

Community Respondents Are Just As Likely To Know Someone Who Was Hospitalized Or Died From COVID-19, As Someone Who Didn't Have It At All

1 IN 500

Americans Have Died Of COVID-19***

* Our Community Skews More Young, Coastal And BIPOC Than The National Average.

** Source: [The COVID Tracking Project, Aug 2021](#)

*** Source: [US Census + John Hopkins University, Sept 2021](#)

Despite COVID-19's Impact, They're Vaxxed And Ready To Go Back Out IRL.

FULLY VACCINATED

80%

Community Respondents

56.5%

Americans*

79%

Over Three Quarters Of Community Respondents Say It's Currently Important To Them To Be Able To Have IRL Experiences, Both By Themselves As Well As With Others

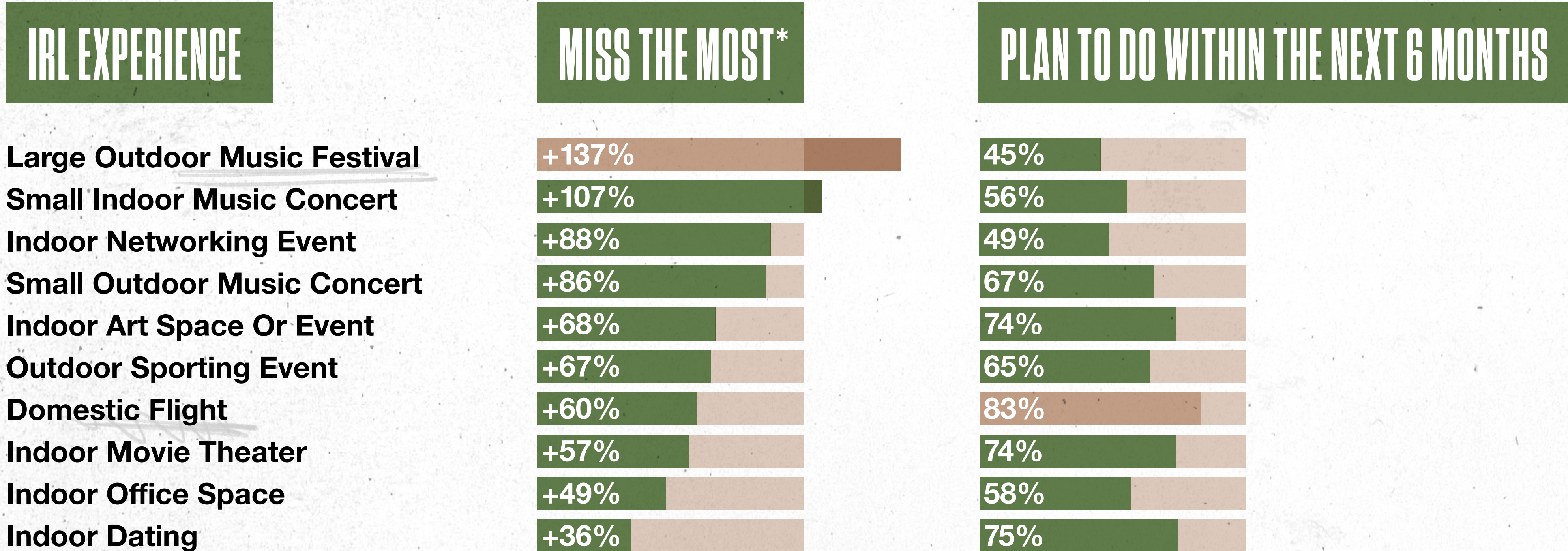
Q:

WILL THEY EVER GO BACK TO LIVE MUSIC, AIRPORTS AND GYMS?

A:

They miss the feeling of live music and hopping on a plane for vacation most, but COVID-19 is giving them the most pause on international jet-setting and gyms.

What IRL Experiences Do They Miss The Most?



* Based On What IRL Experiences They Are "Already Doing Within The Past 6 Months" Vs. "Planning To Do Within The Next 6 Months"

The Return Of Live Music Is Energizing People At Record Speed.

Whether it's a music festival or an intimate concert, they miss live music more than any other type of IRL experience.

Rolling Loud Miami 2021

In Under 2 Hours

Outside Lands 2021

In Under 2 Hours

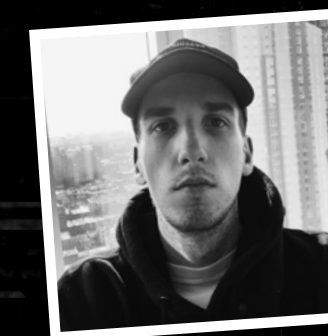
Austin City Limits 2021

Both Weekends In Under 3 Hours

Astroworld 2021*

100,000 Tickets Within Minutes Without Announcing Line-Up

“ They're selling out in record time. And that's with Delta out and still a lot of uncertainty. There's still crazy high demand, like higher than ever before.



ERIC SKELTON

DEPUTY MUSIC EDITOR @ COMPLEX NETWORKS

*It is imperative to not overlook audience safety in an attempt to capture the burgeoning audience demand, especially in light of the recent tragedy at Astroworld. In fact, 52.5% of community respondents say the news coverage of Astroworld has impacted their interest in attending music festivals and concerts in the future.

From ASAP Rocky to Kerwin Frost, Live Music Drove Some Of The Most Hype at ComplexCon 2021.

After its 2020 hiatus due to COVID-19, ComplexCon returned to Long Beach in November 2021. Amidst the weekend of coveted drops, it was live music that broke through in big way.

ASAP Rocky headlined the music stage, performing his full debut album, *Live. Love. ASAP*, to celebrate its 10th anniversary. He appeared in the middle of the crowd to perform his first song, jumping side by side with his fans. Even his girlfriend — none other than Rihanna — was front row with the rest of the audience. It was one of the most buzzed about moments of the weekend — a real feeling of music bringing everyone together.

In the middle of the convention floor was Kerwin's Kingdom. It was a giant, multi-room cardboard castle, complete with a drawbridge entrance, built by music, style and comedy icon Kerwin Frost. He not only dropped collabs with adidas, 7-Eleven and Beats By Dre within the castle. He also programmed the space with a stacked lineup of eclectic music performances by his friends, including Mac Demarco, Tommy Wright III and Kero Kero Bonito. The castle was packed from cardboard wall to cardboard wall, and the long line of people waiting to get in through the drawbridge didn't seem to end all weekend.

It's Not Just The Return Of Live Music. It's The Return Of Their Identity.

For nearly two years, they have lost an important part of themselves, and they will do almost anything to get it back.

“ For me, with music... that is my life. When I see an artist in person, when they're right in front of me, and they mean so much to me from listening to them, it's just a life changing experience.



BRETT, 21, MARYLAND

“ Concerts are the thing I miss most. It's probably one of the things that made me get vaccinated.



Q, 31, LOS ANGELES

Domestic Flights Are Surging.

Domestic flights are not only the **#1 (83%)** IRL experience they are planning to do in the next six months — they're also a national trend.

With the coming winter holidays, United Airlines is experiencing the biggest increase in domestic flights for December 2021 since March 2020.

“ The uptick in flights has been just phenomenal. In domestic, there's just not enough planes and capacity to fulfill the demand that's there today.



RAFAT ALI
CEO/FOUNDER @ SKIFT

What IRL Experiences Are They Questioning if They'll Ever Do Again?



International Travel is as High Anxiety as It is High Desire — Which Has Led to Trip Stacking.

New variants sweep the globe. Many countries still struggle with glaring inequities in vaccine distribution. And so, international travel is the **#1** IRL experience they're questioning if they will ever do again. In fact, international bookings were **4x** lower in May 2021 than January 2020.*

However, international travel is the only IRL experience that ranks just as high in anxiety as it does in desire. **1 in 2 (49%)** of community respondents say they feel comfortable flying internationally, even if they haven't necessarily done so yet.

This high-anxiety-yet-high-desire tension has led to a new trend — **trip stacking**. People are taking advantage of COVID-19 cancellation policies. They book multiple trips — more than they actually plan to go on. Some are riskier bookings, like longer haul international travel. Others are safer domestic plans or shorter haul international flights, like the U.S. to the Caribbean. Then they make last minute travel decisions based on forced or desired cancellations.

* Source: Skift U.S. Travel Tracker, July 2021

“ By second half next year, a lot of travel will begin to seem more normal around almost all parts of the world.



RAFAT ALI
CEO/FOUNDER @ SKIFT

High Anxiety About Gyms Has Led to High Investment in At-Home Fitness.

Their health and safety concerns about gyms are endless. Will the air be well ventilated and filtrated? Will everyone else be vaccinated? Wearing a mask? Properly distancing? Disinfecting the equipment after use? Even doing something as simple as washing their hands?

As a result, investments in at-home fitness are surging. Dumbbells and kettlebells experienced major shortages from being bought up in spring 2020, joining the ranks of toilet paper and Nintendo Switches. Personal trainers are exiting gyms and starting their own direct-to-client Zoom-based brands. Most of all, smart gyms are booming. Peloton grew its revenue by 120% and digital subscribers by 176% from 2020 to 2021. Similarly, the amount of Peloton users who also hold a gym membership has decreased by 33% over the past two years. Lululemon acquired Mirror for \$500 million. Even LeBron James has entered the field, becoming an investor and brand partner of Tonal.

“ If companies are allowing consumers to work from home indefinitely, some may continue to make their home a one stop shop and cut down on costs. Brands need to play into the idea of not living like once before and meet their consumers where they are.



JONATHAN T. MCLEAN
NIKE SNKRS + NBHD BRAND MARKETING

TAKEAWAY

↑ Invest In High Desire Experiences

Especially Ones That Connect Them To Live Music And Traveling For Vacation

|| Pause On Or Disrupt High Anxiety Experiences

Especially International Travel And Gyms, And Consider Redirecting Investment Into Inverse Experiences Like Domestic Travel And At-Home Fitness

Q: GIVEN THE INTENSE POLARIZATION AROUND COVID-19, WILL THEY GO OUT FOR IRL EXPERIENCES IF THEY DON'T TRUST OTHERS?

A: They're wrestling with their longing for human connection, but increasing distrust of others.

They Are Starved of Human Connection. This is the #1 Factor Motivating Them to Go Out for IRL Experiences.

They Long For Seeing Friends and Family, Meeting New People, Networking And Going On Dates.



57%

Over Half Say Connecting With Others Is The Biggest Reason Why They Plan To Attend IRL Experiences

“ **Social interaction
feels weird. I want
to be in a crowd and
feel normal again.**

LAKSHAY, 23, CALIFORNIA

Group Activities That Brought Friends (Even Strangers) Together Won ComplexCon 2021

Hypland x Hello Kitty Carnival

From classic games like corn hole to win prizes, to roller coaster and ferris wheel rides, the Hypland x Hello Kitty Carnival brought an entirely fresh experience to ComplexCon that it never had before, leaving friends raving about it all weekend.

MA®KET Court

Streetwear brand Market built a basketball court, challenging attendees to shoot their shot. By making three-pointers, they could win prizes ranging from designer toilet paper, to \$1,000 cash, to a \$20K Swarovski crystal basketball. What really brought the energy, however, was the crowd of spectators around each shooter. Friends and strangers alike cheered them on. When a shot was made, not only did the shooter win—prizes and cash were thrown into the air for all, floating back down to the crowd.

“ComplexCon is truly a community coming together. Connection is in the DNA of the event.”



NEIL WRIGHT

HEAD OF COLLABORATIONS & EXPERIENTIAL
@ COMPLEX NETWORKS

Complex Connect

ComplexCon hosted sessions for like-minded individuals to network and learn from each other. Each session was packed, with attendees and influential community members connecting about how to start a brand, build a community, find the right business model, and even get their start in NFTs.

Despite Craving Human Connection, Their Distrust In Others Is At An All-Time High.

This Is Especially True For Historically Marginalized Communities And Those Disproportionately Impacted By COVID-19.

* Source: [CDC, Sept 2021](#)

DON'T FULLY TRUST OTHERS TO FOLLOW COVID-19 GUIDELINES DURING IRL EXPERIENCES

85%

Community Respondents

94%

Women, Black And Indigenous Community Respondents

COVID-19 DEATH RATE VS. WHITE AMERICANS*

2.4x

Indigenous Americans

2.0x

Black Americans

Before brands and creators can expect people to come out to their experiences and engage with their brands, they first need to put themselves into the shoes of the community, consider what they have been experiencing and what role they should play to support them.

“ First and foremost, brands need to be transparent and admit any shortcomings. They need to prioritize doing things in an organic way and making long-lasting community commitments.



SHARIFA MURDOCK
CHIEF IMPACT OFFICER @ KITH

James Whitner of The Whitaker Group (Social Status, A Ma Maniere, Prosper, A.P.B.) is paving the way for how brands should approach building trust and connection with communities.

“ James and his company are a clear indication of not only reaching success, but also reaching down to bring people up for the ride. Community centers in low income neighborhoods. Art gallery above the store for kids to see high profile art as they shop for their next outfit. Free Game, a monthly Zoom call open to the public where James shares his personal stories and brings on knowledgeable guests to educate those on the call.



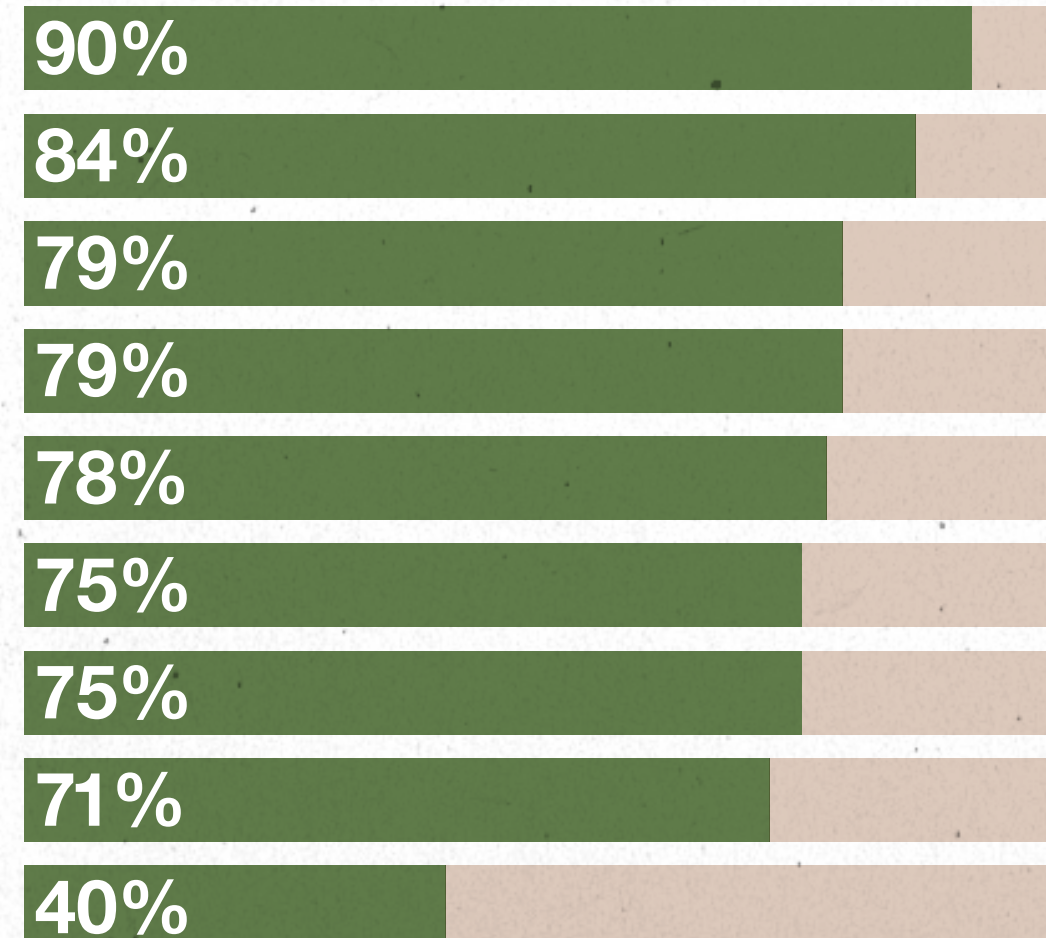
JONATHAN T. MCLEAN
NIKE SNKRS + NBHD BRAND MARKETING

What Health Guidelines Are Best To Build Trust In Connecting With Others During IRL Experiences?

HEALTH GUIDELINES

- Increased Sanitation Measures ✓
- Mask Requirement
- COVID-19 Vaccination Requirement
- Socially Distanced Spacing Or Seating
- Negative COVID-19 Test Requirement
- Limited Or Reduced Capacity
- Timed Or Scheduled Attendance
- COVID-19 Rapid Testing On Site
- COVID-19 Sniffing Dogs

MORE LIKELY TO ATTEND IRL



Vaccination Requirements For IRL Experiences Remain Contentious.

Despite vaccination requirements being one of the highest ranked health guidelines for building trust in an experience, it's also unsurprisingly the most debated. In fact, **1 in 10** said they wouldn't attend an IRL experience that required proof of vaccination for entry — making this the **#1** reason that would deter attendance. This group against vaccination requirements are **100% men, 83% unvaccinated and 67% in the South or Midwest.**

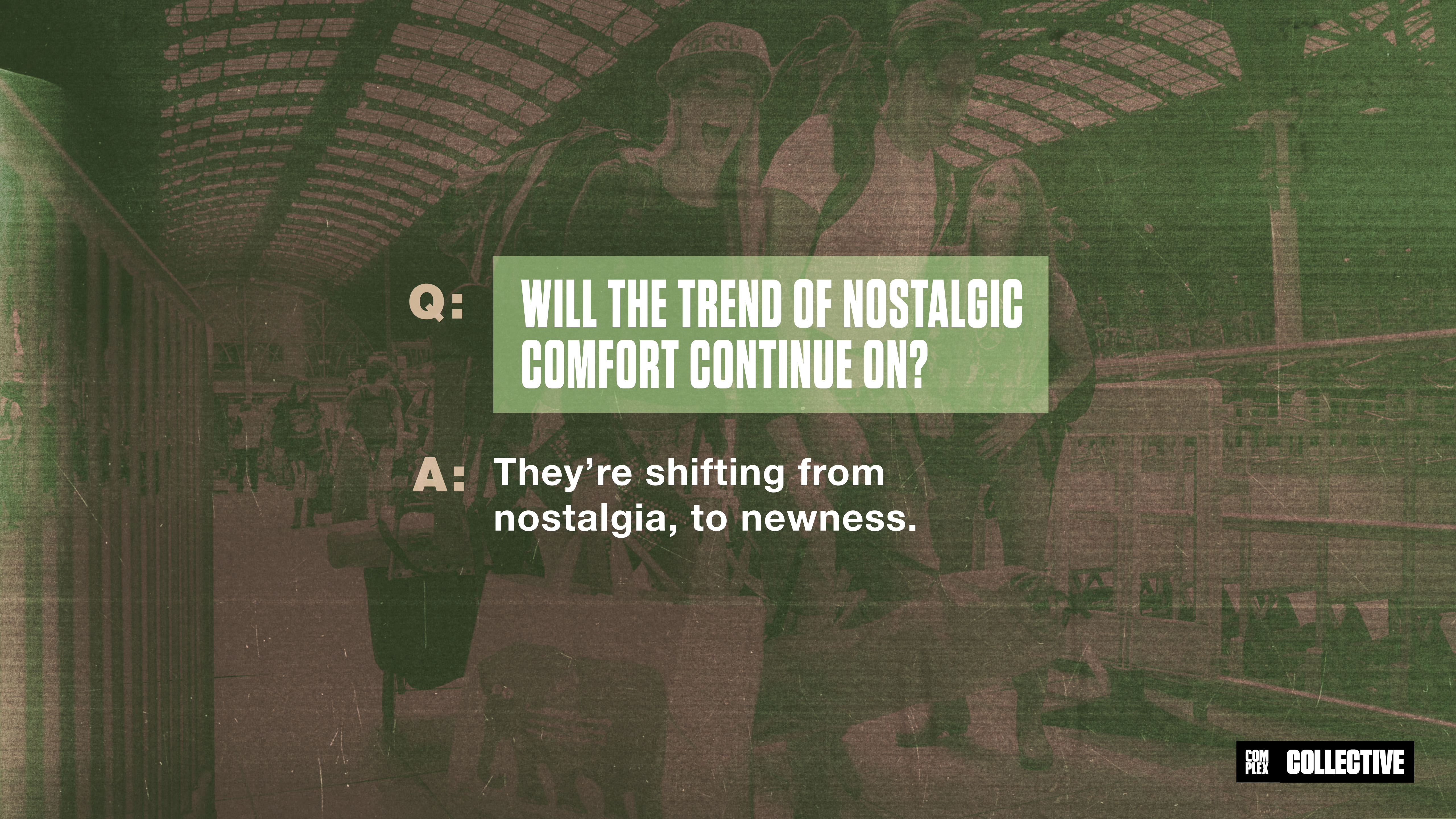
Event organizers and creators have been left without an easy answer. Many artists and comedians want to require vaccination for attendance of their shows. But they have found themselves cancelling tour dates in states that don't allow them to. Coachella and Stagecoach initially took a hard stance by requiring vaccination for attendance. After experiencing backlash online, however, they later reversed their decision and expanded guidelines to accepting a negative COVID-19 test for entry.

TAKEAWAY

Create IRL Experiences That Facilitate Connection

Integrate And Message IRL Safety Guidelines To Build Trust In Connecting With Others, Especially Sanitation, Masks And Vaccination Measures

But To Truly Repair Trust With Historically Marginalized Communities That Have Been Disproportionately Impacted By COVID-19, Consider What Systemic Inequities Should Be Corrected – In Experiences And Beyond – To Better Support Them



Q:

WILL THE TREND OF NOSTALGIC COMFORT CONTINUE ON?

A:

They're shifting from nostalgia, to newness.

They Have Been Waiting Nearly Two Years To Get Back To Checking Off Their Bucket List Experiences.

They Need A Break From Watching *The Office** And *Friends*** On Repeat, And Get Out Of The House To Shake Up Their Environment.

While There's No Indication That The Nostalgia Trend Will Go Away Or Be Replaced Entirely, There Is A Significant Shift Towards The Newness Of IRL Experiences – Events, Travel Destinations, Networking And Dream Career Moves They've Never Experienced Before.

* The Most Streamed TV Show In 2020 - Source: [Nielsen, Jan 2021](#)

** The Most Watched Comedy On Broadcast Or Cable TV In 2020 - Source: [Nielsen, Mar 2021](#)

1 IN 5 

Say Experiencing Something New For The First Time Is The Biggest Reason Why They Plan To Go Out For IRL Experiences

“ I want to get out of the four walls I’ve been seeing for months and months on end. I really wanted to go to Johannesburg in January 2020. Should have gone. Understatement, duh. I still do want to go to Australia for the first New Years in the world.



Q, 31, LOS ANGELES

“ There’s so many people around the country that I’m friends with that I’ve never even met in person before. So I want to go to Miami to meet a lot of those people for the first time, and have a lot of new experiences with them.



BRETT, 21, MARYLAND

TAKEAWAY

Empower Them To Go IRL And Check Off Their Bucket List Experiences

**Access To A Coveted Event. A Trip To An Exotic Destination.
The Perfect Network Contact. The Next Dream Career Move.**



Q: WILL THEY EVER WILLINGLY LOG IN TO A VIRTUAL EXPERIENCE AGAIN?

A: It's not that they're sick of virtual experiences, they're sick of a lack of connection and feeling.

While They Say They're Sick Of Virtual Experiences, What They're Really Sick Of Is A Lack Of Connection And Feeling.

“ There's no human connection
and it makes you feel lonely.

NICOLE, 31, MASSACHUSETTS

51%



Half Say There Isn't A Single Virtual
Experience They're Interested In
Attending Within The Next 6 Months

69%



Over Two-Thirds Say Their Biggest
Frustration With Virtual Experiences
Is A Lack Of Connection To Others

30%



Nearly One-Third Say Their Biggest
Frustration With Virtual Experiences
Is A Lack Of Feeling

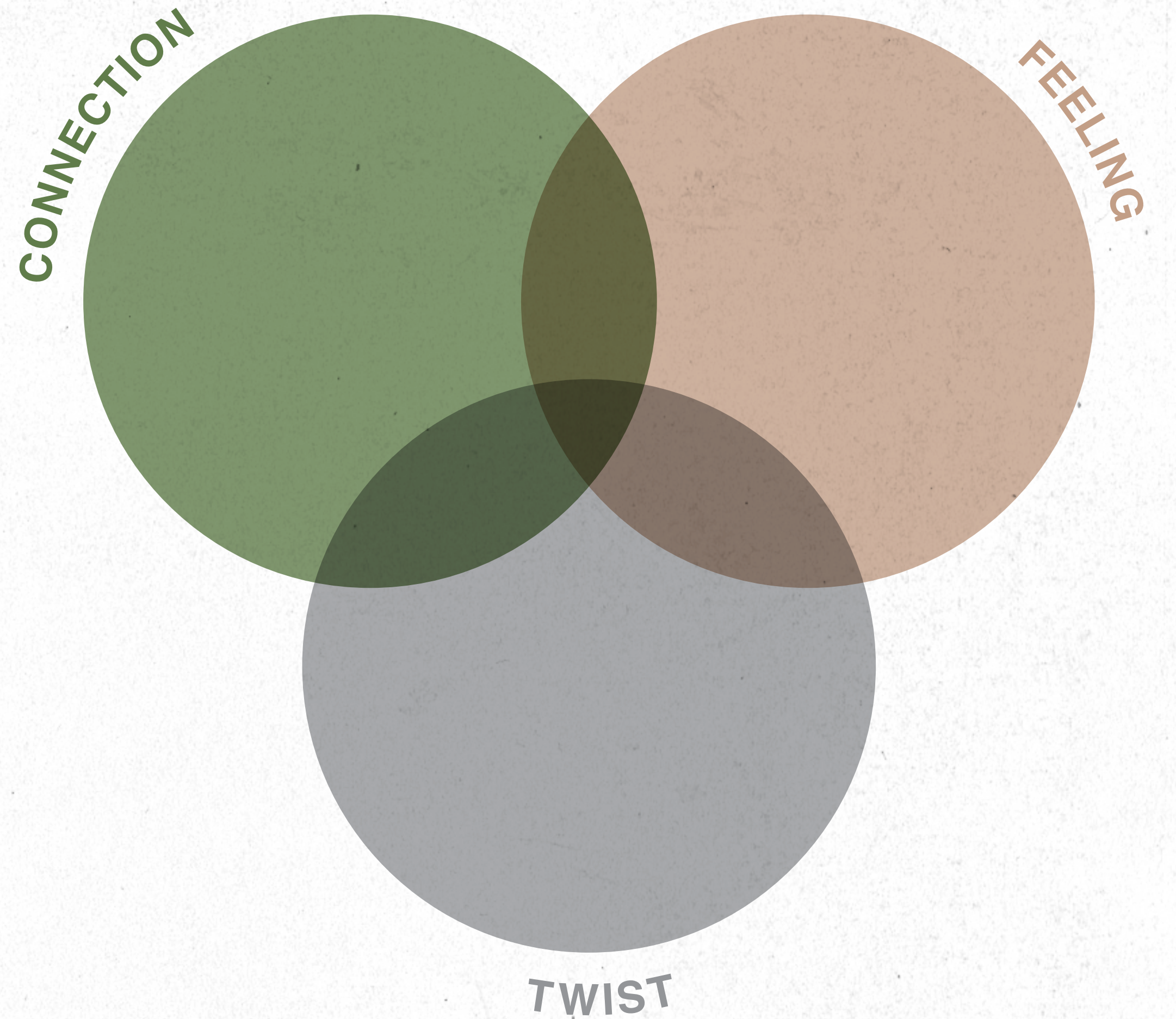
In Addition To Connection And Feeling, Virtual Experiences Need A Twist.

“ There’s something to be said for using the medium in an innovative way, and not trying to recreate the live experience virtually. People are tired of things they can see on YouTube, or experience in a music video, or something similar to just having a camera set up at a live show. If you are going to create a virtual experience, you have to come with some kind of twist that people have not seen before, especially if they’re going to be paying money.



MAURICE PEEBLES
EDITOR IN CHIEF @ COMPLEX NETWORKS

The Blueprint For Virtual Experiences



Verzuz

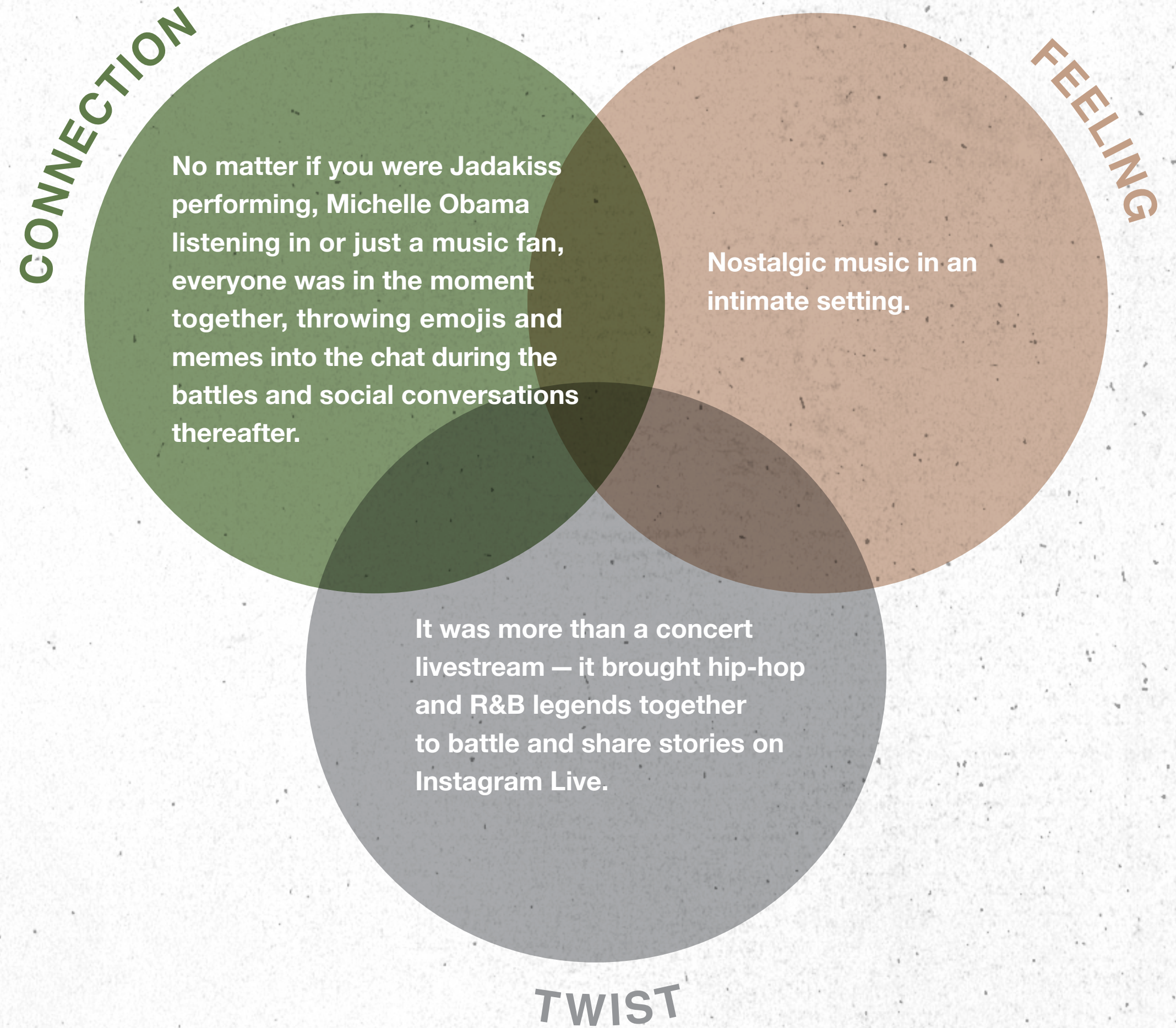
Swiss Beats and Timbaland's Instagram Live series was probably the most talked about entertainment of 2020. Not only did each episode drive millions of views, the halo effect around them was astonishing. After Erykah Badu and Jill Scott's battle, their music streams skyrocketed by 300%. Similarly, the day after Brandy and Monica's battle, they had 30 out of the 40 top songs on Apple Music's Top 40 R&B Soul Tracks.

“ When you watch a Verzuz battle, and you see the chat with all the celebs and brands chiming in, you feel part of it. They're doing it the best. I'm jaded and still get excited to watch.



NEIL WRIGHT

HEAD OF COLLABORATIONS & EXPERIENTIAL
@ COMPLEX NETWORKS



ComplexLand 2.0

In the second year of our virtual destination, ComplexLand added new features like new exclusive product drops, avatar skins, virtual selfies, a gamified scavenger hunt to collect hidden coins and an NFT museum. Nothing, however, drove more interactions than the new Multiplayer mode. Over 700,000 people attended ComplexLand 2.0, driving over 9.5 million total interactions. Over 2 million of those interactions were driven by the Multiplayer features alone. This signals the audiences demand to use virtual experiences as a point of connection with others.



Virtual Dating Is Their #1 Absolute Least Favorite Type Of Virtual Experience

It's low connection, low feeling – the least ideal way for them to build a deep, romantic connection. So, they're flocking back out.

Brands like Bumble are realizing on-app dating alone is not enough. In July 2021, they opened [Bumble Brew](#). It is the app's first-ever brick and mortar cafe and wine bar in NYC, all to help build IRL connections and spark all the feels.



56%

Over Half Say They Are Least Likely To Attend A Virtual Dating Experience



75%

Three-Quarters Say They Are Planning To Go On IRL Dates Over The Next 6 Months

“ It’s not great. I don’t know what the other person is feeling, really. Like on FaceTime, for example, you don’t really get to understand what the person is really trying to say.



KARAMOKO, 18, NEW YORK CITY

TAKEAWAY

Focus Virtual Experiences On High Connection, High Feeling Moments, With A Twist



- 1 Create IRL Experiences That Facilitate **Connection**.
- 2 Invest In **High Desire** Experiences Like Live Music And Traveling For Vacation.
- 3 Pause On Or Disrupt **High-Anxiety** Experiences Like International Travel And Gyms. Consider Redirecting Investment Into Inverse Alternatives Like Domestic Travel And At-Home Fitness.
- 4 Empower People To Go IRL And Check Off Their **Bucket List** Experiences – The Events, Travel Destinations, Networking And Career Moves They Dream About.
- 5 Integrate And Message IRL **Safety Guidelines** To Build Trust In Connecting With Others, Especially Sanitation, Mask And Vaccination Measures.
- 6 To Truly Repair Trust With **Historically Marginalized Communities** That Have Been Disproportionately Impacted By COVID-19, Consider What Systemic Inequities Should Be Corrected – In Experiences And Beyond – To Better Support Them.
- 7 Focus Virtual Experiences On **High Connection, High Feeling Moments, With A Twist**.

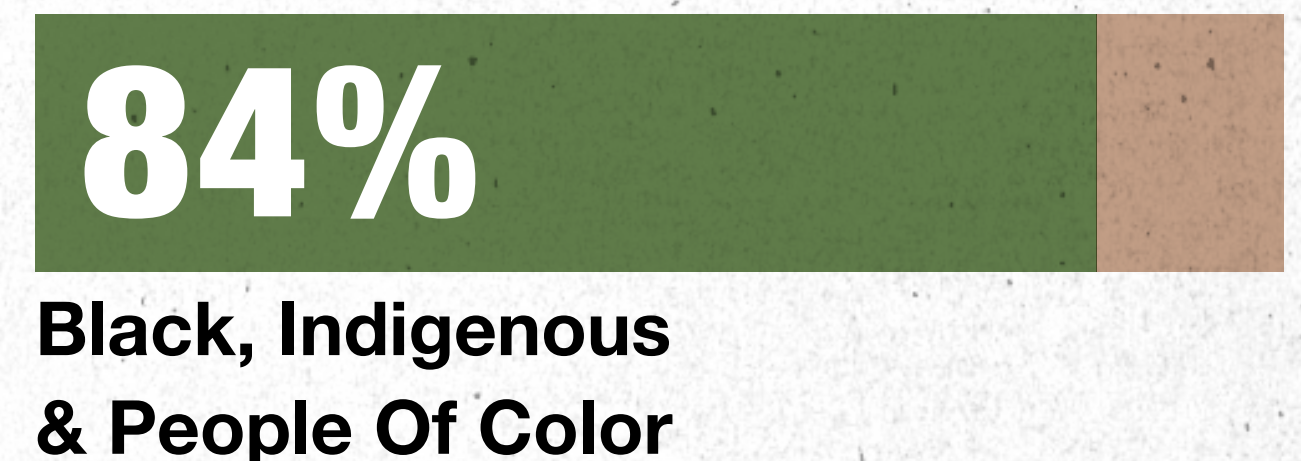
Methodology

Complex Collective is Complex Networks' primary research and intelligence platform, forecasting what's next in culture and commerce through our community of over 30,000 young diverse voices.

In September 2021, Complex Collective conducted a controlled primary survey with a focus group of over 130 members of our community to better understand their thoughts and feelings about IRL and virtual experiences.

To augment the research, Complex Collective held in-depth conversations with our community members, Complex Networks leadership, and cultural experts on our Advisory Council.

THE RESPONDENTS WERE:



CREDITS

EVP, MARKETING:

Jonathan Hunt

SVP, BUSINESS INTELLIGENCE, SEO +
PERFORMANCE MEDIA + GM, COMPLEX
COLLECTIVE:

Aaron Braxton

HEAD OF STRATEGY:

Nick Susi

COMMUNITY MANAGER:

Jess Hall

VP, COMMUNICATIONS:

Piper McCoy

DESIGNED BY:

Robb Harskamp

CREATIVE PROJECT
MANAGEMENT BY:

Rosy Huang

COPY EDITED BY:

Anslem Samuel Rocque

Sr. Director Content & Strategy, Branded Entertainment

SPECIAL THANKS TO:

**Rafat Ali, Jonathan T. McLean,
Sharifa Murdock, Maurice
Peebles, Eric Skelton,
Neil Wright and all community
members who participated
in our research.**

INTERESTED IN CREATING A CUSTOM STUDY TO
BETTER UNDERSTAND EXPERIENCES OR OTHER
TOPICS? [CLICK HERE.](#)

INTERESTED IN OUR INSIGHTS NEWSLETTER?
[CLICK HERE.](#)

WANT TO BECOME A MEMBER OF OUR
COMMUNITY TO HAVE YOUR VOICE AND OPINIONS
HEARD AND UNLOCK REWARDS? [CLICK HERE.](#)

COM
PLEX

COLLECTIVE