SXSW® 2025 KEY INSIGHTS

What business and tech leaders should know for the year ahead: game-changing strategies that can accelerate growth and inform the future of business and culture

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pwc

SXSW®

EXECUTIVE OVERVIEW

SXSW 2025 – UNLOCKING THE POWER OF HUMAN INGENUITY

> "We can do more together than anyone can do alone."

Session: AI-Powered Organizations Redefining the Future of Work
Speaker: Melissa Valentine

SXSW covered a lot of ground in 2025. From modern branding to AI-in-action, quantum, health, space, and beyond.

The central theme from SXSW this year was **unlocking the power of human ingenuity**. The power of technology's potential was showcased across hundreds of sessions. Yet, without human creativity, technology-enabled opportunities cannot reach their full potential, or advance humankind and business. To bring this central theme to life, we've captured eight key insights that are summarized and expanded upon in the following pages.

Photo by Mike Jordan

WHAT MAKES SXSW UNIQUE

SXSW amplifies Austin into a living hub of innovation and connection. The moment in time for the conference harnesses energy as industries converge, ideas become reality, and brands create experiences that are an integral part of the culture—marrying business and creativity. That energy goes beyond the conference as attendees return to their lives, work, and communities recharged with new ideas and a broad understanding of what is next for business, the world, and humankind.

With 24 unique tracks and hundreds of sessions, SXSW **ignites curiosity, sparks unexpected connections, and turns ideas into action**. It's where industries intersect, ambitious thinking is celebrated, and progress feels not just possible—but inevitable.

Insight 1: Amplifying Ingenuity – AI's Creative Renaissance

AI is transforming industries today and is poised to amplify human intelligence, creativity and problem solving. **Democratization of AI innovation** and strong upskilling programs will unlock **AI + humans building together a new world**.

Insight 2: Take the Quantum Leap – Computing's Next Revolution Is Here

Quantum computing is out of the lab and in the real world. Early adopters will lead the next wave of industrial and scientific breakthroughs, while those who hesitate risk being left behind.

Insight 3: Companies That Master Policy Shifts Will Shape the Future

Economic policy, geopolitical tensions, and national investments in AI and quantum computing are **redefining global power dynamics** and poised to impact long term competitiveness and growth.

Insight 4: Digital Safety Is About Minds, Not Machines

With AI, quantum, and immersive tech reshaping human experiences and driving more and more of our lives into the digital world, the **need for ethical and responsible innovation is imperative to a positive human future.**

Insight 5: The Power of Experiential Brands

For modern marketers, the mandate isn't just to inform or entertain—it's to tell stories that people can feel, shape, and share. The best brands don't just capture attention—they leverage emerging tools to create immersive, emotional, and interactive **experiences** that foster deep audience connection.

PWC'S ROLE

We put a PwC team of industry specialists on the ground at SXSW in 2025 to capture key trends and identify the most impactful insights for business and technology leaders.

PwC joined 100 sessions, engaged with industry leaders, connected with attendees, and digested the daily SXSW recaps to distill the most critical themes.

Leveraging AI to help transcribe session notes and scan media coverage, the PwC team combined cutting-edge technology with human expertise to identify and prioritize the SXSW 2025 insights that matter most—helping businesses stay ahead in an era of rapid transformation.

You'll find more about the PwC and SXSW teams in the appendix.

Insight 6: AI Isn't Replacing Doctors – It's Accelerating Cures

Technological advancements in precision medicine, AI-driven diagnostics, and longevity research are driving healthcare into a new era of progress at warp-speed, moving from lifes-pan to healthspan. Technology enables curative treatments and preventative approaches that offer good health for a lifetime.

Insight 7: Space Is Open for Business

Space is the new testing ground for health research, AI, and next-gen materials that have the potential to transform life on Earth.

Insight 8: Immersive Tech Is Redefining Fandom

Fans are no longer simply consumers, they are critical stakeholders in entertainment. Entertainment is expanding into immersive, co-created experiences driven by AI, VR, and decentralized content ownership.

Think of this insights report as a strategic download from the SXSW 2025 festival to help you roadmap your planning efforts in the years ahead. We've also shared links to watch some of the most memorable 2025 SXSW presentations on page 41 and included information on how to register to be a part of SXSW in 2026 on page 40.

Photo by Tico Mendoza

Photo by Nick Piacente

Photo by Jason Bollenbacher

KEY INSIGHT #1

AMPLIFYING INGENUITY – AI'S CREATIVE RENAISSANCE

"AI fundamentally changes the nature of human capabilities, even what it is to be human."

Featured Session: The Auto-Evolving Business: AI's Agentic Near Future
Speaker: Neil Redding

Photo by Diego Donamaria

AI isn't just reshaping workflows; it is reshaping what we believe humans are capable of. At SXSW, a new perspective emerged: AI is not here to replace us, but to unlock new dimensions of creativity, problem-solving, and human connection.

AI Isn't Replacing Human Potential—It's Expanding It

From mapping the dark universe to advancing quantum computing, **AI is beginning to transform how we understand the world** and decode life's greatest mysteries. While its long-term impact remains uncertain, it presents a powerful set of tools that could accelerate discovery, enhance creativity, and open up new ways of solving complex problems.

AI is not just a tool for efficiency—it has the potential to act as a **creative and intellectual amplifier**, supporting how we innovate, create, learn, work, and solve complex problems. It is

not replacing human ingenuity, but offers the possibility of expanding what's possible, unlocking new approaches to creativity and accelerating discovery in ways we are only beginning to explore.

AI Is a Potential Force Multiplier for Human Ingenuity

- **AI & Science** – AI accelerates breakthroughs by simulating complex molecules, generating novel hypotheses, simulating and helping test complex systems, and handling tasks that once took centuries of human effort. Researchers get faster, deeper insights—spurring more effective, data-driven advances from climate modeling to drug discovery.
- **AI & Music** – Instead of replacing artists, **AI becomes a creative partner**—remixing styles and suggesting new melodies in real time. By automating repetitive tasks, it **frees musicians to push musical boundaries** while maintaining full artistic control.
- **AI & Art** – Visual creators harness AI to explore new forms, textures, and mediums, often blending traditional methods with algorithmic generation. **AI is helping artists experiment in ways like never before possible**. Rapid iteration and hybrid aesthetics open fresh frontiers in design, all guided by human ingenuity.
- **AI & Business** – AI reveals hidden patterns in massive data sets, fueling smarter, faster decisions. Acting as a "talent multiplier," it offers capabilities that span real-time coaching for everything from pitches to product ideas. AI-powered decision-making is helping eliminate blind spots in strategy and businesses are jump-starting their timelines. As one speaker noted, "iteration is key—AI rarely delivers perfection on the first try."


Photo by Aaron Rogosin

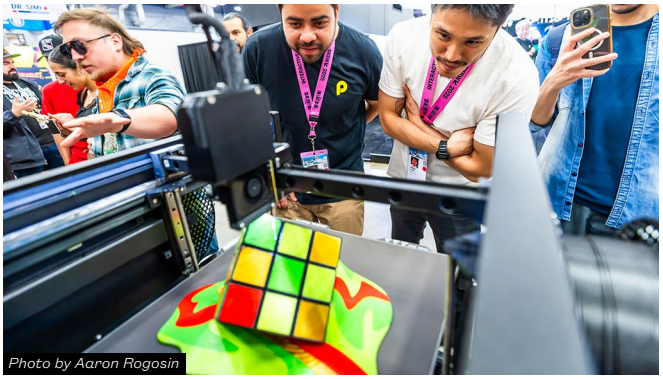


Photo by Aaron Rogosin

The Real Shift: AI as a Thought Partner for All, Not Just a Machine

"AI should not only advance—it should help humans advance and flourish" (Meet Your Future You).

For years, nearly everyone who's gone online—to shop, scroll social media, play games, watch videos, or download books—has encountered some form of AI. Historically, these capabilities ran quietly in the background, enhancing recommendations or personalizing content. Now, **AI is becoming the front door for user engagement and a digital companion**: it's less of an

invisible utility and more of a central feature that actively creates and shapes new experiences. AI's role as a thought partner spans:

- **AI as a Co-Creator** – AI has evolved from automation to an **active partner** capable of generating **new ideas**. One example is artists who use AI for real-time composition and **dynamic storytelling support**. AI can **elevate human creativity** across domains.
- **AI as a Skill Builder and Training Partner** – The **shelf life of skills is collapsing** from 30 years to six months (or shorter). Professionals who **learn from and direct** AI—rather than simply use it—will stand out. Use AI as a **powerful and continuous training partner**. As one speaker noted, "the next war for talent isn't about engineers or coders – it's about rapid skill acquisition and time to application" (How Not to Screw up a Transformation While Shaping the Future of Your Company). AI can simulate tough conversations, guide novices through new technologies, and help break complex topics down into bite sized, easier to absorb micro-lessons.
- **AI Amplifies Human Ingenuity** – Ultimately, AI's potential greatest power lies in **amplifying** what humans do best: **creative thinking, complex problem-solving**, and **visionary leadership**. By leveraging AI's **analytical strengths**, teams gain the **freedom** to push boundaries and deliver **breakthrough solutions** in record time.
- **AI as a Companion** – Generative AI has advanced to the point where it can interact with humans in a way that feels **surprisingly close** to real human engagement. One SXSW speaker remarked, "just because a relationship is with an AI, doesn't mean it's less meaningful" (Love Machines, the Science of AI Companionship), pointing out that people already form deep bonds with pets, fictional characters, and even objects.
    - **Positive Potential:** For individuals who feel lonely or those looking to practice social skills, an AI companion can provide immediate, judgment-free support.
    - **Potential Downsides:** Overreliance on AI relationships can isolate users from genuine human contact. In extreme cases, it may even warp social norms or open the door to harmful echo chambers.


Photo by Andy Wenstrand


Photo by Andy Wenstrand

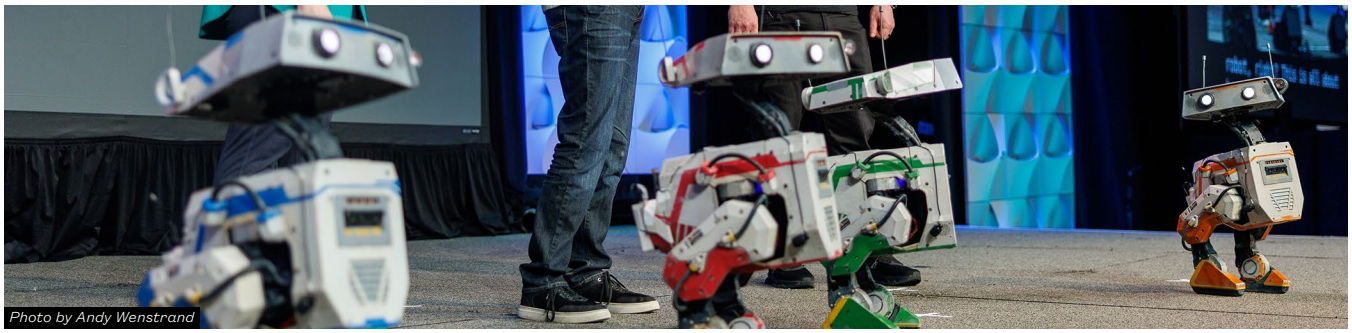


Photo by Andy Wenstrand

Early Adopters Are Using AI to Drive Strategic Business Outcomes–Select Examples:

- **AI as a Research Partner.** AI can understand and make recommendations on how to design and execute differentiated market positioning efforts. (trends, competitor positioning, customer needs, etc.)
- **AI Empowers Marketing & Sales Teams**. AI can be a powerful sales and marketing companion to improve customer experiences by surfacing personalized customer insights, sales suggestions, and beyond.
- **Streamlining Internal Operations** to free human time for more valuable tasks, AI can support:
  - **Quick Employee Answers:** AI can handle inquiries like those directed to teams like HR ("what is the vacation policy"), and marketing ("does this logo comply with brand guidelines"), uncovering information otherwise buried in corporate sites or answering questions that do not need to be human-led.
  - **Stakeholder Message Optimizations:** AI "thinks" from different perspectives ("marketer," "engineer") to refine and strengthen recommendations and human-designed collateral.
  - **Development Efforts:** AI supports more rapid software development lifecycle efforts, driving products and features to market faster.
  - **Call Center Efficiency:** Augmented customer-service centers reduce wait times, optimize call routing, and improve resolution accuracy.
- **Combining AI Tools for Greater Impact**. When conversational AI connects with agentic systems and other embedded technologies, the resulting synergy amplifies human productivity and impact.
- **Environmental Innovations**. AI is helping advance the climate agenda, including efforts to support methane management and cleaner jet fuel.
- **Governance and Compliance Considerations.** Given the growing focus on ethical and responsible AI, data privacy, and deepfake technology, companies need to make sure their AI models are transparent, equitable, and aligned with emerging regulations. For more on considerations in this space please refer to Insight #3.

What Business Leaders Need To Do Now

1. **Use AI as a Creativity Engine:** Don't limit AI to productivity gains. It can spark new industries, art forms, and breakthroughs. Well-designed AI **needs human oversight and iterations** to refine and guide AI's outputs.
2. **Build AI-Human Hybrid Teams:** The value from AI often comes when human expertise and machine intelligence work together. Encouraging collaboration between people and AI systems improves design, product development, and operational decision-making.
3. **Rethink Workflows:** AI introduces new possibilities that often do not fit into existing processes. Leaders may want to evaluate where current workflows limit impact, and where redesigning around AI can enable speed, insight, and scalability.
4. **Encourage AI Experimentation for All:** AI isn't just for the IT team, encourage broad AI adoption and use. Giving departments the space to explore and apply AI in their own contexts can spark innovation, improve adoption, and generate use cases that reflect real business needs.
5. **Embrace Unique + Tailored Data and AI Models:** As general-purpose models become widely accessible, organizations that invest in models based on proprietary data and domain-specific knowledge can create more defensible value. As one speaker said, "LLMs will make you average – real value will come from proprietary knowledge and experience."
6. **Invest in Talent Upskilling:** AI adoption requires a workforce that is ready to use it with confidence and purpose. Organizations that prioritize clear communication, capability building, and practical training will be better positioned to scale impact and adapt over time.
7. **Responsible AI:** As AI becomes a central driver of business strategy, leaders must adopt a responsible AI framework that balances innovation with ethical, regulatory, and societal considerations. With rising political and policy scrutiny around data governance and platform regulation, responsible AI is no longer just about compliance—it's a strategic advantage in building trust and long-term competitiveness. For more on considerations in this space please refer to Insight #3

Bottom Line: AI Is the Tool—Human Potential Is the Strategy

AI is no longer an edge case—it's a defining force in how **ideas are developed, decisions are made, and industries evolve**. Leaders who wait for perfect clarity will find themselves outpaced by those who act now. The opportunity isn't just to integrate AI—it's to **reshape what your organization can imagine, build, and become**. This is a **call to lead: reimagine workflows, empower every team with AI fluency, and invest in creativity and curiosity as core capabilities.** The future will favor those who treat AI not as a threat to manage, but as a partner to help redefine what's possible.

KEY INSIGHT #2:

TAKE THE QUANTUM LEAP – COMPUTING'S NEXT REVOLUTION IS HERE

"Quantum computing is no longer a distant future – it is already proving useful today. By 2026, it will surpass classical computing in solving problems that were previously impossible."

Session: Cracking the 'Cradle of Life' Molecule with a Quantum Computer

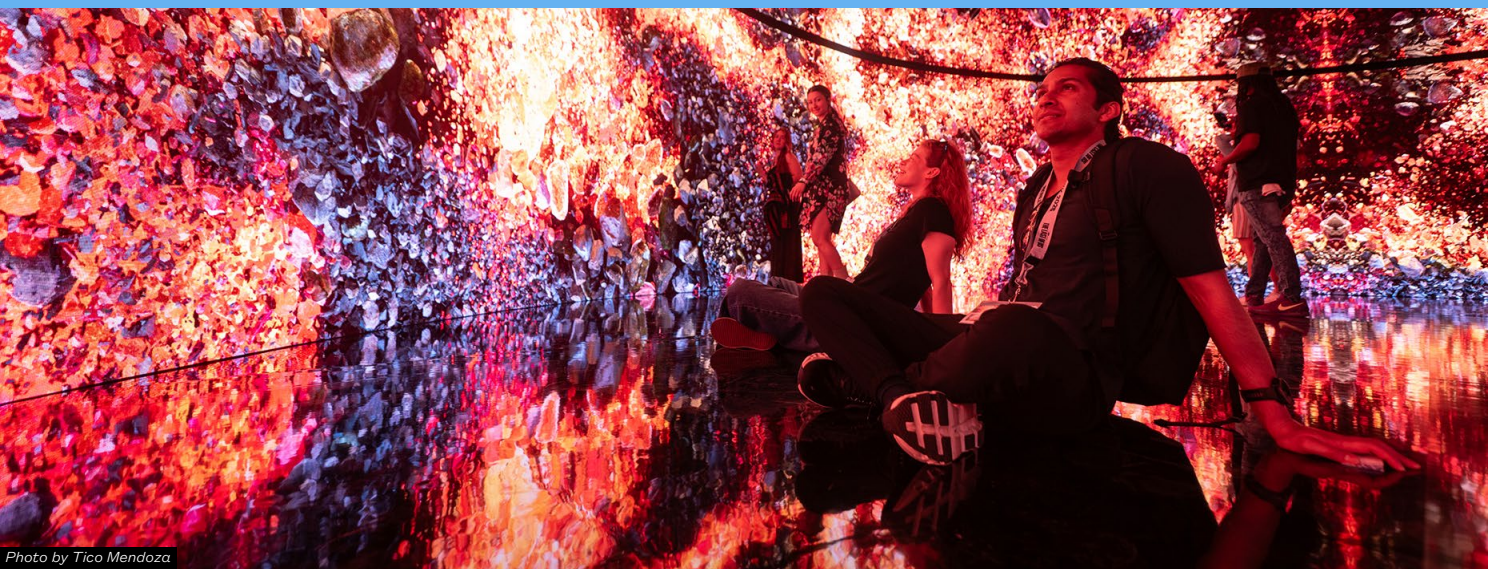


Photo by Tico Mendoza

Quantum computing is set to revolutionize our world – from developing new drugs and materials, to helping bring back lost species (We're looking at you, Woolly Mammoth!). It has gone from something far in the future to something expected to drive meaningful innovation in the near term.

Quantum Computing Is Rewriting the Rules—From Science to Industry, Are You Ready?

Quantum computing has moved beyond theoretical speculation. Future innovation will expand and build on compute speed improvements and **move to innovation that**

transforms industries. Those who invest today—such as businesses, research institutions, or governments, will position themselves at the forefront of this transformation.

How Quantum Computing Could Impact Different Industries

Pharma & Life Sciences – Pharmaceutical companies are exploring quantum computing to enhance drug discovery, leveraging quantum chemistry to simulate molecular interactions that classical computers struggle to process. They are also using quantum simulations to accelerate R&D, potentially cutting drug development timelines from decades to years.

Materials & Manufacturing – Quantum computing is helping drive next-generation material design. Simulations promise to reduce costly trial-and-error testing, streamlining material innovation. Aerospace and industrial leaders are experimenting with leveraging quantum computing to create lighter, stronger materials with unprecedented efficiency. Quantum computers can effectively simulate the behavior of complex magnetic systems (outperforming classical supercomputers), a breakthrough that will directly contribute to these new use cases becoming a reality.

Finance & Risk Modeling – The financial sector is at the forefront of quantum computing adoption, particularly in risk modeling, fraud detection, and portfolio optimization. Banks and hedge funds are experimenting with hybrid quantum-classical models to enhance forecasting, trading strategies, and risk assessment. Experts anticipate that finance will be among the earliest industries to capitalize on quantum advancements, as rapid engineering progress continues to refine the quantum architectures most suited to financial applications.

Logistics & Supply Chain – Quantum computing is being tested for its ability to optimize logistics networks, focusing on workforce scheduling, delivery route planning, and supply chain efficiency. Studies suggest that quantum-enhanced optimization could improve operational agility and reduce bottlenecks in logistics management.

Energy & Climate Science – Quantum computing is emerging as a powerful tool for accelerating breakthroughs in sustainable energy. Researchers are investigating how quantum simulations could enhance fusion energy modeling, refine battery chemistry, and optimize power grid distribution. Initial findings suggest that quantum technologies could significantly accelerate clean energy innovation in the coming years.

Photo by Amy E. Price

Photo by Aaron Rogosin

What Business Leaders Need To Do Now

1. **Develop a Quantum Strategy** – Quantum computing is not a distant technology—it is already being tested in real-world applications. Businesses in industries such as logistics, finance, and telecommunications should start exploring cloud-based quantum services, conducting proof-of-concept studies, and developing internal expertise to prepare your organization to understand and think about how quantum will impact your business and industry.
2. **Invest in Talent and Partnerships** – The biggest bottleneck in quantum adoption isn't hardware—it's expertise. Organizations should start building quantum talent pipelines and forming strategic partnerships with leading quantum research labs, cloud providers, and startups.
3. **Identify Industry-Specific Quantum Use Cases** – Business leaders should conduct internal assessments to identify where quantum computing could provide an immediate advantage—whether it's optimization, material design, risk modeling, or beyond.
4. **Stay Ahead of Policy and Security Risks** – Quantum computing will eventually break today's encryption standards. Governments and corporations need to invest in post-quantum cryptography now to protect sensitive data.

Bottom Line: Quantum Is Out of the Lab, and Into the Market

The message from the experts is clear: Quantum computing isn't a 20-year from now idea—it's happening now. Quantum computing is a really complicated subject, and it provides the ability to build upon and solve complex problems that are often too time consuming for even the most powerful traditional computers. Companies that invest early will shape the industries of the future, while those that hesitate will be left playing catch-up. The question isn't whether quantum computing will change your industry—it's whether you'll be ready when it does.

Photo by Samantha Burkardt

KEY INSIGHT #3:

COMPANIES THAT MASTER POLICY SHIFTS WILL SHAPE THE FUTURE

"Uncertainty raises risk and slows investment. [Strong economic] policy needs clear, transparent and stable regulatory models."

Session: Innovations Driving the Future of Energy

Photo by Michael Buckner

The intersection of policy, economics, and innovation has grown increasingly complex and dynamic. At SXSW, the message was clear: regulation will evolve, markets will shift, and industries will be disrupted—but those who move decisively, invest strategically, and shape their own path forward will define what comes next.

SXSW's Inclusive Approach for Policies and Politics

Policy conversations can be complex, but **SXSW created an environment where business leaders, investors, and policymakers could engage in meaningful discussions about the**

future. Rather than political debate, the focus was on **understanding the implications of policy shifts and finding solutions that will drive innovation forward**. This wasn't just about adapting to change—it was about **recognizing opportunities, taking action, and making sure that industries remain competitive in an increasingly regulated world**.

How Policy Is Reshaping Business & Innovation

Geopolitics is restructuring global markets. Trade agreements, tariffs, supply chain realignments, and national security concerns around AI, semiconductors and quantum are forcing businesses to rethink sourcing, partnerships, and market footprint. Some nations are doubling down on domestic production, while others are reinforcing trade alliances to maintain a competitive edge. This shift is creating both risks and opportunities for businesses adapting to the dynamic landscape.

Policies are impacting brands and platforms. AI governance, data privacy laws, and platform restrictions—such as the potential U.S. TikTok ban—will have a major impact on how companies build, scale, and engage with audiences. Brands, content creators, and businesses that rely on digital platforms must be prepared for a fragmented digital landscape and to re-evaluate their long-term platform and media strategies.

Energy policy is now a business imperative. Energy policy is now a fundamental driver of innovation, as access to reliable, scalable, and clean power determines the growth of energy-intensive industries like AI, quantum computing, and advanced manufacturing. Policy decisions on grid modernization, clean energy incentives, and infrastructure investment will not only dictate the speed of technological breakthroughs but also shape economic power and long-term competitiveness in a rapidly evolving global market.

Workforce Readiness and Strategic Investment Must Go Hand-in-Hand

AI, quantum computing, and advanced manufacturing are at the center of national funding priorities and private-sector competition—yet the **demand for talent in these sectors continues to outpace supply**. Organizations that move quickly to invest in emerging technologies will gain a competitive edge, but long-term success will depend equally on building the workforce to support them. This means investing in **upskilling initiatives, education partnerships, and workforce development strategies**, while also leveraging AI as a learning tool and on-the-job training solution.

How Different Industries Are Being Impacted

Technology & AI: With increased scrutiny on ethical and responsible AI, data privacy, and deepfake technology, companies must confirm their AI models are transparent, fair, and compliant with evolving regulations.

Media & Advertising: The uncertainty surrounding TikTok and digital platform regulations is forcing brands to diversify their digital strategies. Investing in multi-platform engagement, first-party data collection, and alternative distribution channels will be key. In addition,

concerns on tariffs and the corresponding linkage to profitability may impact marketing and advertising budgets, creating an environment where brands will need to look for creative ways to drive impact and relevance with their customers.

Energy & Sustainability: Renewable energy investments, government incentives for sustainable infrastructure, and regulations around carbon reduction are not just about climate action—they are about economic power and long-term competitiveness. Without efficient, scalable power distribution and affordable energy, industries requiring massive computational and processing power may struggle to scale, limiting economic and technological progress.

Healthcare & Biotech: AI-powered diagnostics, drug pricing policies, and evolving data regulations are reshaping the industry. Companies must focus on compliance, ethical and responsible AI, and balancing innovation with accessibility.

Finance & Investment: Interest rates, tax policies, and government-backed investments in emerging technologies are shifting financial strategies. Investors need to focus on long-term bets in AI, quantum, and sustainability.

Retail & Consumer: With tariffs and economic policies evolving, retailers need a strong approach to pricing, supply chain management and optimization. While the external environment grows increasingly fragmented, retailers should stay focused on the things that matter the most to their customers, to protect and optimize those moments to drive customer retention and lifetime value.

Photo by Amy E. Price

Photo by Amanda Stronza

Photo by Will Blake

What Business Leaders Need To Do Now

1. **Track and anticipate policy changes.** AI regulations, energy policies, and trade shifts will directly impact business models. Leaders must stay ahead of these changes to identify business shifts in a timely manner. Organizations also have a role in helping policy makers understand the benefits of investing in long term innovation, and the risks associated with tariffs and trade uncertainties.
2. Invest in **public and private collaboration models** for innovation. Examples include partnerships with state agencies and universities to foster quantum campuses to bring together researchers to unlock innovation.
3. **Adapt digital brand and marketing strategies for an evolving regulatory landscape.** With platform restrictions and data privacy laws shifting, companies should invest in first-party data, diversify content strategies, and build resilience into their digital marketing plans.
4. **Invest in technology and innovation early.** Businesses that embrace AI, quantum computing, and sustainable solutions now will lead their industries as regulations and market dynamics evolve. Understand consumer and business sentiments and **build trust in responsible innovation** to drive adoption.
5. **Prepare the workforce for the future.** Addressing the talent gap in AI and emerging tech will require collaboration with policy makers and educational institutions, in addition **corporate investment in education, training, and upskilling programs.**

Bottom Line: Geopolitics Is the New Innovation Battleground

Innovation doesn't happen in isolation—it's shaped by policy, investment, and economic forces. Public and private partnerships working together to accelerate innovation and help keep markets that invest in the cutting edge. The companies and industries that act now—investing in talent, technology, and trust—will be the ones defining the future.


Photo by Mike Jordan

Photo by Amanda Stronza

KEY INSIGHT #4:

DIGITAL SAFETY IS ABOUT MINDS, NOT MACHINES

"Your kid in their bedroom [online] might be encountering more danger than they would out at the park with friends."

Session: Gen Z Social Media's Dark Side - Brand and Advertising
Speaker: Lauren Greenfield

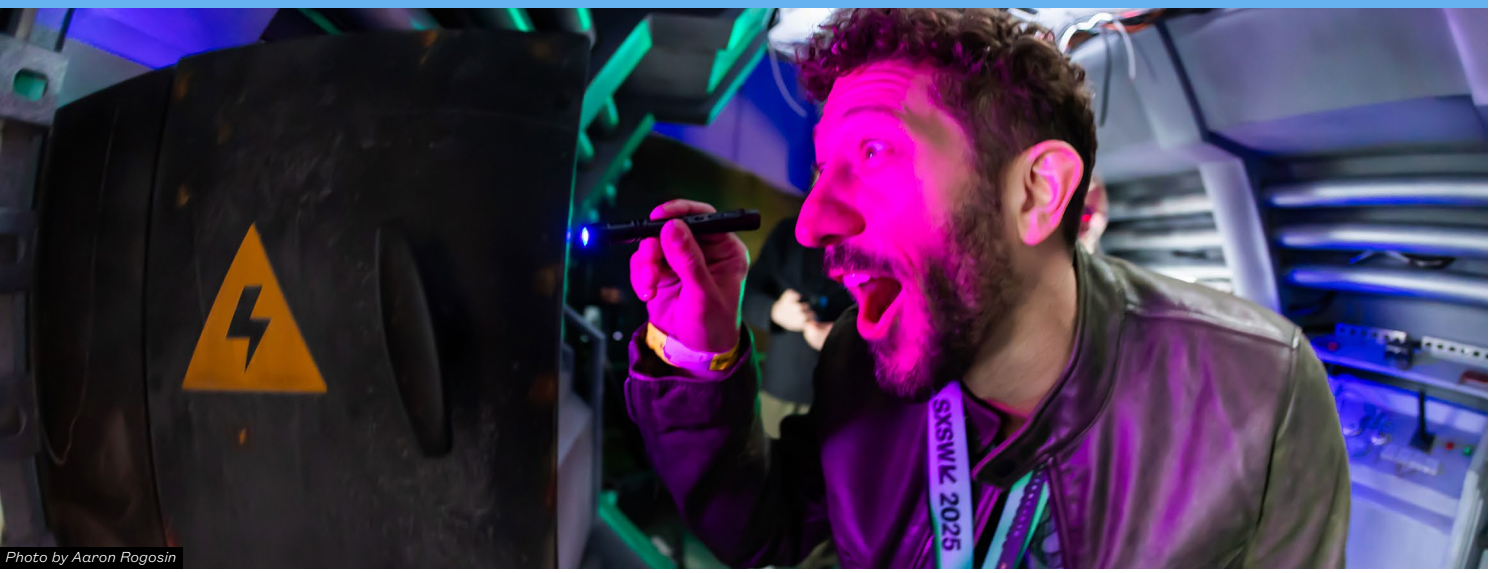


Photo by Aaron Rogosin

As more of our lives are digital, it drives increased risk that digital experiences have an outsized influence on human behavior in both positive and detrimental ways. With humankind already spending considerable time online, and AI and other innovations poised to create even more compelling digital experiences, the imperative for ethical and thoughtful innovation has never been higher.

Digital Influence and the Ethics of AI

As AI, personalized algorithms, and immersive digital platforms accelerate, we're not just facing threats from bad actors—we're facing the reality that even **well-intentioned innovation** can manipulate choices, erode critical thinking, and alter societal norms in ways we don't fully understand. The ethical risks of the digital era aren't just about hacking systems—they're

about hacking **human perception**. The next frontier is about **securing agency**—making sure people remain in control of their choices, thoughts, and interactions in a hyper-digital world.

The risks of a life lived mostly online are not without counter balancing forces for good. Online games can offer a platform for those unable to physically move on their own to feel empowered to connect and play with others unencumbered. Friends made in the digital world can translate to lifetime relationships in the physical world. Those with rare medical conditions can find online communities and support groups to make dealing with their condition easier.

There are many examples of amazing digital experiences, the answer to online risks is not to avoid going online or being shut away from the digital world. There is however the need to ensure digital **experiences, particularly for children and teens, are safer, more oriented to the good of humanity, and designed to release the best of human potential.** As innovation expands the reach of the impact of digital tools on humankind, the ethical innovation imperative rises.

To enable more responsible technology use and innovation there were some areas of focus recommended by speakers at SXSW.

- **More Predictive Management and Prevention of Potential Harm on Digital Sites *Before It Occurs*** – Optimizing for engagement can lead to unintended consequences—bias, misinformation, optimizing for time on page and engagement over safe experiences and beyond. The next generation of ethical innovation must go beyond compliance to build transparency into algorithms and intervention before harm occurs.
- **Education on How To Use AI** – AI-powered persuasion can blur the line between real and synthetic influence. As virtual influencers and hyper-personalized content take hold, we must ask: Who—or what—is really shaping our choices? Companies and individuals need to be aware of the way that AI works, and how to harness AI for good.
- **Digital Environments Are Rewiring Human Behavior** – From addiction loops in social media to gamified financial decisions, behavioral engineering needs the same scrutiny as cybersecurity. The question isn't just how we use technology—but how it's using us. Designing new experiences with a humanity first mindset will be crucial as the pace of tech innovation accelerates, and as more of our lives are spent online.

Industry Disruptions: How This Will Reshape Key Sectors

- **Tech & AI** – Ethical and responsible AI must move beyond bias audits and compliance—**businesses must invest in algorithmic observability** to understand how AI systems evolve and what unseen influence they exert over users.
- **Financial Services** – The rise of AI-generated scams and deepfake fraud is well-known, but **the bigger risk is trust erosion**—if people no longer believe what they see, **financial markets based on confidence and verification could destabilize.**

- **Healthcare & BioTech** – AI-driven diagnostics and digital health tools must be secure and be **designed to prevent over-reliance** on automated decisions that strip doctors and patients of critical thinking in medical care.
- **Retail & Consumer** – AI-powered recommendations and hyper-personalization could lead to **decision autopilot**, where consumers make purchases without real agency. Responsible brands will create friction—deliberate moments for users to pause, reflect, and confirm choices.
- **Media & Entertainment** – The fight against misinformation isn't just about fact-checking; it's about designing platforms **that incentivize rational engagement over emotional reactivity.**

What Business Leaders Need To Do Now

1. **Audit for Influence, Not Just Security** – Businesses must analyze not just how secure their systems are, but how their digital experiences subtly **shape behavior, decisions, and perceptions** over time.
2. **Build 'Ethical Friction' Into Digital Experiences** – Create intentional design breaks that force users to **pause before making high-stakes decisions**, whether in finance, media, or e-commerce.
3. **Develop AI That Explains Itself** – Black-box AI models won't cut it. Leaders must push for systems that **show their reasoning and give users control over how they engage with recommendations.**
4. **Defend Cognitive Bandwidth as a Security Asset** – Protecting attention spans and decision-making ability should be treated as a **core security issue**, just like data encryption.
5. **Anticipate the Trust Crisis** – Organizations need **preemptive strategies for when deepfake fraud, AI persuasion, or behavioral engineering scandals** inevitably shake consumer confidence.
6. **Develop strong AI governance models and advocate for thoughtful policies and regulation** that foster digitally safe, inclusive, private experiences for consumers online.

Bottom Line: Protecting Minds, Not Just Machines

As technology becomes more immersive, intelligent, and embedded in daily life, the real risk isn't just what systems can do—but **how they shape what we think, feel, and choose**. Protecting users now means protecting attention, autonomy, and agency. Business leaders must prioritize ethical design, transparent AI, and proactive trust-building to make sure innovation advances not just technology—but humanity.

KEY INSIGHT #5:

THE POWER OF EXPERIENTIAL BRANDS

"The things that stand out, the things that are remembered, are always different."

Session: Enough with the "Delving" – Staying Human in the Age of AI
Speaker: Melina Palmer

Photo by Aaron Rogosin

The most memorable brands aren't built through messaging alone—they're built through moments and stories that people can feel, remember, and share.

How the Most Forward-Thinking Brands Are Setting Themselves Apart

The next era of engagement is being shaped by creators who are blurring the lines between content, experience, and culture. At SXSW 2025, the brands that broke through were those that handed the mic to their audiences, invited co-creation, and built worlds—not just ads. From immersive brand universes to interactive performances and creator-led story arcs, the center of gravity has shifted from broadcast to collaboration. Audiences crave emotional resonance, participatory storytelling, and experiences they can share and shape.

Emerging technologies—from generative AI to mixed reality and quantum—are powering a new kind of storytelling: dynamic, participatory, and deeply personal. These tools aren't replacing creativity; they're expanding it, enabling audiences to step inside stories, shape narratives in real time, and connect with brands in ways that feel less like marketing and more like shared experience.

Photo by Jordan Hefler

Recommendations for brands and marketing teams driving toward a future-ready business captured at SXSW:

- **Move from visibility to immersion.** The best brands—and businesses—don't just communicate; they create interactive, participatory experiences. Whether stepping directly into the eerie world of a new movie, interacting with an immersive, AI-driven candy store, editing a music video powered by quantum computers or walking through a museum decorated with the lore of your favorite hamburger, success comes from participation, not just presence. At SXSW multiple brands activated this strategy of moving beyond logos to bespoke experiences that told a broader story of what it was like to experience the brand. Examples included the ability to drive a Rivian truck over rugged landscapes in downtown Austin, to trying a new haircare product, to listening to the music of a specific city as part of a tourism activation, and beyond.
- **Creators are reshaping influence.** The creator economy has moved well beyond product placement. Today's most impactful creators are not just amplifying messages—they're co-developing campaigns, crafting original IP with brands, and even designing physical experiences. From musicians and filmmakers to health influencers and fashion innovators, creators are reshaping how ideas reach people—and how people respond.

- **Content, community & commerce are merging.** Consumers expect **authentic, multi-platform engagement** where entertainment, connection, and transactions happen seamlessly. Brands must rethink strategy beyond individual platforms, building **cohesive narratives across social media, in-person experiences, and digital commerce** to remain relevant. Digital storytelling is evolving, and the best digital stories embed a deep understanding of consumer need and intention.
- **Be human-led, AI-enabled.** AI and emerging technology can enhance creativity, but **the best campaigns, innovations, and customer experiences still need human insight, humor, and emotion.** Brands should use AI for efficiency—like optimizing ad placements or refining messaging—but leave storytelling, creativity, and cultural nuance to human ingenuity. **AI at its best enables human ingenuity and unleashes the human edge.**
- **Balance data-driven insights with intuition.** Today's consumers generate **unprecedented behavioral data**, but successful brands use it to **enhance creativity, not dictate it.** Predictive analytics should guide strategy, but **authenticity and emotional intelligence should drive execution.** The best marketing efforts balance the potential tension between creativity, technology, and science to allow creative talent to be creative, and also informed by data signals and innovation.
- **Advertising products and platforms are facing innovation** and disruption as AI increasingly serves as the entry point / user interface for media, shopping, learning, and planning use cases.

Photo by Adam Kissick

Photo by Will Blake


Photo by Aaron Rogosin

What Business Leaders Need To Do Now

1. **Prioritize deeper engagement over exposure.** Customers don't just want to be reached—they want to feel connected. **For consumer brands, this could mean immersive experiences or AI-powered personalization.** In industries like retail or fitness, it might be **thoughtful content, expert-led discussions, or tools that provide real value.** The key is making interactions meaningful.
2. **Think beyond platforms—build ecosystems.** Content, commerce, and community now overlap. **For some industries, this means seamless omnichannel marketing; for others, it's integrating expertise and education into their brand presence.** The goal is a consistent, valuable experience across touchpoints.
3. **Balance analytics with emotional intelligence. Data should inform, not dictate.** Use predictive insights to guide decisions, but **lean into storytelling, creative risks, and human connection** to build long-term trust and engagement.
4. **Rethink partnerships for deeper impact.** The creator economy has evolved—**collaborate with creators, experts, or thought leaders as strategic partners, not just spokespeople.** Whether through **co-branded content, industry collaborations, or ambassador programs**, partnerships should drive lasting value, not just visibility.
5. **Use AI to enhance, not replace creativity.** AI should **support human originality, not automate sameness**. Use it to **analyze trends, streamline workflows, and personalize messaging**, but let human insight, emotion, and authenticity drive storytelling and customer interactions.
6. **Reimagine the way creative teams work together.** The traditional structure of design teams is evolving, shifting from large, specialized groups to small, agile, and AI-augmented teams that prioritize speed and value-driven innovation. Designers should think more like product managers, making sure their work is directly tied to business outcomes rather than just aesthetics. The emergence of industry-leading GenAI tools and low-code/no-code platforms allows designers to move beyond execution into rapid prototyping and iterative experimentation. Rather than fearing AI, design teams should integrate AI tools into their workflows, using them to automate repetitive tasks, generate insights, and accelerate creative problem-solving while maintaining human-centered design principles. Marketers and planners also have the ability to embrace AI in their work, using it as a creative partner in planning and tool to reduce administrative / lower value tasks.

Bottom Line: From Reach to Relationship

The future belongs to brands that don't just speak—but invite participation. In a world where audiences expect to be part of the story, the most powerful connections are built through shared experiences, creator collaboration, and storytelling that adapts in real time. Emerging technologies (like AI, and XR) can extend that creative canvas—but it's imagination, trust, and emotional relevance that drive true impact. The brands that lead tomorrow will be the ones that engage meaningfully today.

KEY INSIGHT #6:

AI ISN'T REPLACING DOCTORS–IT'S ACCELERATING CURES

"We are not just treating disease—we are reprogramming the human body at the genetic level.... This is a tidal wave of innovation, and it's coming faster than you think."

Session: Viruses as Medicine: Shaping the Frontier of Gene Therapy
Speaker: Nicole Paulk

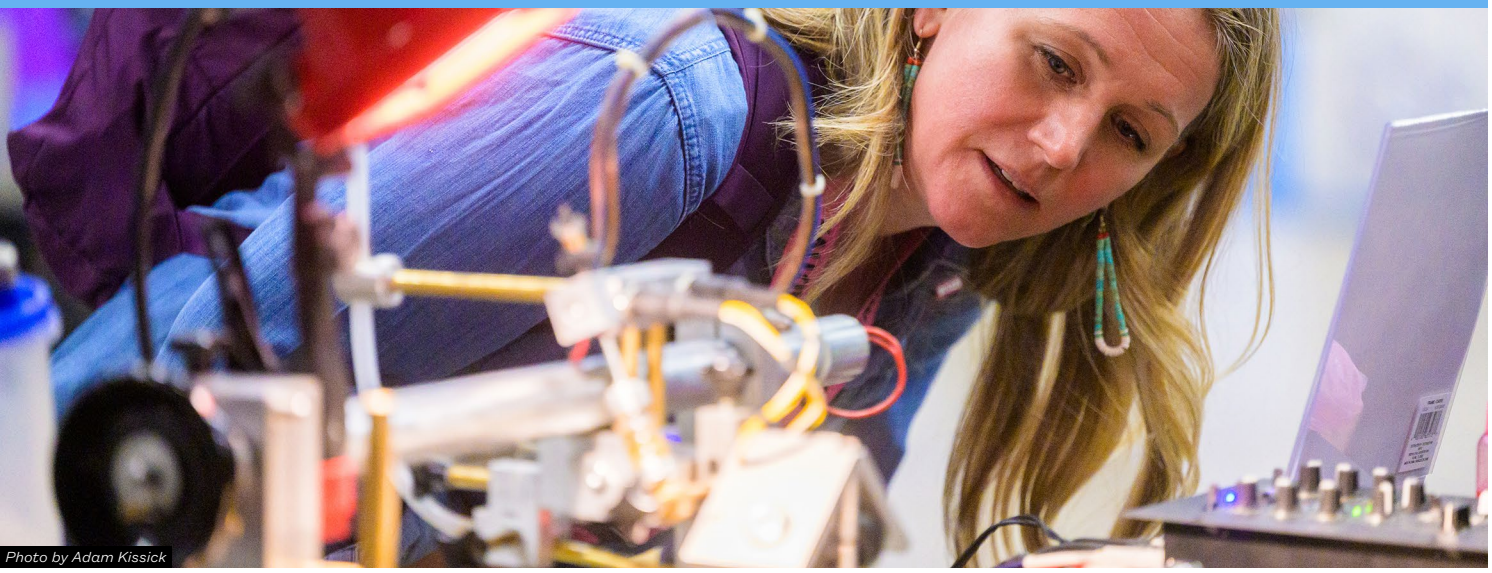


Photo by Adam Kissick

Healthcare is undergoing a transformative era of rapid innovation and breakthroughs, yet progress remains challenged by deep-rooted systemic inequalities and complex ethical considerations.

This year's SXSW sessions showcased groundbreaking advancements in brain science, precision medicine, and AI-driven diagnostics, ushering in a new treatment era for conditions once considered **untreatable**—those previously thought impossible to treat with medication. Rapid progress in neurodegenerative disease and cancer research is being fueled by AI and stem cell-derived organoids. The benefits from this innovation will extend beyond healthcare—Alzheimer's alone is projected to cost the U.S. $1 trillion annually by 2050,

posing major implications for the workforce and caregivers[1]. The development of curative treatments in these areas will have a profound impact on all Americans.

From "Sick Care" to "Health Care"

Across healthcare sessions, there was a shift in mindset and emphasis, from reactive "sick care" to proactive "health care," emphasizing healthspan—not just lifespan. As longevity science becomes mainstream, corporations are investing in science-backed health optimization. While aging has no cure, there is growing recognition that lifestyle factors like sleep, diet, mental health, and exercise play a greater role in longevity than genetics alone, empowering individuals to change their health outcomes. AI and biomarker tracking are driving personalized interventions in aging research, making tailored health strategies more accessible and effective. The importance of human connection and community are being increasingly acknowledged as critical to healthy, long lifespans.

The U.S. Healthcare Paradox

- **Despite its leadership in medical innovation, the U.S. healthcare system falls behind globally in health outcomes, affordability, and the balance between healthspan and lifespan.** This is largely due to an overemphasis on specialization rather than primary care, unsustainable payment models, unequal access, and fragmented health data systems that hinder information sharing; all factors that can negatively impact patient care and overall efficiency.
- Prevention-focused care is essential, but many Americans—especially in rural areas—struggle to access primary care, a problem worsened by healthcare workforce shortages. **Addressing this challenge requires alternative solutions, including AI-driven workflow efficiencies and innovation in technology to support clinicians, not replace them.**
- Breakthrough treatments in gene therapy and precision medicine are not widely adopted due to high costs, limited access, and testing availability challenges. **To make sure these curative therapies are both accessible and sustainable, policymakers and industry leaders must reform regulations and business models to support long-term affordability.**

The Pink Tax: Overcoming Gender Barriers to Capture a Trillion Dollar Market Opportunity

Healthcare access remains unequal, disproportionately impacting women and people of color. Despite making most healthcare decisions and controlling spending, women face systemic barriers like the "Pink Tax," where female-branded products cost more than male equivalents, and 21 states still tax menstrual products while exempting medical devices. In the past year alone, women spent over $8 billion more than men on healthcare[2], yet they experience worse health outcomes. This financial burden is further compounded by the gender pay gap, threatening women's economic security. **To move forward, meaningful change requires**

policy and legislative action, alongside expanded access to virtual care, pharmacy-based health services, and employer-driven benefits.

Empowering Patients Through Health Data Ownership

Improving interoperability across healthcare stakeholders by expanding access to health data is essential for advancing health equity. Currently, patients have limited control over their own health data, impacting both personal care and data availability for research. **Forward-thinking companies are shifting away from corporate data ownership toward patient-consented, value-sharing models, creating a balance between commercial interests, ethical responsibility, and patient empowerment.**

Bottom Line: The Business of Health Is Everyone's Business

AI and emerging technologies are revolutionizing drug discovery, diagnostics, clinical trials, and health data management. Business leaders have a key role in building a more effective and equitable healthcare system. With Americans spending $500 billion annually out-of-pocket on healthcare, Healthcare Consumerism is gaining momentum, shifting power back to patients and caregivers. **To thrive in this evolving landscape, companies must drive meaningful change by improving accessibility, enhancing the consumer experience, and expanding direct-to-patient care models.**

Photo by Mike Jordan


Photo by Chris Saucedo


Photo by Travis P. Ball

[1]Alzheimer's Association. *2024 Alzheimer's Disease Facts and Figures. Alzheimer's Association, 2024, https://www.alz.org/getmedia/76e51bb6-c003-4d84-8019-e0779d8c4e8d/alzheimers-facts-and-figures.pdf*

[2]GoodRx Research. *The Prescription Drug Gender Divide: Women Spent Over $8.5 Billion More Than Men in 2024. GoodRx, 7 Mar. 2025, https://www.goodrx.com/healthcare-access/research/prescription-drug-gender-gap-women-spend-more*

KEY INSIGHT #7:

SPACE IS OPEN FOR BUSINESS

"Going to space is hard, but collaboration makes it possible—no one company or agency can do it alone, and that's what makes this new era of exploration so exciting."

Session: Messaging the Moon
Speaker: Trina Patterson

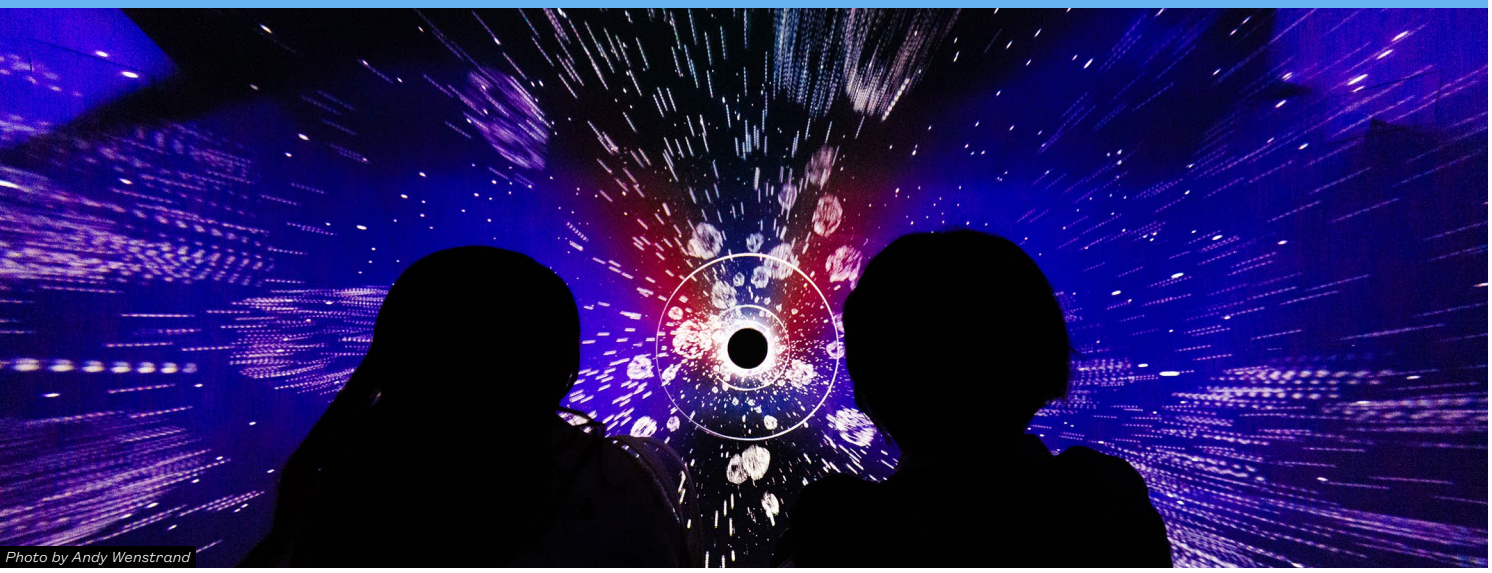


Photo by Andy Wenstrand

Space's role is going well beyond exploration—it is rapidly becoming a proving ground for groundbreaking innovation across industries. From using microgravity to advance health research (such as aging studies and dementia treatments) to building the infrastructure for off-Earth living, space is playing a crucial role in shaping the future. With AI-enabled discovery, commercial investment, and new partnerships between public and private sectors, the industry is expanding. NASA continues to play a leading role, but new opportunities are emerging for private companies, entrepreneurs, and cross-sector innovators to actively contribute to and benefit from this growing ecosystem, offering strategic advantages for industries beyond aerospace.

AI, Private Enterprise, and the Shift to Commercial Space Innovation

The Moon as a Testing Ground for the Future – Space exploration is no longer just about reaching new frontiers; it's about testing, learning, and developing technologies that will reshape industries on Earth. Companies and researchers are leveraging lunar missions to test robotic landers, resource extraction, and survival technologies that could one day sustain human life beyond Earth. The Moon's south pole, rich in water ice, is a prime candidate for future lunar colonies, serving as a steppingstone for deep-space exploration.

AI-Powered Scientific Discovery – AI is accelerating space-based research, analyzing vast amounts of data faster than human scientists ever could. The Euclid telescope is using AI to create the largest-ever 3D map of the universe, compressing years of research into months. AI is also driving satellite automation, space weather prediction, and mission efficiency, enabling real-time analysis of planetary conditions and pinpointing the best locations for human settlement.

The Business of Space Infrastructure & Off-Earth Living – Living in space is no longer science fiction. Self-sustaining habitats, 3D-printed lunar structures, and resource extraction technologies are paving the way for permanent human presence on the Moon and beyond. The Artemis program, in collaboration with private enterprises, is actively working toward a long-term lunar economy, which could serve as a launchpad for Mars exploration. Many of these space-driven technologies also offer Earth-based benefits, such as advancements in renewable energy, climate resilience, and sustainable materials.

Industry Disruptions: How This Will Reshape Key Sectors

- **Healthcare & Biotechnology** – Microgravity research is transforming drug development, gene therapy, and aging studies. Space-based experiments are offering breakthroughs in neurodegenerative diseases and cellular regeneration, which could have major implications for longevity and precision medicine.
- **Energy & Materials Science** – Companies are testing solar energy collection, new battery technologies, and sustainable materials in extreme space environments, leading to earth-based innovations in clean energy and advanced manufacturing.
- **Telecommunications & Consumer Technology** – Mobile phone brands are deploying 4G on the Moon, laying the foundation for future off-Earth communication networks. Consumer brands are integrating space-tested materials into everyday products, as seen with Columbia Sportswear's thermal insulation technology tested in lunar environments.
- **Transportation & Logistics** – The rise of space tourism, commercial payload delivery, and asteroid mining is redefining the future of global supply chains, opening opportunities for companies beyond aerospace.

What Business Leaders Need To Do Now

1. **Recognize Space as a Strategic Investment, Not Just Science** – Companies across industries should explore R&D opportunities in space-driven technology, leveraging insights from microgravity, AI, and resource extraction.
2. **Embrace Public-Private Collaboration** – Businesses should form strategic partnerships with government agencies, aerospace firms, and space-tech startups to integrate space-driven advancements into their industries.
3. **Prepare for the Next Industrial Revolution** – Off-Earth economies will become a reality in the next decade. Companies that invest early in space logistics, sustainable energy, and advanced materials will have a first-mover advantage.

Bottom Line: Space Is No Longer a Mission—It's a Market

The acceleration of AI-powered research, private-sector collaboration, and affordable space access is shifting space from a government-funded mission to a commercial frontier. Companies that integrate space-driven insights, technology, and partnerships into their strategies today will shape the next era of innovation, sustainability, and economic growth. Space is no longer just for astronauts—it's a business opportunity with limitless potential.

Photo by Miguel Esparza


Photo by Aaron Rogosin


Photo by Aaron Rogosin

KEY INSIGHT #8:

IMMERSIVE TECH IS REDEFINING FANDOM

"If we embrace technology, we have the opportunity to completely reshape not just our physical space, but also now, the cognitive one."

Session: How Not to Screw up an AI Transformation
Speaker: Ian Beacraft

Photo by Stephen Olker

Artists are unlocking more immersive fan experiences that unlock a new layer of authentic creation and access. These experiences are paving the way for creator and tech partnerships—and the future of fandom in VR and other environments. Fans are also being invited more and more to co-create content and shape the future of entertainment.

The End of Passive Fandom: Why the Next Era of Entertainment Belongs to the 'Experience Makers'

For decades, fan engagement has meant consumption—streaming music, watching content, buying merchandise. But the most innovative brands, creators, and artists are shifting toward something far more powerful: **co-creation and deep, interactive participation**. In

the Creator Economy, it's about fans becoming collaborators, community members, and even co-owners in the creative process. Instead of simply marketing to fans, companies are now **building with them**, using AI, immersive tech, and direct community integration to create living, evolving entertainment experiences.

This is **not just about access—it's about agency.** Audiences aren't just showing up; they are shaping the art itself. The next generation of entertainment will be defined by its **experience makers**—companies, creators, musicians, and brands that embrace **fan-driven creativity, immersive worlds, and new models of collaboration.**

At SXSW, this dynamic was on full display. Creators weren't just talking about growth, they were breaking down the mechanics of how it's done. In sessions like "*Beyond the Buzz*," experts shared how creators can future-proof their businesses by building cross-platform audiences, leveraging algorithm shifts, and diversifying revenue through memberships, merchandise, and fan-led activations. "*The Creator Economy's Labor Revolution*" highlighted the increasing need for creator protections and sustainability as platform dependency rises. Meanwhile, tactical workshops from insiders at YouTube and Instagram offered behind-the-scenes insights into what drives discovery, engagement, and retention in today's fragmented attention economy. For creators, SXSW is becoming the playbook. And for brands and marketers, it's a front-row seat to the strategies, tools, and cultural shifts shaping an emerging economy they can't afford to ignore.

The Game-Changers Leading This Shift

Metallica's VR Experience – Metallica is setting a new precedent by offering fans a **25-minute immersive VR concert**—not just a passive show, but an experience where fans feel like they are inside the music. This is the next frontier: fans no longer just witness performances; they step inside them.

Apple TV's Approach to Storytelling & Culture – Apple is reinforcing the idea that content must evolve beyond static storytelling. At SXSW, actors discussed how *Severance* blends immersive storytelling with layered fan engagement, proving that successful franchises aren't just watched—they become participatory cultural experiences.

Photo by Renee Dominguez

Spotter & *The Colin and Samir Show* on Creator-Led Growth – Samir Chaudry and Colin Rosenblum of *The Colin and Samir Show* joined Spotter President Nic Paul to break down how creators are scaling sustainable businesses. From leveraging audience data to shape content, to diversifying across platforms and hiring operational teams, the session offered a tactical look at what it really takes to turn a creator brand into a full-fledged company.

Gaming Is Leading the Way – The gaming industry has long understood that engagement isn't just about consuming—it's about playing, shaping, and co-creating. The 2025 **"State of Play Report"** highlights how gaming studios are moving toward decentralized experiences, community-led game development, and participatory world-building, a model that other entertainment industries are now racing to adopt.

The Real Shift: From Owned IP to Shared Creative Ecosystems

What's happening goes beyond immersive experiences—it's **a fundamental shift in ownership and creativity.**

- **Fans Are No Longer Just Audiences—They're Stakeholders:** With AI-generated remixes, user-created storylines, and decentralized fan economies, fans are actively shaping the worlds they love. The **music industry is already seeing this with AI-generated mashups** and artist-fan collaborations powered by technology.
- **Creators Are Building Beyond the Platform:** Rather than relying solely on platforms, creators are developing their own IP and monetization models, spanning everything from serialized content and digital goods to membership-based communities. At SXSW, it became clear: creators aren't only making content, they're architecting new economies
- **Brand & Entertainment Companies Must Design for Ongoing, Living Experiences:** One-off promotions won't cut it anymore. The most successful brands will design **dynamic, evolving environments**—whether through AR, virtual fan spaces, or interactive concert tours.
- **Monetization Is Moving from Content to Community:** The economic model is shifting. Instead of relying solely on ticket sales or ad revenue, brands will monetize through **gated-access digital worlds, community-powered merchandise, and exclusive fan participation experiences.**

Photo by Amy E. Price

Photo by Aaron Rogosin

What Business Leaders Need To Do Now

1. **Stop Thinking in Terms of "Audience Engagement"—Think in Terms of "Experience Architecture"** – The best entertainment is no longer made *for* fans, but ***with*** **them.**
2. **Invest in Participation-Driven Revenue Streams** – AI-assisted content creation, interactive live shows, and co-owned digital assets will **outperform traditional ad models.**
3. **Create Spaces, Not Just Content** – The future of fandom isn't static—it's immersive. Companies must invest in **digital, physical, and hybrid experiences that evolve over time.**
4. **Look to Gaming & Interactive Media for Inspiration** – The entertainment world is following gaming's lead. Those who embrace co-created, interactive experiences will define the next cultural frontier.
5. **Recognize Creators as Cultural Architects** – The Creator Economy is more than new monetization models, it's about modes of influence. At SXSW, creators showed how they are shaping storytelling, product development, fandom, and even labor norms. Business leaders should pay attention, not only to partner, but to learn.

Bottom Line: Fandom Is a Platform, Not Just a Market

The future of entertainment belongs to those who design with their audiences. As fans become collaborators, co-creators, and stakeholders, the companies that thrive will be the ones that build **living, participatory ecosystems**—where content evolves, engagement is active, and value is shared. Passive consumption is out; immersive, co-created experiences are in. **This shift isn't just transforming how we entertain—it's redefining how creators, brands, and platforms operate**. At SXSW, that momentum was palpable. From hallways to headline sessions, creators stood alongside technologists, marketers, and storytellers, not on the sidelines, but in the mix, helping shape what's next. For anyone looking to understand or participate in the future of media, community, and commerce, SXSW offers more than access. It offers a blueprint.

Photo by Aaron Rogosin


Photo by Aaron Rogosin

HOW DID WE CREATE THIS INSIGHTS REPORT?

This report is for the SXSW participant, because it's literally impossible to catch everything happening simultaneously. From sessions to workshops and demos, we hope this report gives you a download on what you missed and provides you with great takeaways from the programming you attended.

This report is also a strategic tool for the **business and tech leader** who wants to understand the thought leadership snapshot of SXSW 2025 and capitalize on these insights to inform future business decisions. To create this report, PwC and SXSW worked together through the following approach:

- SXSW helped PwC identify the directional themes and sessions expected to be most relevant for business and technology leaders
- PwC sent attendees from a variety of industry backgrounds to SXSW, prioritizing key sessions and capturing detailed notes from over 100+ sessions. The session formats ranged from featured keynotes and presentations to fireside chats and panels
- PwC developed a structured note-taking template to make sure key insights and takeaways were consistently documented across all sessions
- PwC spent time engaging with speakers and participants while at SXSW to gauge public interest and perception toward the most impactful themes and trends
- PwC leveraged Generative AI to organize and synthesize all notes, SXSW daily recap emails, broader media coverage, and social listening into cohesive key takeaways and insights
- SXSW and PwC collaborated to refine the initial themes, reviewing insights and crafting a final POV that reflects the most relevant trends for this fiscal year

ADDITIONAL

QUOTABLE MOMENTS

Overarching Themes

"If you don't design your future, someone will design it for you." *– Edward de Bono, quoted at SXSW by John Scott*

"The next generation of computing is moving from app-centric to human-centric."
– Cristiano Amon

"Value in technology is not derived from the invention. Much as we love the invention, value is derived from people using it." *– Arvind Krishna*

Insight 1: Amplifying Ingenuity – AI's Creative Renaissance

"The most productive knowledge workers will increasingly rely on training and managing their AI agents."
– Richard Socher

"You have to ask AI to be critical of you—otherwise, it will just flatter you."
– Featured Session: Unlock Your Creative Problem Solving Super Powers with GenAI

"If you aren't being augmented by AI, you will get left behind. It will make you ten times more effective—so you better know how to work with it." *– Jeremy Utly*

Insight 2: Quantum Leap – Computing's Next Revolution Is Here

"Quantum computing is no longer a distant future—it is already proving useful today, and by 2026, it will surpass classical computing in solving problems that were previously impossible."
– Featured Session: Cracking the 'Cradle of Life' Molecule with a Quantum Computer

"Quantum computing won't replace classical computing—it will complement it, solving problems that classical systems fundamentally can't."
– Charina Chou

We might be able to prove Einstein wrong so we can move forward, and all of this work—getting data and analyzing it—is towards that." *– Marco Bonici*

Insight 3: Companies That Master Policy Shifts Will Shape the Future

"If the U.S. doesn't lead in quantum computing, another nation will—and that has enormous implications for national security and economic power."
– Charina Chou

"AI is not increasing electricity demand—it's creating an arms race where whoever controls the energy controls the future" *– Richard Ogawa*

Insight 4: Digital Safety Is About Minds, Not Machines

"Tech companies don't have to make the algorithms this way. But they do, because their goal is maximum engagement, regardless of the consequences." *– Lauren Greenfield*

"It's about creating tools so that people can make choices for themselves — tools that let us shift the conversation on what technology should be."
– Dr. Rumman Chowdhury

Insight 5: The Power of Experiential Brands

"Brands embracing AI must walk a fine line: leverage the technology for efficiency, but don't sacrifice human creativity and authenticity." *– Usama Fayyad*

"You don't change people's minds with TV commercials or Facebook posts. You do it by building credibility, relationships and trust." *– Glenn Davis*

Insight 6: AI Isn't Replacing Doctors – It's Accelerating Cures

"If I can get cash from any ATM in the world, why can't my health data follow me?" *– Andrew Truscott*

"Imagine having a digital twin of your brain—an avatar that can predict how you'll respond to treatments before you ever take them." *– Alysson Muotri*

Insight 7: Space Is Open for Business

"The Moon isn't just a destination; it's a proving ground for the next generation of explorers, engineers, and dreamers who will take us even further."
– Josh Marshall

Insight 8: Immersive Tech Is Redefining Fandom

"If your AI-generated content makes people question if it was AI-generated, you've already lost them." *– Melina Palmer*

"We so often let ourselves fall into the trap where we see something in a headline and make inferences. We're not putting it in context of everything else that's going on around it." *– Ariel Bernstein*

APPENDIX

WHAT'S INCLUDED

SXSW 2025

EMERGING INSIGHTS AND ADDITIONAL TOPIC AREAS

Keeping the Conversation Going: Emerging Insights from SXSW 2025

Through conversations with attendees, volunteers, and speakers—and by following the buzz across social media—we've uncovered even more ideas and innovations shaping SXSW 2025. While some trends took center stage, these emerging discussions are sparking new ways of thinking and driving important conversations across industries. Below, we highlight key insights gaining momentum. We invite you to be part of the dialogue—share your take, challenge ideas, and help push these discussions forward.

Creator Economy: Grown Up and Spreading Out

The creator economy has matured, with many of the more popular creators using their platform to go beyond sponsorships and advertising to building broader businesses. As part of this transformation, some creators are driving toward deeper brand partnerships (and revenue sharing models) and moving away from follower counts and likes as a key success metric. There is also an increasing shift to more authentic and personalized content and collaborations grounded in shared values, engagement with the community for content, and diversified revenue streams for creators. As one speaker noted, "social media isn't just about posting content – it's a strategic gateway to building businesses, partnerships and personal brands."

The creator economy, including podcasting, is also at a turning point. "Creators have solidified their power—they're part of politics, sports, and commerce. They're everywhere now, not just on social media." For creators to drive audience engagement, long term value, and relevance they need to build multi-faceted businesses across and beyond platforms.

Metaverse & XR: Reframed

The once-dominant hype around "the Metaverse" has evolved into a focus on **practical, human-centered** XR (Extended Reality) solutions. From VR-based employee training to AR-enhanced immersive gaming, developers are honing in on **tangible use cases** that truly elevate learning, entertainment, and retail experiences. It's not just about building virtual realms; it's about **enriching** real-world interactions in dynamic new ways.

The Big (Very Big) Trends

"There are weeks when decades happen" was a great quote from one of many sessions on futurism. When quantum capabilities might become more real in the next decade, the power of what could be is immense. **Convergence** popped as a powerful accelerant to reimagining the future. With the possibility of biotechnology, advanced sensors, and AI creating a platform for a new era of technological and social transformation. Speakers recommended to the audience they integrate longer term thinking into their planning, including the integration of AI with biological systems to enable programmable matter and brain-computer interfaces.

Data Centers: The Unseen Backbone of the Digital World

Data centers and energy needs are critical to enabling the AI boom. If the energy challenges are not solved, AI growth will be limited. Nuclear energy—particularly small modular reactors (SMRs) and fusion—has the potential to transform the energy landscape, but scaling it requires overcoming significant supply chain and regulatory challenges. "The scale of AI-driven demand is so intense that it's forcing us to rethink how we build and operate data centers.... [B]ack in the 90's data centers were the size of a hotel room. Today they're massive campuses."

The convergence of AI and energy is not just about power consumption—it's a battle for economic and geopolitical dominance. Companies and nations that can secure reliable, scalable, and cost-effective energy will dictate the future of AI, industry, and global influence.

AI at the Edge

AI is moving from cloud-based processing to on-device AI, increasing speed, privacy and personalization. There is also growing potential for AI to be embedded in physical sensors to help drive AI learning and extended human use cases that drive even more value. These sensors can help train robots and unlock improved capabilities and use cases from other AI solutions, adding geospatial depth and feedback loops. As one futurist noted, "Sensor networks are transforming AI from observer to controller."

Climate Adaptation Needs to Be a Priority

Current energy infrastructure is not designed for the frequency and intensity of weather change we are seeing today. Utilities, regulators, and businesses must prioritize climate resilience investments, from grid-hardening measures to demand-side management innovations. Extreme weather (including extreme heat) is no longer an outlier but a persistent challenge that will test the limits of our energy infrastructure, forcing utilities to rethink resilience, demand management, and system modernization. The intersection of rising temperatures, rapid electrification, and data center expansion will be a defining pressure point for power systems in the next decade.

Quantum Computing Is Progressing Toward Mainstream Adoption, but Not in Consumer Devices

Quantum computers won't be personal devices like smartphones. Instead, mainstream adoption means reliable accessibility for industries and researchers via cloud-based quantum platforms. It will be an accelerator for specific high-value problems, rather than a replacement for classical computing.

Crypto & Web3, from Hype to Utility

While crypto and Web3 remain key topics at SXSW, the focus has shifted from speculation to real-world impact. Companies and industry leaders showcased **tangible applications** such as secure transactions, supply chain transparency, and equitable digital royalties for creators. The emphasis is now on **proving value and building trust**, ensuring these technologies provide meaningful solutions rather than fleeting hype.

Unexpected Industry Crossovers Driving Innovation

SXSW continues to foster **unconventional collaborations** that push industries forward in unexpected ways. This year's standout intersections included **AI and fashion**, where generative models assisted in fabric design and runway curation, and **sports tech and mental wellness**, with biometric wearables helping athletes optimize both physical and cognitive performance. Other notable crossovers featured **music and neuroscience**, where brainwave-responsive compositions tailored sound experiences in real time, and **sustainability and gaming**, with interactive platforms gamifying environmental impact. These multidisciplinary experiments may not always draw the biggest crowds, but they **drive new conversations, challenge industry norms, and reveal emerging opportunities** with lasting influence.

Let's Keep It Going

These emerging themes represent **just a slice** of what the SXSW community is chatting about, experimenting with, and imagining for the future. Each topic reminds us that **innovation** doesn't happen in a vacuum. It thrives on shared insights, **collaborative energy**, and a willingness to **listen** to the breadth of voices shaping our world.

Got additional insights or personal takeaways? Feel free to **keep the conversation rolling** by sharing your own experiences, questions, and discoveries on social media with us. The most exciting ideas often start with a spark—but they grow when we all lean in and contribute. We've included our contact details on the final page.

SXSW

AS AN EVENT

SXSW creates the rare environment where the convergence of visionary entrepreneurs, creators, students, investors, and industry leaders come together to share productive and optimistic discussions about the future to drive creativity, innovation, and the human experience forward.

ATTEND SXSW IN 2026

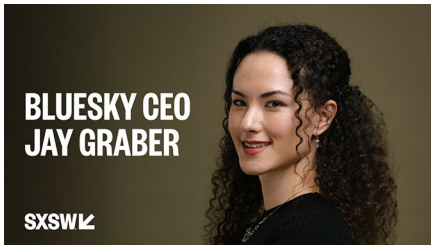
We hope to see you at SXSW in 2026, where you'll experience cutting edge perspectives in business, creativity, technology, and so much more. **Use the QR code to learn more.**

Why should business and technology leaders attend SXSW?

- **Stay Ahead of Emerging Trends** – SXSW offers firsthand exposure to cutting-edge innovations in AI, quantum computing, space tech, healthcare, and more, providing leaders with a strategic advantage in anticipating what's next.
- **Experience Cross-Industry Collaboratio**n – Unlike traditional conferences, SXSW blends business, creativity, and technology, fostering unexpected connections between industries that drive new ideas and disruptive thinking.
- **Gain Actionable Insights from Visionary Leaders** – The event features keynotes, panels, and hands-on sessions with industry pioneers, offering insights that can be immediately applied to business strategy and innovation.
- **See Innovation in Action** – From immersive brand activations to emerging tech demos, SXSW provides a real-world look at how companies are leveraging new tools to redefine customer experience and operational efficiency.
- **Build High-Impact Networks** – With executives, investors, startups, and creatives all in one place, SXSW is a powerful networking opportunity, enabling business leaders to form strategic partnerships, discover new talent, and explore potential investments.

LINKS TO KEY SXSW SESSIONS

WATCH IT YOURSELF!



VALUE PROPOSITION

WHY SHOULD I ATTEND?

That's all great... but why should I or someone from my team attend?

Function	The Value of SXSW to Your Function Includes
Executive & Strategic Leaders *(CEOs, founders, investors, C-suite decision makers, etc.)*	• Gain strategic foresight into how AI, quantum computing, and other disruptive technologies will reshape industries. • Engage with industry leaders across technology, policy, and creative sectors to drive business transformation. • Identify growth opportunities, from new business models to investment trends in high-impact sectors. • Understand both consumer and workforce trends.
Brand, Marketing & Experience Innovators *(CMOs, brand strategists, creatives, experiential leads, etc.)*	• Discover emerging consumer behaviors and evolving trends in digital storytelling, experiential branding, and AI-driven marketing. • Gain insights into content, community, and commerce convergence, preparing for the next wave of marketing innovation. • See the future of personalized marketing and how AI is enabling hyper-customized experiences at scale. • Meet with creators and thought leaders in entertainment, media, and advertising to fuel creative inspiration.
Sales, Growth & Customer Experience Drivers *(Sales executives, growth marketers, CX strategists, etc.)*	• Explore the intersection of commerce, community, and content, and how integrating these elements can boost retention, lifetime value, and organic growth. • Gain insights into next-gen growth strategies, including AI-driven demand forecasting, data-driven personalization, and loyalty-building through interactive customer journeys. • See how AI and automation are transforming customer engagement, from hyper-personalized interactions to real-time sentiment analysis that drives smarter sales strategies.
Finance & Business Strategy Experts *(CFOs, financial planners, corporate strategists, etc.)*	• Stay ahead of financial trends, including the impact of AI, quantum computing, and digital currencies on financial strategy. • Understand emerging regulations and economic policies that will shape global markets and business operations. • Explore investment opportunities in the next wave of high-growth industries. • Gain insights on corporate sustainability initiatives and their financial implications in a rapidly evolving ESG landscape.
Product, Innovation & Technology Leaders *(Product managers, engineers, technologists, R&D teams, etc.)*	• See cutting-edge technology in action, from AI-driven automation to quantum breakthroughs and immersive experiences. • Learn from industry pioneers shaping the future of product design, user experience, and platform ecosystems. • Engage with startups, investors, and enterprise leaders pushing the boundaries of tech innovation.

Function	The Value of SXSW to Your Function Includes
People, Culture & Learning Architects *(CHROs, HR leaders, DEI officers, L&D teams, etc.)*	• Gain insights into the future of work, including AI-driven workforce transformation, skills evolution, and talent management. • Explore strategies for upskilling employees, adapting to automation, hybrid work models, and digital collaboration. • Learn about emerging trends in employee experience, culture transformation, personalized training programs and ethical AI applications in HR. • Connect with thought leaders shaping workplace innovation to develop best-in-class talent strategies.
Healthcare, Science & Wellness Leaders *(Doctors, researchers, digital health innovators, scientists, etc.)*	• Explore breakthroughs in AI-driven diagnostics, precision medicine, and longevity research shaping the future of healthcare. • Engage with global health leaders on how technology is transforming patient care, from predictive analytics to personalized treatments. • See how space, quantum computing, and biotech advancements are revolutionizing drug discovery, neuroscience, and healthspan optimization. • Connect with innovators driving ethical AI applications in healthcare and learn strategies for regulatory compliance in emerging health technologies.
Policy, Legal & Ethics Advisors *(Government officials, policy makers, lawyers, compliance leads, etc.)*	• Stay ahead of AI, data privacy, and tech regulation trends impacting businesses, governments, and global economies. • Understand the geopolitical implications of AI, quantum computing, and trade policies, including supply chain realignments and cybersecurity concerns. • Engage with leaders shaping ethical AI, content moderation, and digital governance to make sure innovation aligns with human rights and public safety. • Gain insights into the evolving energy, sustainability, and infrastructure policies that will define the next decade of economic growth.
Creators, Artists & Cultural Catalysts *(Musicians, filmmakers, designers, creators, influencers, etc.)*	• Discover how AI, VR, and immersive tech are transforming storytelling, music production, and content creation. • Explore new revenue models for creators. • See firsthand how fan culture is evolving, with experiential activations and next-gen content consumption shaping audience expectations. • Network with top creative minds across music, film, art, and gaming to collaborate on the future of interactive experiences.
Media, Content & Storytelling Strategists *(Journalists, producers, media execs, editorial leads, etc.)*	• Understand the future of media monetization, from decentralized content ownership to subscription-based and ad-free experiences. • Explore the ethical implications of AI-generated news, deepfake technology, and misinformation in shaping public perception. • Gain insights into cross-platform storytelling, from social media strategies to interactive and immersive narratives.
Educators, Futurists & Research Thinkers *(Professors, education innovators, foresight practitioners, etc.)*	• Discover emerging research opportunities by engaging with cutting-edge advancements in AI, neuroscience, space, and quantum computing—offering new areas for academic inquiry and interdisciplinary studies. • Gain inspiration for course development and curriculum design, integrating real-world tech trends into seminars, workshops, and academic programs. • Connect with like-minded professors, futurists, and research pioneers to exchange ideas, form collaborations, and explore opportunities for co-authored papers or cross-institutional initiatives. • Engage in discussions on the societal impact of emerging technologies, shaping thought leadership, white papers, and academic publications on the future of innovation.

AUDIENCE (FUNCTIONAL) LENS

WHICH TRENDS ARE MOST RELEVANT TO YOU?

Relevant Trends

Function	Insight 1: AI	Insight 2: Quantum	Insight 3: Policy	Insight 4: Ethics	Insight 5: Brand & Ad	Insight 6: Healthcare	Insight 7: Space	Insight 8: Fandom
Executive & Strategic Leaders *(CEOs, founders, investors, C-suite decision makers, etc.)*						*Leaders in healthcare, biotech, or health-focused industries.*	*Leaders in R&D, infrastructure, or industries exploring space-adjacent tech.*	
Brand, Marketing & Experience Innovators *(CMOs, brand strategists, creatives, experiential leads, etc.)*						*Focused on healthcare brand or patient experience.*	*If tied to aerospace, innovation, or future-forward branding.*	
Product, Innovation & Technology Leaders *(Product managers, engineers, technologists, R&D teams, etc.)*						*Building tech for health or wellness.*	*If in logistics, mobility, or space-adjacent*	*Relevant to dive into consumer first product design.*
Sales, Growth & Customer Experience Drivers *(Sales executives, growth marketers, CX strategists, etc.)*						*Supporting healthcare clients or patient engagement.*	*Industry connects to aerospace, R&D, infrastructure.*	*Relevant for loyalty, community, and platform strategy.*

Function	Insight 1: AI	Insight 2: Quantum	Insight 3: Policy	Insight 4: Ethics	Insight 5: Brand & Ad	Insight 6: Healthcare	Insight 7: Space	Insight 8: Fandom
Finance & Business Strategy Experts *(CFOs, financial planners, corporate strategists, etc.)*							*If you're evaluating aerospace or space tech markets.*	
People, Culture & Learning Architects *(CHROs, HR leaders, DEI officers, L&D teams, etc.)*								
Healthcare, Science & Wellness Leaders *(Doctors, researchers, digital health innovators, scientists, etc.)*								
Government Leaders, Legal & Ethics Advisors *(Government officials, policy makers, lawyers, compliance leads, etc.)*						*Legal or policy in the healthcare industry*		
Creators, Artists & Cultural Catalysts *(Musicians, filmmakers, designers, creators, influencers, etc.)*						*Content is focused on healthcare*		
Media, Content & Storytelling Strategists *(Journalists, producers, media execs, editorial leads, etc.)*						*Content is focused on the healthcare industry*		
Educators, Futurists & Research Thinkers *(Professors, education innovators, foresight practitioners, etc.)*							*Particularly valuable in cross-disciplinary research planning*	

SXSW 2025

PITCH COMPETITION WINNERS

SXSW's Pitch competition is more than a startup showcase—it's a **window into the ideas and technologies shaping the future.** Unlike traditional pitch events that focus on a single sector, SXSW brings together startups from **radically different industries, each tackling pressing global challenges from unique angles.** From **food production and AI ethics to sustainability and healthcare accessibility**, this year's winners highlight the power of interdisciplinary problem-solving and emerging trends that will reshape business and society.

Even if you don't work directly with these companies, the **themes and innovations behind their success offer valuable insight** into what's next for technology, business, and culture.

Accelerating Sustainable Food Production Through AI & Robotics

Winner: Knead Technologies (AgTech & Food) – Calgary, Canada

What They're Doing:

Knead Technologies uses advanced robotics and machine learning to automate commercial baking processes, aiming to ensure consistent product quality, minimize food waste, and significantly improve production efficiency.

Where This Might Lead:

- **AI-Driven Precision:** Similar robotic automation could expand to various food production sectors, potentially boosting yields, reducing environmental impact, and supporting global sustainability efforts.
- **Empowering Creativity:** By automating repetitive tasks, workers may be able to focus on higher-level roles, driving innovation in recipe development and quality assurance.
- **Sustainability Beyond Food:** Optimization models used here could be adapted for other industries—pharmaceuticals, manufacturing, logistics—to increase efficiency and reduce waste across supply chains.

Restoring Trust with AI Transparency and Integrity

Winner: Polygraf AI (Enterprise, Smart Data, FinTech & Future of Work) – Austin, TX

What They're Doing:

Polygraf AI provides real-time tools for detecting deepfakes, misinformation, and biases in AI-generated content, helping organizations maintain transparency and accountability when integrating AI into critical business processes.

Where This Might Lead:

- **AI Standards:** Technologies that verify AI outputs may shape ethical frameworks in healthcare diagnostics, automated hiring, digital identity verification, and more.
- **Building Consumer Confidence:** With greater clarity around AI-generated information, sectors like media, banking, and consumer tech could strengthen customer trust and foster authentic engagement.
- **Cross-Industry Adoption:** Tools for verifying AI outputs may eventually extend to education, insurance, government, and public services, protecting decision-making against bias and misinformation.

Transforming Media Through AI-Powered Visual Creativity

Winner: NeuralGarage (Entertainment, Media, Sports & Content) – Bangalore, India

What They're Doing:

NeuralGarage uses artificial intelligence to rapidly modify visual content without extensive reshoots, enabling real-time adaptations of videos for diverse markets, platforms, and personalized experiences.

Where This Might Lead:

- **Hyper-Personalized Content:** This type of AI-driven content adaptation could influence media, advertising, corporate training, education, and virtual events to tailor materials instantly for varied audiences.
- **Creative Accessibility:** Small and mid-size companies might leverage these tools at scale, democratizing capabilities that were previously limited by high production costs.
- **Adaptive Experiences:** Immersive education, museum exhibits, tourism, and hospitality services could evolve into dynamic platforms that adapt content to user preferences and cultural contexts.

Enhancing Mobility and Independence Through AI Accessibility

Winner: Glidance (HealthTech, MedTech, BioTech & Accessibility) – Seattle, WA

What They're Doing:

Glidance has developed an AI-powered mobility aid for individuals who are blind or visually impaired, offering real-time, precise navigation support that can enhance independence and confidence.

Where This Might Lead:

- **Accessible Smart Cities:** If widely adopted, AI-based navigation could influence city planning, creating more inclusive urban environments for elderly and differently-abled communities.
- **Adaptive Technology in Healthcare:** Similar solutions could appear in hospitals, airports, retail spaces, and workplaces, promoting universal accessibility.
- **Inclusive Design Revolution:** Broader adoption of AI-enhanced accessibility might become standard in consumer tech, home automation, and public transportation, elevating norms for inclusive design.

Accelerating Innovation with Quantum Computing

Winner: Xatoms (Innovative World Tech) – Toronto, Canada

What They're Doing:

Xatoms leverages quantum computing to conduct complex material simulations, potentially speeding up discovery processes in areas such as renewable energy, electronics, and sustainable packaging.

Where This Might Lead:

- **Faster Scientific Breakthroughs:** Quantum-powered simulations could accelerate progress in pharmaceuticals, agriculture, aerospace, and automotive by reducing research timelines.
- **Sustainable Industry Transformation:** Rapid discovery of new materials may enable businesses to meet sustainability goals sooner, offering eco-friendly alternatives to current resource-intensive options.
- **Cross-Sector Adoption:** As quantum technologies mature, they could become standard tools for industries pursuing faster market entry, cost reduction, and minimized environmental impact.

Augmented Reality Empowering Industrial Precision

Winner: Contoro (Robotics, Web3, Voice & Extended Reality) – Austin, TX

What They're Doing:

Contoro integrates augmented reality (AR) into robotic control systems, enabling precise, intuitive human oversight of robotics and industrial machinery in real time—even from remote locations.

Where This Might Lead:

- **AR-Enabled Workforce:** Widespread use in manufacturing, construction, and healthcare could enhance safety, productivity, and upskilling opportunities.
- **Remote Operational Excellence:** Remote control applications may expand to emergency response, disaster relief, and hazardous material handling, safeguarding workers and optimizing efficiency.
- **Training & Upskilling:** Adopting AR-robotics collaboration could spark new educational approaches, focusing on immersive, hands-on training in technical fields.

Real-Time Climate and Security Insights via Satellite AI

Winner: Little Place Labs (Security, GovTech & Space) – Houston, TX

What They're Doing:

Little Place Labs applies AI to satellite imagery for near-instant analysis, supporting climate change monitoring, natural disaster response, agriculture, and national security.

Where This Might Lead:

- **Proactive Disaster Response:** Instant insights could improve global preparedness and response to natural disasters, potentially reducing impacts and saving lives.
- **Smart Agricultural Practices:** Near-real-time monitoring may help farmers optimize resources, boosting productivity while respecting environmental constraints.
- **Strategic Security Intelligence:** Governments and corporations could integrate live satellite data into strategic planning and risk mitigation, supporting environmental compliance and security measures.

Redefining Climate Control through Sustainable Tech

Winner: Helix Earth (Smart Cities, Transportation & Sustainability) – Houston, TX

What They're Doing:

Helix Earth, founded by a former NASA engineer, developed an ultra-efficient air dehumidification and cooling system designed to cut energy use dramatically compared to traditional HVAC solutions.

Where This Might Lead:

- **Sustainable Infrastructure Norms:** As energy efficiency becomes a greater focus, buildings worldwide could incorporate advanced climate tech to meet stricter environmental guidelines.
- **Cross-Industry Efficiency:** Data centers, healthcare facilities, and transportation hubs might adopt similar systems to reduce energy consumption and move closer to sustainability goals.
- **Climate-Resilient Cities:** Widespread use of efficient climate-control tech could help cities lower emissions, enhance public health, and adapt to evolving environmental demands.

Accelerating Healthcare and Public Safety with AI-Driven Drug Testing

Winner: MabLab (Student Startup) – Boston, MA

What They're Doing:

MabLab has developed an AI-enhanced testing strip system for recreational drugs, aiming to provide consumers with rapid, accurate substance identification. This approach could help reduce harm by alerting users to adulterants and potentially dangerous ingredients in street drugs.

Where This Might Lead:

- **Harm Reduction at Scale:** Easy-to-use test strips could become a key tool for festivals, nightlife venues, and community outreach programs, helping users make safer choices.
- **Real-Time Public Health Data:** Aggregated testing data, handled ethically and securely, might support more proactive health policies and early interventions in at-risk communities.

- **Broadening Accessibility:** As AI improves accuracy and lowers costs, smaller clinics, non-profits, and local governments could employ such testing solutions, expanding public safety measures.

Bottom Line

The solutions introduced by this year's SXSW Pitch winners address pressing challenges and could pave the way for future industry shifts. By exploring these emerging innovations—and considering how they might evolve—businesses can anticipate potential changes, position themselves for new opportunities, and participate in shaping what's to come.

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PWC

ABOUT PWC

We help organizations turn breakthrough ideas into lasting outcomes. The forces shaping today's business landscape, including AI, immersive technology, health innovation, policy shifts, and platform disruption, require more than vision. They demand execution, scale, and speed.

We work with clients across industries to move insights into action. From defining bold strategies to building the capabilities that bring them to life, our approach combines commercial insight, deep sector expertise, and hands-on delivery.

Our Technology, Media and Telecommunications (TMT) practice helps companies grow, adapt, and stay ahead in rapidly evolving markets. We work with clients to improve customer engagement, modernize digital platforms, unlock new revenue streams, and activate emerging technologies in ways that are grounded in business value. Learn more ›

Our Customer Experience and Innovation (CX+I) capabilities help clients reimagine how they connect with customers. We bring together experience strategy, design, and advanced technology to modernize marketing, sales, commerce, and service. Whether building personalized customer journeys, redesigning front-office platforms, or deploying AI to deliver smarter interactions, we help organizations create experiences that drive growth, efficiency, and long-term loyalty. From launching new ideas to reinventing existing ones, we blend strategy, design, and technology to help our clients not just adapt to change but lead it. Learn more ›

At PwC, our purpose is to build trust in society and solve important problems. We're a network of firms in 149 countries with over 370,000 global employees who are committed to delivering quality in assurance, advisory and tax services.

Related thought leadership

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- Global Entertainment & Media Outlook
- AI agents can reimagine the future of work, your workforce and workers
- 2025 AI Business Predictions
- Data-driven M&A: Unlocking value and driving growth for media companies

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