

Trajectory Planning:

Explore six drivers of change influencing the future

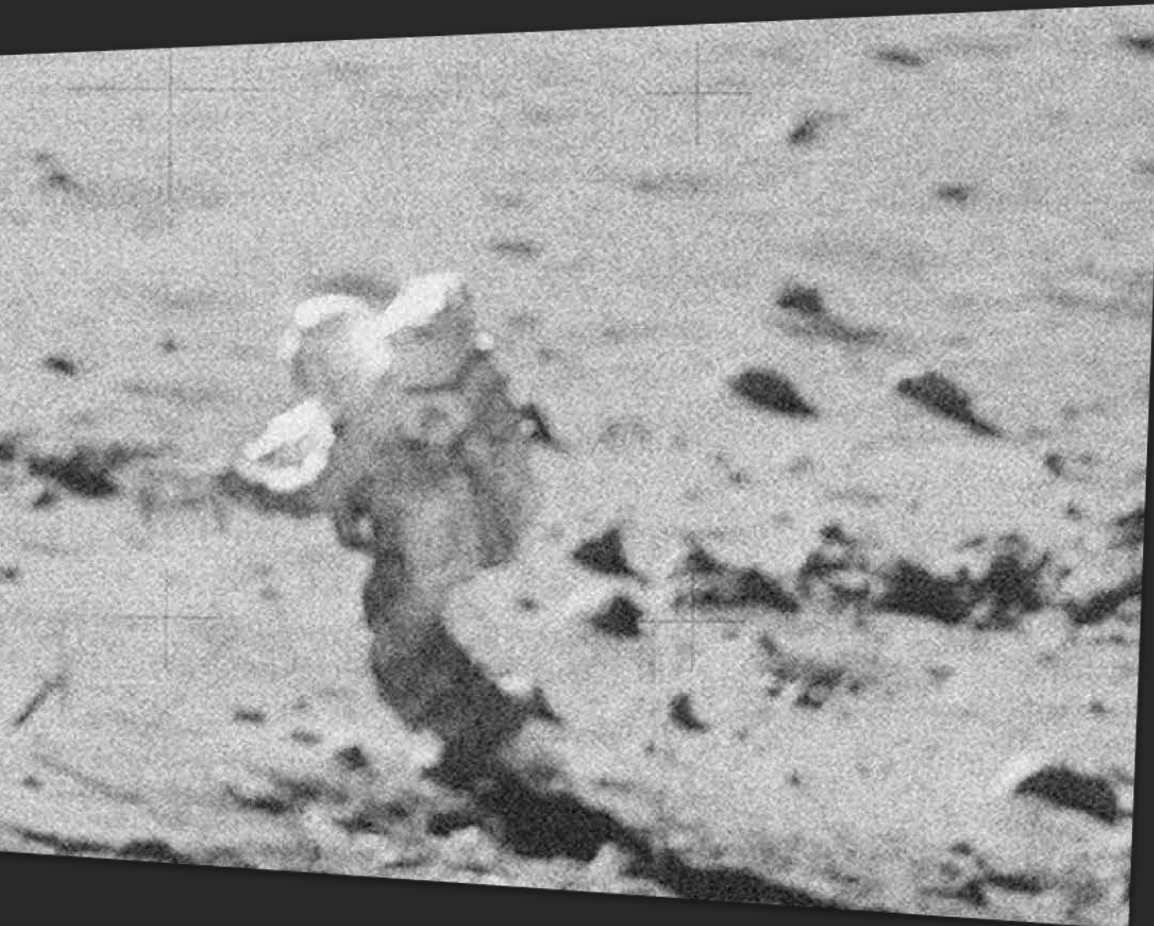
SEPTEMBER 2020

Zeus
Jones

As culture moves faster,
companies have to plan smarter.

*It's not enough to think
about short-term
trends. Instead, think in
long-term trajectories.*

Shape your world



Rigid planning timeframes are less relevant than ever. What you need today is an understanding of the forces that will drive long-term change and a vision that consists of multiple connected trajectories that ensure you will thrive in all of them.

By planning for multiple futures, you'll be ready for huge cultural, environmental and social shifts that may happen quickly. The goal of this Trajectory Planning work is to help you build paths that take you from the present to the future—so you can imagine and build proactively.

What do you want your trajectory to look like?

—Adrian Ho, CEO Zeus Jones

How might emerging *cultural forces* change your business?

To envision what the future holds, we look at emerging shifts across science, technology, infrastructure, demographics, economics, and the environment. And we use these to paint a picture of the future that might be.

There are four key steps in our trajectory planning process:

01. Explore the possibilities

What is the future landscape and what trajectories get us there? We answer these heady questions by analyzing 6 drivers at 3 different time intervals to understand possible outcomes.

02. Create a Future World

What happens when these multiple drivers come together? We explore this question by intersecting these trends and outcomes to understand possible futures.

03. Determine Implications

What are the implications for culture, for our category and our company? How will we best thrive in this future? Using a series of exercises we outline what this means for us.

04. Develop Roadmap

What internal capabilities, partners, and gaps can we identify? What do we already have or need to add to achieve our future state? Finally, we collaborate on creating the change model that will allow us to start acting towards that future, today.

This report is a sliver of the full process, but can still open your mind to new possibilities for the *future of your business*

PART 1

01. Explore the possibilities

What is the future landscape and what trajectories get us there? We answer these heady questions by analyzing 6 drivers at 3 different time intervals to understand possible outcomes.

In the first part, we'll lightly outline each of the six drivers, their trends and overall outcome, but for only one time interval

02. Create a Future World

What happens when these multiple drivers come together? We explore this question by intersecting these trends and outcomes to understand possible futures.

03. Determine Implications

What are the implications for culture, for our category and our company? How will we best thrive in this future? Using a series of exercises we outline what this means for us.

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 Demographics

 Economics

 Infrastructure

 Environment

 Technology

 Science

PART 1

In the first part of this report we'll walk through key trends that we're watching in each of the six major drivers of change.

For each driver we'll discuss how this driver is impacting the future and spotlight three trends that signal change.

How this driver will impact the future

Overview of what's happening in this driver over the next 5-10 years

Privatized solutions emerge to address the needs of *surging urban centers*

Public infrastructure systems are failing us, and citizens don't feel change is occurring at the pace they want and need.

The double hit of a global health pandemic & racism pandemic have exposed the gaps that exist within our society. From access to healthcare to the digital divide, these fissures are more visible than ever.

Over the next decade, privately-owned solutions will rise as companies attempt to solve our greatest infrastructure needs. Private companies will drive innovation in multiple infrastructure verticals, starting with education, energy and transit.

1



Megacities hold the global economic power

By 2030 there will be 41 megacities (pop 10 mil+) worldwide, the vast majority in Asia Pacific. As public and private investors pour dollars into these urban centers, the economic output of urban areas will proliferate.

2



Huge urban populations put strain on public health needs

Surging urban populations will place further strain on transit systems, schools, energy, access to drinking water, and health care. Inequities snowball as divides become even more stark.

3



Privately-owned infrastructure takes control of major metros

If dollars flowing into infrastructure startups continue, by 2025 we may see large companies increasingly control US urban centers.

Three key trends in this driver over the next 5-10 years

The driving
force of

Demographics

Huge values shifts are coming for families, the workforce, and the country

Over the next decade there will be continued tension between young and old generations, challenging familial infrastructures, the political balance of power and the face and voice of the U.S. workforce.

Younger generations are already bringing more progressive perspectives. They crave new approaches to healthcare, corporate and political transparency, and climate change. And they believe in a quality of life (e.g. work-life balance) that will redefine the American Dream.



The aging population outnumbers the young

The social construct of America shifts from one of mothers and fathers to one of caregiving as younger generations shoulder the burden of aging Boomers.



Youth populations becomes the majority, and they're largely minorities

Nearly 6 in 10 minority Americans are Millennials or Generation Z and younger, and they will soon be the largest voting block in the U.S.



Gen Z/Gen Y reshape what it means to work

They will build a workforce from a new set of values: lifelong learning, flexibility, and quality of life. They'll work with more freelancers, invest in re-skilling and empower their teams to work remotely to reduce pressures on some of the most overcrowded cities.

One to watch: Boomers might be aging but are not irrelevant

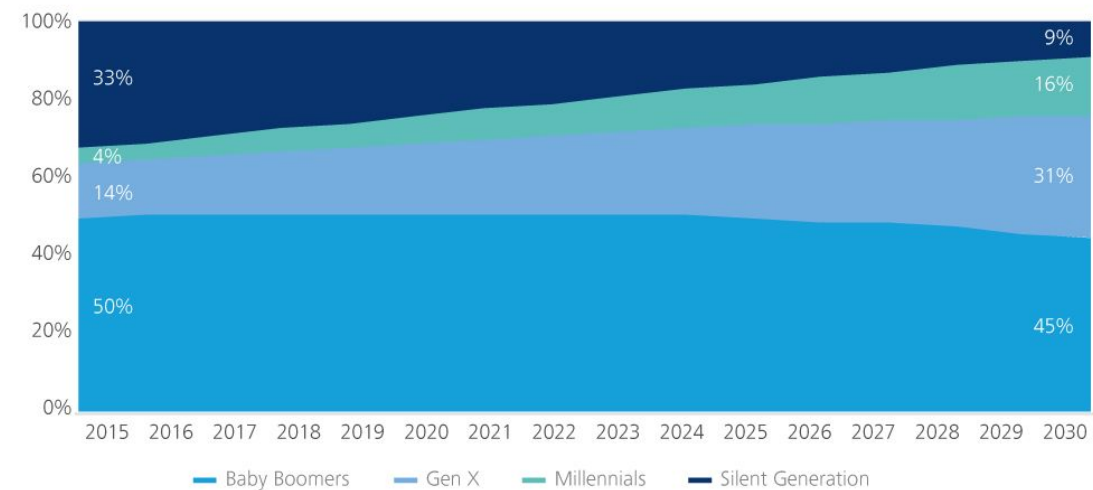
Baby Boomers have dominated the political, cultural and economic landscape for six decades. As they age it would be easy for brands to sunset this generation in favor of its younger counterparts — but that would be a mistake.

For the next decade Boomers will continue to hold the majority of the wealth in the U.S., commanding significant consumer clout.

Additionally, they are redefining what it means to age, from their post-career lifestyles to their perspectives on health and even dying. They have high expectations and refuse to compromise.



Figure 2. Generational share of net household wealth (percent)



Source: Deloitte Center for Financial Services.

Graphic: Deloitte University Press | DUPress.com

If 80 is the new 40, Baby Boomers intend to live every additional year with gusto, not settling for the nursing homes or retirement community convalescence of their parents' generation.



The driving
force of

Economics

The current U.S. economic crisis will *long outlast the pandemic*

Before the pandemic, our economy favored the wealthy, while masking the plight of the working class. The pandemic has lifted that veil as millions more joined the ranks of those struggling to make ends meet.

Moving forward, two key forces could help improve the future of the US economy: less partisan political discourse and a reduction in the wealth gap. Yet both are only projected to get worse.



Growth will be curbed for a decade

The US economy is predicted to shrink by \$8 trillion over the next 10 due to COVID's impact on health, employment, consumer spending, and business closures.

Minorities, women, and millennials will suffer the most - and collectively they make up 76% of the population.



US debt will continue to rise

Accelerated by \$2 trillion added in Q1 2020 for tax reductions and the CARES act; when it was already growing an average of \$1.2 trillion per year.

The **US is projected to drop to third place** behind China and India in economic power.



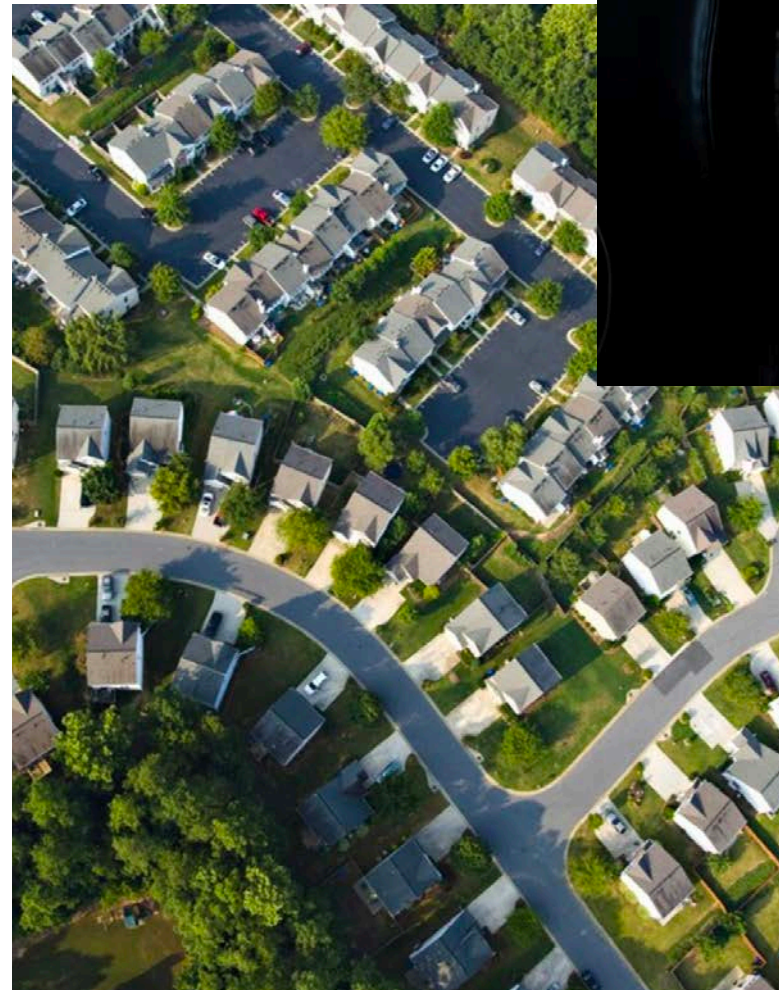
Job displacement will speed up

Safety concerns, changing preferences, and the need to cut costs drive faster adoption of automation displacement. As expected, this impacts minorities first, across the largest U.S. occupational categories - translating to ~40% of US jobs.

One to watch: We have the power to fuel inclusive growth

While the gender and racial wealth gaps feel forever-looming, we collectively have the power to change them. And it's in business's interest to do so, because closing both gaps will add \$5.5 trillion to the U.S. economy (attributable to increased spend on housing, consumption, and stock market investments).

By changing recruiting and hiring practices, expanding partnerships, lobbying for fair practices, and building in ways to lift up under-represented communities and workers, we can ensure the path to profit does no harm.



The legacy of gender and racial wealth gaps left by previous generations will be dismantled by the upcoming generations of leaders.



Universal basic income or a similar program will be enacted in response to uncertain government assistance during the pandemic and other crises, giving both women and minorities the boost they need to get ahead.

The driving
force of



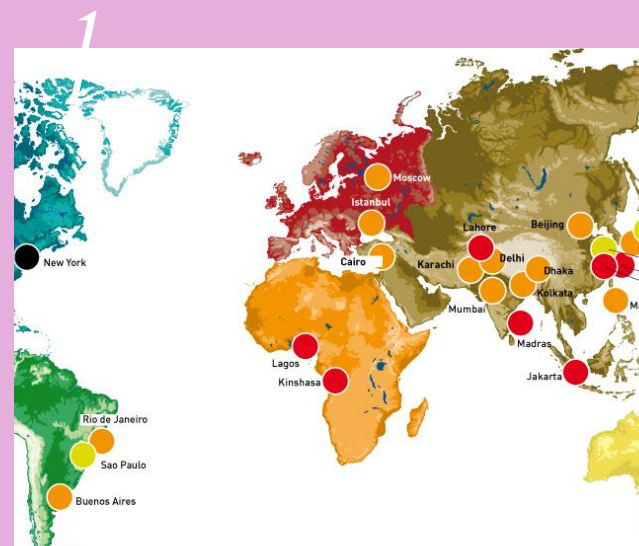
Infrastructure

Privatized solutions emerge to address the needs of *surging urban centers*

Public infrastructure systems are failing us, and citizens don't feel change is occurring at the pace they want and need.

The double hit of a global health pandemic & racism pandemic have exposed the gaps that exist within our society. From access to healthcare to the digital divide, these fissures are more visible than ever.

Over the next decade, privately-owned solutions will rise as companies attempt to solve our greatest infrastructure needs. Private companies will drive innovation in multiple infrastructure verticals, starting with education, energy and transit.



Megacities hold the global economic power

By 2030 there will be 41 megacities (pop 10 mil+) worldwide, the vast majority in Asia Pacific. As public and private investors pour dollars into these urban centers, the economic output of urban areas will proliferate.



Huge urban populations put strain on public health needs

Surging urban populations will place further strain on transit systems, schools, energy, access to drinking water, and health care. Inequities snowball as divides become even more stark.



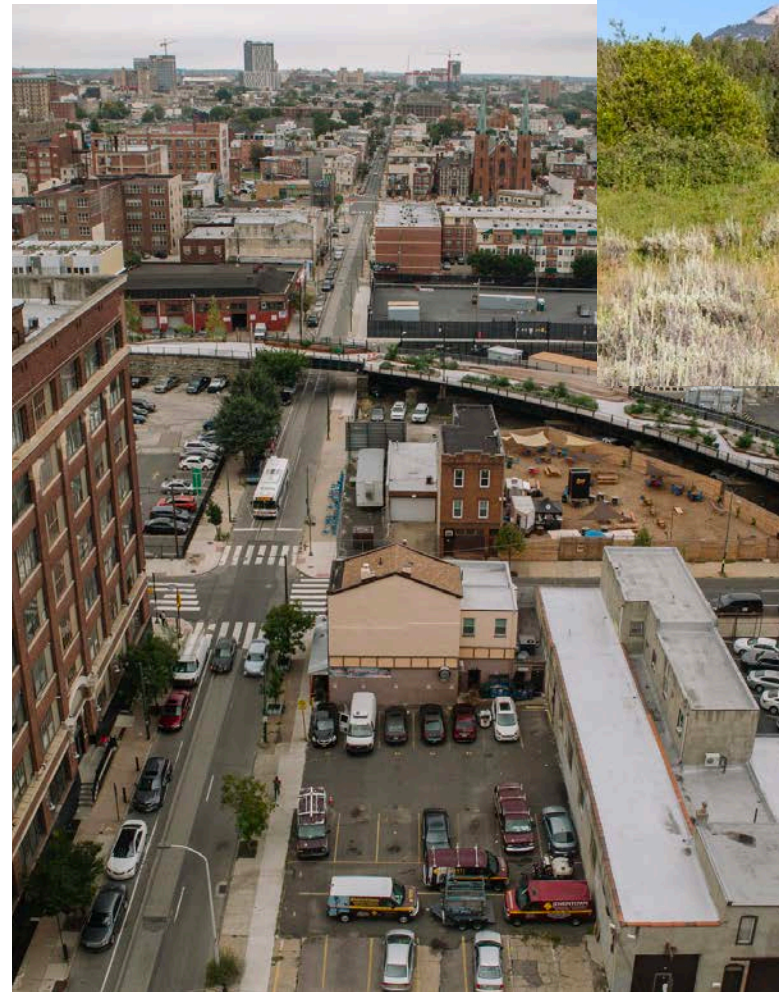
Privately-owned infrastructure takes control of major metros

If dollars flowing into infrastructure startups continue, by 2025 we may see large companies increasingly control US urban centers.

One to watch: Impact of COVID on the urban core

Prior to COVID, urban areas were gaining on key measures while suburbs were lagging behind in growth in education, income and home values. Urban areas hold much of the economic power and that trend showed few signs of slowing.

Preliminary evidence suggests that residents may be reconsidering their choices between cities versus suburbs and rural areas in response to the COVID-19 pandemic. However, it's too soon to see what the long-term impact will be, and some futurists predict cities will come back stronger than ever. Do not abandon urban strategies quite yet.



Both the pandemic and racial tensions have led some to reconsider their options – viewing the suburbs and rural areas as both safer and providing them with more space to weather the COVID-19 storm.

Nationally, the urban core traditionally accounts for around 75% of all purchase rate locks. During 2020 weeks 21-24, the urban core experienced year-over-year growth of 29% compared to 39% for non-urban areas.

The driving
force of



Environment

Positive behavioral change will accelerate through *more collaboration and innovation*

Climate change affects everyone, and human ingenuity is trying to catch up to the demand for change that has started to become mainstream. As the breaking point is reached, positive behavioral change will accelerate through more collaboration and innovation.

Businesses that want to succeed in the long run must act on this information today. How are we preventing global health crises? How are we accelerating innovation in clean, accessible water? How are we building cache as organizations that recognize and support group and individual behavioral change in support of environmental progress?



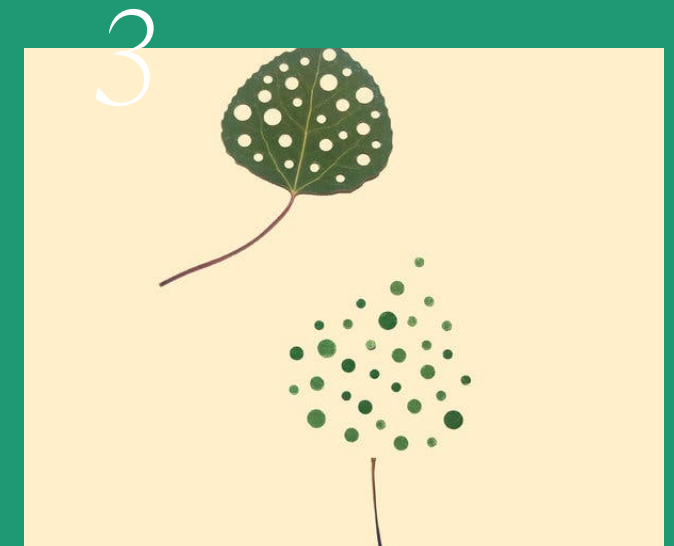
Climate change becomes a health epidemic and shifts perspectives on how to manage public health

Climate change has the potential to reverse the health gains from economic development that have been made in recent decades – not just through the direct effects on health, but through indirect means such as increased migration and reduced social mobility.



Fresh water becomes more unpredictable and then a coveted public resource

Glacier and mountain “water tower” melt is putting a huge portion of the world’s fresh water supply at risk. Even with an increase in rainfall and snow, scientists don’t believe we can replenish the fresh water supply.

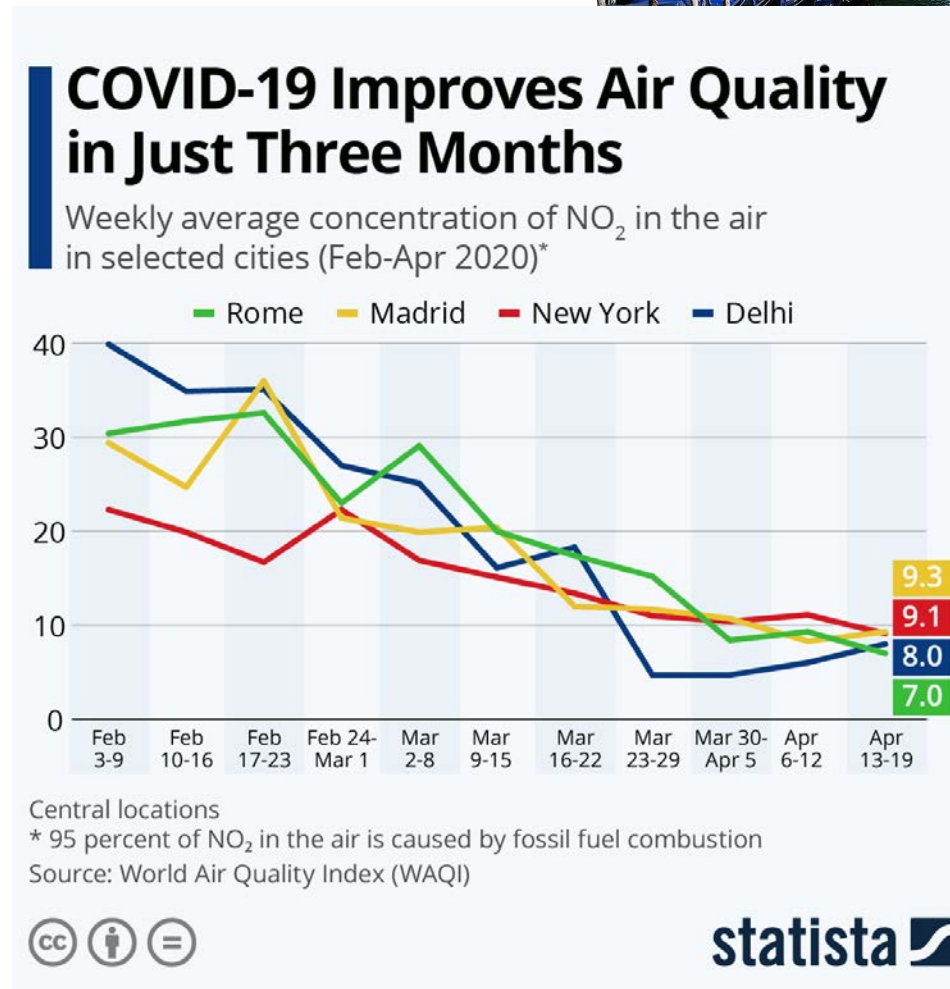
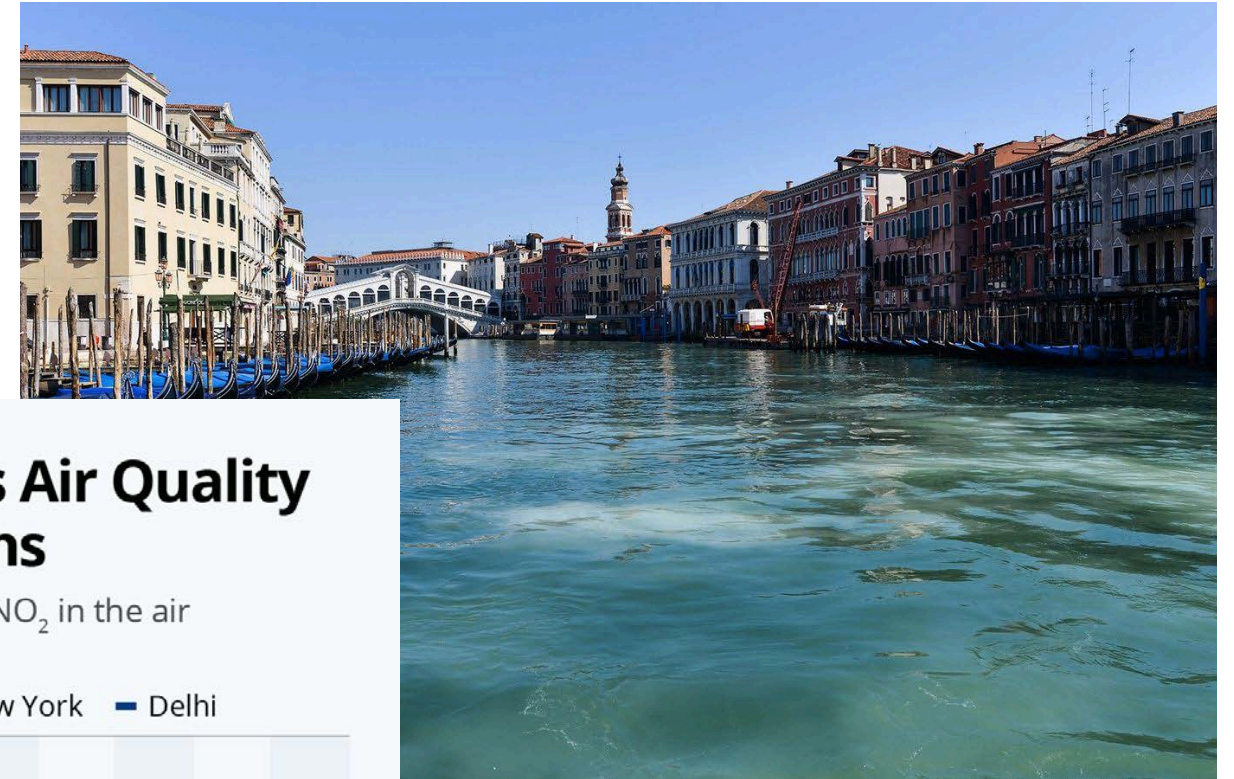


Climate offset behaviors become more extreme

In order to do their part, people will strive to find new ways to offset climate change. This means things like consuming less, traveling infrequently and adopting a plant-based diet. These behavior changes may push into water and air usage.

Don't be fooled by: Shut-down fueled rapid environmental recovery

The shut-downs that accompanied COVID-19 sparked comments about rapid environmental recovery in some places, proving to many that humans were capable of making change quickly. A silver lining in a destructive year. However, as folks push for a “return to normal,” that often translates into a return to environmentally destructive behaviors. This means that the trajectory of massive climate upheaval is still on pace - we must be more intentional in our efforts to make environmental progress.



There have been a myriad of misleading or false reports of ecosystems in tourist hubs (like Venice) recovering because the water is clearer or there were animals spotted. This shows how much education is necessary to make true progress - superficial (or false) changes are being interpreted as sustained improvements.

The driving force of

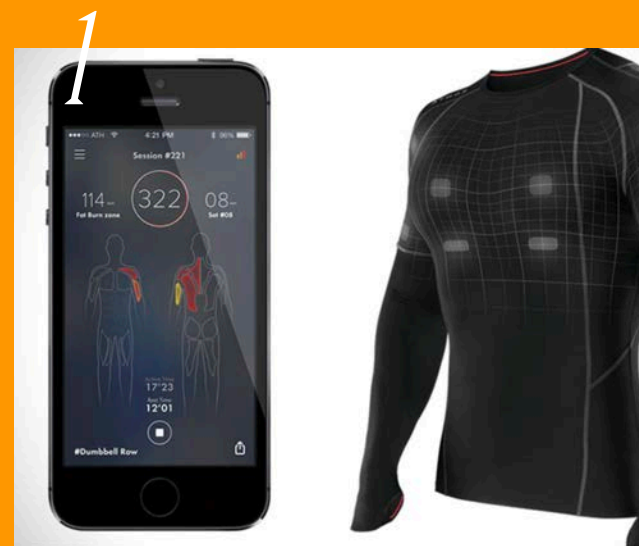


Technology

Technological advancements are expected and accepted, not adversarial

While data security and corporate transparency will ultimately require radical shifts in policies and legislation, younger generations have higher expectations of the benefits of technology and different thresholds for privacy.

Patterns are emerging that point to technology's ability to make us more human, connecting us across the globe, even as it makes us superhuman — extending our lives with wearable and implanted devices.



Technology and healthcare will continue to become more intertwined

Smart wearables will continue to improve and become more niche, delivering a broader set of health benefits, both superficial (athletic performance) and life-saving (heart or diabetes monitoring).



Technology will solve ever-more complex, and human, problems

By 2025, quantum computing will have outgrown its infancy, and a first generation of commercial devices will be able to tackle meaningful, real-world problems — such as accelerating product development and R&D for life-saving drugs.



Tech may be seen as enabler for humanity, rather than a barrier to it

COVID-19 accelerated the blurring of physical and virtual spaces, and in the next five years we'll see AI technology built to connect people at a human level and drive them closer to each other. We'll move beyond streaming to full-blown experiences.

One to watch: The future of work may not be digital (only)

COVID-19 forced millions of people to embrace remote work, to the benefit of tools such as Zoom and Slack that allow them to stay connected. Companies like Google, Facebook and others are already putting stakes in the ground about the staying power of remote work, and cottage industries have sprung up to service working from home and to smooth over disrupted corporate cultures.

While COVID-19 has shown us that it can be done, it's too soon to call it for remote work. Facebook declared 50% of its workforce would be remote in a decade, and then leased a 730,000-square-foot office in Midtown Manhattan. Other are making similar contradictory moves.

The reality will likely be somewhere in between—a new way of working that is personal to employees and the companies they work for.



Depending on who you talk to, remote work is either an asset or a hinderance. The reality is a little bit of both, and it's unlikely that a one-size-fits all answer will emerge.

The driving
force of



Science

Scientific practices and outputs re-engineer to not just fix *but make even better*

The realm of science is wide and far-reaching, but there is one common question across them: do we focus on repairing damage or do we focus on progressing forward?

While this question will remain, we believe that across the scientific community there will be a shift from making things as they were to making things better.

Businesses will need to look to a variety of sciences that will be writing the future of our planet, our food and even our bodies.



Sustainability science creates a new type of innovation in regenerative systems

Without new thinking, innovation will create progress but also large-scale setbacks. For example, full landfills due to planned obsolescence and easily replaceable products.



Food becomes non-organic...again

Genetically engineered foods (GMOs 2.0) will help combat nutrient deficits due to rising CO2 levels. Plus, a new era of food geopolitics: regulation will emerge to control gene-edited organisms getting into the wild, altering natural environments.



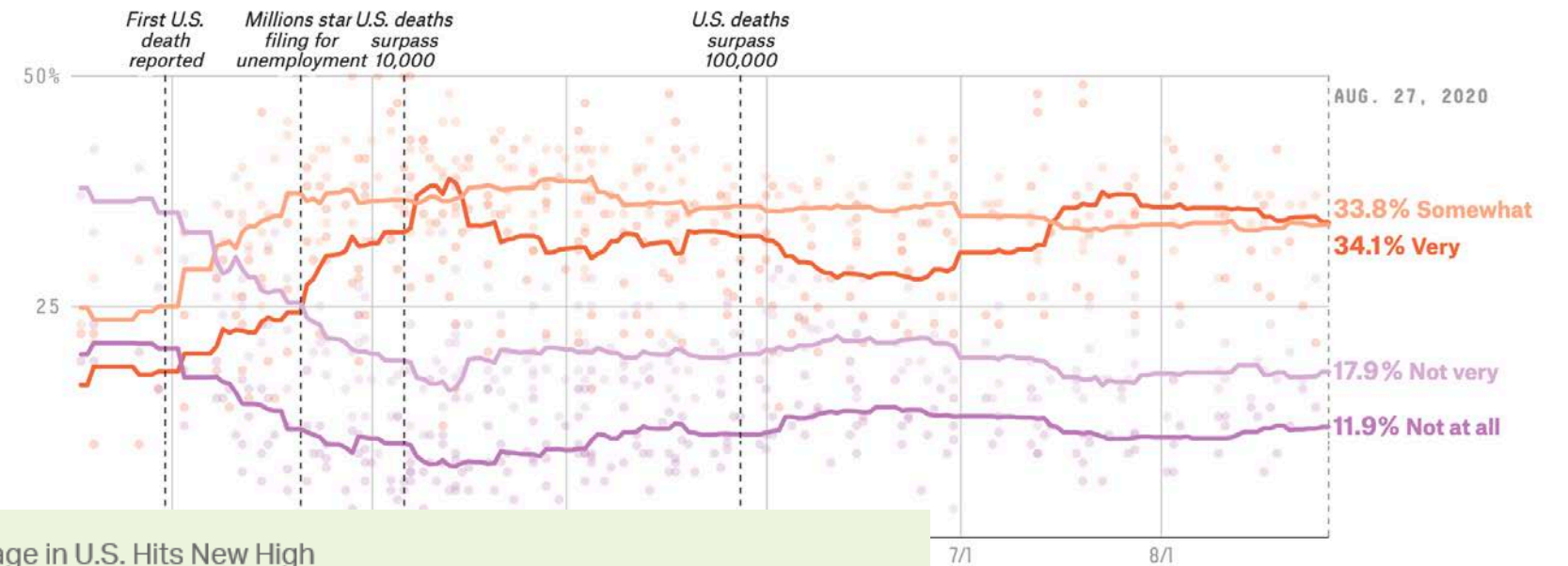
Rewiring human behavior at a genetic level

From gene-editing and bio-hacking to the emergence of synthetic bio (creating DNA and RNA from scratch) to editing entire species, medicinal and biological science will collide to not only “cure” issues but improve human weaknesses.

Don't be fooled by: Politicized views on epidemiology

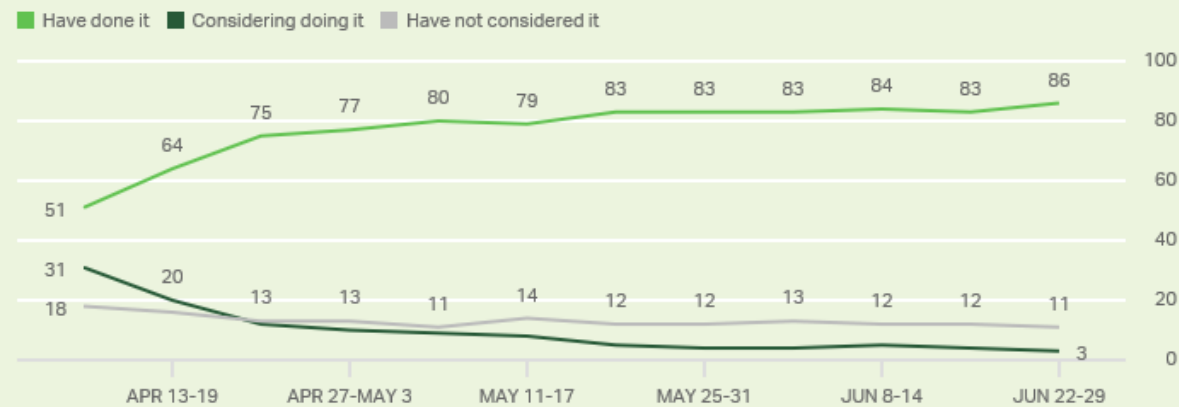
It took over 5 decades for public consensus on climate change to move from non-issue to a top issue. It took COVID-19 five months. Based on highly politicized, polarized and opinion-based coverage it may seem prudent to stay away from acting on science-based recommendations. Don't be fooled—act in accordance with what is best for your business (which is often to follow the lead of scientists) since public opinion on the matter may change dramatically in the course of weeks.

How worried are Americans about infection?
How concerned Americans say they are that they, someone in their family or someone else they know will become infected with the coronavirus



Face Mask Usage in U.S. Hits New High

There are some things people may do because of their concern about the coronavirus. For each one of the following, please indicate if this is something you have done, are considering doing or have not considered in the past 7 days. Worn a mask on your face when outside your home?



GALLUP PANEL

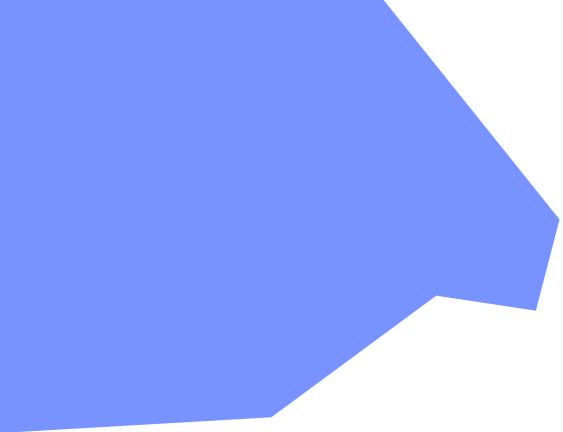
FiveThirtyEight's tracking on COVID-19 opinions shows a dramatic shift from non-issue to an active concern for most Americans in only 5 months.

According to most sources (self-reported and observed) most Americans are wearing face-masks on their own accord.



PART 2

How can you start
applying these lessons
to your business?



While we use a much more robust version of this research to inform our Trajectory Planning engagements with clients, we wanted to share a light version for you to begin applying yourself.

The following exercises are designed to help you see new opportunities for your business across the various intersections.

Were previous transformation planning exercises successful in your org? If not, why?

What are trends you're already seeing that you believe will have profound impact on the future of your category?

What capabilities are you building now that will help you ensure your business thrives in the future?

As a reminder, these exercises are a peek into the whole process, but start to make the possibilities more tangible and actionable

PART 2

01. Explore the possibilities

What is the future landscape and what trajectories get us there? We answer these heady questions by analyzing 6 drivers at 3 different time intervals to understand possible outcomes.

02. Create a Future World

What happens when these multiple drivers come together? We explore this question by intersecting these trends and outcomes to understand possible futures.

In this next part, we'll walk through the intersection process for one intersection and give exercises for you to do the rest.

03. Determine Implications

What are the implications for culture, for our category and our company? How will we best thrive in this future? Using a series of exercises we outline what this means for us.

We'll also give you a few prompts that start to push thinking about what might this future need to make this future possible OR to stop it from happening.

04. Develop Roadmap

What internal capabilities, partners, and gaps can we identify? What do we already have or need to have to achieve our future state? Finally, we collaborate on creating the change model that will allow us to start acting towards that future, today.

Finally, we'll give you a few prompts for you to ideate ways that your business could grow to answer these future needs.

The full process explores all 15 intersections.



	Demographics	Environment	Infrastructure	Economic	Technology	Science
Demographics		1	2	4	7	11
Environment			3	5	8	12
Infrastructure				6	9	13
Economic					10	14
Technology						15
Science						

Let's try one out. Evaluate this intersection by reviewing the signals and hypothesizing larger implications that could be the result of these intersections.

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DEMOGRAPHICS



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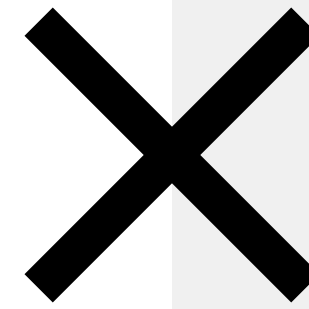
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ENVIRONMENT



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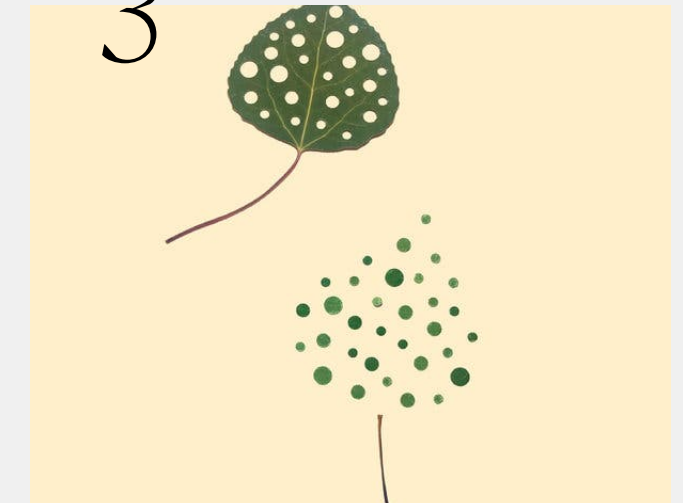
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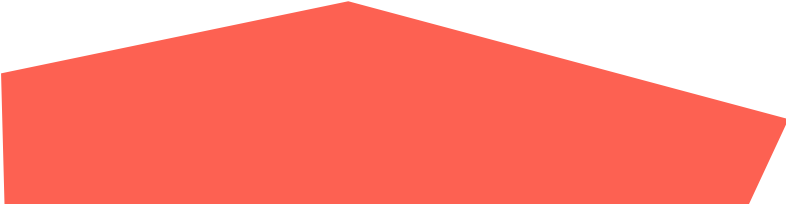


Step 1 - List out all the potential implications that could emerge based on the intersections. Look for implications at a few altitudes: Implications an individual might face; implications another business or industry might face, and problems a community or society might face.

Step 2 - What is the estimated timeframe for this to take place? (5, 10, 15 years)

Step 3 - Rank each implication in order of your conviction.


<i>Example: New generation of business leaders shift more corporate resources toward sustainability initiatives</i>	<i>5 years</i>	



Step 4 - Cut your list down to your top 5.

Step 5 - For each potential implication you've identified, brainstorm opportunities and solutions that your business could solve for.

Tip: It's key here to not limit yourself by the realities of your business today, rather consider: based on your business's values, core expertise, and industry, how might you make this future state a better place to be?



Step 6 - Cut your list down to your top 3.
What's the headline for each opportunity?

Step 7 - Why do you believe your business might be able
to address this?

Thank *you*

We hope this exercise gave you a taste of how we think about Trajectory Planning—and more importantly, sparked some ideas on future opportunities for your business.

We recognize how challenging it can be to get stuck focusing on the problems that face your business tomorrow versus thinking about how you can create your own future by focusing on long-term possibility.

We'll help you think through the big changes that could dramatically reshape your industry. And create a plan for getting ahead.

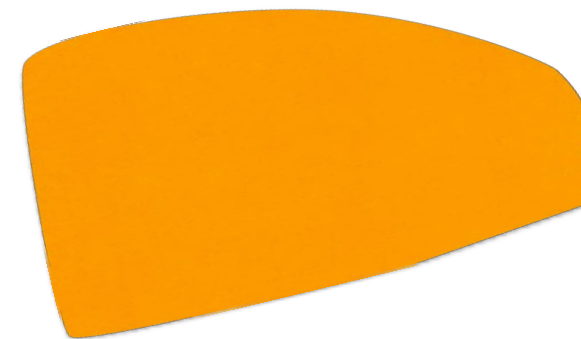
+1 612 279 1400 | hello@zeusjones.com

Want to know more about how we approach trajectory planning?

Learn more at zeusjones.com/trajectory-planning.

Interested in working together?

Let's meet up for a Live Scoping session. It's a free, no-strings attached workshop where we work with you to mutually understand a problem and outline a course of action to solve it, together. Learn more at zeusjones.com/live-scoping



Forecast Sources

Demographic

- U.S. DEPARTMENT OF LABOR WOMEN'S BUREAU STATISTICS
- CDC VITAL STATISTICS RAPID RELEASE PROVISIONAL DATA (BIRTHS) 2018
- U.S. CENSUS BUREAU POPULATION PROJECTIONS MARCH 13 2018
- PEW RESEARCH CENTER: GLOBAL ATTITUDES AND TRENDS
- PEW RESEARCH CENTER: FACT TANK
- POPULATION REFERENCE BUREAU'S POPULATION BULLETIN, "AGING IN THE UNITED STATES"
- NATIONAL INSTITUTE ON AGING
- CENTER FOR AMERICAN PROGRESS

Economic

- CONGRESSIONAL BUDGET OFFICE
- WORLD BANK AND THE INTERNATIONAL MONETARY FUND
- OXFORD ECONOMICS
- BUREAU OF ECONOMIC ANALYSIS
- UN DEPARTMENT OF ECONOMIC AND SOCIAL AFFAIRS
- THE CARNEGIE ENDOWMENT
- U.S. GLOBAL CHANGE RESEARCH PROGRAM: FOURTH NATIONAL CLIMATE ASSESSMENT
- THE NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION
- MCKINSEY GLOBAL INSTITUTE
- NATIONAL BUREAU OF ECONOMIC RESEARCH, CAMBRIDGE UNIVERSITY AND UNIVERSITY OF SOUTHERN CALIFORNIA
- CENTER FOR INTEGRATIVE ENVIRONMENTAL RESEARCH (CIER) AT THE UNIVERSITY OF MARYLAND

Infrastructure

- AECOM STUDY
- QUANTUMRUN FUTURE OF CITIES
- QUANTUMRUN FUTURE OF ED
- PWC ON PUBLIC-PRIVATE BLURRING
- LA'S METRO 2028 VISION
- EDUCATION BCG
- DISRUPTOR DAILY
- BUSINESS INSIDER
- CNBC
- FORBES
- CITYLAB

Forecast Sources

Environment

- ARS TECHNICA
- QUANTUMRUN
- PHYS
- CSS
- BIG THINK
- INTER-GOVERNMENTAL PANEL ON CLIMATE CHANGE
- WORLDBANK
- TELEGRAPH UK
- SCIENCE DAILY
- NOR
- CNN
- NATIONAL GEOGRAPHIC
- THINK PROGRESS
- GREEN FACTS
- SCIENCE NORDIC
- BBC FUTURE
- STANFORD
- THE GUARDIAN
- WE FORUM
- NEW YORK TIMES
- STATISTA

Technology

- GLOBAL TRENDS TO 2030 CHALLENGES AND CHOICES FOR EUROPE | EUROPEAN UNION INSTITUTE FOR SECURITY STUDIES (EUISS) | APRIL 2019
- WORLD ECONOMIC FORUM'S GLOBAL AGENDA COUNCIL ON THE FUTURE OF SOFTWARE & SOCIETY
- RSA | THE FOUR FUTURES OF WORK | MARCH 2019
- CCS INSIGHT | PREDICTIONS: 2020 AND BEYOND | OCTOBER 2019
- BILL GATES
- PIETER LEVELS | DUTCH PROGRAMMER, DESIGNER, AND ENTREPRENEUR
- DR IAN PEARSON BT'S FORMER FUTUROLOGIST NOW RUNS FUTURIZON, A FUTURES INSTITUTE.
- JOHN BRANDON | TECH REPORT INC.COM
- REINALDO NORMAND | CEO AND CO-FOUNDER OF INNOVALAB
- FAITH POPCORN | BEST-SELLING AUTHOR AND FUTURIST, FOUNDER AND CEO OF BRAINRESERVE,

Science

- APOLITICAL: EVIDENCE BASED POLICY-MAKING
- THE ATLANTIC: THE INEVITABLE EVOLUTION OF BAD SCIENCE
- EDGE: THE FUTURE OF THE MIND
- FUTURISM: BONE MARROW TRANSPLANT RESULTS IN DONORS DNA
- FUTURISM: NEW TRIAL BRAIN IMPLANTS FIGHT DRUG ADDICTION
- FUTURISM: THE LEAKED CRISPR BABY STUDY
- NOAA: CORAL REEF RISK OUTLOOK
- PHYS: COMPLEX QUANTUM TELEPORTATION ACHIEVED FOR THE FIRST TIME
- PHYS: AS CO2 LEVEL CLIMB, MILLIONS AT RISK OF NUTRITIONAL DEFICIENCIES
- QUANTUM RUN: OUR ENERGY ABUNDANT WORLD FUTURE
- QUANTUM RUN: SCIENCE BEHIND HUNGER
- QUANTUM RUN: TARGETTING PROTEINS TO COUNTERACT BINGE EATING
- SCIENCE DAILY: CANCER SURVIVORS PREDICTED TO NUMBER OVER 22 MILLION BY 2030
- SCIENCE DAILY: MACHINE LEARNING PREDICTS BEHAVIOR OF BIOLOGICAL CIRCUITS
- SILICON REPUBLIC: BREAK-THROUGH SCIENCE PREDICTIONS 2020
- STFC UKRI: THE FUTURE OF ASTRONOMY
- SUSTAINABILITY SCIENCE: THE FUTURE OF SUSTAINABILITY
- SCIENCE: A SOLUTIONS ORIENTED RESEARCH APPROACH
- VOX: CRISPER GENE EDITING
- WE FORUM: TECH LIFE PREDICTIONS FOR 2030
- WE FORUM: WHAT HAPPENS IF ALL THE CORAL REEFS DIE
- ZME SCIENCE: THE NEXT BIG THINGS IN SCIENCE 10 YEARS FROM NOW
- GALLUP
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