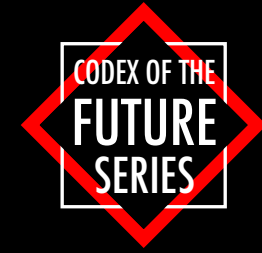


311 INSTITUTE

ANNUAL TRENDS CODEX

3RD ANNUAL EDITION . BOOKLET 4 OF 7



SOCIETAL TRENDS

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CONSUMER BEHAVIOURS

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WORKFORCE

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SUPPLY CHAIN

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311 ANNUAL TRENDS CODEX



ABOUT THE AUTHOR

Matthew Griffin, multi-award winning geopolitical advisor, leadership coach, and Futurist, and 15 times author of the smash Codex of the Future series, is described by his clients as a "Walking encyclopedia of the future" and a "Futurist polymath." Matthew is the Founder and Futurist in Chief of the 311 Institute, a global Futures and Deep Futures advisory looking up to 50 years out, as well as the World Futures Forum and XPotential University - two philanthropic organisations whose mission it is to solve global inequality and the world's greatest challenges.

Regularly featured in the global media including the AP, BBC, Bloomberg, CNBC, Discovery, Forbes, Khaleej Times, RT, the Telegraph, ViacomCBS, WIRED, and the WSJ, Matthew's ability to identify, track, and explain the impacts of hundreds of exponential emerging technologies and trends on global business, culture, and society is unparalleled.

Recognised as one of the world's most renowned futurists, disruption, foresight, and strategy experts Matthew is an international advisor and keynote speaker who helps the world's most respected brands, governments, investors, NGO's, and royal households, explore, envision, and shape our collective future.

BE BOLD .

MAKE FIRST CONTACT .



PROUDLY BUILDING THE FUTURE WITH ... & MANY OTHERS

ABB

accenture

AXA

BCG

Disney

DP WORLD

NOKIA

NOVARTIS

sky

standard
chartered





WELCOME FROM THE AUTHOR

PEOPLE . PLANET . PURPOSE . PROSPERITY

THE SKELETON COAST . NAMIBIA . 19.9873° S, 13.2605° E

I chose this striking image to represent this section because in many ways it's representative of many of today's realities: The Skeleton Coast is complex and unpredictable, but home to an amazingly adaptable ecosystem, yet it's also representative of the stark contrast between the have and have nots, those with water and other resources and those without, our increasingly polarised society, and even the contrast between our habitable blue planet and the desolation of space. The desert and the sea are also relentless, just like the human spirit, and given the right conditions they can overcome everything in their path, just as humanity can when we work together for the benefit of everyone to create a brighter future for all of us.

THE **311 Annual Trends Codex** contains explicit details about hundreds of trends that affect everything you care about - whether that's you, your business, your industry, your country, our planet, or all of them. Designed to be a one stop shop for everything that's trendy and trending it also contains everything you need to run your very own strategic foresight programs, model scenarios, and develop actionable initiatives and strategies to help you rule the future like a boss.

Furthermore, as our main trends Codex grows exponentially larger I've taken the liberty of splitting it into separate **Minibooks**, like this one, that make it easier for you zero in and focus on only the categories of trends that matter to you.

Most trends are like tides - relentless forces that are hard to control or influence. And, just like tides they can impact a great many things - both directly and indirectly. Having written Codexes that cover the latest emerging technologies and the latest disruptive business thinking, innovation, and strategy, I felt that creating the trends Codex was a natural next step to compliment them, and ergo provide you with a valuable expert set of resources that contain everything you need to design, debate, create, and shape your own future.

This Codex, like all my others, is a living book, it's always being updated with the latest trends and information so that you always have access to the

latest insights and research, but perhaps its biggest benefit is that you can see every trend for everything in one place. This is important because since everything in our world is connected, as I've shared many times during my keynotes, this convenience allows you to easily stay abreast of changes in individual regions or sectors, technologies or trends - any one of which could impact the things you care about, even if the changes occur in areas that at first you don't think are relevant to you.

A simple but powerful example of this are the changes we see in the Energy sector where new energy generation and distribution technologies and trends are impacting everything from the business models and product development in the Transport sector, corporate ESG initiatives and Government policy making, climate change and other environmental trends, as well as the multi-trillion dollar investment portfolios of the global Financial Services sector - and far beyond.

No other trends book puts so many trends across so many categories, lines of business, and sectors in one place, or makes them so accessible, and that you might say is this book's USP. That is, of course, if tens of thousands of insights and statistics at your fingertips aren't enough already!

Explore More,

Matthew Griffin
Founder and Futurist in Chief



USING THIS TRENDS MINIBOOK



WITH SO many trends shaping our world and with more emerging all the time it's easy to get overwhelmed and fail to grasp their individual and collective impact on the things you care about. As a result I've done my utmost to make this Minibook, which is a verbatim extract from my main **311 Institute Annual Trends and Foresight Codex** and that you can download in full from our company website, as easy to use as possible.

In this section you can learn more about how to use the Trend Sheets to get the information you need, and can see the complete list of trends included in this minibook - with more being added all the time.



CLIMATE CHANGE

2ND YEAR ON THE LIST



QUICK TAKE

Scientists saw it coming in the 1950's. They called it out and made films about it in the 1980's. And now, over forty years later individuals, governments, and organisations are starting to take unilateral global action to tackle Climate Change with many scientist arguing that we are now too late to avoid a "life altering" 1.5C increase in average global temperatures, and that we are within years of crossing a climate tipping point which will see its devastating global effects accelerate and create a run away cascade of **Extreme Weather** and devastation.

Data sources: IPCC, National Geographic, WWF, and various.

IMPACT

The impact of Climate Change can be seen everywhere - from the changes of the seasons, and the subtle changes in the flora and fauna in peoples gardens, to the tree covered mountain slopes that used to be buried by glaciers and snow, to the expanding deserts of the Sahara, and the deep of the oceans. It impacts every living thing and every natural system on Earth.

From longer frost free growing seasons, to changes in global rain patterns, longer droughts and more intense heat waves, and more extreme weather, to more powerful hurricanes and higher sea levels, the consequences are as varied as they are acute.

If the world warms by 1.5C then the Arctic Ocean will become ice free once every 100 years, with extreme hot days in the mid-latitudes being at least 3C hotter than pre-industrial levels, and sea levels could rise by up to 0.77m, with a further decrease in global bio-diversity of between 5% and 8%. Meanwhile corals could decline by at least 70% with marine fisheries annual productivity declining by at least 1.5 Million tons. And a 2C rise would be exponentially worse for people and planet.

EXAMPLES

Earth is mission critical for humanity and all life on Earth. And as the rate of Climate Change accelerates we continue to see a variety of records being set and smashed with climactic events that used to be once in a century becoming once a decade, and then the norm. And examples of these are plentiful.

Greenland's ice sheet, the world's second largest after Antarctica, is now melting 12 times faster than in the past 12,000 years and losing over 532 Billion tons of ice a year - and that rate is accelerating. Not only does this melt account for almost 25% of today's sea level rise, but in 2021 the melt rate accelerated even further when, during a time when temperatures in the region were already 18C higher than average, three days worth of rain - where the rain itself was a first for the region - dumped over 7 Billion tons of rain water onto the ice sheet.

And, from the world's biggest, deadliest, and most damaging floods, to the world's biggest, deadliest, and most damaging droughts, heatwaves, hurricanes, and wildfires almost every country on the planet is now feeling the damaging impacts of climate change.

ACT NOW

As we see elsewhere in our universe, from the dust dunes of Mars to the acidic oceans of Venus, our planet will always be able to adapt to new climactic conditions. But life on Earth will find it increasingly difficult as Climate Change accelerates and its effects become more extreme and pronounced. Therefore, ironically, tackling this trend is more about saving humanity's future than the planets.

EXPLORE: 12

- Carbon Capture and Storage
- Emerging technologies and technology roadmaps
- Future of Agriculture, Energy, Government, Manufacturing, Sustainability, Transportation, and Work
- Net Zero Pledges
- Unilateral global accords and coordinated global action

USING THE TREND SHEETS

IN THIS codex we've gone to great lengths to document the major trends affecting all sectors and line of business operations and simplify them for you. Furthermore, we're always surfacing more trends which is why this codex is regularly updated. As a result each trend contains all manner of action points, details, insights, and stats that you can use to your advantage, whether it's developing scenarios and strategies using the frameworks in this and our **other codexes**, or whether it's just exploring the art of the possible. This is the key to the sheets:

1 / UNITED NATIONS SDG NUMBER

The UN SDG most impacted if you act on the trend.

2 / TREND NAME

The most appropriate name for the trend.

3 / YEARS IN THE CODEX

How many years the trend has been listed in our codex since the first edition.

4 / TREND LONGEVITY

● LONG ● MEDIUM ● SHORT

The trends longevity and how long it is expected to have an impact for.

5 / TREND PRIORITY

The higher the number the more attention and weight you should give the trend.

6 / TREND MOMENTUM

⤴ ASCENDING ⤵ FLAT ⤶ DESCENDING

The overall momentum of the trend.

7 / TIMING OF THE TREND

● HERE NOW ● EMERGING ● DISTANT

When the trend is expected to have a measurable and pronounced impact.

8 / RELATED TRENDS

Other trends that either impact the trend or are impacted by it.

9 / DATA SOURCES

A list of our data sources for the trend.

10 / IMAGE

An image to portray the trend.

11 / ACTION

The action we suggest organisations take now based on the available data.

12 / EXPLORE

Other things you can or should explore to better understand the trend and how to solve or use it to your advantage.

13 / DISCOVER MORE

Click or scan the QR code to access more website resources related to the trend.

TRENDS CONTENTS

SECTION CONTENTS

- ... Ageing Population
- ... Algorithmic Bias
- ... Algorithmic Society
- ... Cultural Misappropriation
- ... Declining Internet Freedom
- ... Demise of Anonymity and Privacy
- ... Deplatforming
- ... Digital Divide
- ... Epidemics and Pandemics
- ... Global Energy Demand
- ... Global Learning Poverty
- ... Global Loneliness
- ... Global Mental Health Crisis
- ... Green Colonialism
- ... Job Automation
- ... Polarised Society
- ... Population Growth
- ... Social Echo Chambers
- ... Truth Decay
- ... Woke Culture

**// FOLLOW THE TRENDLINES
NOT THE HEADLINES . //**

- William B. Clinton, 42nd US President

SUMMARY UPDATE

IN TODAY'S ever-changing world, societal trends continue to play a pivotal role in shaping our collective realities. Technological advancements, activism and social justice movements, cultural shifts, and environmental consciousness are all having a profound impact on individuals and society as a whole.

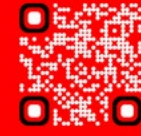
Technology continues to revolutionise almost all areas of society, from Artificial Intelligence (AI) and automation to data-driven decision-making. While these advancements offer convenience and efficiency concerns regarding privacy, job displacement, and algorithmic biases need to be addressed, as we grapple with the ethical implications they bring.

Additionally, we've seen a surge in the number of activism and social justice movements, driven by a desire for equity and system level change. Climate activism and racial justice campaigns, among others, are pushing for a more inclusive and fair society which have also sparked debates on social inequalities and have forced many institutions to reevaluate their business practices to ensure justice and equality for all.

We're also seeing the evolution of cultural norms and values with discussions around gender identity, mental health, and sexual orientation gaining momentum, challenging long-standing stigmas and promoting inclusivity. And, as society becomes more aware of its biases and prejudices there is growing demand for representation and acceptance, reshaping the cultural landscape and fostering a more compassionate society.

Similarly, the urgency to address climate change has reached new heights with people and organisations alike recognising the need for sustainable practices and environmentally conscious choices, with the move towards circular economy models, renewable energy, and reducing carbon footprints transforming industries and inspiring individuals to adopt greener lifestyles - all of which have far-reaching implications, and influence corporate responsibility and government policy making.

BOOK AN



EXPERT
CALL

STATS THAT MATTER

8 BN

GLOBAL POPULATION,
2023

UN

73

HUMAN LIFESPAN,
GLOBAL AVG, 2023

WHO

617 ML

CHILDREN IN LEARNING
POVERTY, 2023

UN

410 ML

ANNUAL GLOBAL ENERGY
DEMAND, EXAJOULES 2022

IEA

4.48 BILLION

PEOPLE GLOBALLY ON SOCIAL MEDIA, 2022

BACKLINKO

6

SOCIAL PLATFORMS USED
PER PERSON, MONTHLY

BACKLINKO

2.5 HRS

TIME ON SOCIAL,
GLOBAL DAILY AVG

GLOBAL WEBINDEX

187

COUNTRY WIDE INTERNET
SHUTDOWNS, 2022

ACCESS NOW

86 %

NUMBER OF PEOPLE IN G25 WHO ADMIT FALLING
VICTIM TO ONLINE MISINFORMATION, 2022

IPSOS

33 %

LONELY ADULTS,
GLOBAL AVG 2022

MCKINSEY

SOCIAL





AGEING POPULATION

2ND YEAR ON THE LIST



8

QUICK TAKE

As global living standards, which include everything from the availability of quality education, food, and healthcare, to water and work, continue to improve, and as the global population increases, it is inevitable people will live longer, and that this will impact on almost all aspects of society.

Today the pace of population ageing is much greater than it was in the past, and that rate is accelerating, and it is putting countries under greater strain as they try to adapt and cope with the inevitable consequences.

IMPACT

Between 2015 and 2050 the proportion of the world's population over 60 years old will increase from 12% to 22% and 80% of those people will be living in low and middle income countries, many of whom will face major challenges trying to ensure that their health and social systems are ready to make the most of the demographic shift, and that their younger generations aren't left with an increasingly burdensome deficit ratio or higher tax burdens.

As the pace of population ageing increases this too will create its own set of unique challenges for many countries. France, for example, had 150 years to adapt to a change from 10% to 20% in the proportion of people aged 60 or over, whereas now countries like Brazil and China will have just 20 years.

While an ageing population can bring significant personal and social benefits, as well as the economic benefits of a longer working life, it will also have a dramatic impact on every area of policy making including education, equality, health, infrastructure, monetary policy, pension planning and retirement, social contracts, urban planning, work, and many other important areas.

EXAMPLES

The global population aged 60 years and over numbered 962 million in 2017, more than twice as large as in 1980 when there were 382 million older persons worldwide. And this number is expected to double again by 2050 when it is projected to reach at least 2.1 billion - and that is before we factor in the impact of future revolutionary life extension innovations and technologies.

By 2040 it is anticipated that, with fewer health conditions, an expanded labour force, and increased productivity, the ageing population could add an additional \$12tn to global GDP. But, without the right policies the ratio of people of working age to people over 60 would increase from 3.7 in 1999 to 2.1 in 2040 thereby placing a significantly higher economic and social burden on the working population.

As average lifespans lengthen people might also get married later, and even take a "late life" break in their 60's and then go on to have second careers, retiring instead in their 80's rather than their 60's which is common today. However, as with the whole trend, this alone would require a major re-thinking of government investments and policies.

ACT NOW

While some countries see an ageing population as a burden looked at with another lens it could also be a demographic dividend. However, in order to maximise the upsides, to both the individuals and the state, politicians and policy makers must prioritise education and healthcare initiatives.

EXPLORE:

- Affordable quality healthcare and housing solutions
- Career breaks and the concept of multiple careers
- Financial planning reforms
- Future of Education, Financial Services, Government, Healthcare, and Work
- Improved social mobility strategies and new social contracts
- Progressive government policies to promote financial and social inclusion
- Revising the pension age



ALGORITHMIC BIAS

2ND YEAR ON THE LIST



QUICK TAKE

Algorithmic bias, where the results and output of “code and machine” based analysis and decisions are biased, is often the direct result of societal bias being unintentionally encoded into AI algorithms during their training phase.

Needless to say the implications, especially in our increasingly algorithmic and automated society where people have little recourse for appeal and where transparency is limited, can have dire societal consequences that reinforce societal divisions and stereotypes, and increase polarisation.

IMPACT

Ultimately the real impact of algorithmic bias is that pre-existing societal biases get encoded into our algorithmic society, which is both automated and operates at massive speed and scale, and perpetuates them.

Furthermore, the lack of transparency, when it comes to algorithmic based analysis and decision making, exacerbates the problem even more because unlike in the real world where people can call others out for bias, and even have legal recourse, it's almost impossible for individuals to call out and prove algorithmic bias - in short it's hard to prove that the “biased ghost in the machine” exists.

While the actual impact of this trend on individuals, organisations, and society as a whole has never actually been measured or quantified we are certain that it has had an impact on everything from censorship, credit availability and scoring, healthcare diagnosis and provision, gender equality and hiring practises, marketing, policing and probation, voting, and much more.

EXAMPLES

Algorithmic bias both reinforces and in some cases heightens and exaggerates human bias.

With respect to hiring studies have shown that Amazon, Facebook, and Google's algorithms have all too often shown executive, high income, and STEM job adverts almost exclusively to men, ignoring women and other demographic groups even though, for example, women make up 27% of boards today. And in one particularly pertinent example Amazon's algorithm was shown to favour middle aged white men from California for software development jobs because of the data it had been trained on.

Algorithms have also been shown to lead police to unfairly target certain demographic groups and neighbourhoods - as well as favour other groups for parole and early release from prison.

Then, as if to drive the point home, there's the odd example of Microsoft's Tay bot which, taking data input from internet users, turned homophobic, racist, and xenophobic.

ACT NOW

In our modern world algorithmic bias is nothing less than a cancer which, if left unchecked and unsolved, could erode the very fabric of society itself and cause irreparable harm. While there are solutions though today organisations should automatically assume that all their algorithms contain some form bias and take appropriate actions to rectify the issue.

EXPLORE:

- AI best practise training methodologies
- Algorithmic audits
- Future of Artificial Intelligence
- Synthetic datasets



ALGORITHMIC SOCIETY

2ND YEAR ON THE LIST



QUICK TAKE

We all live and participate in an increasingly algorithmic society where Artificial Intelligence algorithms direct and influence our lives - whether it's because they are used to assess our credit worthiness to buy products or a home, or access welfare, or match us to jobs, or our future partners, or display information we're searching for, or a million other examples.

As a consequence algorithms are having an increasingly out sized level of influence over every aspect of our lifestyles, livelihoods, and even who we live and share them with.

Data sources: Pew Research, Plos, and various.

IMPACT

Algorithms layered upon layers of algorithms make people's attempts to free themselves from the unintended consequences of the algorithmic society all but impossible, and in a world where algorithms are pervaded by bias the consequential ethical and societal issues should not be underestimated.

The overall impact of algorithms on peoples work and personal lives also has many experts split with recent surveys suggesting that 38% of them believe the algorithmic society will have a positive impact, 37% believing it will be negative, and 25% saying it will be neutral.

Reports have also called out concerns about the impact of the loss of human interaction as algorithms are tasked with making more decisions, algorithmic bias, and the likelihood that people who are already disadvantaged in society will be at even more of a disadvantage in the future. And without strong algorithmic literacy, oversight, and transparency programs being put in place all of these issues will be compounded as their use increases.

EXAMPLES

There are plenty examples to demonstrate the impact that our algorithmic society has on our daily lives whether it's the algorithms that decide what ads to show us or which search results to prioritise, the later of which influences our view of the world, or the algorithms used by the financial services industry which determine our credit worthiness and thereby the kind of home and neighbourhoods we live in.

And let's not even discuss how algorithms choose which online dating profiles to show you - if you're into that sort of thing - or how they only show you content they think you like which then increases the likelihood that your view of the world will become increasingly polarised and radicalised in internet echo chambers.

On the plus side though algorithms can speed up decision making - helping us get that dream job or loan faster, helping doctors diagnose ailments quicker and, again, all manner of other examples.

ACT NOW

On the one hand algorithms can help automate mundane tasks and make decision making easier and faster, but on the other if those algorithms are poorly designed or implemented, or infected with bias they can change peoples lives for the worse. Therefore, not only is getting the balance right important it becomes essential.

EXPLORE:

- Algorithmic auditing and transparency initiatives
- Best practises
- Emerging technologies and technology roadmaps
- Future of Artificial Intelligence, and Governments



CULTURAL MISAPPROPRIATION

2ND YEAR ON THE LIST



QUICK TAKE

Cultural misappropriation is the adoption or exploitation of another culture by another more dominant culture, and covers a multitude of activities including appropriating artefacts, cultural expressions, IP, and traditional knowledge from someone else's culture without permission. While it can sometimes be used innocently to demonstrate kinship with another culture it can also reinforce stereotypes and negatively impact people's mental health which is why today more people than ever before believe that recognising the cultural roots of trends is more important than ever.

IMPACT

Most cultural misappropriation takes place without people understanding or respecting the original cultures history, significance, or traditions, and while the vast majority of it is done innocently and without malice the impacts are far reaching and take place across society and within industries on a regular basis.

Despite the fact that many argue this trend is helping raise awareness of key political and social issues, which has helped boost **CSR** and **ESG** initiatives, **Diversity and Inclusion** initiatives, and boosted the profiles of other trends including **Brand Activism**, **Brandalism**, and even **Green Colonialism**, some of the most serious negative consequences include minority economic exploitation, the dilution and loss of cultural identity, psychological impacts, and the reinforcement of stereotypes.

From the blending of different cuisines to create Fusion Cuisine and cross-cultural art and design, through to the globalisation of fashion and world music and exchange there are many beneficiaries and casualties of this trend and, as always, it's important that brands engage and listen to others.

EXAMPLES

There are many examples of this trend such as Gucci's tangle with it in 2019 when they faced a global backlash for selling a turban resembling those worn by Sikhs who consider it a sacred symbol of their faith. Then, again in 2019, Kim Kardashian suffered her own backlash when she released her Kimono shapewear line and had to rename it after a backlash by Japanese consumers. Even Disney fell foul of it in 2016 when they released a children's costume representing the character Maui from the movie Moana which included a bodysuit with Polynesian tattoos with critics arguing it disrespected and commoditised Polynesian culture.

While most brands end up recalling lines and apologising this trend also provides them with an opportunity to build trust, improve their reputation, and foster positive relationships with diverse under represented communities. Nike provide a good example with their Native American N7 collection - after several backlashes regarding the use of Native American imagery the brand opened a dialogue and collaborated with the communities in a profit share agreement to celebrate their culture and heritage.

ACT NOW

When brands open a dialogue with under represented communities there is an opportunity for a win win but it does require brands to be authentic, fair, and sincere in their conversations and negotiations.

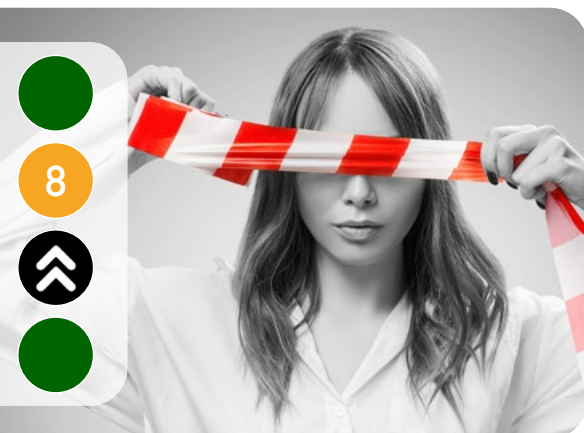
EXPLORE:

- Brand partnerships
- Business and impact assessments
- Copyright and Trademark protections, and WIPO guidelines
- Emerging technologies and technology roadmaps
- Empasising cultural exchange
- Future of Financial Services
- Hiring cultural consultants
- Open dialogues
- Product development initiatives



DECLINING INTERNET FREEDOM

2ND YEAR ON THE LIST



QUICK TAKE

Internet Freedom is an umbrella term that encompasses everything from digital rights, freedom of information and freedom from internet censorship, net neutrality, and the right to access the internet and digital services. And while many institutions and people believe that all of these should be basic human rights there are an increasing number of governments who are limiting and suppressing them in a variety of ways with the net result being that globally internet freedom has been in decline for more than a decade and the trend shows no signs of reversing.

IMPACT

From digital authoritarianism, mass surveillance, and using social media to undermine democracy and alter public behaviours and opinions, to eroding privacy, privatising censorship, and silencing different communications channels, today there are plenty of ways online freedoms are being eroded. And that's before we discuss the impact of Splinternets and Internet Shutdowns, or the disappearance and "re-education" of particular groups and individuals whose views are at odds with the ruling party's views.

Estimates suggest out of the 3.8 Billion people with internet access 71% live in countries where people have been arrested for posting content on political, social, or religious issues, 65% live in countries where people have been attacked or killed for their online activities, 59% live in countries whose governments regularly manipulate online discussions, 56% live in countries where content is routinely blocked, 46% live in countries where authorities regularly disconnect networks, and 46% live in countries where access to social media is temporarily or permanently restricted. All of which is just the tip of the iceberg.

EXAMPLES

Not only does this trend have an economic and social impact, but it also has an impact on the reputation of the countries who increasingly use the internet as a blunt instrument to enforce their agendas - at both home and abroad. And, unfortunately, today there is no country that is completely free of one or more of these behaviours.

Recently researchers have seen the rise of what they call "extremely aggressive" internet censorship in over 103 countries some of which such as China, Ecuador, Russia, Sudan, and Turkey, won't surprise people. But surprisingly Japan, Italy, India, Israel, Norway, and Poland were also on the list. And while the researchers saw a slow up tick in the amount of censorship in the USA they note that the groundwork for mass censorship has now been laid, and warn about a "slippery slope" there too.

Meanwhile other examples include full internet shutdowns as we have seen in Egypt, India, Myanmar, Sri Lanka, Syria, Yemen, and many other parts of the world, and the mass censoring of content by the Chinese government as well as other autocratic governments such as Iran and North Korea.

ACT NOW

Once promoted as a democratising and liberating technology in the past decade the internet has rapidly become a conduit for mass control, manipulation, and surveillance. And this trend shows no signs of slowing down. In fact, as we see an acceleration of domestic and foreign led disinformation and misinformation campaigns, torrenting, and other factors, it will likely accelerate.

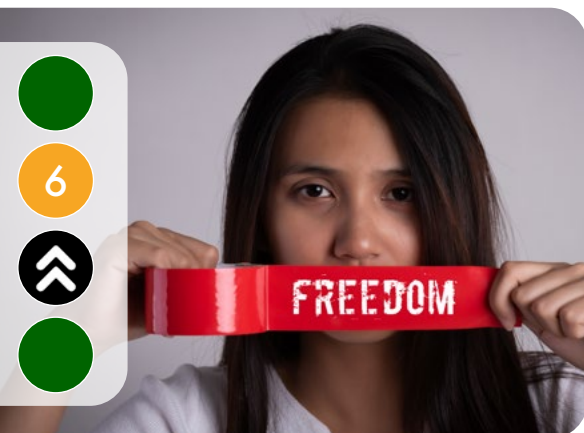
EXPLORE:

- Emerging technologies and technology roadmaps
- Ethical leadership
- Fixing social media
- Future of Communications and Government
- Policy and regulation reform
- Reinforcement of democratic values
- Recognising and removing harmful foreign influence



DEPLATFORMING

2ND YEAR ON THE LIST



QUICK TAKE

Many of us are told we live in a free society where we are free to express ourselves and our opinions. But, as we all know, life isn't that black and white and there are boundaries - especially when those opinions are deemed to be harmful to others.

Social networks and our connected society amplify the individuals ability to communicate with others at global scale and in real time, but only if you have a place on them, and if you don't abide by their rules then one minute you have an audience of millions and the next you're deplatformed.

Data sources: Forbes, Georgia Tech, Mashable, Twitter, and various.

IMPACT

The impact of being deplatformed in today's society is both divisive and damaging. On the one hand it's divisive because there will always be people who don't agree or want to abide by others rules or Codes of Conduct, and on the other it's damaging because the act of deplatforming itself can often feel very visceral and have real world emotional and psychological consequences - especially when it becomes increasingly difficult to appeal or communicate with institutions which are increasingly autonomous, automated, and opaque.

As the old saying goes: What technology gives with one hand it takes away with the other.

Despite all of the above, however, there are benefits to being able to de-platform people, especially those who proliferate fear, hate, and misinformation, that help fuel the creation of a **Polarised Society**, but getting the balance right relies on having strong, trustworthy institutions who are self-less and unbiased. And, frankly, that's getting harder as our society appears to become increasingly polarised. Which is ironic.

EXAMPLES

When an individual or organisation is deplatformed from one provider often there is a domino effect where they are deplatformed from multiple providers simultaneously, and for many the process of trying to replatform themselves, so that they can regain all or some of their former influence or power, is no easy task.

One of the most infamous events which caused a mass deplatforming of individuals and organisations was the Capitol riots of 2020 which saw over 70,000 Facebook and Twitter accounts deplatformed, including that of then US President Donald Trump, and the deplatforming of "free speech" social media platform Parler by Amazon Web Services, Apple, and Google, which then only narrowly avoided bankruptcy. And as for the former US President's efforts to get back "online" we've seen numerous attempts and numerous failures.

Seen by many as "cleaning up the internet" other deplatforming examples include Gab, InfoWars, the British Alt-Right and the Proud Boys, numerous foreign government officials, and of course many COVID-19 conspiracists.

ACT NOW

To many the act of deplatforming is seen as the equivalent of diminishing or taking their voice away, and the act of deplatforming should not be taken lightly and should always be done in a way that is both proportional and transparent, with the right to appeal and review.

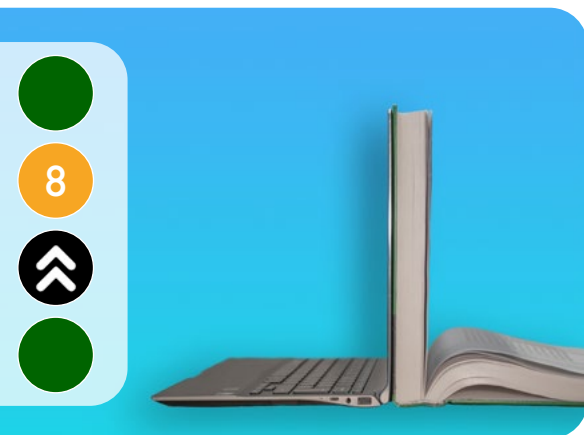
EXPLORE:

- Emerging technology and technology roadmaps
- Ethics and oversight boards
- Future of Communications, and Government
- Polarised society
- GRC, policy, and regulation reform
- Strong global institutions



DIGITAL DIVIDE

2ND YEAR ON THE LIST



QUICK TAKE

When people talk about the Digital Divide they can be talking about a variety of things - such as the fact that today over 4 Billion people on the planet either have no broadband or internet connectivity or limited access, or they could be talking about the significant differences in broadband speeds and prices between different regions and the impact it has on social inequality.

In short, the digital divide is essentially a crude measure of the gap between those who benefit from the Digital Age and those who don't or can't.

IMPACT

Many of us couldn't fathom a world where we didn't have permanent access to all the world's information and almost every digital service the world has to offer at our fingertips. But for billions of people in the world today, in both developed and developing countries, this digital world and everything it has to offer is either difficult to access, or still just science fiction - whether it's because there is an access or use divide, or even a quality of use or digital skills divide.

It shouldn't come as any surprise either that the stats vary wildly depending on the region we're discussing. For example in North America over 95% of people have access to the internet, in Europe 90%, in the Middle East and LATAM 70%, Oceania 67%, Asia 55% in spite of China and India's own impressive statistics, and in Africa it's just 40%. Ultimately these digital divides create barriers to communication, knowledge, social inclusion, study, and work, heighten social differences, facilitate gender discrimination, and impact people's lives, livelihoods, and prospects by limiting access to education, government, financial, health, and other important services.

EXAMPLES

While the number of people who have good quality access to digital services and the internet will increase over time there is obviously still a lot of work to be done to close the divide because not only do people need to be given access they also need the devices, skills, and tools to make the most of that access.

Examples of this divide can be seen everywhere and in every country, but globally women are 8% less likely to own a mobile phone than men and it's believed that just closing this gap alone would add an additional \$700 Billion in GDP growth in those low and middle income countries affected. Additionally, in the USA where connectivity levels are high over 90% of all emergency calls are made from mobile devices which, in turn, has improved the personal well being of women when they are away from home.

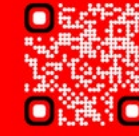
Meanwhile other benefits of closing this divide include better future earnings potential, improvements in educational performance, reducing the cost of delivering services to people, savings made from paying bills and transacting online, reductions in social isolation, and many others.

ACT NOW

We think we live in a digital world but that only applies to about half the people on the planet, and while people in developed countries benefit greatly from having access to the internet and other digital services for what seems to be a relatively small amount of money as it relates to income, for many others this world is at best awkward to access or completely out of their reach. As a result it is arguable that this closing this divide is both one of the world's greatest challenges and its greatest opportunities.

EXPLORE:

- Affordable connectivity initiatives
- Digital skills programs
- Education and literacy initiatives
- Future of Communications
- Infrastructure investment initiatives
- Space based internet services



DEMISE OF ANONYMITY AND PRIVACY

2ND YEAR ON THE LIST



QUICK TAKE

While anonymity and privacy are two sides of the same coin there are subtle differences between the two that mean governments and organisations need to approach how they handle and regulate both of them, and treat them separately.

While most people remain focused on the debate about privacy, rather than anonymity, as more of our offline and online personal and professional data is captured and analysed by different institutions for different purposes we are increasingly entering an age where both are at risk of disappearing - ironically, for better and worse.

IMPACT

Ultimately the impact of this trend, from both an individual and societal perspective, depends on what data institutions capture and analyse, how they use it, and how those use cases impact people.

For example, on the one hand using people's biometric information to identify their risk of cancer or heart disease so that institutions can make interventions that save or extend their lives is a utopian-like use case, with a positive impact. But, on the other hand using their data to identify them and imprison them in concentration camps or execute genocide is, needless to say, a dystopian use case.

This then brings us to the importance in building strong, trustworthy institutions whose purpose is to selflessly improve the lives and livelihoods of their citizens and customers. And, let's face it - that's an entire conversation and debate in itself, and one where somewhat ironically democratic, strong, and trustworthy governments need to take the lead.

EXAMPLES

You might be surprised at just how many different ways that the data that institutions collect about you can be used. From being able to use both online and offline tools, for example the cameras, microphones, and other sensors in your environment, to infer your character, education, ethnicity, gender, guilt, mental and physical well being, personality, and sexual orientation, as well as profile your income, lifestyle, relationships, and much more, we are already at the stage where the amount of insights institutions can glean from our data is frankly staggering. And as for some examples well there are millions but here are some top picks.

Today the Chinese government are using data to give all their citizens a Social Credit Score which is then used to determine their level of access to services such as broadband, education, finance, health, and transportation. But, drop litter, jaywalk, or bad mouth the ruling party and your risk of being cut off increases quickly. Elsewhere though doctors are using facial recognition to pre-emptively diagnose people with cancer, genetic conditions, heart disease and make interventions to save lives ...

ACT NOW

From giving institutions the means to entertain you or serve you better, to giving them new ways to save your life or detain and kill you, as our anonymity and privacy gets stripped away one layer at a time the time to discuss and regulate how we use arguably our most important asset is now. And, if we don't, and if society isn't aware of the dangers that lie ahead, then we run the risk of sleep walking into dystopia ...

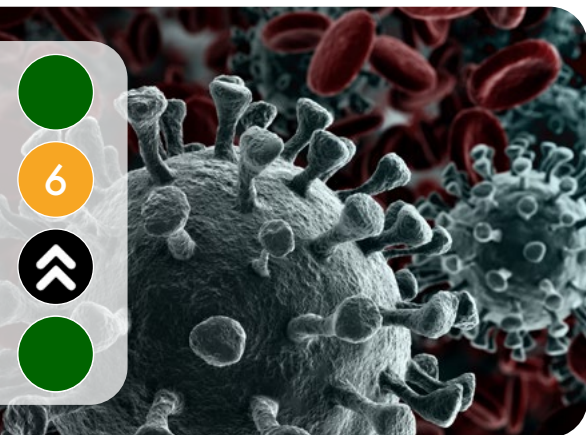
EXPLORE:

- Artificial Intelligence audits, bias, and training best practises
- Data sovereignty and Sovereign ID systems
- Emerging technologies and technology roadmaps
- Future of Artificial Intelligence, Customer Experience, Ethics, Government, Industry, and Society
- Policy and regulation reform
- Strong global institutions



EPIDEMICS AND PANDEMICS

2ND YEAR ON THE LIST



QUICK TAKE

Epidemics and Pandemics have always gone hand in hand with human development and settlement, so much so that many are irrevocably intertwined with our views of different civilisations and regions of the world whether it's Cholera, Dengue, Ebola, Influenza, and others. However, while many of us are removed from their awful impacts, with the global COVID-19 pandemic being an exception, since records began in the 1600's the intensity and frequency of novel extreme epidemics and pandemics has been increasing with researchers warning they could become three times more common in the decades ahead.

IMPACT

The impact of different epidemics and pandemics varies but includes economic, environmental, political, and societal consequences with the impact of the global COVID-19 pandemic being one of the most severe with over 7 Million deaths - or approximately 10% of the global annual total in an average year.

At its peak its impact on global inequality and poverty was staggering. 3.3 Billion people, especially in the **Informal Economy** and especially women, faced losing their livelihoods, an estimated extra 124 Million people fell into extreme poverty, with 500 Million being pushed closer to it because of increased healthcare costs, and the number of undernourished people increased by 132 Million to 822 Million. Economically supply chains snarled, PMI hit 26.5, global GDP contracted 3.2%, global output shrank by \$8.5 Trillion, and workers lost an estimated \$11 Trillion in earnings. Furthermore the percentage of children in low and middle income countries living in Learning Poverty increased from 53% to over 70%, with estimates suggesting that globally this generation of students will lose over \$17 Trillion in future earnings potential. All for starters.

EXAMPLES

Call them what you will - epidemics, pandemics, or plagues - humanity and our livestock have been afflicted by them since records began. Today even **Global Food Security** is under threat because of the spread of Bird and Swine Flu, and as for human epidemics and pandemics there are too many to list, but the worst have literally ended civilisations and wiped out empires.

In 2002 and 2012 SARS and MERS respectively went global with over 800 deaths each. In 2015 an outbreak of the Zika virus took off in Brazil and spread to more than 60 countries with thousands of women giving birth to babies with Microcephaly, a condition in which a child's head is smaller than normal, and other congenital conditions. And, in echoes of 2020 when the Tokyo Olympics were cancelled because of COVID-19, there were calls to cancel the 2016 Rio de Janeiro Olympics.

In 2018 and again in 2020 the Democratic Republic of Congo declared an outbreak of the Ebola virus and over 2,300 people died, COVID-19 hit in 2019, then in 2022 the Monkeypox virus took hold in over 75 countries with tens of thousands infected.

ACT NOW

Today there are an estimated 1.5 Million unknown viruses in the world as researchers hunt for "Disease X," and as we see trends such as **Climate Change** and a **Warming Planet** which make the proliferation of bacteria and viruses more likely, and **Deforestation** which pushes humans and animals closer together, accelerate it seems almost certain that the intensity and frequency of epidemics and pandemics will increase. Furthermore, combine these with increased human mobility and **Population Growth**, and you have a potential powder keg which means that, irrespective of the country you reside in, you be on guard.

EXPLORE:

- Business continuity planning
- Emerging technologies and technology roadmaps
- Future of Healthcare and Transportation
- Public health communication and monitoring policies
- Rapid response plans and teams



GLOBAL ENERGY DEMAND

2ND YEAR ON THE LIST



QUICK TAKE

In a world coming to terms with fuel and even Lithium **Resource Scarcity** today we consume roughly 410 Exajoules of energy, which is growing at a rate of between 1.7% and 3% per year, and by 2050 it's estimated this figure will be closer to 550 Exajoules - depending on who's doing the modelling and whether or not the world meets its **Climate Change, Green Energy Transition, Net Zero** and other energy related goals. During the same period global electricity generation capacity is also expected to grow 3.3% per year which, ironically, could outstrip **Global GDP Growth** of between 2.5% and 4.5%.

Data sources: BP, Exxon, IEA, Total, UN IPCC, World Energy Council, and various.

IMPACT

Soaring global energy demand, which is in no small part due to the fact that by 2050 the world's **Population Growth** will exceed 10 Billion people, will have many impacts on our environment and society. But just how negative some of these are will depend on the future energy mix, how fast we can adopt energy efficient technologies, and how fast we can transition from a fossil fuel based energy generation system, a major contributor to **Air Pollution, Climate Change, Extreme Weather, Ocean Acidification**, and our **Warming Planet**, to new environmentally friendly alternatives.

While global energy demand is commonly calculated at the final point of use, or Total Final Consumption (TFC), unsurprisingly different research organisations estimate global energy consumption will peak sometime during the 2030's or 2040's, primarily because it's hard to accurately predict variables that include everything from the rate of **Vehicle Electrification** to the rate of the Green Energy Transition. By 2050 though estimates suggest buildings will consume 55% to 75% of TFC, and that we will reach peak gas by 2030, and peak oil between 2028 and 2035.

EXAMPLES

Across the board demand for electricity production, heating, and transportation fuels is increasing, but increasingly the kinds of fuels - or sources of energy - are changing, moving away from fossil fuels to greener, lower carbon alternatives.

When we have a look at some of the most pertinent examples of growing energy demand we expect air conditioning, which today accounts for 10% of all global energy demand, to triple by 2050, and by 2030 we expect the number of electric vehicles to grow from today's 10 Million to over 150 Million again with the impact that that'll have on future electricity generation requirements and peak load timings. And, with regards to our increasingly digital world it's estimated that the energy consumed by datacenters will double by 2030 to 4%.

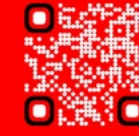
Based on estimates though it should come as little surprise that by 2050 China's energy demands will increase by 30% and that in the same time frame India's will triple. However, to counter balance these Europe expects its 2050 energy demand to be 15% less than 2005 levels as new energy saving initiatives and technologies take hold.

ACT NOW

While the world's thirst for energy won't abate any time soon, and probably never will, overall the majority of organisations and people expect whatever energy sources they use to be predictably affordable, convenient, secure, and increasingly sustainable. And, having seen first hand the impact of **Epidemics and Pandemics**, supply chain snarl ups, and wars, on global energy price inflation and security, as well as its downstream impact on consumers and economies, and **Wealth Inequality**, as well as company profits, it's no surprise that future energy affordability, diversification, and security, is now a top priority for many governments and organisations.

EXPLORE:

- Business impact assessments
- Emerging technologies and technology road maps
- Energy saving and security policies
- Future of Energy, Financial Services, Government, and Sustainability
- Global energy reform



GLOBAL LEARNING POVERTY

2ND YEAR ON THE LIST



7



QUICK TAKE

Access to a quality education that lets people reach their full potential should be a given, but today an estimated 617 Million children don't meet the minimum standards in maths and reading with global **Epidemics and Pandemics** only making the situation worse - so much so that today 70% of under 10 year olds in low and middle income countries don't get the basic education they richly deserve. With education playing such a vital role in people's lives its therefore unsurprising that many children will end up in the **Informal Economy** and being on the wrong end of the **Wealth Inequality** trends.

Data sources: Bill and Melinda Gates Foundation, World Bank, UNESCO, and various.

IMPACT

With every year of education increasing an individuals earnings by up to 10% noone doubts the importance of a good education so it's no surprise that this trend has profound economic and societal impacts - for individuals and countries alike - with people's lack of basic education and skills severely curtailing their future opportunities for personal growth and economic success, and curtailing **Global GDP Growth** by an estimated \$301 Billion.

Not only does this trend perpetuate poverty and inequality, as well as giving many people little alternative than to work in informal economy, but it also has a serious impact on their happiness, health and well being, and social status. All of which, if not tackled can see a country's GDP stagnate, and social unrest, political instability, and **Fragile Government** become the norm.

Globally it's estimated that 53% of children and adolescents worldwide, or 617 Million, don't meet minimum proficiency levels in reading and maths. In Sub-Saharan Africa this number rises to over 87%, while in South Asia, it's over 80%, the impact of which is far reaching.

EXAMPLES

While there are far too many examples to list here some of the most extreme and severe include those from Africa and Asia.

While Ethiopia has made huge progress in recent years tackling the issue around 60% of children under the age of 10 are still unable to read or understand simple text. In Nigeria this figure is 40% and in Pakistan it's 75%. Meanwhile, in South Africa which is currently suffering from record levels of youth unemployment an estimated 50% of children aren't learning the basic skills needed for success in life.

However, when we sub divide these figures by gender 52% of girls in low and middle income countries aren't learning the basic literacy skills compared with 41% of boys which, while feeding into many of the other trends I mentioned, also helps exacerbate **Global Gender Inequality**.

Unsurprisingly, this trend impacts children from marginalised communities, especially those from rural areas, indigenous communities, and those living in conflict zones the most.

ACT NOW

While estimates suggest that reducing the number of children in learning poverty by 10% could increase a country's GDP by 0.3%, which for some governments should be enough to spur action, the fact of the matter is that this trend has life long implications and implications that perpetuate across generations. It should not be lost on you, therefore, that by improving the education circumstances for one child you then improve not only their future quality of life, but also the quality of life for all their descendants as well.

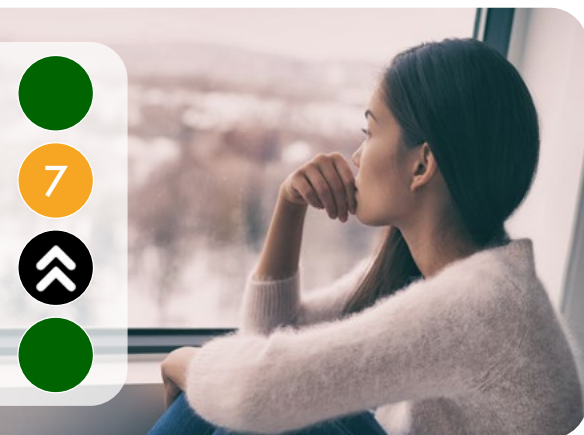
EXPLORE:

- Child employment reforms
- Energy and food affordability, availability, and security
- Emerging technologies and technology roadmaps
- Future of Communications, Education, Work and the Workplace
- Inclusive educational programs and policies



GLOBAL MENTAL HEALTH CRISIS

2ND YEAR ON THE LIST



QUICK TAKE

The Global Mental Health Crisis has reached such an extent that it is now spoken about in much the same way as other **Global Epidemics and Pandemics** and, just like contagion based cousins its mental and physical impacts can often be just as economically, mentally, and physically damaging and long lasting.

Commonly brought on by an individual's environment or lifestyle globally each year 1 in 7 people have a mental health disorder, with 1 in 4 experiencing a mental health disorder in their lifetime, and depression being the most common.

IMPACT

While mental health disorders such as anxiety and depression, the top two disorders, stem from many sources, from a person's brain chemistry and genetic disposition to their environment and lifestyle, which can then accentuate stress and substance abuse, this trend's global impact is staggering. Furthermore, studies have shown that people with serious mental health issues are twice as likely to develop life-limiting cardiovascular and metabolic diseases.

Every year over 970 M people have a mental health disorder, and of those over 700,000 commit suicide with men being 1.7 times more likely to commit suicide than women, those between the ages of 15 to 29 being afflicted the most, and 77% of suicides occurring in low to middle income countries. Despite this though just 2% of health budgets are spent tackling the issue, and just 25% of people seek help.

Also, every year 12 Billion productive days are lost costing the world \$2.5 Trillion per year, rising to \$6 Trillion by 2030 - the impact of which itself can help reinforce people's situation and worsen their poor economic, personal, and professional decision making.

EXAMPLES

While this trend can afflict anyone surveys continually show that almost half of Gen Z and Millennials are stressed all or almost all the time, and that these age groups also have the greatest percentage of mental health issues as a percentage of the population. Perhaps it's no coincidence then that it's also these generations that are more likely to suffer from **Global Loneliness**.

As we stare more **Global Epidemics and Pandemics** in the face it would be remiss not to include a note on the impact of the global COVID-19 pandemic on this trend which, on top of the already burdensome global mental health crisis, triggered a massive 25% increase in the prevalence of anxiety and depression that hit young people, again, and women the hardest.

Meanwhile, in the UK more people than ever are seeking treatment with 1.81 Million referred in 2021, up from 1.69 Million in 2020, and of these 66% were women, with the number of women referred outnumbering men in every region of the country. When it comes to funding the UK is also bucking the trend with 13.8% of the UK NHS budget, and increasing, being spent to tackle it.

ACT NOW

Asides from the Socio-Economic burdens the physical disease burdens associated with this trend shouldn't be underestimated with evidence showing that this trend regularly brings about the onset of, and significantly multiplies the intensity of, physical health burdens, which can stress even the biggest healthcare systems. By identifying and tackling the sources of mental health disorders early, and by making interventions sooner collectively we can move the dial on this trend.

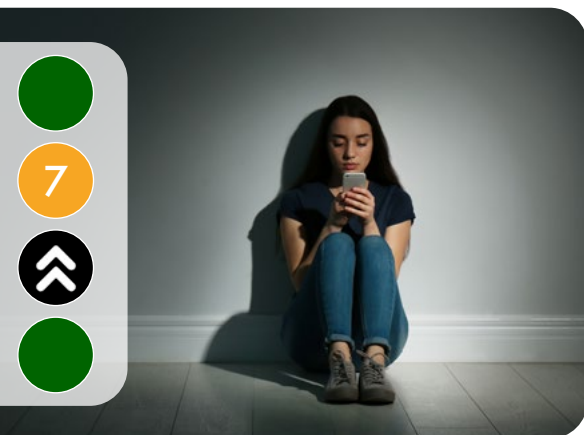
EXPLORE:

- Address gaps in care and explore innovative mental health solutions
- Early identification and intervention strategies
- Emerging technology and technology roadmaps
- Future of Education, Financial Services, Healthcare, and Work and the Workplace
- Raising awareness, Socio-Emotional education, and avoiding stigmatisation



GLOBAL LONELINESS

2ND YEAR ON THE LIST



QUICK TAKE

Globally 33% of all adults experience loneliness but of course this varies greatly by country and ranges anywhere between 50% in Brazil to 15% in the Netherlands. When exploring this trend it's important to distinguish between loneliness and solitude. Many of us frequently crave solitude, but few of us crave loneliness. And we also need to be careful about mindlessly incorporating single person household data which in the USA alone have doubled since 1950 - even though people living alone often find it harder to physically and socially connect with others and integrate into wider society.

Data sources: BMJ, Cigna, Harvard, Holt-Lunstad, Ipsos, University of Sydney, and various.

IMPACT

Loneliness, which some call the new global health pandemic, takes many forms including emotional, existential, and social, affects all ages and demographic groups, and has many impacts - generally all negative - on people's economic, mental, and physical well being, and prospects. And identifying lonely people, who are increasingly more likely to be younger than older, but just as likely to be men and women, making the right interventions, and in some cases helping them avoid **Extremism and Radicalisation**, or worse, is hard.

Statistically though lonely workers are less engaged and productive at work, twice as likely to quit their jobs, and take twice as many sick days as their colleagues - costing the US economy alone an estimated \$550 Bn. Research also suggests loneliness increases your risk of death by 26%, is worse for you than obesity, and can have the same health impacts as smoking 15 cigarettes a day, while also accelerating cognitive decline, dementia, depression, and other mental illnesses, which impact the **Global Mental Health Crisis**, and that it also exacerbates poor financial, professional, and social choices.

EXAMPLES

During the global COVID-19 Pandemic over half the world's population were in lockdowns and there is no doubt that this contributed to a sharp rise in global loneliness, with 42% of people believing that the pandemic will have long lasting mental health implications. And, ironically people living in cities during the pandemic felt the loneliest, by 30%.

Unsurprisingly perhaps the research also shows globally 41% of people have become lonelier in the past few years compared with just 19% who haven't. But, also interestingly, globally 32% of people think their communities have become more supportive in the past six months - especially those in China and India (both 55%), followed by Saudi Arabia (51%), Peru (44%), Chile and Malaysia (both 43%), Mexico (40%), the UK which incidentally is the only European country in the top 10 (39%), Singapore (39%), and Argentina (38%), with Japan, Russia, and Turkey being the least supportive.

Additionally, in the US, surveys suggest 79% of Gen Z, 71% of Millennials, and 50% of Boomers feel lonely which, if true, could be yet another consequence of the **Polarised Society** trend.

ACT NOW

Gaps in country level datasets, especially Africa and parts of Asia, make it hard to get a truly comprehensive view of global loneliness and its impact on different demographic groups and regions. Despite this though overall we can see loneliness is increasing and that there's a statistically important and worrying rise in the number of young people feeling lonely. Furthermore, as **Global Digital Addiction Rates, Doom Scrolling, Job Automation**, and other trends ascend it is increasingly important we have the systems in place to identify and support those most in need and at risk.

EXPLORE:

- Community and inclusion initiatives
- Emerging technology and technology roadmaps
- Future of Education, Financial Services, Government, Healthcare, and Work and the Workplace
- Improved access to mental health and social support programs
- Tele-Health and Tele-Psychiatry



GREEN COLONIALISM

2ND YEAR ON THE LIST



QUICK TAKE

Green Colonialism is the trend of displacing, disrupting, or removing, whether it's by contract or force, the indigenous people of a region by companies who want to use their land and other natural resources to support green initiatives and projects such as mining, renewable energy projects, and offsetting environmental impacts. As the **Green Energy Transition** accelerates and as governments continue to promote and enforce **ESG** and **Net Zero Pledges**, more companies than ever are using and exploiting the natural resources of other parts of the world such as the Global South for profit.

Data sources: Columbia University, Greenpeace, UN, and various.

IMPACT

While it could be argued that green initiatives such as the construction of cabins, mines, power stations, and renewable energy projects, as well as environmental offset schemes such as carbon offset schemes, are all well intentioned there are companies and governments who behave compassionately and ethically and there are those who don't. And, as we continue to see more green projects ramp up throughout the world, there's no doubt we'll see more conflicts with indigenous people who find their lands resources being targeted by interested parties.

As green initiatives and projects become more valuable it's inevitable that some companies that want to maximise profits and protect their investments will be unethical and over zealous, often at the expense of the liberties of indigenous people who, even when they have signed land lease agreements, often find themselves being exploited. While this mostly involved barring them from their ancestral lands, interrupting their ways of life, and human rights violations, it also includes limiting or preventing access to water resources, rivers, and roads, and even genocide and murder.

EXAMPLES

Given the complexity of land lease agreements it's unsurprising that indigenous people won't always fully understand what they're getting themselves into so it's little wonder that some companies use this to their advantage to exploit and ride roughshod over them and their rights.

In recent years we've seen examples of companies in Brazil, Ecuador, and Uganda, grabbing land from indigenous people to support reforestation and plantation based carbon trading and carbon offset projects, and in the worst example of its kind in Honduras 23 farmers were killed after claiming their land had been illegally sold to a big palm oil plantation operator, Grupo Dinant, who were part of the EU's green emission trading scheme.

Then, closer to home the approval by the Norwegian government to let companies build wind farms on the ancestral lands of the indigenous Saami people led to conflict with the Saami's claiming they put their sustainable livelihoods at risk because they blocked their reindeer's migrations and disrupted their grazing patterns, leaving many too weak to survive the long winter months.

ACT NOW

While almost everyone agrees that the world needs to be greener, to curtail the impact of **Climate Change** and a **Warming Planet**, and that business needs to be more sustainable, when it comes to how we achieve this companies and governments need to be vigilant that they don't directly or indirectly enable or support the persecution of indigenous people.

EXPLORE:

- Audits, monitoring, and policing
- Emerging technologies and technology roadmaps
- Global accords and robust grievance mechanisms
- Human rights reform
- Independent contract arbitration, reviews, and settlement
- Policy and regulation reform
- Rights based negotiations



JOB AUTOMATION

2ND YEAR ON THE LIST



QUICK TAKE

When we think about automation we often think about **Artificial Intelligence (AI)**, **Robotic Process Automation (RPA)**, and **Robotics**. What we often forget, however, is that there are fundamentally two kinds of automation, namely automation that's dumb which we often simply refer to as "Automated," and then automation that's smart where different jobs and tasks are performed by intelligent systems that are often capable of complex decision making which are "Autonomous." As we head into the future this distinction, between automated and autonomous, is crucial.

Data sources: WEF, World Futures Forum, and various.

IMPACT

When it comes to the trend of job automation today there are a variety of **Exponential Technologies**, **General Purpose Technologies** (GPT), and tools, that are becoming increasingly capable and mature, which in turn is accelerating their adoption by businesses across all sectors as organisations everywhere embrace **Digitisation** and look to streamline operations, reduce costs, and reduce human related accidents and errors.

However, while analysts and news networks are all too often alarmist we must remember that there are jobs which can be fully automated and those that are only partly automatable. Furthermore, while many organisations cite automation as helping improve productivity so far **Global Productivity** statistics have remained pretty flat and stagnant - something known as the Solox Paradox.

Statistics wise many believe that by 2030 55% of the jobs that don't require a degree are in jeopardy of being automated, and that one third of all of the jobs we have today won't exist - although inevitably this will be somewhat offset by new kinds of jobs.

EXAMPLES

Job automation has always been a stalking horse that's worried people, and even a few decades ago people were worried that the internet, for example, would wreak havoc on the jobs market. Today though "the internet" has created hundreds of millions of new jobs and represents more than 10% of US GDP, which is perhaps good news as we look forwards to its next evolution **Web 3.0**.

Today there are many examples of job automation, whether it's tractor drivers whose jobs are being made redundant by the arrival of self-driving tractors, call center operators, claims handlers in the insurance sector, equities traders in the financial services sector, paralegals in the legal sector, or even AI programmers and data scientists in the technology sector. If truth be told we are all at risk of automation, even in the right brained creativity and innovation sectors which employ more than 235 Million people and generate over \$8 Trillion in GDP, with the arrival of trends such as **Creative Machines**, **Digital Humans**, and **Synthetic Content**, but as the speed of both cognitive and manual automation accelerates it's imperative we find ways to adapt.

ACT NOW

As humans we are great at finding new ways to do old things, and new ways to do new things, which inevitably means that we are also adept at finding ways to automate many of the jobs and tasks that we all do on a daily basis, no matter how complex they are, even surgery and dentistry. However, while automation is always going to be a stalking horse the real issue isn't that we should be afraid of it, it's that we should have the social and political policies in place to help people transition from dead ending careers and roles to new ones with agility and speed.

EXPLORE:

- Business and impact assessments
- Education and training reform
- Emerging technologies and technology roadmaps
- Future of Artificial Intelligence, Communications, Education, and Work
- Policy and regulation reform



POLARISED SOCIETY

2ND YEAR ON THE LIST



QUICK TAKE

We appear to live in an increasingly divided and polarised society where we're seeing **Global Democracy in Decline**, a world where diametrically opposite opinions and views are the norm, where people with neutral views are increasingly marginalised and ignored by others, and where differences increasingly divide us rather than unite us. Furthermore this trend, which is also eroding social cohesion, is accentuated by the rise of **Algorithmic Echo Chambers, Global Loneliness, Rapid Urbanisation**, and the exploitation of negative and polarised media content for individual purposes.

Data sources: Pew Research, UoCB, and various.

IMPACT

As many societies appear to become increasingly polarised - and thereby divided - whether that's because those are the narratives that mainstream media and the social networks appear to promote in order to increase their engagement and viewership, whether it's the direct result of disinformation and misinformation campaigns, or the consequence in the rise in the number of algorithmically generated and promoted echo chambers, or even because of the consequence of badly thought out urban planning and government policies, one thing is certain - a divided society is no society at all.

This trends impact though is broad, growing, and pervasive, and asides from the toll it takes on peoples emotional, mental, and physical well being, it's also a leading cause of government shut downs, public disinformation and misinformation, segregation, violence, and risks to public health. And all that's before we discuss the impact it has on communities, families, schools, and workplaces, where people are becoming more judgemental, segregated, and less helpful, undermined, and more antagonistic towards one another.

EXAMPLES

There are plenty of examples, and ultimately many of them are the result of the coming together of many different factors, which make "unwinding" our increasingly polarised society no easy task. Although, that said strong education systems and the teaching of tolerance, and increasing trust in government, information, and people, could go a long way to helping bridge the divides.

When we look at the COVID-19 Anti-Mask, Anti-Vax, and Vaccine-Hesitant groups for example reports show that over 65% of all global vaccine disinformation and misinformation came from just 12 people, the so called "Disinformation Dozen," the impact of which was mass protests and an estimated 90 Million Americans opting out of vaccinations - all of which had a significant impact on America's attempts to unlock and re-open its borders and economy.

Needless to say other polarising topics include class, climate change and the environment, immigration and migration, race, religion, and science, with politics now perhaps being the most polarising because it encompasses all of these.

ACT NOW

Most polarising topics are amplified by passionate actors who have become increasingly adept at exploiting the technologies and tools that underpin our connected society, as well as behavioural and social engineering. Furthermore, on the whole the content they create and share often includes shreds of truth, if not the entire truth, to give it the appearance of legitimacy and boost its appeal.

EXPLORE:

- Emerging technologies and technology roadmaps
- Disinformation and misinformation strategies, and information weaponisation
- Future of Education, Government, Media and Entertainment
- Policy and regulation reform
- Social cohesion and inclusion initiatives
- Urban management and planning strategies



POPULATION GROWTH

2ND YEAR ON THE LIST



QUICK TAKE

The world's population, which stands at just below 8 billion today, is estimated to grow to over 10 billion by the year 2050 which will be an increase of more than 25%, and it is feared that this will put increasing strain on the world's finite resources.

While this is a slower rate of growth than we have experienced in the past by 2100 it is projected that there will be over 11 billion people - all of which is before we take into account future healthcare improvements which will increase human longevity.

IMPACT

The world has finite resources and, as you can see from the other trends in this Codex humanity has already had a significant impact on the planet, all of which has implications for future generations and the resources they have access to and available to them.

On average the world's population uses over 60 billion tonnes of resources every year, and while the overall distribution varies by region, when we consider the resource use for food, housing, and transport alone, Africans consume around 10kg of resources per day, Americans 88kg, Asians 14kg, Europeans 79kg, Latin Americans 34kg, and Oceania 100kg.

As we look to the future where not only the population size will grow but so too will the consumption figures it's easy to see how we could run into problems of resource scarcity which will include everything from food and water, to commodities and territory. And that's all before we consider the detrimental impact human activities may have on some of those resources, which include over consumption, land degradation, pollution, spoilage, waste, and other trends.

EXAMPLES

In order for the world's population to maintain its existing size global fertility rates need to be approximately 2.1 births per woman, and it is expected that we will drop below that figure by 2070 as global fertility rates continue to decline with the net result being that organisations expect the world's population to stop growing by 2100.

Between today and 2100 it is expected that Africa's population will grow from 1.3 billion to 4.3 billion, Asia's will peak at 5.3 billion and shrink from 2055, Europe and Latin America's will peak at 748 million and shrink from 2058, and that North America's will increase from 369 million to 491 million by 2100 - albeit artificially boosted by net inward migration which is estimated to be 85 million people.

By 2100 it is also anticipated that the populations of just six countries will account for more than half the world's population - these are India with 1.45 billion, China with 1,065 billion, Nigeria with 733 million, the USA with 434 million, Pakistan with 403 million, and finally D.R. Congo with 362 million.

ACT NOW

While there are many solutions to population growth some of them are obviously controversial.

EXPLORE:

- Access to affordable quality education and healthcare
- Circular economy and sustainable living solutions
- Family planning initiatives
- Female empowerment and gender equality initiatives
- Government policy reforms
- Resource planning initiatives
- Restricting child marriage



SOCIAL ECHO CHAMBERS

2ND YEAR ON THE LIST



QUICK TAKE

Arguably one of the most influential trends of the modern age social echo chambers quickly highlight both the dangers and potential that Artificial Intelligence and people skilled in behavioural conditioning have to change the world and shape global opinion. Partly caused by like minded people coming together to share points of view, and exclude those who don't share those views, and partly caused by algorithms which prioritise and display content that reflects the preferences of those individuals, echo chambers create and heighten societal divisions that otherwise wouldn't be as prolific.

IMPACT

The result of many different factors the impact that social echo chambers have on our society can be seen everywhere, and in some cases they are both devastating and deadly.

Pick any of the big topics of the day - climate change, gun control, immigration, race, religion, science, technology, terrorism, and more - and in many cases when you venture online you'll see an almost cult-like polarisation of views with different groups of people living in different worlds consuming and sharing utterly different content.

From influencing the outcome of democratic elections and expanding and reinforcing the views of the far right and QAnon, to spreading misinformation and stoking the fires of racism, there are very few topics that echo chambers don't distort. And while they initially simply reflect people's views, over time the majority of them take advantage of people's angers and fears and exploit them to such an extent that they inspire cult-like devotion which then flows out onto the streets and manifests itself as real world action, protests, and wanton violence.

EXAMPLES

While it's always easiest to blame the social networks themselves for creating social echo chambers research shows that it's often the influencers, the people at the centre of these networks who are connected to everyone, rather than the algorithms that have the greatest impact when it comes to amplifying the differences between people and use them to further their own specific agendas.

Furthermore, research also shows that if the person at the center of the network shows any particular bias it can quickly be amplified by the network.

There is also evidence that polarised, or polar opposite, echo chambers coevolve with one another. In other words as one echo chamber's opinions change or get stronger so too do the opinions of the opposing echo chambers with prime examples being those relating to abortion, gun control, immigration, Obamacare, the pandemic, and partisan politics.

ACT NOW

While there are mix of echo chambers, from the benign and amusing, to the outright dangerous and extreme, solving the issue of echo chambers has many academics and policy makers tied in knots, but as we live more of our lives online and as we consume more online content which shapes our real world opinions getting a handle on this trend is increasingly becoming a priority for multiple groups around the world as it becomes increasingly responsible for fracturing parts of our society.

EXPLORE:

- Algorithmic adjustments
- Future of Artificial Intelligence, Communications, Government, and Society
- Intervention initiatives
- Political and social trends
- Policy and regulation reform



TRUTH DECAY

2ND YEAR ON THE LIST



QUICK TAKE

We live in a world where many of our behaviours and opinions are increasingly shaped by Truth Decay, namely the distribution of disinformation and misinformation that's often created by anonymous and autonomous people and bots. And, while this trend is widely responsible for undermining most people's trust in information and in one another on the one hand **Artificial Intelligence (AI)** algorithms are using the outputs to create **Social Echo Chambers**, and on the other **PsyOps** and other nefarious actors are weaponising it to sow division and create a **Polarised Society**.

Data sources: Various.

IMPACT

When people no longer trust the information they're presented with you can easily argue that the fabric of society itself starts to unravel and that we find ourselves on a slippery slope into oblivion because inevitably not only does this trend undermine the credibility of our ubiquitous and vital information networks, but it also undermines trust in one another, which then creates division where there should be unity.

Today we live in a world where the **Power of the Individual** means that one person can reach out and influence millions, even billions, of people at a speed and scale that was unimaginable just a decade ago. And, while this can be good for **Solopreneurs**, when it comes to this trend it means that just a handful of people or bots or Troll Farms can spread disinformation and misinformation at staggering speed which can result in protests, rioting, violence, and even mass murder. As a consequence not only is this a highly dangerous trend it's also one that's only going to get worse as nefarious actors use increasingly sophisticated tech such as AI, **Digital Humans**, and **Synthetic Content**, to create even more sophisticated campaigns.

EXAMPLES

Sometimes characterised by the umbrella term "Fake News" this trend exists in all kinds of formats - from the small white lies created and shared by individuals that cause small amounts of harm to the professionally crafted and controlled campaigns run by state sponsored actors who are motivated to do extreme harm and sow dissent in their adversaries. Unfortunately, there are plenty of examples of this trend - that is of course if you believe them.

During the pandemic we all saw the social divisions that were created when disinformation about the safety of COVID-19 vaccines, and the motivations of governments, were posted online. Not only did it lead to protests and riots, and worse, but researchers discovered that just 12 individuals were responsible for more than 65% of all of the online anti-vax disinformation.

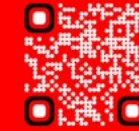
We've also seen multiple BLM disinformation and misinformation campaigns as well, and then of course during the Russia-Ukraine war we saw PsyOps and **False Flag Attacks** campaigns go into full swing, and we're not even beginning to scratch the surface yet.

ACT NOW

When it comes to this trend the majority of watchers find that many of the most damaging and divisive campaigns are run by arms length state sponsored organisations, Troll Farms, and tight nit "motivated" fringe groups, and that almost all the accounts they use are fake which then leads us to wonder whether or not the pre-requirement to register and prove your identity before you're able to open a new social media account should be made mandatory as it is in China where all new registrations have to be biometrically authenticated.

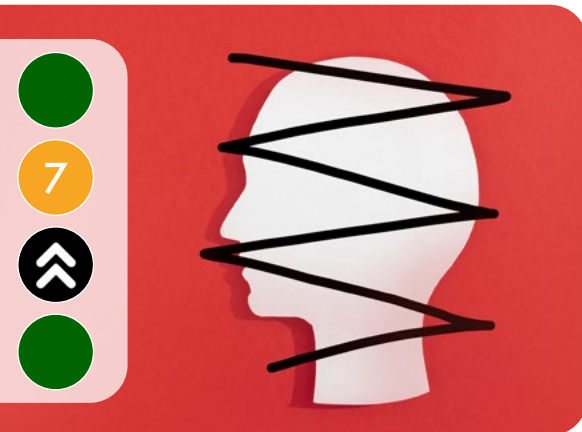
EXPLORE:

- Digital ID's
- Education reform
- Emerging technologies and technology roadmaps
- Future of Artificial Intelligence, Communications, Media and Entertainment, Education, and Government
- Policy and regulation reform



WOKE CULTURE

2ND YEAR ON THE LIST



QUICK TAKE

Before circa 2016 the references to woke were simply an endearing term for being socially aware or empathetic and the word was closely aligned to the 1990's trend of political correctness. Fast forwards to today though and the trend has been heavily politicised, especially in the USA and especially by right leaning political parties who have seized hold of it to heap blame on it for everything from deadly mass shootings to lower military recruitment. The result of which means that it is now its own powerful trend, and both a force for highly inclusive politics and societal behaviours, and highly divisive ones.

Data sources: IPSOS, Pew Research, YouGov, and various.

IMPACT

We live in a diverse world and on a diverse planet, and while almost all of us celebrate natural diversity unfortunately that's not always the case when it comes to human diversity so unsurprisingly this trend, which some argue has helped raise awareness of key political and societal issues, has many impacts. As the world embraces **Globalisation** and **Diversity and Inclusion**, with some bumps, we're seeing a growing number of strong pro Woke voices and strong anti Woke voices - some of which are designed to grab headlines and gain financially from the trend, and others that are the result of authentic discourse and sentiments.

Amplified in **Social Echo Chambers** and within government increasingly this trend is being weaponised resulting in the rise of **Cancel Culture**, and an increasingly **Polarised Society** and **Fragile Government** - both of which have serious implications for democracy, freedom of expression and freedom of speech, as well as corporate and government policy making, and their impact on social equity and justice including affirmative action programs, anti-discrimination laws, and social services programs.

EXAMPLES

A prime example of "Culture Wars" there is still significant confusion over the term "Woke," and unsurprisingly the responses vary by age, demographic group, ethnicity, and political affiliation. In the USA and UK 47% and 43% of people respectively are familiar with it, with twice the number of young people - circa 60% - recognising it compared to over 55's. Then, doubling down, in the USA 66% of people of colour are familiar with it compared with 43% of white respondents, and politically 61% of Democrats feel it's a positive term compared with just 8% of Republicans.

So, unsurprisingly, name a topic and it's likely near a Woke storm somewhere - whether it's abortion, gun control, LGBTQ+ rights, climate change and the environment and ESG investing, gender and religious education, and others.

And, try as they might even companies like Disney, whose CEO Bob Chapek in 2022 said they would not take a public stance on the Florida's Parental Rights in Education Act, but whose employees then did, aren't immune from "Woke Wars" after then Gov. DeSantis took offence, put them in his cross hairs, and revoked their Reedy Creek agreement.

ACT NOW

In a world where free speech is a right, but not always a given, it's vitally important that we all keep an open mind. And, while we are all entitled to our own opinions it is also important that we respect other people's beliefs, even if they are contrary to our own, and that those beliefs don't directly or indirectly cause anyone mental or physical harm. Increasingly when it comes to this trend the advice for brands is to be clear with your core mission, purpose, and values, be authentic, and don't adopt a narrative you don't believe in and wouldn't be willing to stand behind.

EXPLORE:

- Audit internal policies, marketing communications, and partnerships
- Active listening programs
- Business and impact assessments
- Corporate alignment, culture, messaging, purpose, and values
- Education and open dialogues
- Future of Government

Notes:

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An astronaut in a white spacesuit is floating in space, with Earth's clouds visible below and a starry galaxy in the background. The astronaut's helmet reflects the Earth. The text "THIS IS NOT THE END . EXPLORE MORE ." is overlaid on the top left.

THIS IS NOT THE END . EXPLORE MORE .

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