

# DRIVING IMPACT IN A CHANGING WORLD

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## The Ten Mega Trends That Are Changing Our World

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Session 1: A Changing World

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**GAME CHANGERS**





**What are the external forces changing our world?**



# THE MEGATRENDS



Ageing today  
Declining tomorrow  
The rise of Africa



Asian middle class  
Better education  
Half the world is still off-line



Rising urban population  
New megacities  
Pollution



Multiple communications  
channels  
Impact of smartphones on  
behaviour?



Rising life expectancy  
Pressure on  
healthcare systems  
Obesity



Personalisation  
Rise of local  
brands  
Sharing economy



Fewer marriages  
Single person  
House holds  
Rising crime



Global English language  
Changing role of women  
Big divisions on religion,  
abortion, homosexuality



Pressure for  
individual success  
The responsible  
company  
AI @work



My country going  
in wrong direction  
Rise of populism  
Nostalgia for the past



# THE MEGATRENDS

## 1. Dynamic Populations

## 2. Growing Opportunity and Growing Inequality

## 3. Megacities

## 4. Increasing connectedness and decreasing privacy

## 5. Healthier and sicker

## 6. Rise of individual choice and fracturing of the mass market

## 7. Rise of the individual and decline of social cohesion

## 8. Cultural convergence and increasing extremes

## 9. Always on versus off the grid

## 10. Emergence of public opinion as revolutionary force

Rising urban population  
New megacities  
Pollution

Rising life expectancy  
Pressure on  
healthcare systems  
Obesity

Personalisation  
Rise of local  
brands  
Sharing economy



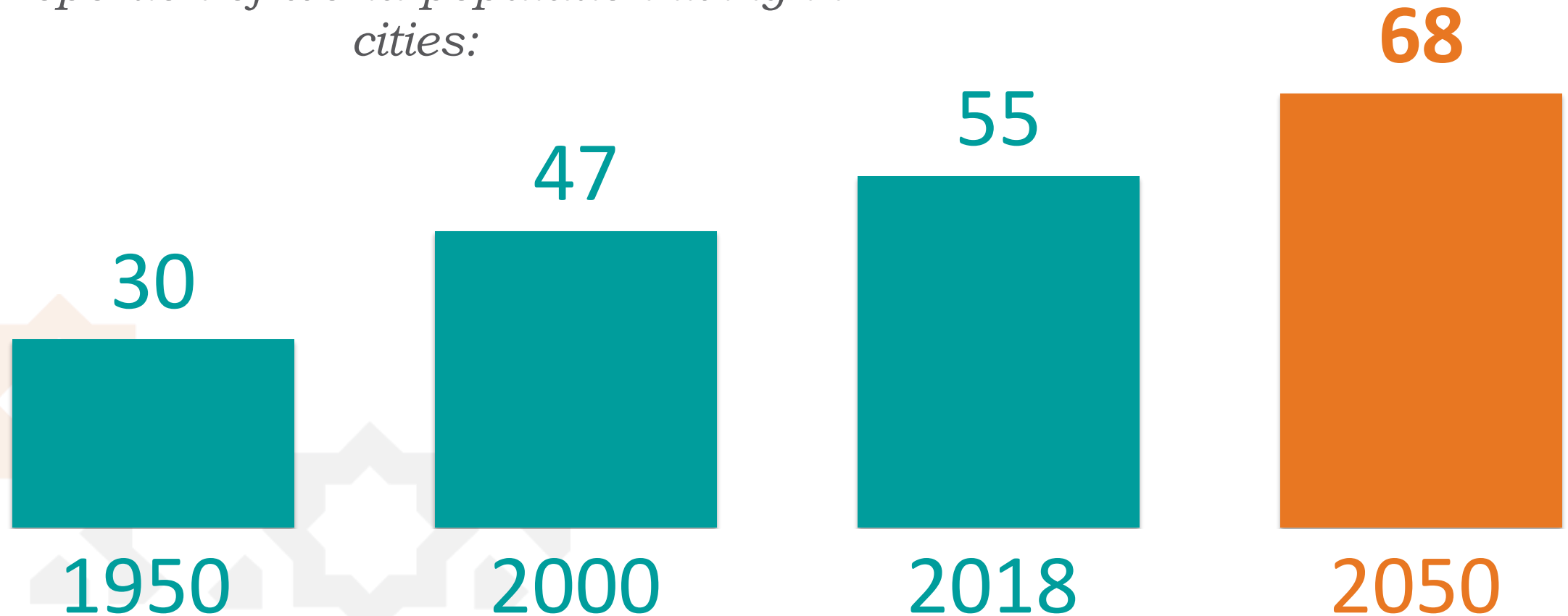
# Megacities

The continued rise of city living



## CITY LIVING CONTINUES TO CLIMB

*Proportion of world population living in cities:*



# BUT MOST EXPECTED GROWTH IS OUTSIDE MENA

Existing  
megacities  
(>10 million)

New  
megacities  
by 2030

Bogotá

Lima

Lagos

Kinshasa

Luanda

Johannesburg

Lahore

Ahmedabad

Hyderabad

Bangalore

Chennai

Chengdu

Ho Chi Minh City

Bangkok







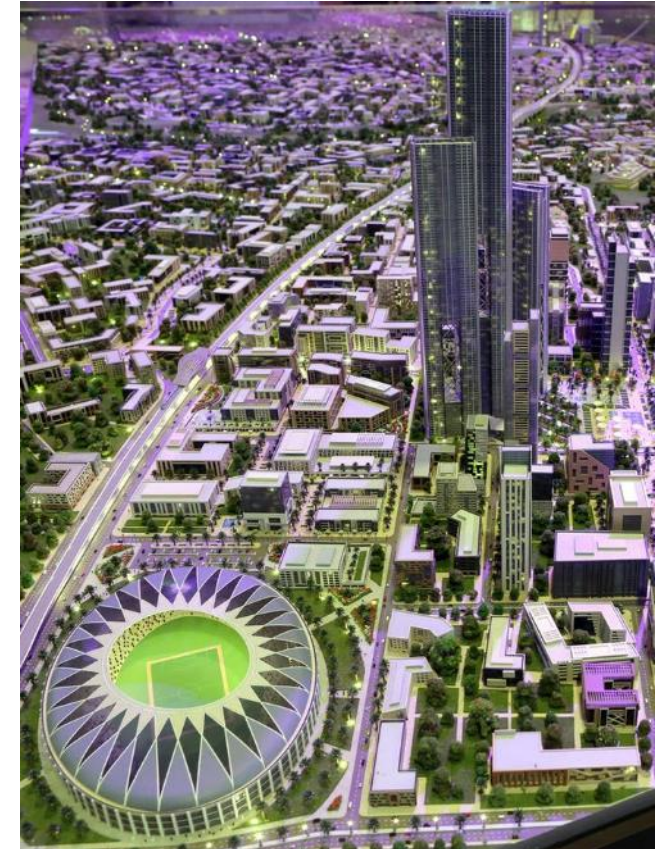
# SMART CITIES – BUILD IT AND THEY WILL COME?



NEOM  
Saudi Arabia



Masdar City  
UAE



New capital city  
Egypt



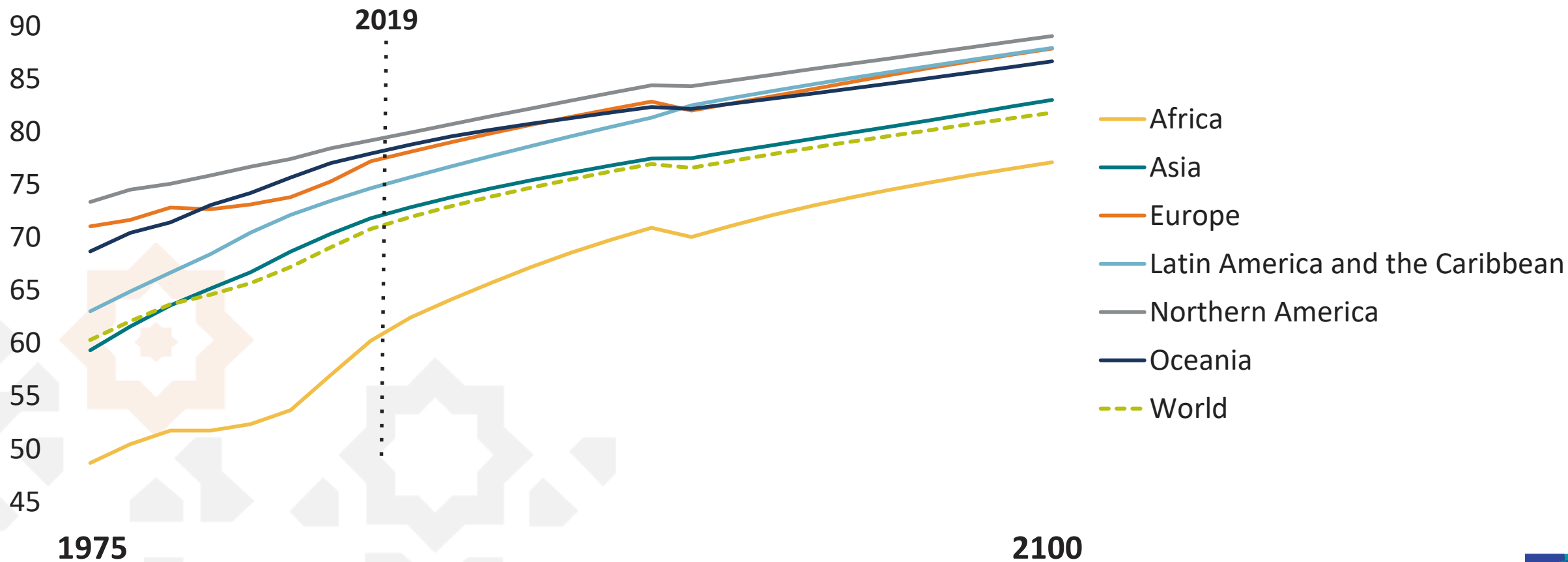
# Healthier and sicker

Longer lives, chronic conditions





# FURTHER RISES IN LIFE EXPECTANCY ARE PREDICTED



# BUT WILL A LONGER LIFE BE A HEALTHIER LIFE?

## Causes of death (WHO)

*Infectious disease*

*Non-infectious  
disease*

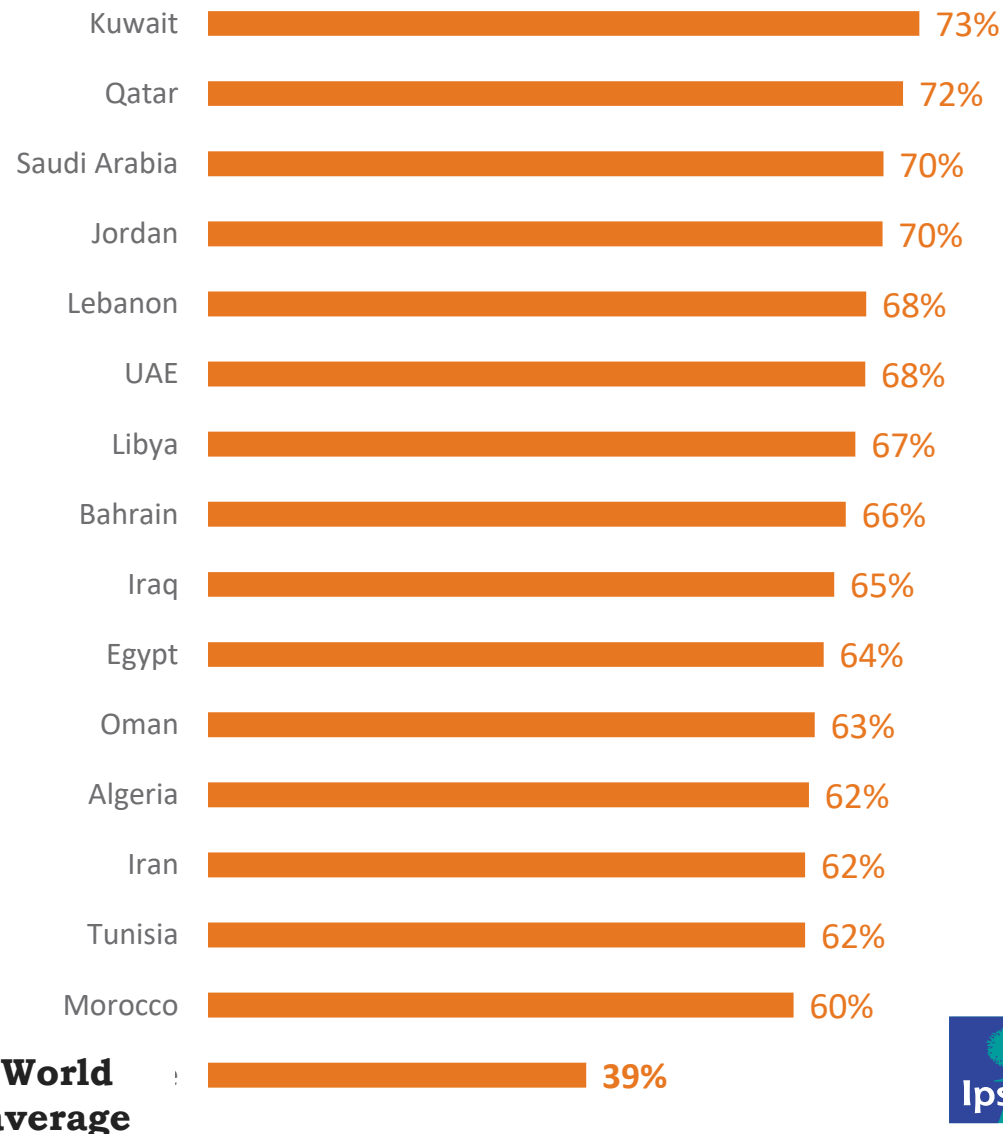
2015  
23%

68%

2030  
17%

74%

## Estimates of obesity - 2016



## BUT WE ARE NOT RECOGNISING THE SCALE OF THE ISSUE



Q. Out of every 100 people  
aged 20 years or over],  
how many do you think are  
either overweight or  
obese?

Country	Guess	Actual	% Difference
Saudi Arabia	28%	70%	-42%
Turkey	32%	65%	-33%
Great Britain	44%	62%	-18%

## PREVENTION AND NOT JUST CURE . . . .?

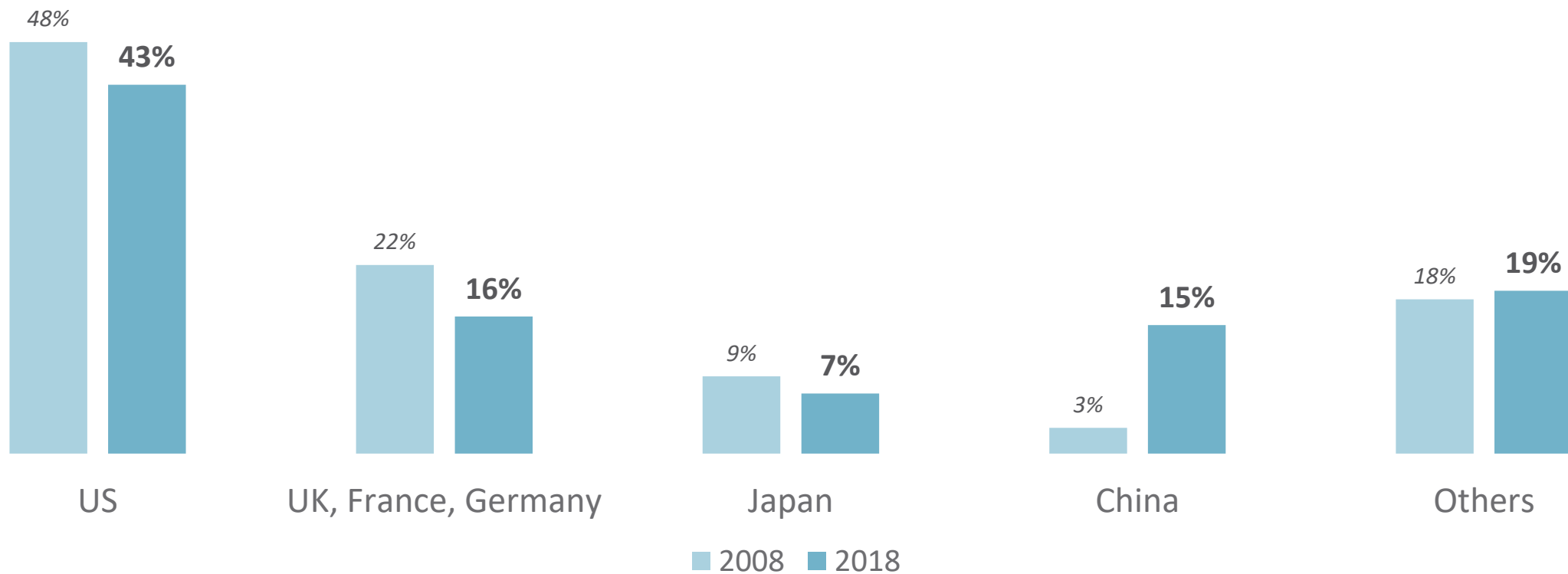


# The rise of the Glo'cal brands

Personalisation vs Privacy



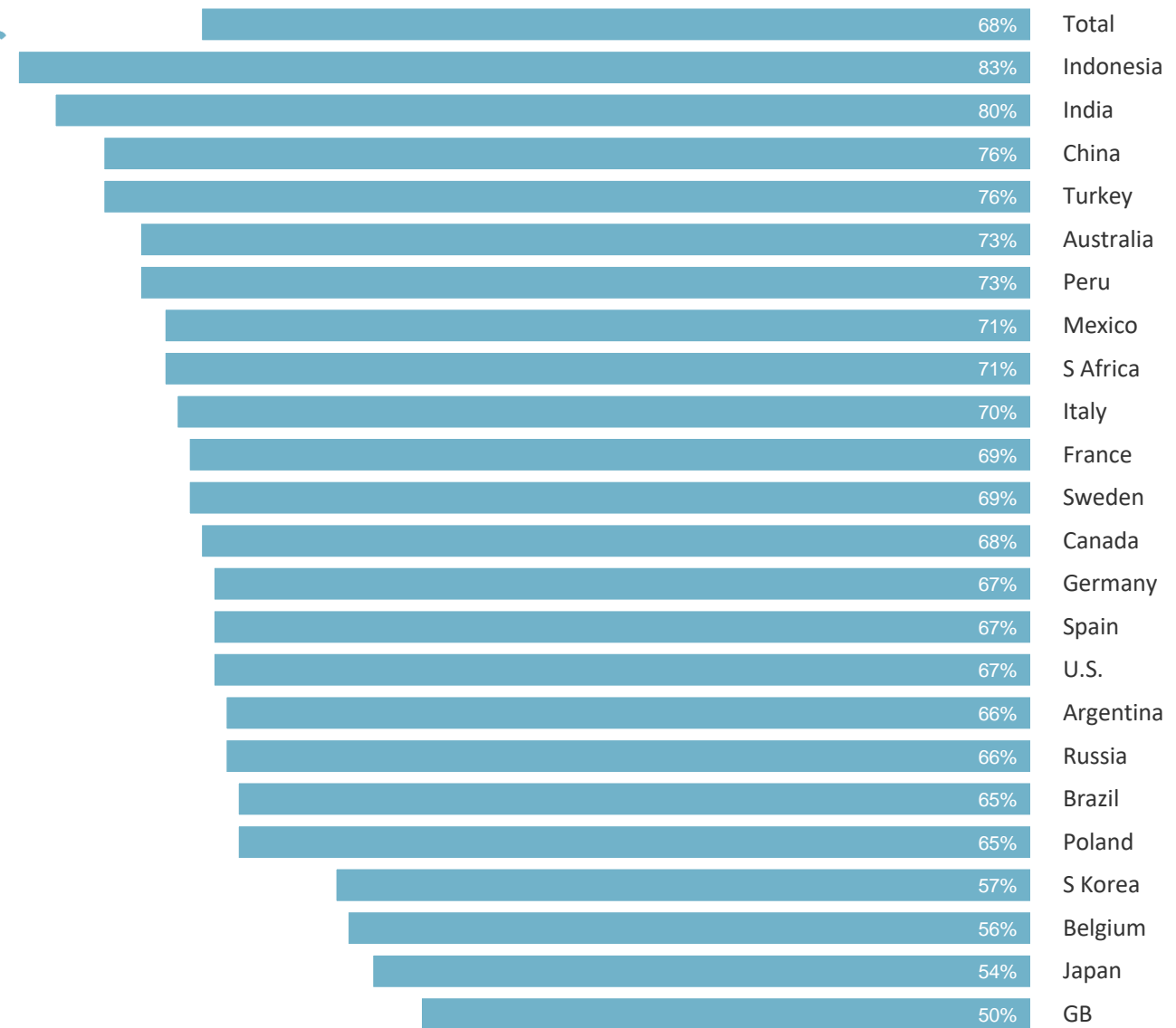
# THE GEOGRAPHY OF GLOBAL BRANDS IS CHANGING



BUT SHIFTING ECONOMICS  
IS ONLY PART OF THE  
PICTURE

68%

“I am more likely to buy products  
that are locally grown than those  
that are grown elsewhere”





# THESE BRANDS DIDN'T EXIST 20 YEARS AGO . . .



**The world's largest taxi company owns no vehicles**



**The largest accommodation provider owns no real estate**



**The most popular media provider creates no content**



**The most valuable photo company sells no cameras**



**The fastest growing television network lays no cables**



**The most valuable retailer has no inventory**

**None of these six companies existed twenty years ago**

# PERSONALISATION VS PRIVACY IS A MEGATREND IN ITS OWN RIGHT

**World citizens are in the dark about how their personal information is used**


**Most people do not trust how organizations use their personal data**

Consumers ask for transparency and assurances of confidentiality and security

The public values privacy and compensation more than the benefits of sharing personal data

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# Thank you

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