Future Change Drivers

10 drivers for the next 10 years
Global perspective 2022-2032
MW Global Foresight

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Director North America
March 2, 2022



What is a Change Driver?

A foresight change driver is a thematic cluster describing developing causes of change. It allows us to understand both the cause of what's happening in the world, and anticipate its larger implications.

While described separately here, change drivers collide, intersect and counter one another. They also impact different regions and parts of our business in distinct ways across various time horizons.

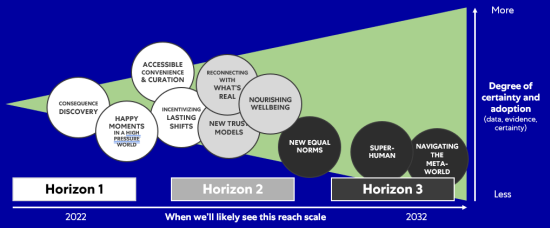
This work is broad and it is complex. But it is important to start at this macro level to see the flow of events that impact our future.

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How to use the Change Drivers.

1. As a starting point to understand how big global macro forces of change are impacting our business.
2. To pressure test and provoke our existing strategies and capabilities.
3. Choose areas to explore depending on gaps in knowledge, energy or synergy with existing strategies.
4. Dive deeper through prioritization & scenario planning workshops.

More macro	Macro Forces	Environmental and constant
	Change Drivers	Implications for plausible futures
	Shifts	Evolving implications for ~5 years
More micro	Trends	Discrete and concrete platforms
	Territories	Innovation platforms
	Signals	What we see emerging



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“When you were a kid, didn’t you ever fantasize that there was more to the world than what you were seeing?”

Niantic CEO John Hanke

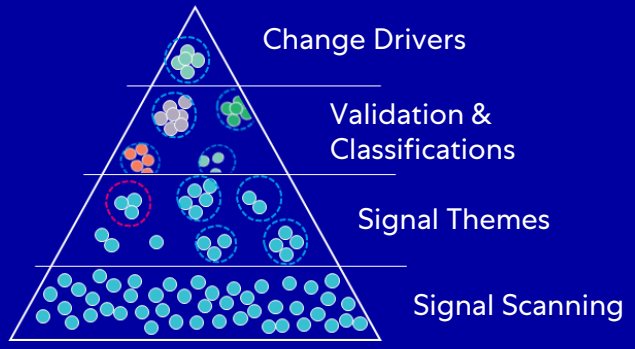
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Over a 6 week period the Foresight team mapped signals across the Global Consumption and Enjoyment landscape



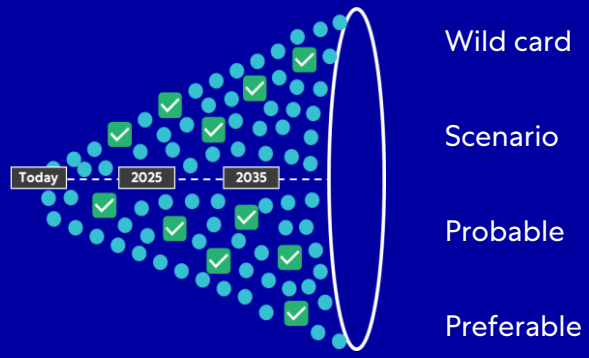
Research.

Global Horizon Scanning leveraging 200+ signals capturing macro and micro forces of change.



Analysis.

Foresight methodologies allow us to project into the short, mid and long term future.

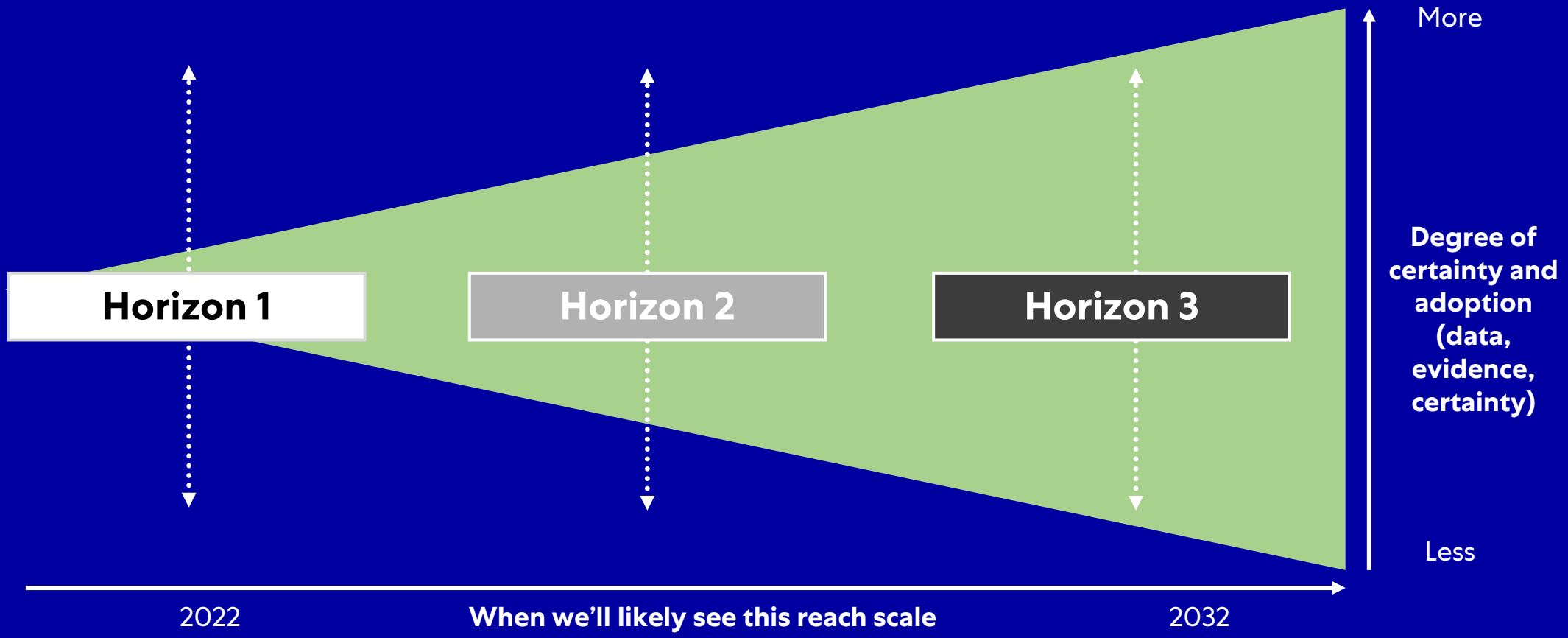


Stress test.

Cross-analysis through interviews with global and US experts.

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From this we have identified 10 of the most influential change drivers likely to impact our industry this decade.

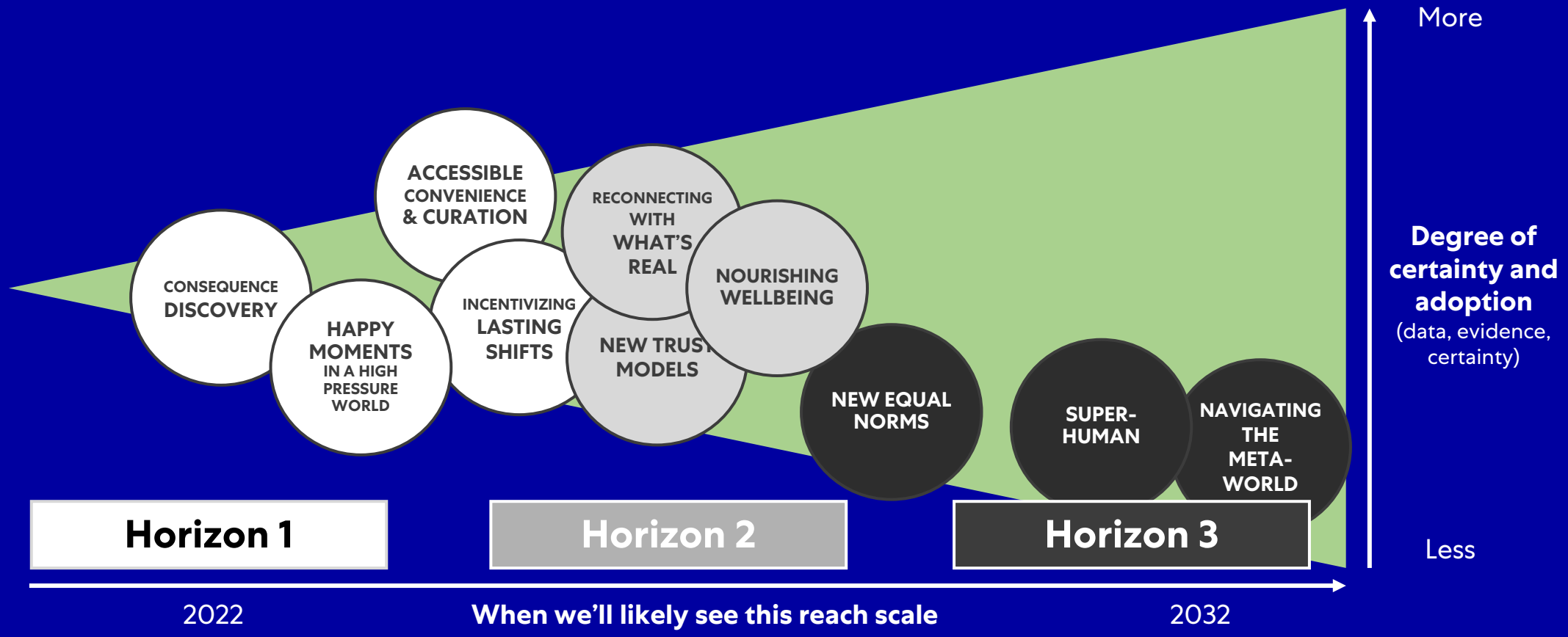


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🌍 **This is the initial global lens.**



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10 Change Drivers high level overview

In order of Horizon projection.



10 Consequence Discovery

Flaws in systems designed with consequences to people and planet come under spotlight.

HUMAN DRIVERS

- FEARING LACK OF SECURITY
- SHAME & GUILT
- SEEKING KNOWLEDGE & UNDERSTANDING
- SELF-AWARENESS

HUMAN BEHAVIORS

- TAKING CONTROL OF FOOTPRINT
- NAVIGATING GOVERNMENT INTERVENTION
- CONFRONTING WASTEFULNESS
- SEEKING VISIBILITY & TRANSPARENCY

Implication to Consumption & Enjoyment.

As a category bought on emotions, we exist to serve the spectrum of human emotional needs - including guilt and shame. As people become more in tune with those emotions and how they relate to the category, the consequences inherent in mindless and wasteful patterns of behavior for our products become more **visible**.

Leading factors.

LEADING MACRO FORCES.

environ-mental | **cultural**

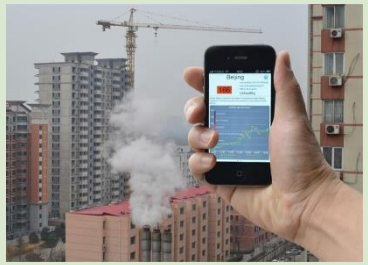
LEADING REGIONS.

DEVELOPED	DEVELOPING

Signals of change.



Eco-friendly and sustainable retail store designs



Water scarcity, air pollution and growing eco-anxiety about resources



Plastic reduction and added efforts to recycle and repurpose

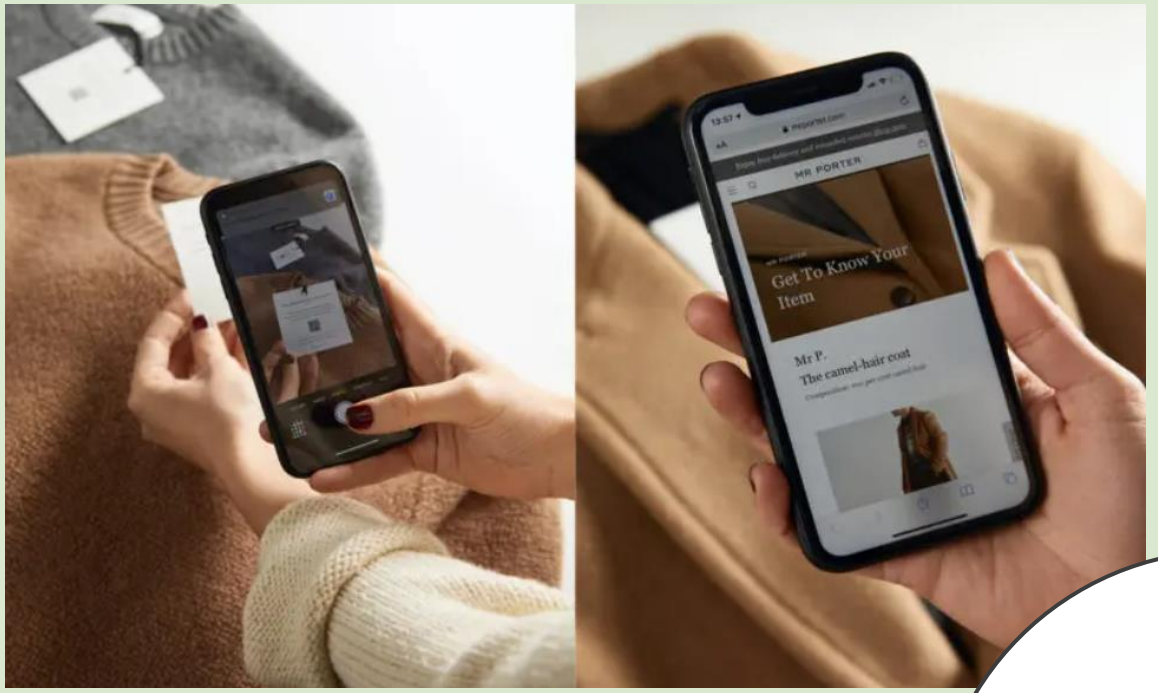


Upcycled and regenerative production practices that are planet friendly



Possible: a traceable future
Molecular barcodes.





CertainT is a platform from Applied DNA Sciences that tags fibers using a molecular identifier.

Almost two-thirds of customers want to be able to scan products with their phones to see more information.

MIT Technology Review 2021

9 Happy Moments in a High Pressure World

Exploring novel moments leading to safety, freedom and responsible hedonism amidst the chaos of our daily lives.

HUMAN DRIVERS

- EMOTIONAL SAFETY
- FREEDOM
- DISCOVERY & LEARNING
- BELONGING

HUMAN BEHAVIORS

- SIMPLE DECISIONS
- ESCAPISM / NOVELTY
- EVERYTHING ENTERTAINING
- LUXURY WITH MEANING

Implication to Consumption & Enjoyment.

Moments in our lives are likely to evolve after the hard reset of the pandemic. It may manifest itself through differing media consumption, search for novelty / **escapism** and exploring responsible hedonism. A common theme across these emerging moments are likely to be seeking help to reduce noise and clutter.

Leading factors.

LEADING MACRO FORCES.

cultural

economic

COUNTER TREND: Nourishing Wellbeing

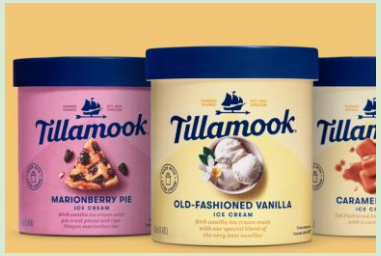
LEADING REGIONS.

DEVELOPED	DEVELOPING

Signals of change.



Focus on novel & unique experiences while seeking leisure



Responsible hedonism



Pivot in media consumption



Reducing noise / clutter



Probable: a future with more joy
Upscale vending.





"Cake ATMs" with individually wrapped slices shipped daily from **Carlo's Bake Shop** — the Cake Boss. US.

In the US, 88% of Gen Zers say that immersion is what makes an experience fun.

VICE 2022

"China's consumers are seeking unique experiences and 85% intend to spoil themselves"
Retail in Asia

For many years, quality and convenience have generally been two separate propositions. In the future, younger generations will gravitate towards products and services that meld both. Strategies that marry them will create a new form of brand engagement and loyalty.

SOON Futures

Human Intelligence

8 Accessible Convenience & Curation

Instantaneous access to everything, facilitated by technology and assistive intelligence.

HUMAN DRIVERS

- SECURING ESSENTIALS
- CONVENIENCE AND EFFICIENCY
- BEING PRAGMATIC ABOUT NEEDS
- MAINTAIN PHYSIOLOGICAL SECURITY

HUMAN BEHAVIORS

- RELINQUISHING CONTROL
- INCREASED EXPECTATIONS OF GETTING WHAT I WANT, WHEN I WANT IT
- OUTSOURCING EFFORT AND DECISIONS

Implication to Consumption & Enjoyment.

Instant gratification is becoming more accessible and convenient, so humans are being trained to expect more frequent and more instantaneous impulse satisfaction. Automation, predictive technology and assistive intelligence are allowing people to **relinquish control** of certain tasks and decisions, removing time consuming or mundane elements from peoples lives.

Leading factors.

LEADING MACRO FORCES.

tech

cultural

COUNTER TREND: Incentivizing Lasting Shifts

LEADING REGIONS.

DEVELOPED	DEVELOPING

Signals of change.



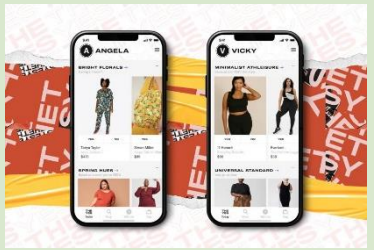
Automated, robotic and advanced shopping and delivery options



Faster and better performance conveniently delivered



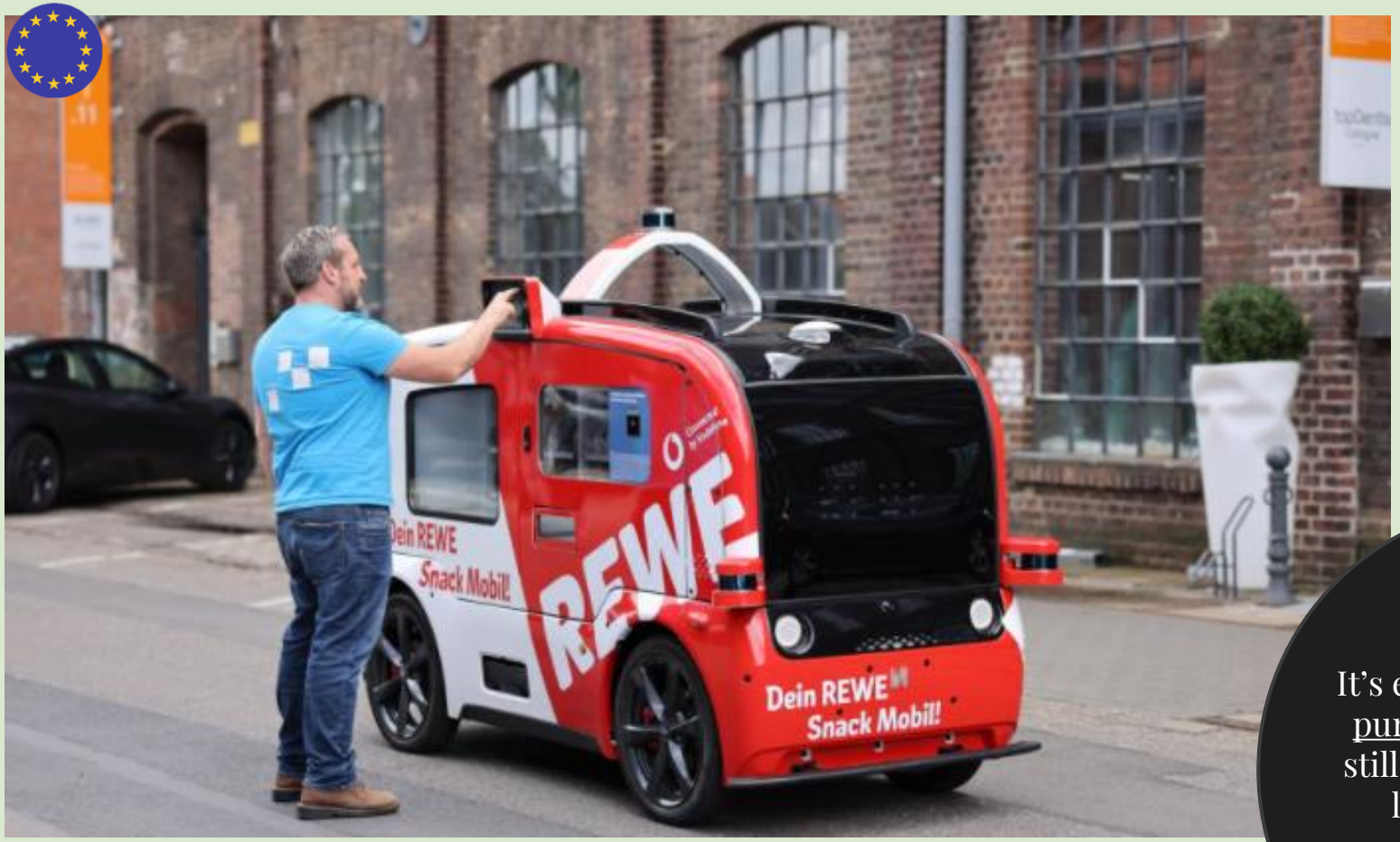
Hyper-personalization, including emotion and gaze recognition



Predictive and curated shopping, using AI which learns preferences



Possible: a hands-off future
Self-automated robotics



German supermarket **Rewe** partnered with Vodafone to trial a self-driving shop, Snack Mobil. Germany 2021.

It's estimated that 78% of purchases globally will still be made in physical locations by 2024.

Euromonitor 2020

7 Incentivizing Lasting Shifts

Creating and encouraging better habits and greater mindfulness.

HUMAN DRIVERS

- REGAIN CONTROL
- RECOGNIZE TRUTH OF BEHAVIORS
- GAIN KNOWLEDGE 4 INTELLECTUAL SAFETY
- SHOWING RESPECT AND CARE

HUMAN BEHAVIORS

- NUDGING TO POSITIVE HABITS
- TRACKING & MONITORING FOR AWARENESS
- GREATER MINDFULNESS
- LIFESTYLE CHANGES FOR ENVIRONMENT

Implication to Consumption & Enjoyment.

Our category is built to serve convenience, immediate satisfaction and affordable rewards. Because it is built on the idea that pleasure must be instant it is usually associated with decisions fraught with frivolity. As people start to gain control over their instinctive habits, and **make more educated and thoughtful choices**, consideration of our category will evolve.

Leading factors.

LEADING MACRO FORCES.

cultural **political**

COUNTER TREND: Accessible Convenience

LEADING REGIONS.

DEVELOPED	DEVELOPING

Signals of change.



Eco labeling & government systems to make better lifestyle choices



Smart wellness tech; apps, wearables and devices for better wellbeing habits



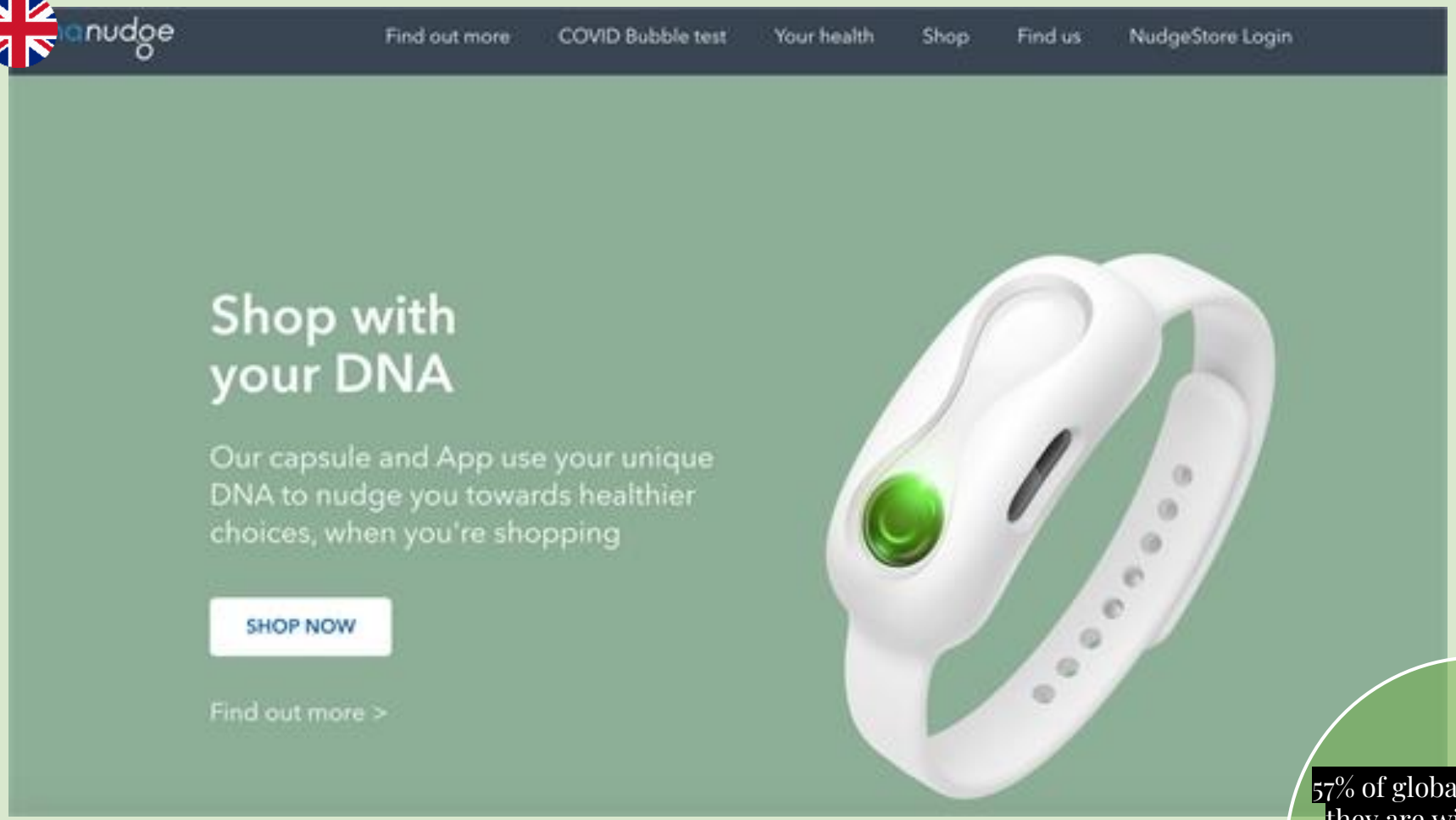
Nature positive, eco-friendly (climatarian and regenetarian) diet changes



Unlikely partnerships that help brands nudge positive behaviors around things like food waste reduction



Possible: a future guided
Shop with your DNA



Genetics-centric nutrition start-up **DNANudge** partnered with Waitrose, offering consumers a cheek swab analysing genetic traits regarding nutrition and their metabolism. UK 2019.

57% of global consumers say they are willing to change their buying habits to reduce their environmental impact.
National Retail Federation 2021

Four in five customers now want personalisation, demonstrating a huge surge in customer expectations.

Retail Insight Network 2021

6 Reconnecting with What is Real

Escape from digital illusion & get back to the physical world.

HUMAN DRIVERS

- SEEKING CONNECTION
- SELF RESPECT AND CARE
- MAINTAIN PHYSIOLOGICAL SECURITY
- SELF-AWARENESS

HUMAN BEHAVIORS

- LIMITING DIGITAL USAGE
- SEEK FOR MEANINGFUL CONNECTION
- GET CLOSER TO NATURE
- FOCUS ON PHYISCAL EXPERIENCE

Implication to Consumption & Enjoyment.

As people are enjoying the convenience and excitement brought by technology, constantly people are reflecting on their behavior and finding ways to **reconnect to nature** and the **people** around us. What does it mean for our category if people are readjusting their consumption and enjoyment moments between the virtual and physical world?

Leading factors.

LEADING MACRO FORCES.

cultural

technolo-gical

COUNTER TREND: Navigating the Meta-world

LEADING REGIONS.

DEVELOPED	DEVELOPING

Signals of change.



Products 'sourced from the earth'



Digital Detox/ Disconnecting from tech



Focus on my physical body; functional wellbeing



Reconnecting with nature / home arts and crafts



Plausible: a hands-on future
Bio-focus



Nine out of ten people believe human touch is key to happy and fulfilled lives.

Beiersdorf, 2021

Trips that involve walking, hiking and generally being in nature have been amongst the most in-demand activities since the pandemic began.
Booking.com 2021

Global Emerging Markets

Carrefour's first BIO store, featuring a café and an in-store hydroponic farm. UAE 2022.

2022 could mark the end of stores primarily focusing on transactions as shoppers pursue retail experiences with a human touch and sensory elements.

Stylus 2022

Human Intelligence

5 New Trust Models

With increasing clutter and lack of trust, exploring a world with more authentic people like ‘me’.

HUMAN DRIVERS

- BELONGING
- SEEKING SECURITY
- REBELLION & LEARNING
- SEEKING TO TRUST

HUMAN BEHAVIORS

- SEEKING TRUTH
- POSITIVE COMMUNITIES / PEOPLE LIKE ME
- LACK OF CONFIDENCE IN SYSTEMS
- MEANINGFUL RELATIONSHIPS

Implication to Consumption & Enjoyment.

The agents influencing our consumption choices are likely to change significantly from a position of prestige to one of **trust** and authenticity. As we seek newer trust models, this will manifest in enjoying micro-moments in our micro-communities.

Leading factors.

LEADING MACRO FORCES.

cultural **political**

LEADING REGIONS.

DEVELOPED	DEVELOPING

Signals of change.



Transparent treats that give back / are responsibly sourced



Rise of community commerce



Micro-communities / cultures



Decentralized currencies and business models



Plausible: a communal future
Decentralized ownership



Fries Dao is a decentralized social experiment where a crypto community builds and governs a fast food franchise empire.

The world is currently undergoing a crisis of trust, and every organization must act.
Marc Benioff, Salesforce

8 in 10 ten U.S. businesses anticipate selling on social media within the next three years.

Statista 2022

4 Nourishing Wellbeing

Actively prioritizing the self; listening to what connects us to true meaning & happiness.

HUMAN DRIVERS

- EMOTIONAL SAFETY
- RESPECTING MYSELF
- RECOGNITION OF UNHEALTHY R'SHIPS
- SEEKING GREATER PURPOSE

HUMAN BEHAVIORS

- SELF CARE FOR BODY, MIND AND MOOD
- SEEKING BALANCE FOR LIFE'S PRIORITIES
- SLOWING DOWN
- MEANINGFUL SOCIAL CONNECTION

Implication to Consumption & Enjoyment.

Our category is a **quick happiness fix t**o any problem. Without fail it offers release, a moment of joy, a little bit of escape. But it is created on set, ingrained routines and rituals that are often associated with guilt and unhealthy cycles of dependence. As people look to a variety of new products that offer **nourishment**, how can we ensure we remain relevant?

Leading factors.

LEADING MACRO FORCES.

cultural **tech**

COUNTER TREND: Happy Moments in a High Pressure World

LEADING REGIONS.

DEVELOPED | **DEVELOPING**

Signals of change.



Micropreneurship, the start up boom and being your own boss



Psychedelics and experimental wellness



Open fragility and recognition that things are not perfect

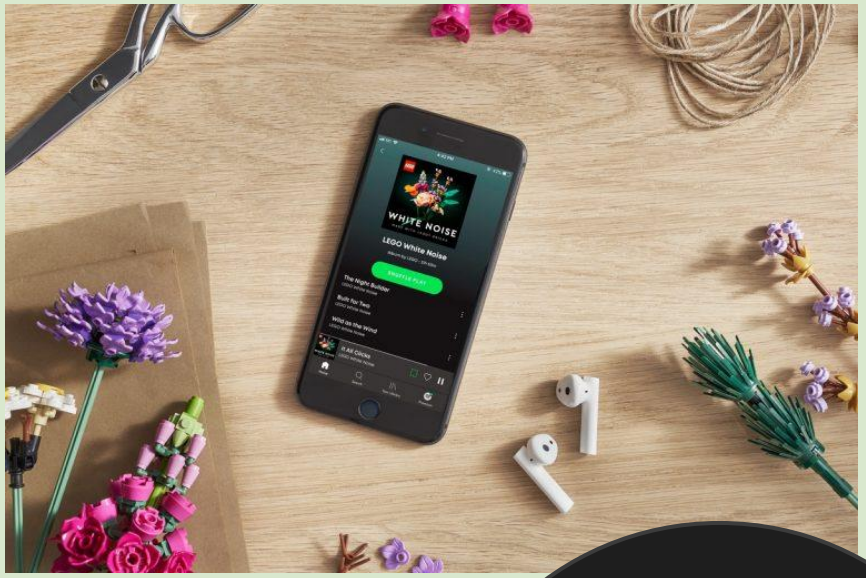


Slowing down and listening to what the body needs / intuitive eating



Possible: a purposeful future
Calming aids





LEGO releases White Noise album, soothing ASMR noises of its bricks clicking against one another. 2021.

Half of working adults said they experienced increased anxiety, work stress, or difficulty finding a work-life balance, as a result of the pandemic.

WEF 2020

3 New Equal Norms

Addressing systemic injustices that form standards of living around the world.

HUMAN DRIVERS

- RESPECTING OTHERS
- RECOGNITION & SELF-AWARENESS
- SEEKING EQUALITY & CARING
- TRUST & SAFETY

HUMAN BEHAVIORS

- DIVERSIFICATION OF VOICES
- BRIDGING DIVIDES WITH TOLERANCE
- QUESTIONING WHO IS IN POWER
- FIGHTING FOR FAIRER SYSTEMS

Implication to Consumption & Enjoyment.

2020 accelerated awareness around global divides in access to basic human rights. Issues around food scarcity, poor access to nutrition, racial justice movements, growing wealth gaps, social and economic biases are on display. Consumers now expect brands to take part in fixing what some see as a **broken system**.

Leading factors.

LEADING MACRO FORCES.

political | **environmental**

LEADING REGIONS.

DEVELOPED	DEVELOPING

Signals of change.



Food sovereignty, food justice and teaching skills of self sufficiency



Wealth divide and gap between the haves and have nots



Questioning big brand action and long standing capitalist models



Empowering women and minorities for equal opportunity



Possible: a responsible future
Diverse showcase





Pop Up Grocer has a highly curated showcase focused on smaller brands. US.

"I've made it clear that current rapid delivery business models are guaranteed to fail."

Brittain Ladd, a former Amazon exec and supply chain consultant.

“We’ve seen that the future is going to be things being delivered, and that doesn't look so good for the future, if you're doing it the way it's done today.”

Zach Rash CEO and co founder of Coco

2 Superhuman

Expanding sense and experience enabled by technology.

HUMAN DRIVERS

- STATUS & EGO
- LIVING LIFE TO THE FULLEST
- SEEKING CONTROL
- EMOTIONAL SAFETY

HUMAN BEHAVIORS

- MOMENTS & OCCASIONS NOW VIRTUAL
- ENHANCEMENTS AND AUGMENTS
- PHYGITAL LIVING & VIRTUAL ESCAPE
- SYNTHETIC AND GENETICALLY CREATED

Implication to Consumption & Enjoyment.

Breakthroughs in medicine, human performance and materials science are enhancing people's sense and experience. What will it mean when the category moments, drivers and transactions that we know today become little by little augmented, so they no longer resemble the traditional definitions we build our business around?

Leading factors.

LEADING MACRO FORCES.

cultural tech

LEADING REGIONS.

DEVELOPED	DEVELOPING

Signals of change.



Acceptance of synthetic biology and what is genetically engineered



Internet of the senses and digital / physical worlds colliding



Integrated wearables and augmentation of our bodies



Genetically personalized products



Possible: a future hacked
Internet of the Senses



Haptic vests by start up **Owo** allow you to feel different sensations from the rain, to a gunshot, to a hug. 2022.

The current moment—in which we are learning to manipulate molecules, engineer microorganisms, and build biocomputing systems—is the start of a new era in the evolution of civilization: the Biological Age.

Amy Webb, WIRED 2021

1 Navigating the Meta-world

Adapting to a blended reality world, with virtual identities, hybrid living and digital ownership.

HUMAN DRIVERS

- BELONGING AND CONNECTION
- FREEDOM
- STATUS AND RECOGNITION
- SECURITY

HUMAN BEHAVIORS

- VIRTUAL IDENTITIES REFLECTING VALUES
- FEELING PRESSURE TO 'KEEP UP'
- SEEKING NEW WAYS TO CONNECT
- ADAPTING TO CHANGING CONTEXTS

Implication to Consumption & Enjoyment.

As the metaverse becomes part of people's day-to-day life, encompassing digital possessions, relationships and social spaces, consumption and enjoyment will be catered for as much through the immersive virtual universe as in the physical world. The human compulsion to reveal style and status through possessions will adapt to the virtual economy, with joy coming from buying and flaunting digital assets. Moreover, digital proxies offer a virtual escape, with avatars taking part in enhanced experiences and forming part of online communities – **free from the constraints** of physical geography.

Leading factors.

LEADING MACRO FORCES.

social **tech**

COUNTER TREND: Reconnecting with What's Real

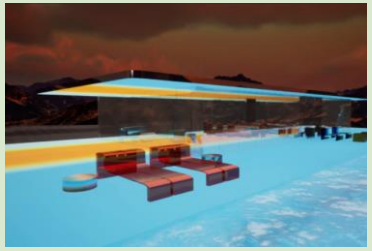
LEADING REGIONS.

DEVELOPED	DEVELOPING

Signals of change.



Virtual idols and AI influencers



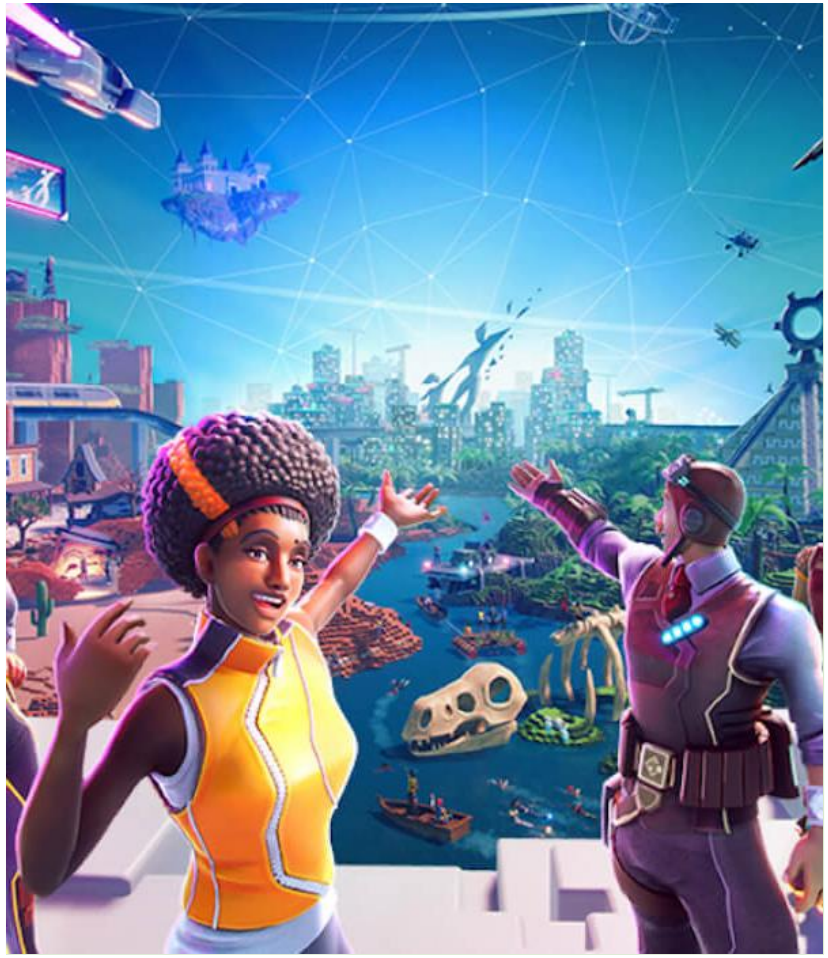
NFT revolutionizing digital ownership, virtual products and possessions



Meta worlds that compliment IRL experiences like eating



Virtual events, socializing and networking with enhanced experiences



Plausible: an unbound future
Meta food market



Carrefour sets a strategy to 2026 in becoming a “global leader” in digital retail, including the launch of an address in The Sandbox. France 2022.

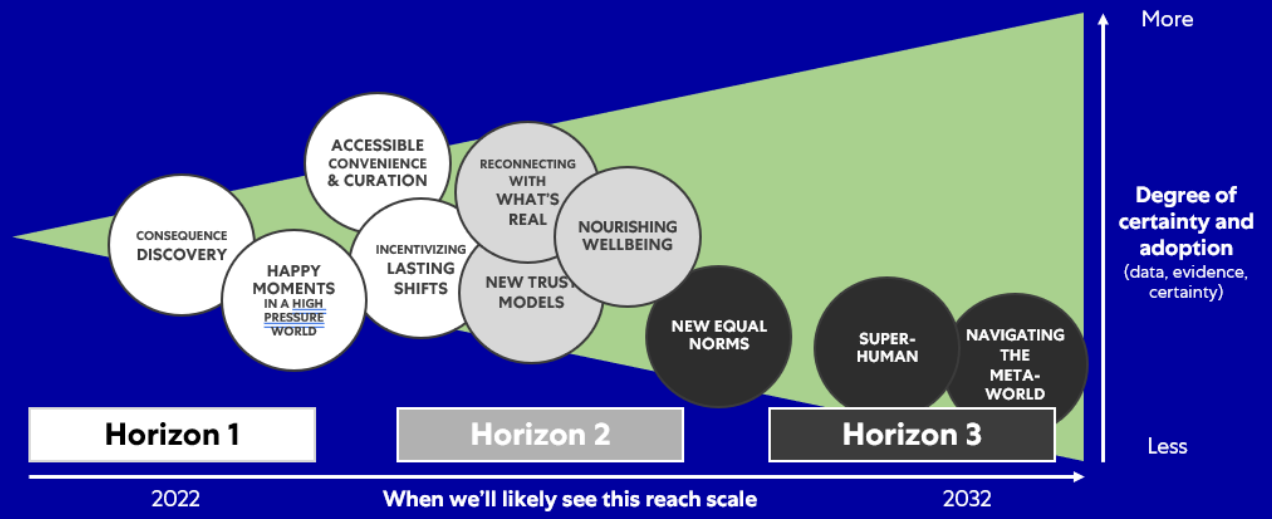
There will be no clean Before Metaverse and After Metaverse
Matthew Ball, venture capitalist and Metaverse expert

“All the building blocks are already in play, the next step is assembling these into meaningful products and experiences.
Steve Koenig, VP of research, Consumer Technology Association

“This is a much bigger change than people realize. You’ve got to go back to the Industrial Revolution to find a change of this degree. A lot of the big players that didn’t get it, frankly are now disappearing.”

Mark Pilkington Author, Retail Recovery 2021

There are many implications and opportunities for us, to be able to better serve future human needs.



Knowledge through traceability	Connection through nature positive initiatives	Respecting others through re-thinking our models
Escapism through meaningful indulgence	Belonging through trusted micro communities	Progress through synthetic biology
Pragmatism through predictive AI	Emotional safety through aids to slow down	Freedom through boundless hybrid realities
Self-respect through genetic nudges		

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