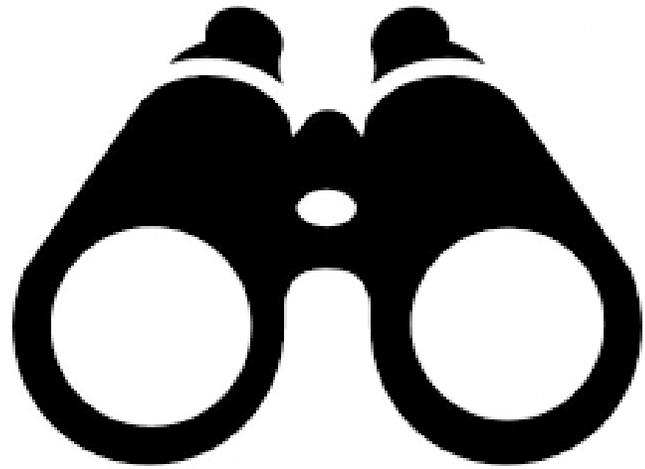


**Robert Moran**  
Partner, Brunswick Group

# 2020

# TRENDS FOR THE NEW DECADE

20 Global Trends that will  
shape the 2020's



Explore Together

20  
20

TRENDS  
FOR THE NEW  
DECADE

20 Global Trends that will  
shape the 2020's

BRUNSWICK FORESIGHT

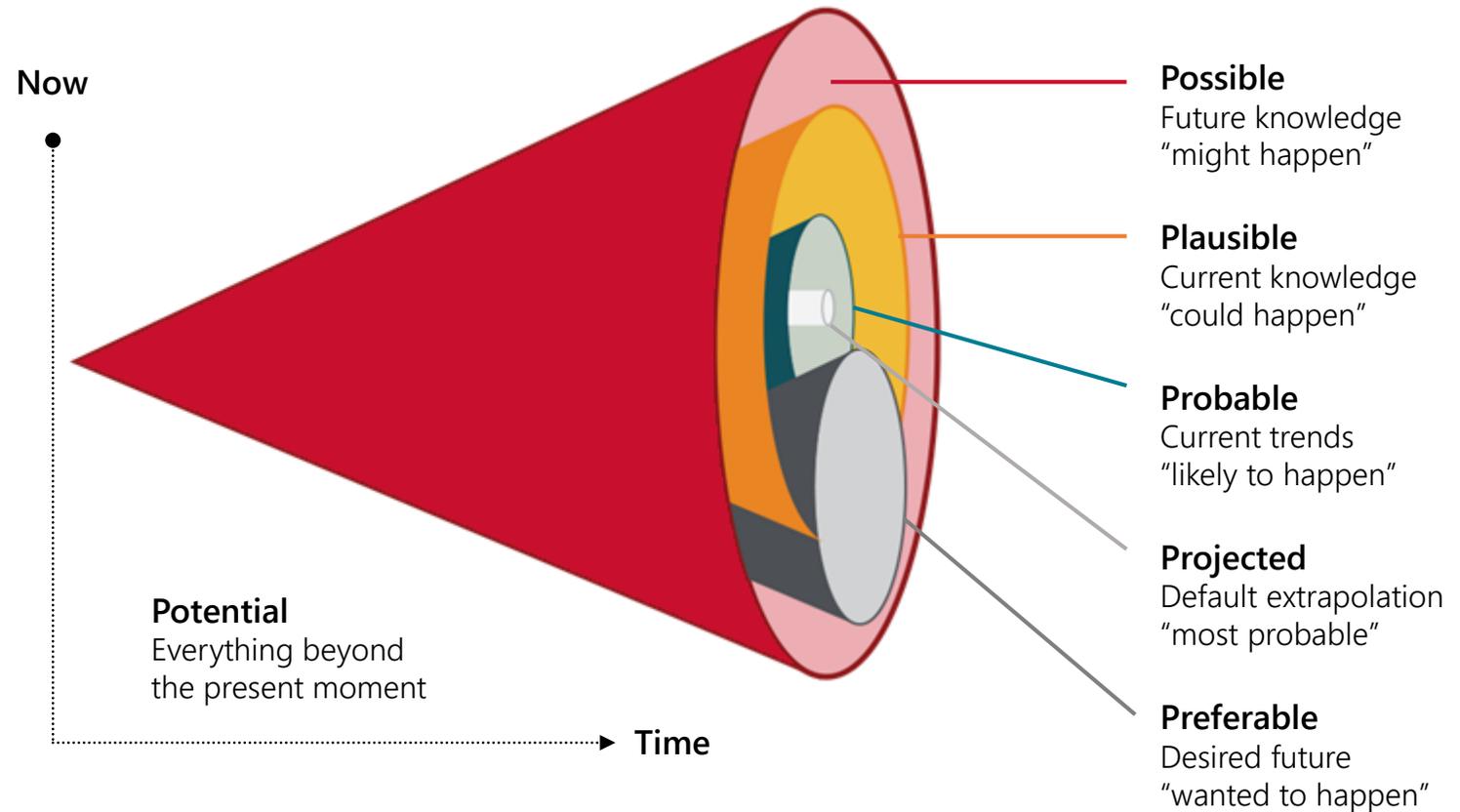
# Thinking Like a Futurist

# The FUTURE

Plural (Futures)

Open

Makeable



# S.T.E.E.P. Change Drivers in the 2020s

Social

Technological

Economic

Environmental

Political





**1. Emerging Global Middle Class**  
How will leaders meet the economic and political demands of the new, global middle class?



**9. Sustainability**  
How will organizations meet demands for greater sustainability?



**17. Truth Decay**  
How do organizations communicate in an era of deepfakes?



**2. Rise of Women**  
How will increasing economic and leadership clout of women change societies?



**10. Automation and the Future of Work**  
Which scenario: Slow Boil, Task Automation or Shock Automation?



**18. Cybersecurity/ Cyberwarfare**  
How will organizations secure their knowledge?



**3. Urbanization and the Megacity**  
How will Megacities flex their economic and political muscle?



**11. Commercialization and Weaponization of Space**  
Who leads the new space race?



**19. Decline of Religion, but Rise of Corporate Purpose**  
How will organizations connect profit and purpose?



**4. Aging and Extreme Longevity**  
How will slow growth, aging societies operate?



**12. Globalization vs Nationalism**  
How do multinational corporations navigate nationalism and populism?



**20. Surprised Elites**  
Which assumptions should leaders now question?



**5. Water Scarcity**  
How will nations, regions and businesses adjust to extreme water stress?



**13. Splinternet**  
How will data and data flows be regulated?



**6. Technological Advance and Surprise**  
How will AI, alternative energy, genetics, robotics, tissue engineering, and everywhere reshuffle the economy?



**14. Surveillance and its Discontents**  
How will citizens and consumers react to 21st century surveillance?



**7. Merging With Our Technology**  
How quickly will we merge with our technology?



**15. Generational Power Shifts**  
How will GenX lead?



**8. Individual Empowerment**  
How will tech empowered people change longstanding institutions?



**16. Information Overload and Simplicity**  
How will leaders communicate in an era of attention scarcity?

# 2020 | TRENDS FOR THE NEW DECADE

20 Global Trends that will shape the 2020's



# 1. Emerging Global Middle Class

- 3.8 billion people, over 50% of the global population
- 67%, 5.6 billion, by 2030
- Spending: \$35 Trillion in 2017, \$64 Trillion in 2030
- 88% of the next billion entrants will be in Asia
  - 380M India, 350M China
- Spike in demand for meat, clothing, cosmetics, appliances, representation



**How will leaders meet the economic and political demands of the new, global middle class?**



## 2. Rise of Women

- Average # of schooling years:
  - Girls: 1970: 6.7      2015: 12.5
  - Boys: 1970: 8.6      2015: 12.4
- In the US, women are over half the college educated labor force.
- In the US, women earn 57% of undergraduate degrees and 59% of all master's degrees
- 24% of all national parliamentarians globally in 2019 were women.
- This is up from 11% in 1995.

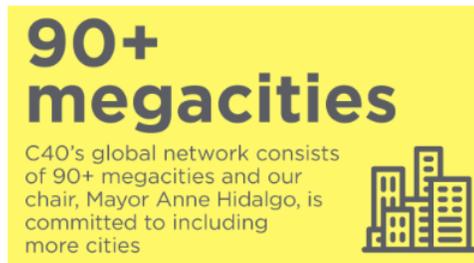


**How will increasing economic and leadership clout of women change societies?**

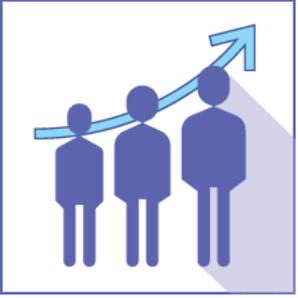


### 3. Urbanization and the MegaCity

- Majority of global population now urban!
- 68% of global population in cities by 2050 (55% today)
- 43 megacities by 2030 (10M+ population)
- Jakarta largest megacity at 36M people by 2030
- Increased demand for basic building materials (and sand!)
- Rise in diabetes?



**How will megacities flex their economic and political muscle?**



## 4. Aging and Extreme Longevity

- People over 60 now outnumber children under 5.
- 9% of the world is over 65 today.
- 22% of the world population will be over 60 by 2050.
- 80+ population will triple to 426 million by 2050
- More than 80% of global GDP is generated by countries with rapidly ageing populations.
- Downward pressure on growth in aging, advanced economies.



TV Show 20:04, 20-Mar-2019

Will China get old before it gets rich?

?

**How will slow growth, aging societies operate?**



## 5. Water Scarcity

- 14 of 20 global megacities are experiencing water scarcity or drought.
- Favors North and South America
- By 2030, India's water demand is expected to be twice supply
- Anticipate significant restrictions on water usage
- Precision agriculture / vertical farming
- Desalinization
- Industrial efficiency



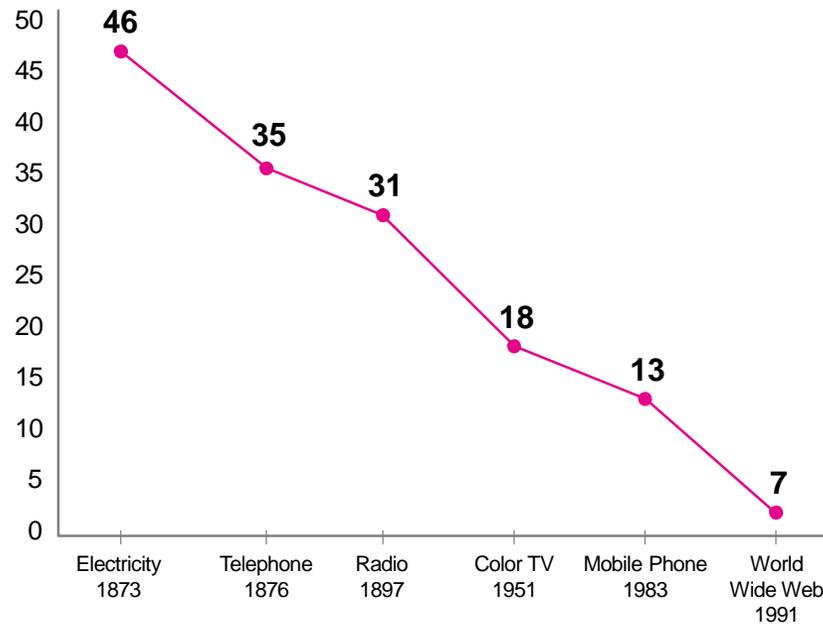
**How will nations, regions and businesses adjust to extreme water stress?**



# 6. Technological Advance and Surprise

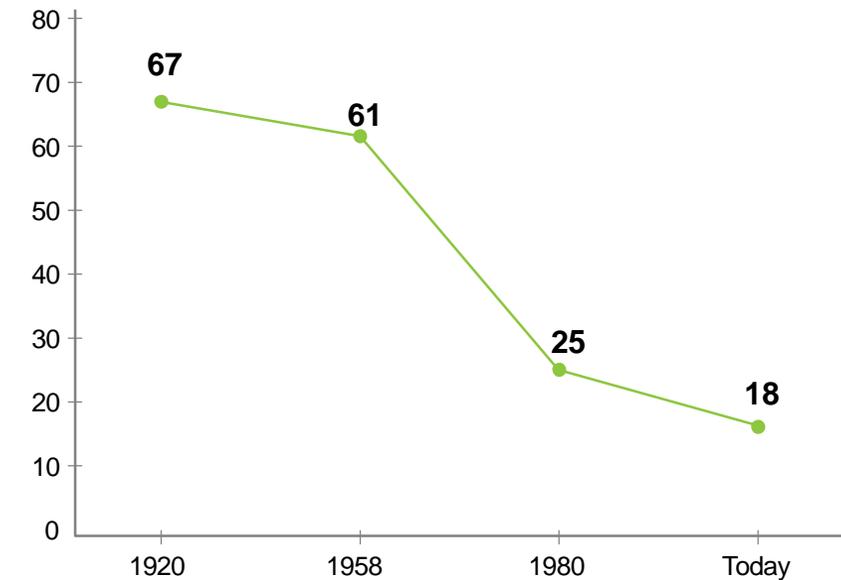
- GRINTechs – Genetics, Robotics, Internet, Nanotech
- + AI, 3D Printing, solar, tissue engineering, everywhere (embedded computing)

Years from invention to 25% of U.S. Population



Source: National Intelligence Council's "Global Trends 2030: Alternative Worlds" Report

Lifespan of Corporation on S&P 500

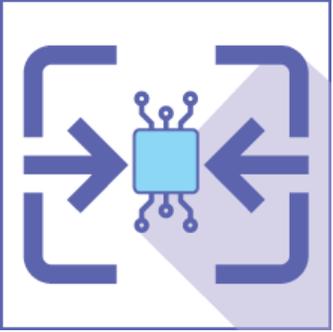


Source: Richard Foster, Yale

[http://www.innosight.com/innovation-resources/strategy-innovation/upload/creative-destruction-whips-through-corporate-america\\_final2012.pdf](http://www.innosight.com/innovation-resources/strategy-innovation/upload/creative-destruction-whips-through-corporate-america_final2012.pdf)



**How will AI, alternative energy, genetics, robotics, tissue engineering, and everywhere reshuffle the economy?**



## 7. Sapiens 3.0: Merging With Our Tech

- “Technology gives us super-human powers.” Sebastian Thrun, Google X
- Since the end of WW2 computers have gone from something in a building, to something in an office, to something on your desk, to something in your pocket, to something on your wrist.
- Eyewear and voice activated AI will bring it even closer.
- And closer. Brain to computer interfaces.
- Cochlear implants are another example – 324,000 people have them today.



**How quickly will we merge with our technology?**



# 8. Individual Empowerment

GLOBAL TRENDS 2030:

## ALTERNATIVE WORLDS

*a publication of the National Intelligence Council*

*“Individual empowerment will accelerate owing to poverty reduction, growth of the global middle class, greater educational attainment, widespread use of new communications and manufacturing technologies, and health-care advances.”*

**glassdoor**



**China's internet vigilantes and the 'human flesh search engine'**

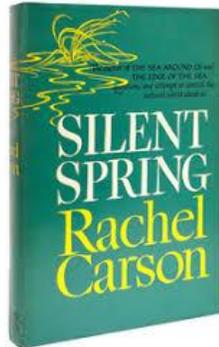


**How will tech empowered people change longstanding institutions?**

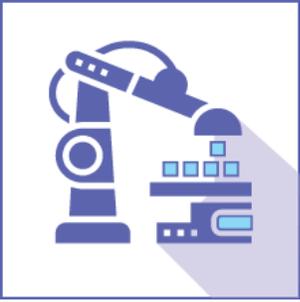


# 9. Sustainability

- Global trend.
- At least 221 major corporations have made a 100% renewable pledge.
- 99% of CEOs of companies over \$1B in revenue believe sustainability will be important to the future success of their business. (Accenture)
- Expect significant, internal, employee led, activism on corporate sustainability practices in the 2020s



**How will organizations meet global demands for greater sustainability?**



# 10. Automation and the Future of Work

1.0 Fear of Shock Automation



2.0 Not so fast....



3.0. Task Automation



**Which scenario?**

- 1. Shock Automation**
- 2. Slow Boil**
- 3. Task Automation**



Our scenarios suggest that half of today's work activities could be automated by 2055, but this could happen up to 20 years earlier or later depending on various factors, in addition to other economic conditions.

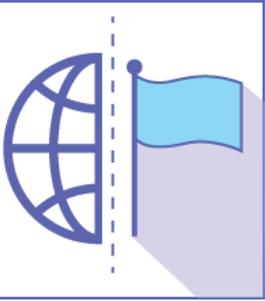


# 11. Space: Commercialization/ Weaponization

- The global space economy is estimated at \$345 Billion
- Morgan Stanley projects the global space economy will be \$1.1 trillion by 2040
- Bank of America projects \$3 trillion
- US Secretary of Commerce's priority
- The Outer Space Treaty specifically covers asteroid mining
- "Make no mistake about it — we're in a space race today, just as we were in the 1960s, and the stakes are even higher," Pence said during the fifth meeting of the National Space Council (NSC) at the U.S. Space & Rocket Center in Huntsville, Alabama.

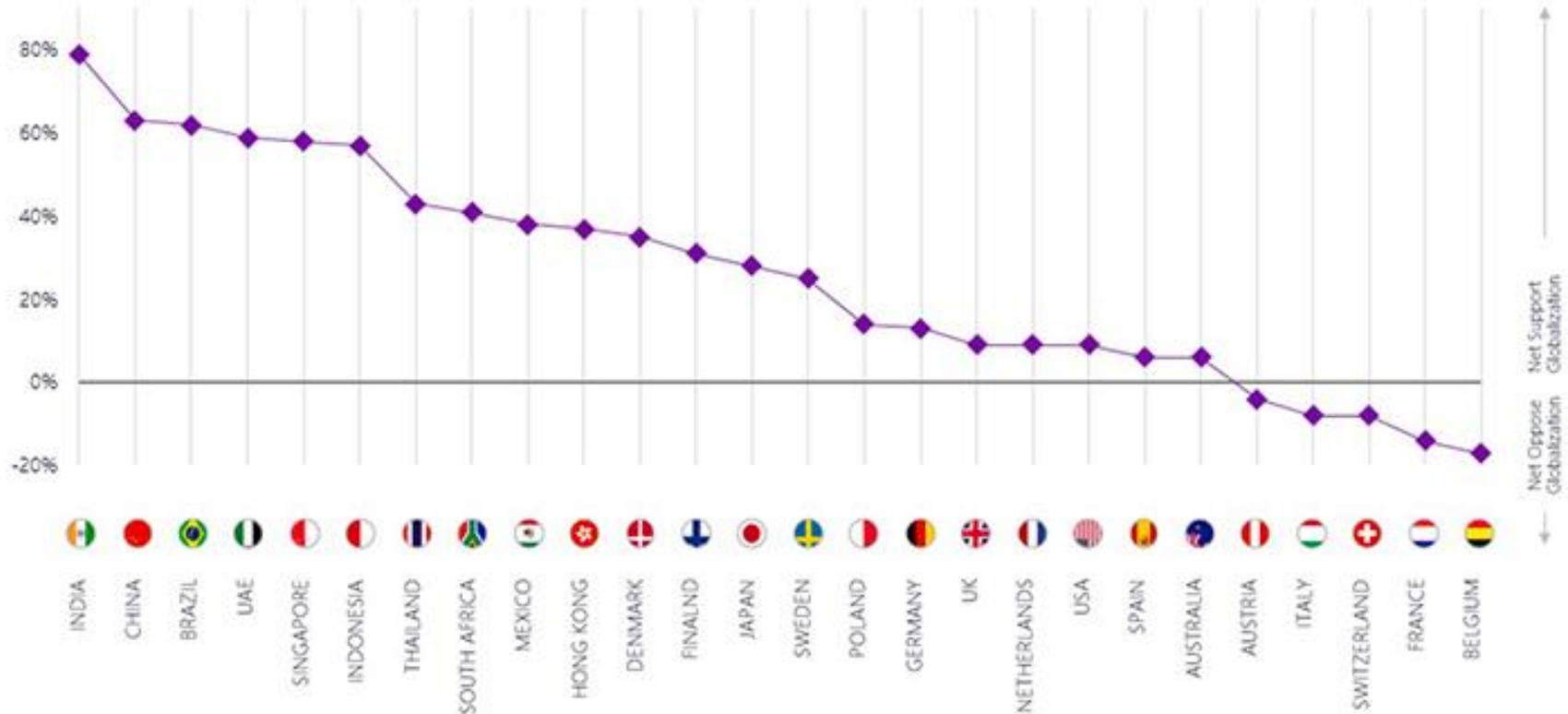


**Who leads the new space race?**



# 12. Globalization vs Nationalism

## Support for Globalization



**How do multinational corporations navigate nationalism and populism?**



# 13. Splinternet

- Rise of “data sovereignty”
- Server nationalism
- Data localization laws: Australia, Canada, China, Germany, India, Indonesia, Kazakhstan, Nigeria, Russia, South Korea, Vietnam
- Russian Internet, Chinese “Great Firewall”



The “Splinternet” is Already Here

**FORTUNE**

The Splinternet Is Growing

**FASTCOMPANY**

Get Ready for the Splinternet:  
The Web May Not Be Worldwide Much Longer



**How will data and data flows be regulated?**



# 14. Surveillance and its Discontents

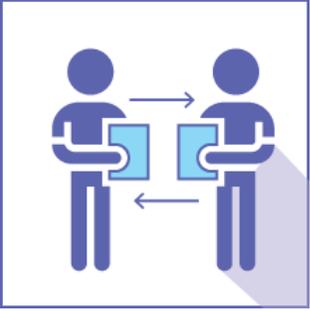
- 75 of 176 countries use AI tech for surveillance.
- 64 use facial recognition technology
- Weak Signal: SF, Oakland, Berkeley, California and Somerville, Massachusetts have passed bans

INTERNATIONAL • HONG KONG PROTESTS

## **FORTUNE**      **Hong Kong's Mask Ban Pits Anonymity Against the Surveillance State**



**How will citizens and consumers react to 21<sup>st</sup> century surveillance?**

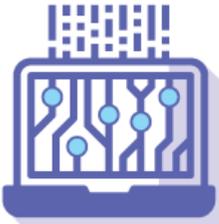


# 15. Generational Power Shifts

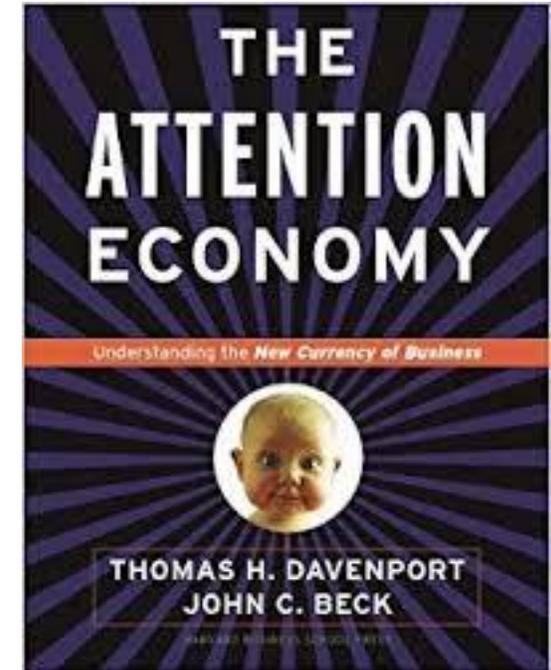
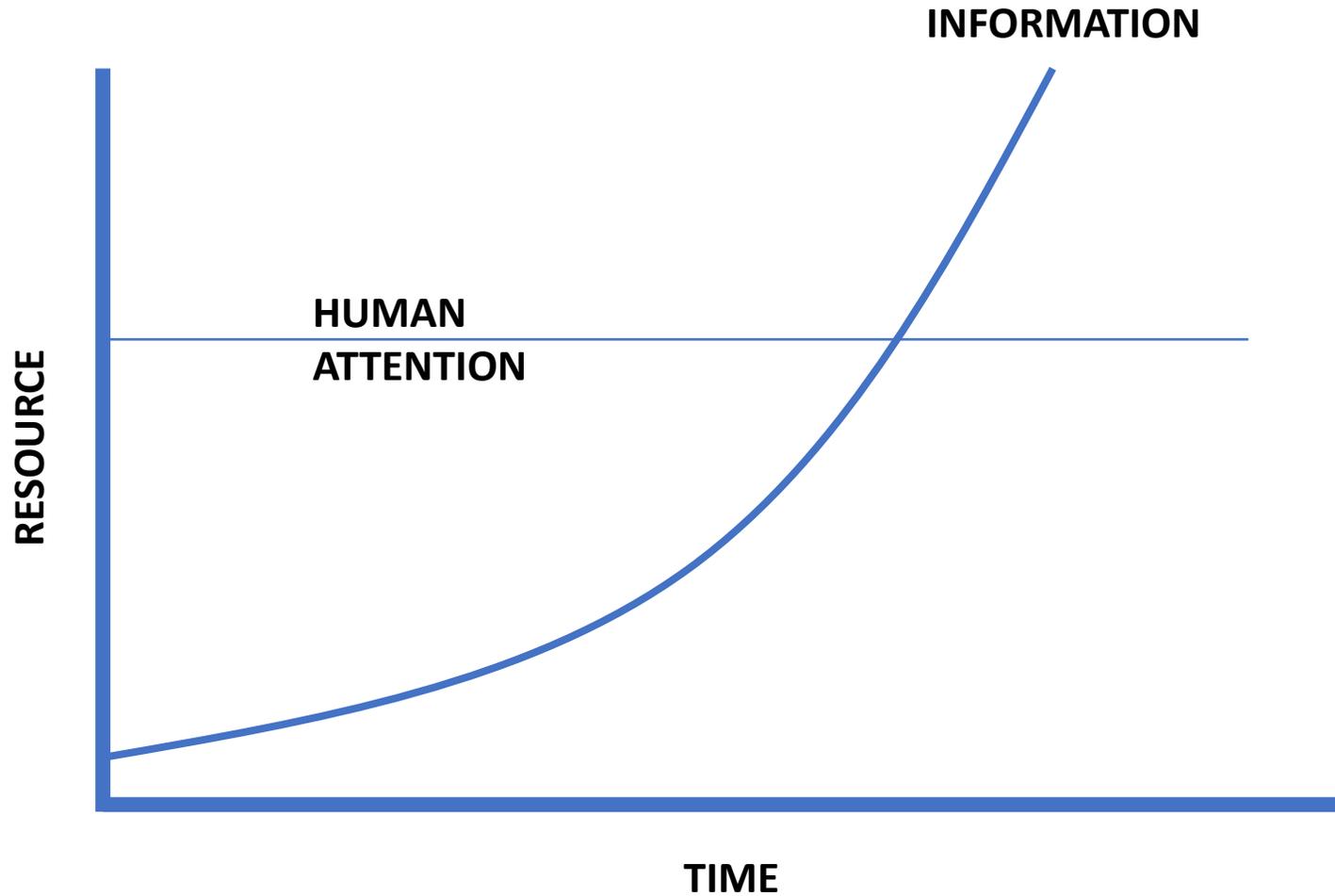
- Average age of US CEO is 58
- Oldest GenXer in 2020 is 55
- Large generational differences between those born before and after invention of the Internet.
- Example: Cannabis legalization in the United States
- Example: Support for Socialism and Capitalism in the United States



**How will GenX lead?**



# 16. Information Overload and Simplicity



?

How will leaders communicate in an era of attention scarcity?



# 17. Truth Decay

- Disinformation: Everyone's 2nd favorite Grey Zone weapon
- 90% of US adults say altered videos/images create confusion about the facts
- 77% of Americans support restrictions on altered videos/images.
- Deepfakes will be used in the 2020s to attack corporations and manipulate stock markets



**The  
Guardian**

**You thought fake news was bad? Deep fakes are where truth goes to die**

?

**How will organizations communicate in an era of deepfakes?**



# 18. CyberSecurity / CyberWarfare

- Major cyber attack every 39 seconds
- \$6 trillion in spending globally on cybersecurity in 2021
- Cost of cyber crime in 2021 estimated at \$6 trillion by 2021
- Average cost of data breach is over \$150 million
- Average share price fall after a data breach is -7%
- Sub-Threshold Conflict: Everyone's favorite Grey Zone weapon

**"Is our vision of the World Wide Web the global digital commons -- at this point you should see butterflies flying here and soft background meadow-like music -- or a global free fire zone?"**

-Former NSA and CIA director Michael Hayden



**How will organizations secure their knowledge?**



# 19. Decline of Religion / Rise of “Purpose”

- Rise of the “Nones”
- 40% of US Millennials identify as religiously unaffiliated
- US cause sponsorship was \$2.2B in 2019, up 5% from 2018.
- 64% of US consumers choose, switch, avoid, or boycott brands based on social stances.
- 28% of Americans have stopped using a brand because of something negative they learned about it in the news.

**FORTUNE**

**America’s CEOs Seek a  
New Purpose for the  
Corporation**



**How will organizations connect profit and purpose?**



## 20. Surprised Elites

- Consistently surprised by Brexit, Trump, Bolsonaro, AfD, etc.
- 90% of US internet publishing employees work in a county Hillary Clinton won in 2016.
- 73% of US internet publishing jobs are in the corridor including Boston, NY, Washington, and Richmond and the West Coast Seattle to San Diego to Phoenix.
- Of the 100 “thickest” bubble zip codes, 86 were in LA, Boston, the Bay Area, and NYC.



**Which assumptions should leaders now question?**

# 4 Scenarios for the 2020s

GRIN  
Tech  
Industries  
Takeoff

## Transition Trauma

New industries as oases of growth in slow growth economy  
Aging advanced economies struggle  
Significant economic deceleration in China  
Sovereign bankruptcy  
Young-Old social tension  
Significant efforts in many countries to increase birth rate

## Roaring 20s

Vibrant economic growth, especially in portions of the N11  
Rise of new industries  
Significant advances in AI, robotics, tissue engineering, gene editing, 3D printing  
Increased economic opportunity (for the smart and creative)  
Tech Titans as heroes  
Rapid social change  
Scarcity of strategic materials  
Significant competition for talent

Global  
Middles Class  
Accelerates  
Growth

Global Aging  
Decelerates  
Growth

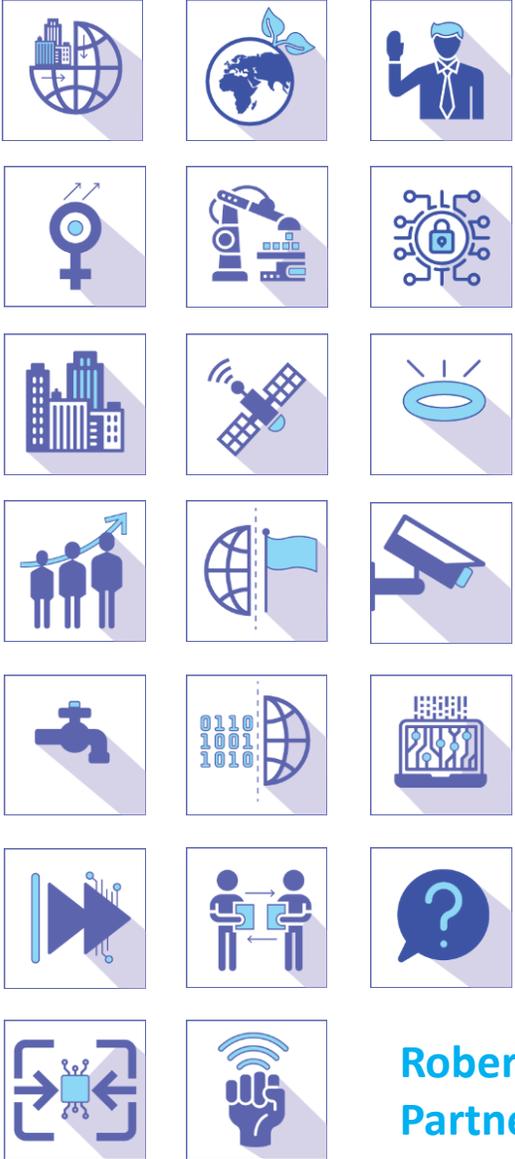
## Grayer, Angrier

Weak economic growth  
Aging advanced economies struggle  
Significant economic deceleration in China  
National efforts to increase demand / drive growth  
Sovereign bankruptcy  
Young-Old social tension  
Significant efforts in many countries to increase birth rate  
Massive income inequality  
Increase in "deaths from despair"  
Tech Titans as villains

## New Gilded Age

Strong Economic growth  
Massive efficiency gains  
Increased income inequality  
Tech Titans as villains  
Rebirth of Labor Unions  
Progressive politics / Anti-trust focus  
Social upheaval  
Scarcity of strategic materials  
Nativist, anti-immigrant politics

Shock  
Automation



**Robert Moran**  
Partner, Brunswick Group

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