

The Accenture logo, featuring the word "accenture" in a lowercase, sans-serif font with a small chevron symbol above the letter 'u'.

accenture

Society disrupted, now what?

Get Ready for the
New Lifestyles of
the Future

October 2020



Introduction

It feels like nothing will ever be the same again. Where and how we work, move, socialise, consume, learn, or protect ourselves have all changed radically in 2020. Irrespective of the society that we live in, the old ways of life have been suddenly and profoundly disrupted.

Prominent economists¹ and visionary business leaders² agree that due to, among other issues, rising inequality, environmental degradation and the profound impact of emerging technologies³ on human life, the future will not be a gradual extension of the past.

Modern societies are at a turning point. The question is: how can businesses use the present moment as an opportunity to create a thriving future for our societies?

To address this urgent question, we have conducted an extensive study across fourteen countries, from Asia Pacific to the Middle East to Latin America (see 'About the Research'). These countries represent a total of US\$30 trillion in GDP and 48% of the world's population.

Specifically, we focused on people's lifestyles, which according to Alfred Adler⁴, the credited founder of individual psychology, are "The characteristic [ways] that we act, think, and perceive and the way we live. It is from the lifestyle that we select the methods for coping with life's challenges and tasks."

In this paper, we seek to inspire business leaders to prepare for a future where individual lifestyle choices are shaped by new and potentially long-lasting shifts in attitudes and technologies. These will include greater individual concern for health and the environment, growing digital literacy, smarter neighbourhoods and greater focus on local economies.

The question is: how can businesses use the present moment as an opportunity to create a thriving future for our societies?



**A moment of
introspection**

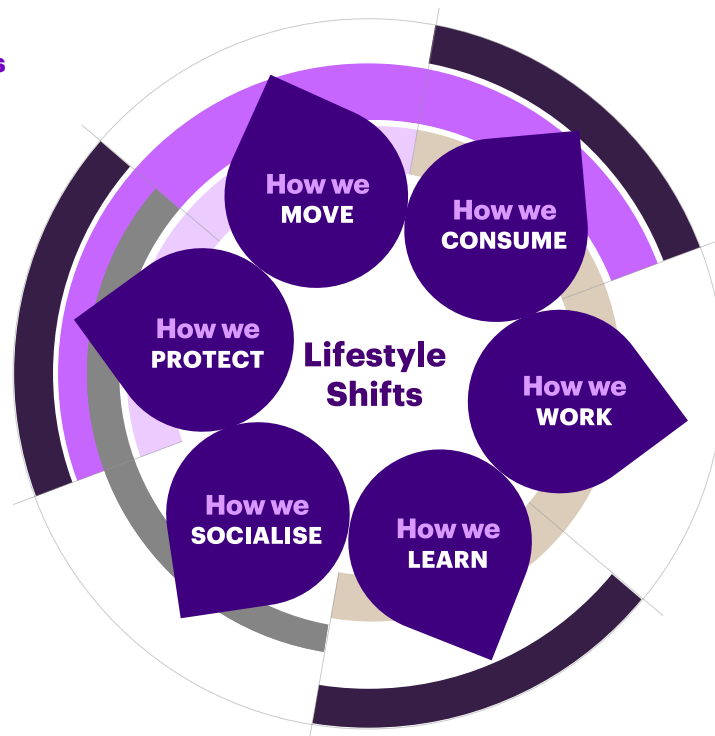
During this time of disruption, we have a unique opportunity to turn a moment of anxiety into a moment of introspection.

According to Joseph Stiglitz⁵, a prominent economist and Nobel laureate, “If we want to put people first, we have to know what matters to them, what improves their well-being, and how we can supply more of whatever that is.” To put people first (customers, current and future employees, and other members of the

community), business leaders need to understand individual lifestyle choices better. In essence, they need to understand what people truly care about.

Leveraging our “Lifestyle Framework” (Exhibit 1), we examined the powerful shifts that are reshaping the ways in which we move, consume, work, learn, socialise and protect ourselves.

EXHIBIT 1:
Five future lifestyles to prepare for today



- 1 The state of health** influences where we can travel (*rise of digital health passports*)
- 2 Environmental concerns** drive new modes of transport (*rise of micro mobility*)
- 3 Affordable tech** increases economic self-sufficiency (*rise of the micro-entrepreneur*)
- 4 Smarter habitats** inspire more connected living (*rise in sustainable physical spaces*)
- 5 Responsible denizens** fuel stronger local economies (*rise in smart tracing of goods*)

We envisage that in the next version of society, new lifestyles that combine technology in novel ways across the digital, physical and biological realms will become more prevalent. In this study, we provide a peek into the future of five such emerging lifestyles. This study is urgent for two reasons. First, the 2020 crisis is accelerating the shifts underpinning these lifestyles (i.e., personal and collective state of health determines the freedom to travel). Second, these shifts are putting the role of businesses into the spotlight (i.e., responsible use of natural resources, human capital, technology and personal data).

Visionary leaders, such as Fast Retailing CEO⁶ Tadashi Yanai, understand that the role of business is to “Help people shed unnecessary items and create their own unique, high quality lifestyle. We can’t enjoy lasting success by chasing industry trends. I want to ensure a solid operational platform by nurturing management teams who can anticipate global change and evolve our business.”

While most companies are worried about their survival right now, the real danger comes from failing to recognise the long-lasting shifts that will shape the future ways of life. Companies that fail to move in the direction of these shifts are at risk of being left behind.

The lifestyle shifts that we highlight in this paper represent future growth opportunities for businesses. And organisations can seize these opportunities by enabling more people to improve their well-being (e.g., through self-directed and more affordable health management options), and by finding new, environmentally friendly solutions (e.g., investment in sustainable and intelligent transportation and energy infrastructure).

Companies that fail to move in the direction of these shifts are at risk of being left behind.

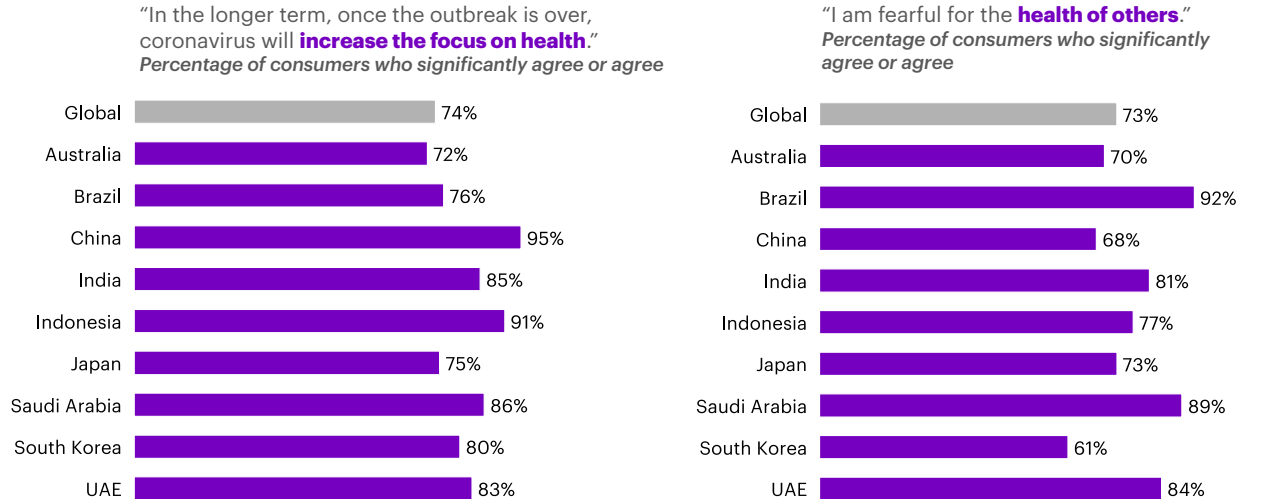
01 Lifestyle Shift

The state of health influences where we can travel

While the “great travel depression⁷” is dominating the headlines, this moment of unprecedented restriction will not curb the desire for adventure and exploration in the years to come. But it will change the experience of travelling. As travellers, we will need to be ready to accept new social norms, such as extended physical distancing measures and more extensive health checks at airports, train stations, hotels, or even beaches.

The heightened attention to individual and collective well-being is not a temporary concern (Figure 1). Associated challenges need to be addressed with the long-term in mind.

FIGURE 1:
Caring beyond “me, myself and I”



Source: Accenture Consumer Pulse Research, June 2020

According to Dr. Simon Mair⁸, an Ecological Economist from the UK, **“The key element of a thriving society is about giving people meaningful control and autonomy over their lives. The characteristic experience for many now is that they’re being pushed and pulled in many different directions by forces beyond their control.”**

Increased focus on public health will give rise to digital health passports⁹ —universal, electronic ID for border entry, combining travel and health information (such as personal immunity status), approved and issued by governmental health authorities. However, before such a solution becomes a reality in our societies, significant investment is required to accelerate the implementation of digital health records, and to resolve cybersecurity¹⁰ and personal data protection¹¹ issues. Technology companies will continue to play an important role in helping government agencies to resolve these challenges. But what are the opportunities for businesses in other industry sectors?



New opportunities for businesses

Beyond the technology sector, businesses need to get ready to put care-centric innovation at the heart of their future offerings. Improved and broad access to health services will be expected, especially at establishments that cater to travellers, such as transportation hubs or lodging operators. This will require the development of more affordable, easily accessible and digitally secure health management products and services. Our analysis reveals that venture capital is already flowing towards such opportunities (Figure 2).

While the bulk of capital continues to flow into pharmaceuticals and biotech, there has been a growing interest in healthcare service innovations. Funding into new areas such as disease diagnosis, healthcare plans, medical facilities services, medical information and alternative medicine has grown at a CAGR of 69% between 2014 and 2019.

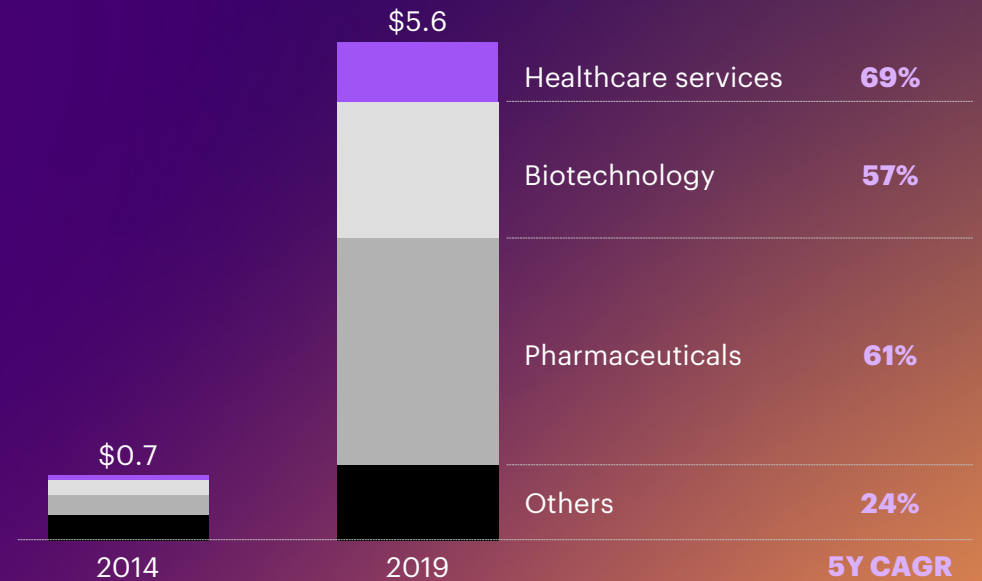
Health is not just about when you are unwell. We all need to take care of our health every day. With health propelled into the public's consciousness, the shift away from remedial "sick-care" to proactive "wellness care" will mean a growing market for self-directed health management. And businesses outside of the traditional healthcare sector have an opportunity to create new self-care services using technology.

* Australia, Brazil, China, India, Indonesia, Japan, Malaysia, New Zealand, Saudi Arabia, Singapore, South Africa, South Korea, Thailand, UAE

Source: Accenture analysis, © CB Information Services, Inc. – used by permission.

FIGURE 2:
Venture capital investments flow into care-centric innovations

Venture capital funding into Healthcare sector (seed to series D), US\$ billions
Select countries in Growth Markets*



Being well, staying well

What if your toothbrush were clever enough¹² to detect changes in your blood pressure, oxygen levels, and the sodium in your saliva to alert you at the earliest warning signs of cardiac disease? Scientists have studied the link between gum health and cardiovascular disease for decades¹³, but only recently have technology advancements allowed them to apply this knowledge to consumer product inventions, such as the everyday toothbrush.

Whilst inventions like the smart toothbrush are still going through their R&D lifecycles, consumer goods companies are actively entering the wellness market. In June 2020, athletic apparel brand, Lululemon, announced its inaugural acquisition of Mirror¹⁴, a home fitness start-up that sells intelligent, wall-mounted mirrors that can stream on-demand workouts in your home and provide real-time feedback about performance via Bluetooth connections to your smart watch and mobile phone.

Japanese company Xenoma¹⁵ uses smart apparel technology to create smart pyjamas, loungewear, tracksuits and shirts. Its e-skin Sleep & Lounge collection is smart apparel for the well-being and health monitoring of elderly people. The new tech promises to monitor sleep and activity levels, as well as send alerts to registered family members or caretakers when a person has slipped or fallen.



02 Lifestyle Shift

Environmental concerns drive new modes of transport

Rising city congestion and pollution levels, which are particularly pronounced in Asia, are adversely impacting the quality of modern life (Figure 3). In the early stages of the 2020 pandemic, air pollution in every major city dropped dramatically as traffic subsided. Many witnessed for the first time the direct impact our collective transportation choices had on the environment.

Simultaneously, the pandemic flared personal concerns about the risk of infection, instilling aversion towards public commutes in close quarters. The pursuit of immediate personal safety has led many to invest in private vehicles. In fact, in China, consumers intending to utilise private cars almost doubled (from 34% to 66%) in the wake of the coronavirus outbreak*.

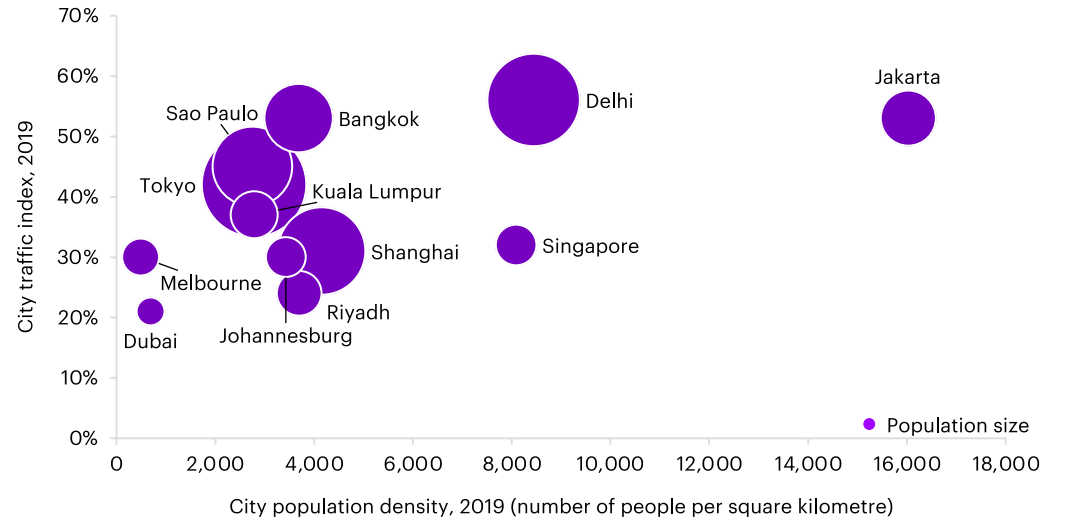
Sources: TomTom International BV - TomTom Traffic Index, World Population Review

Note: TomTom's Traffic Index ranks urban congestion worldwide, e.g. A 53% congestion level in Bangkok means that a 30-minute trip will take 53% more time than it would during Bangkok's baseline uncongested conditions. City selection based on the most populous city (metropolitan/municipality/special region) in each country

* Ipsos (2020 March 12), Impact of Coronavirus to new car purchase in China.

FIGURE 3:
Economics of density will have to change in future societies

City congestion levels and population density, 2019

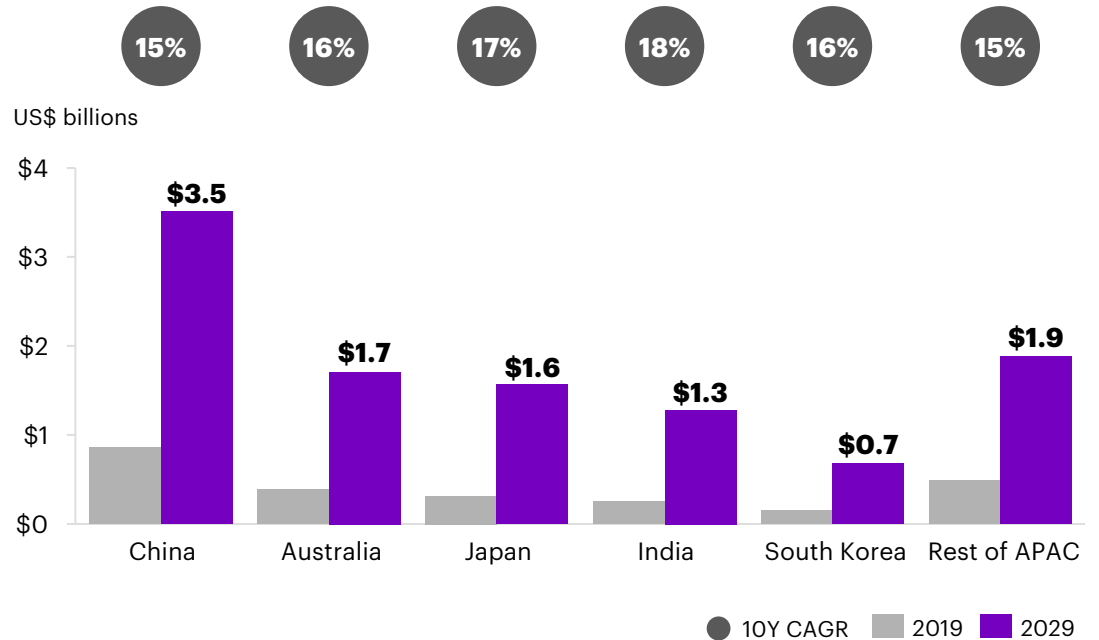


But there is more. The rise of micromobility is accelerating (Figure 4) and it's expected to help alleviate traffic congestion. In the next decade, low touch micro-vehicles, such as rentable bikes, e-bikes and e-scooters, will become increasingly attractive for urban commuters, as they are cheaper and time-saving alternatives to other modes of transport.

Asia Pacific is expected to experience the highest growth in micromobility (at 16% CAGR), reaching US\$10.1 billion by 2029. There are of course several pre-conditions that need to be in place before micromobility can enter the mainstream: notably infrastructure investments, and new safety regulations.

FIGURE 4:
When Smaller Is Better (Rise of Micromobility in Asia Pacific)

Micromobility market projections for Asia Pacific



Source: Accenture analysis, BIS Research - "Global Micro-Mobility Market", September 2019

In the longer term, we envisage a future where daily commuters will switch to new, more environmentally friendly personal transportation options, choosing from a range of “ACES” vehicles: Autonomous; Connected; Electric; Shared. The global electric car stock¹⁶ has already grown substantially, from 17,000 units in 2010 to 7.2 million in 2019. Future demand is expected to expand significantly, especially in China (Figure 5).

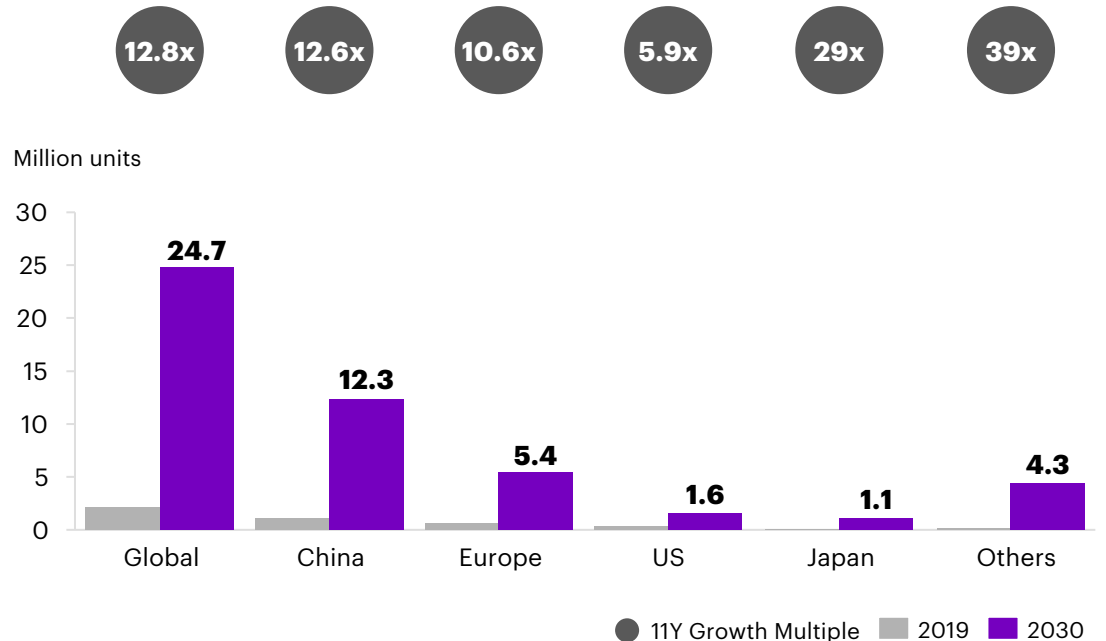
Whilst the widespread adoption of ACES is unstoppable and welcomed, it is expected to take years, if not decades. There is a need to wait for the proliferation of mobile network solutions¹⁷ that can power connected driverless technology, as well as for the maturing of new chemistries¹⁸, manufacturing techniques and better pack designs before renewables like the lithium ion battery, or alternatives¹⁹, will be ready to scale to billions of travellers at a lower carbon footprint.

Source: Accenture analysis, IEA (2020), Global EV Outlook 2020. All rights reserved.

Note: Electric vehicle refers to either a battery electric vehicle or a plug-in hybrid electric vehicle in the passenger light-duty vehicle segment, it does not include hybrid vehicles that cannot be plugged in.

FIGURE 5:
Electric vehicle market is projected to flourish, especially in China

Global electric vehicle sales



New opportunities for businesses

There are already positive signs that businesses and governments are coming together to design a future that encourages different modes of personal transportation, while also looking after the environment. For example, hyperlocal urban designs such as the “15-minute city²⁰” are on the rise, including in major global cities such as Paris²¹ and Melbourne²², where the key needs of every resident can be met within 15-minutes of their home.

Businesses need to play a prominent role by making new personal mobility solutions more accessible (beyond large cities), inclusive²³ and cybersecure²⁴ in the future.

Those that push the imaginative boundaries of what mobility will look like in 20, 40 or even 60 years²⁵ from now, and those who make progressive investments in environmentally-friendly solutions, will be well placed for future success.

Businesses need to play a prominent role by making new personal mobility solutions more accessible, inclusive and cybersecure in the future.



Moving in the right direction

In 2019, bp partnered²⁶ with Chinese mobility giant DiDi, a leading mobile transportation platform, to expand its presence in China, the world's largest EV market. China is already home to more than half²⁷ of the world's electric vehicles (EV). The joint venture, focused on building EV charging infrastructure, grants bp access to DiDi's wide-reaching platform, which boasts 550 million users and 10 billion trips a year.

This move was a preview of bp's new ambition²⁸: "To become a net zero company by 2050 or sooner" across its operations and on carbon in its oil and gas production, among other targets. To bolster this ambition, a new strategy was announced in August²⁹ to outline how bp will reinvent itself by 2030 into an "integrated energy company" (IEC), focused on delivering low carbon energy solutions to its customers, instead of on the production of two core commodities.

As part of its new convenience and mobility focus area, bp aims to establish over 70,000³⁰ EV charging points by 2030, up from 7,500 units in 2019, and new energy partnerships with 10-15 major cities around the world. According to CEO Bernard Looney³¹, "bp is going to significantly scale-up our low-carbon energy business and transform our mobility and convenience offers... And we are not starting from scratch in this new world. From our Lightsource bp joint venture – now in 13 countries – to our electric vehicle charging partnership with DiDi in China... we are already building scale and capability."



03 Lifestyle Shift

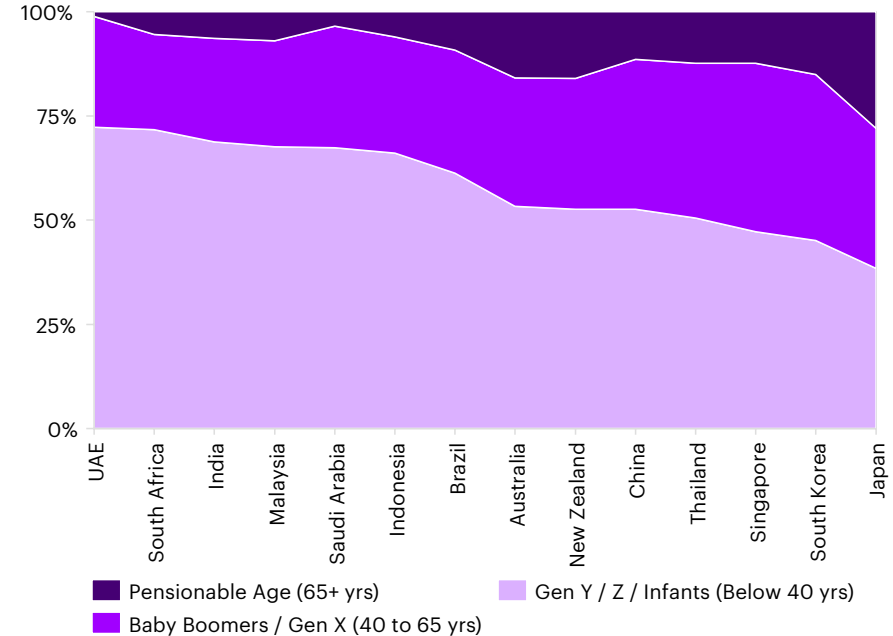
Affordable tech increases economic self-sufficiency

Even before the 2020 crisis hit, people were looking for more self-sufficient lifestyles. ‘I Can Look After Myself’ was a key consumer trend in 2019³².

One of the reasons for this is the increasing influence of the younger population. Across the 14 countries we analysed, 60% of the population was under the age of 40 in 2019, a total of 2.2 billion people (Figure 6). We envisage that in the future, the younger population will seek on-demand, tailored relationships, both in consumption and employment.

FIGURE 6:
Younger generations will redefine the rules of personal economy

Population distribution by age group, 2019



Source: Accenture analysis, Copyright © 2018 Fitch Solutions, Inc.

A major challenge is that youth unemployment remains high in most countries. According to our research, 35.5 million people between the ages of 15 and 24 were seeking jobs unsuccessfully in 2019. Even for young people who are employed, personal income is declining. A recent study in Australia³³ found that between 2008 and 2018, incomes for people aged between 15 and 24 fell by 1.6% a year, while for those aged between 35 and 64, incomes rose by 1.4% a year.

Many young people are living precarious existences, and their prospects have only been worsened by the crisis. Thus, new employment and income-generating alternatives for young people will be sought after in the coming years.

Policymakers, educational institutions and their partners are already developing new approaches to alleviate youth unemployment. One major focus is on improving the ICT knowledge³⁴ of this segment of the population, in order to help them find employment and participate in their societies more productively.



A good example comes from QUEST Alliance³⁵, a not-for-profit trust that equips young people with twenty-first century skills by enabling self-learning. It has trained over 20,000 youths for jobs in India's retail, customer interaction and services sector, with a 70% placement rate.

Armed with the right skills, the younger population has the potential to inaugurate a new age of “micro-entrepreneurs”. This digitally savvy generation will seek new income channels powered by affordable tech. Using their skills and interests tailored to emerging technologies, they will embrace new and more flexible types of jobs (e.g., digital content specialist, augmented reality filter creator, eLearning video producer). For example, Fiverr³⁶, an online marketplace for freelance digital services ranging from website building to video editing, has more than 11 million business users and over 100,000 sellers. Custom freelance offers can go up to US\$50,000, and sellers take an 80% cut.

According to Jana Dawson³⁷, the Director of Academic and Training Development at The School of Positive Psychology in Singapore, “**Young people are becoming more creative about what they do to achieve fulfilment in life. What individuals will be looking for are opportunities to participate in society that are authentic and that align with their natural competence and sense of purpose—through their jobs, relationships, or communities.**”

As younger, digital-savvy micro-entrepreneurs become more active in the workforce and the economy, how can large, established companies help them to get ahead?

Many young people are living precarious existences, and their prospects have only been worsened by the crisis. Thus, new employment and income-generating alternatives for young people will be sought after in the coming years.

New opportunities for businesses

Over the last two decades, the gig economy has created many opportunities. But it has also been questioned over a number of issues, including insufficient employee rights and limited wage protection. To appeal to the future workforce of micro-entrepreneurs, established companies will, over the next decade, need to offer more varied work and create a stickier organisational identification³⁸. Introducing changes to refresh corporate culture, such as providing the organisation with a new, more socially conscious purpose, is only the beginning.

Importantly, if companies want to gain access to a more dynamic and diverse talent pool, they need to fundamentally rethink their talent strategy. Consider Yahoo! Japan: the company is exploring new employment models to accelerate innovation. Notably, it has committed to hire over 100 non-regular workers from diverse backgrounds, who are willing to dedicate a few hours a month to Yahoo Japan³⁹ on top of their primary vocations. These 100 people, along with the COO and CSO, will consider new business ventures and services for the company. The unprecedented move comes as part of the company's effort to enhance technological innovation and competitiveness.

Access to the talent pool of younger, digitally-savvy micro-entrepreneurs will also require a new social contract⁴⁰ that enables flexible working arrangements, and one that benefits both businesses (i.e., knowledge retention) and workers (i.e., new types of benefits such as well-being programs⁴¹, self-directed training etc.).

Today's leading companies are going even further, by rethinking their role and measuring their impact on indirect job creation in the society at large.



The power of business is in enabling new job creation

In 2018 alone, Alibaba Group claims to have created over 40 million jobs⁴² across its e-commerce platforms, including the upstream and downstream sectors of its online retail service. For an annual fee, small businesses can “plug-in” to the Alibaba retail ecosystem to create their bespoke storefronts⁴³ and receive operational services, such as microsite creation and data analytics.

According to the retired founder of Alibaba Group, Jack Ma⁴⁴, “Entrepreneurs are the most important element to promote society.” In late 2019, he expressed his hopes to bring e-commerce resources to the entrepreneurs in Africa, starting with Rwanda, which was the first African country to join the Alibaba-led electronic world platform (EWTP) that seeks to expand digital trade worldwide.

At its 20th anniversary in 2019, Alibaba renewed its commitment⁴⁵ to serve 2 billion consumers, help create 100 million jobs, and enable 10 million SMEs to become profitable by 2036.



04 Lifestyle Shift

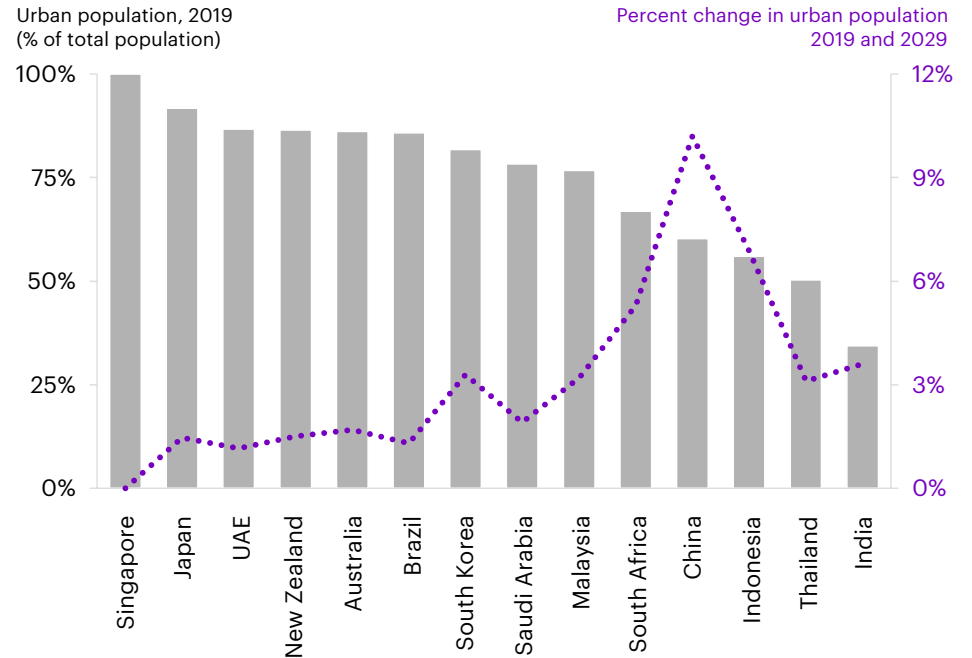
Smarter habitats inspire more connected living

Fifty-four percent of the population in the 14 countries we studied live in high density, urban areas. In several countries, namely Singapore and Japan, urbanisation is already peaking. In these countries, demand for “smarter habitats” is prominent. These are technology-enabled residential neighbourhoods that are designed to offer more vibrant, versatile and sustainable living spaces. For others, like China and Indonesia, where urban population growth will continue at a faster rate, the shift to smarter habitats is expected to gain strong traction in the coming years (Figure 7).

Source: Oxford Economics

FIGURE 7:
Urbanisation will accelerate especially in China and Indonesia

Urban population trend: 2019 vs 2029

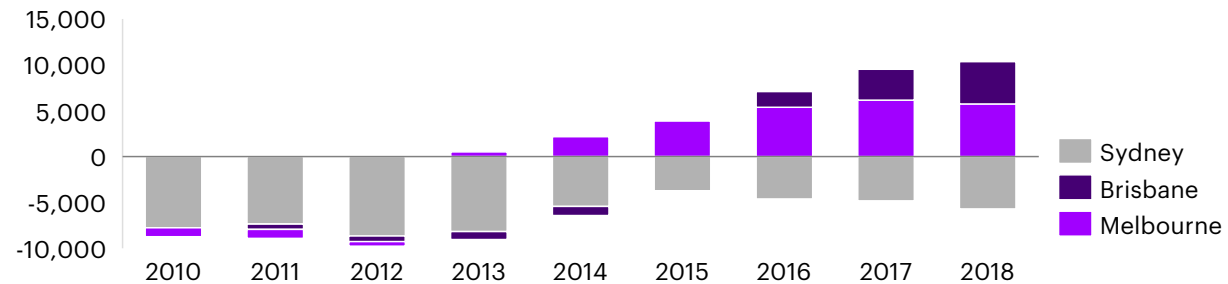


The smart city visionaries must find the right model for use and protection of people's personal information.

Furthermore, we expect that workforce migration will intensify demand for more connected living, both within megacities across Asia and in smaller cities. For instance, in Australia, the working cohort between the ages of 24 to 44 years old has been shifting interstate, in search of more slow-paced, affordable, yet connected lifestyles (Figure 8).

FIGURE 8:
Some prefer smaller, lower density cities, as shown in Australia

Australia: Net migration of working cohort (aged 24 – 44)



Smarter habitats can take different forms. They could be physical communal spaces that can be flexibly configured to meet their occupants' needs, such as on-demand working, or wellness spaces within apartment buildings, or even vertical urban farm spaces.

The key pre-requisite for more connected living spaces is not only the intelligent collection and sensemaking of data. The smart city visionaries must find the right model for use and protection of people's personal information. Ground-breaking progress⁴⁶ might be credited to the smaller towns of Japan, such as Aizuwakamatsu in the Fukushima prefecture. Its 120,000 residents can choose if they want to provide personal information in exchange for smart services, such as medicine delivery and booking no-wait-time hospital appointments. These types of "opt-in" models are critical in gaining the trust of residents and ensuring future success of smart urban developments.

New opportunities for businesses

Beyond the responsible handling of data, key enablers of smarter habitats such as a hyper-connected 5G network, internet of things and renewable energy infrastructure, will be integral to the commercial and residential estate designs of the future.

There are many opportunities for businesses to not only inspire the imagination, but also encourage urban residents to experience the future benefits of living in smarter habitats.





Sustainable, smart town with a 100-year vision

Panasonic's "Fujisawa Sustainable Smart Town"⁴⁷ (SST), first launched in 2014, is projected to house up to 1,000 smart homes by 2022. As part of its founder's long-held philosophy, Panasonic actively seeks to contribute to the development of society and to the vibrancy of local communities. With Fujisawa SST, the electronics giant aims to create ways of living which are both smart and eco-friendly, by building five key "lifestyle-based systems": energy, security, mobility, wellness and community. Panasonic has a 100-year vision for the smart town, with plans to develop, mature and further evolve the Fujisawa SST community for three generations.

The sustainability of Panasonic's smart town relies on the proactive involvement of the resident community. Alongside partners in industry, government and education, residents spearheaded the "Fujisawa SST Parent Project"⁴⁸ initiative to nurture the town and foster community building. As an example, residents attended disaster prevention programs to upskill on the necessary measures and equipment handling to prevent and deal with disasters.

05 Lifestyle Shift

Responsible denizens fuel stronger local economies

Closed borders and country lockdowns during the 2020 crisis caused mass disruptions to global supply chains. Food security became a concern for citizens around the world. This corresponded with a growth in purchasing local⁴⁹, as consumers' spending choices reflected their desire for trust, authenticity and personal connection.

The Singapore government launched its “Gardening with Edibles⁵⁰” initiative in June 2020, with the aim of strengthening national food resilience. Uptake was overwhelming: the original target was to distribute 150,000 seed packets, but the initiative eventually gave out 400,000.

The reality, however, is that not everybody can grow their own fruits and vegetables. Hence the shift towards more reliable “providores” of food and other products—both locally and internationally—is expected to accelerate.



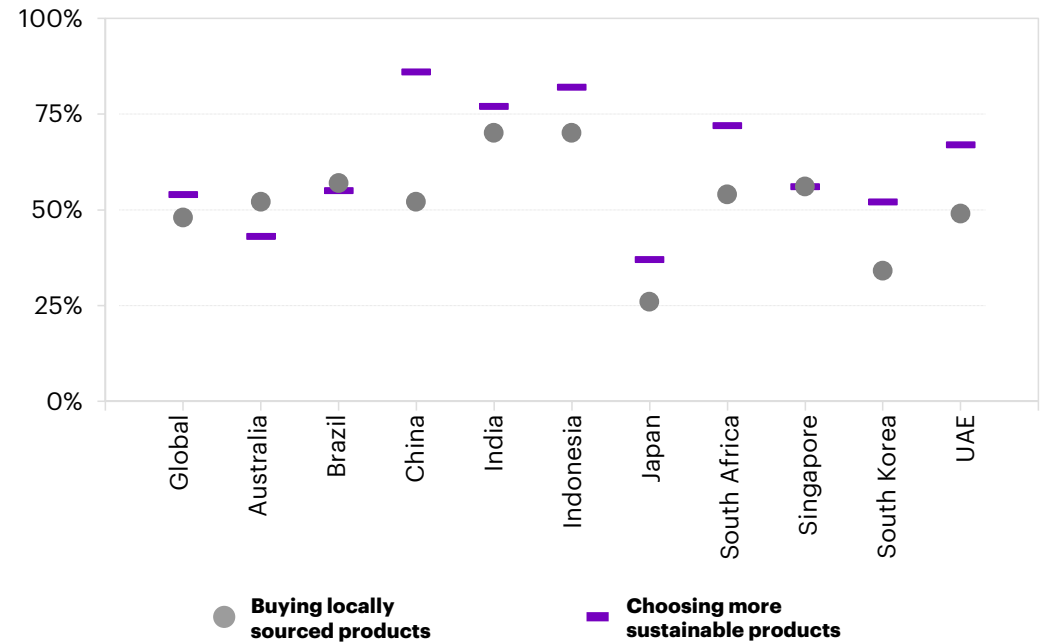
Source: Accenture Consumer Pulse Research, April/June 2020

We envisage that future denizens will pay closer attention to resource scarcity (Figure 9) and the impacts that their spending habits have on local communities. They will demand greater transparency from suppliers, especially when it comes to the origin of goods. Small, innovative companies are already responding to this demand. Teapasar, a Singaporean-based food tech start up, utilises its “ProfilePrint⁵¹” technology to verify the tea’s “fingerprint”, which provides information like its origins, terroir and harvest age. The company aims to prevent unfair pricing and misrepresentation, and to authenticate tea leaves sold by retailers at a fraction of the cost. This is done by identifying whether tea leaves are contaminated with excessive pesticides or are of sub-optimal quality.

According to Rohit Talwar⁵², a global futurist and the CEO of Fast Future⁵³, **“In order for a society to thrive, there is an understanding now that we need to change our collective behaviours, and especially our consumption choices. Here, technology can be very valuable, for example, in helping us understand the total environmental footprint of what we are buying, including how far something has travelled, and the resources used—such as how much energy was used in its production. With better information, there will also be a growing consumer segment that wants to feel good about its consumption by making more ecologically sound choices about what they are buying.”**

FIGURE 9:
Concerns about resource scarcity influence personal choices

Percentage of consumers who expect recent shopping habit changes to continue in the future



New opportunities for businesses

While many responsible denizens will prefer to spend on goods from local suppliers over imported goods, this is not the end⁵⁴ of global supply chains. Rather, it is the beginning of a new balance.

Businesses need to respond by significantly improving supply chain transparency and resilience⁵⁵ (e.g., with help from analytics), and by doubling down on business models that are responsible by design⁵⁶ (blending ethics with profit). As a result, many companies will need to reassess their brands, to ensure they can meet the new transparency and responsibility demands.

“...this is not the end of global supply chains. Rather it is the beginning of a new balance.”



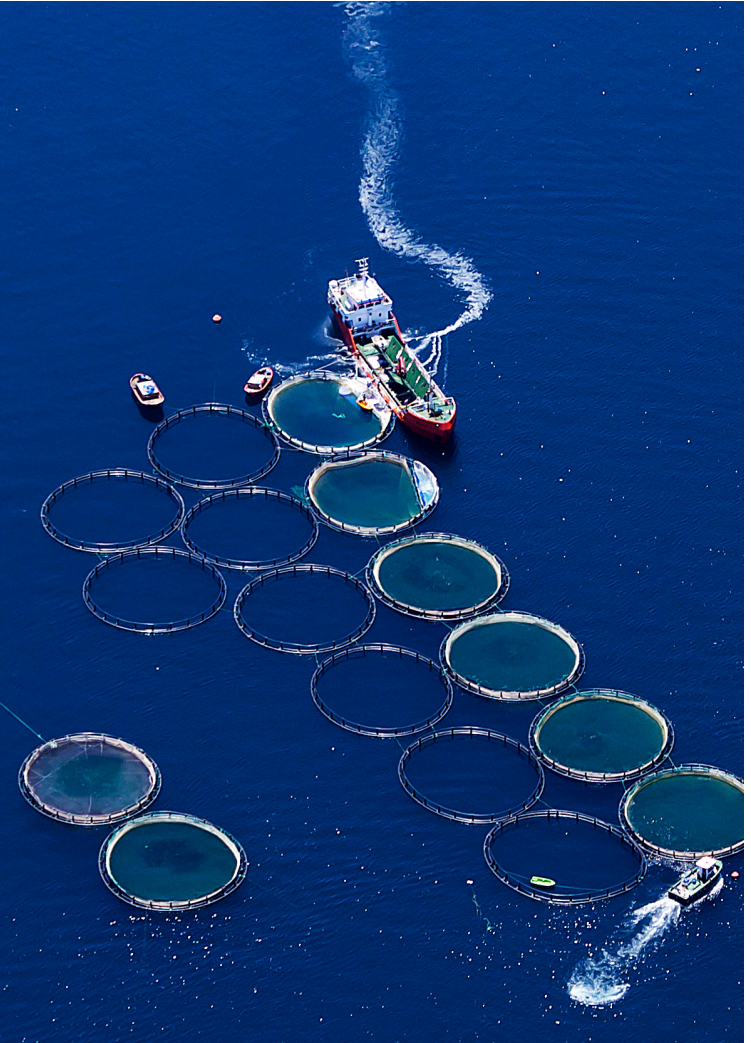
Responsible business has nothing to hide

In the last two decades, alarming food safety events such as “mad cow disease⁵⁷” and avian influenza have turned the attention of the food industry and its regulators to focus more intently on developing new food traceability solutions. Consumers⁵⁸ are equally demanding more in-depth product information and are more likely to switch to brands that can provide it.

In response, track and trace technologies such as product tagging (e.g., RFID, NFC-embedded ID chips), IoT devices (e.g., sensors, cameras) and biological fingerprinting (e.g., DNA, minerals, isotopic-elemental) have become new essentials to guarantee food safety and quality, as well as to reduce food fraud and the high cost of executing recalls, which run upwards of US\$10 million per event⁵⁹.

Consider the latest ‘seafood fingerprinting’ technology⁶⁰ that is being developed by the Australian Nuclear Science Technology Organisation (ANSTO). With a vision to cancel food fraud, it aims to provide handheld scanners that use cutting-edge nuclear and X-ray technology to seafood traders and buyers, which would allow them to verify the source of their produce against an origins database that tracks everything from the geographic origin of the seafood to the farm in which it was bred or where it was caught in the wild.

Whilst technology advancements in the domain of supply chain traceability are very exciting, there is still a lot of work to be done. Companies need to help in finding ways⁶¹ to bring new solutions closer to the start of the food chain, often to farmers or fishermen in remote locations who have limited access to technology.



**Turning
introspection
into positive
change**





We believe that a thriving future for our society will be one where human progress and environmental sustainability are prioritised alongside economic growth.

The role of business will be in creating the right conditions by harnessing human ingenuity and today's technologies—from Artificial Intelligence, to Internet of Things to Blockchain—so that more people across our societies can gain access to and enjoy the emerging lifestyles presented in this paper.

The futuristic scenario illustrated below may sound far-fetched. But the reality is that many of the technologies needed to enable such lifestyles are already available. Converting such technology-enabled lifestyles into the new norm will be up to the early adopters, as well as visionary businesses who act early.

Imagine it is 2030:

Cyborgs⁶²—humans who choose to augment their capabilities with technological devices like bionic lenses—are a norm at experimental augmented reality gaming and sports events.

Budiwati*, a talented cyborg gamer, is renowned for her string of wins at gaming competitions over the past seven years⁶³. Winning competitions is her primary source of income. Her loyal fan base of 15 million followers tune in to her weekly stream to immerse themselves in her competitive matches with the help of augmented and virtual reality. Due to the need for frequent travel to international competitions, Budiwati makes it a top priority to keep fit and stay healthy. And her digital health passport ensures that she can easily gain access to international destinations.

Lately, Budiwati has been contemplating a supplementary vocation. Her partner, an urban farmer, triggered her interest in agricultural innovations like indoor vertical farming and aquaponics. Budiwati has been spending more time at the greenhouse, helping to tag produce with smart tracing labels.

Nearing the age of 27, Budiwati plans to buy a house⁶⁴ within the next three years with accumulated savings from her gaming career. A growing interest in farming and the environment has motivated her to aim for her own energy self-sufficient home in a smart, liveable neighbourhood. While commuting to the grocery store on her e-scooter, Budiwati thinks of ways in which she can sustain both her gaming gig and green thumb in the years to come. She smiles at the thought of how far careers have come in terms of flexibility since her parents' days.



* Budiwati is an Indonesian name for girls meaning “the wise one”.

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About the Research

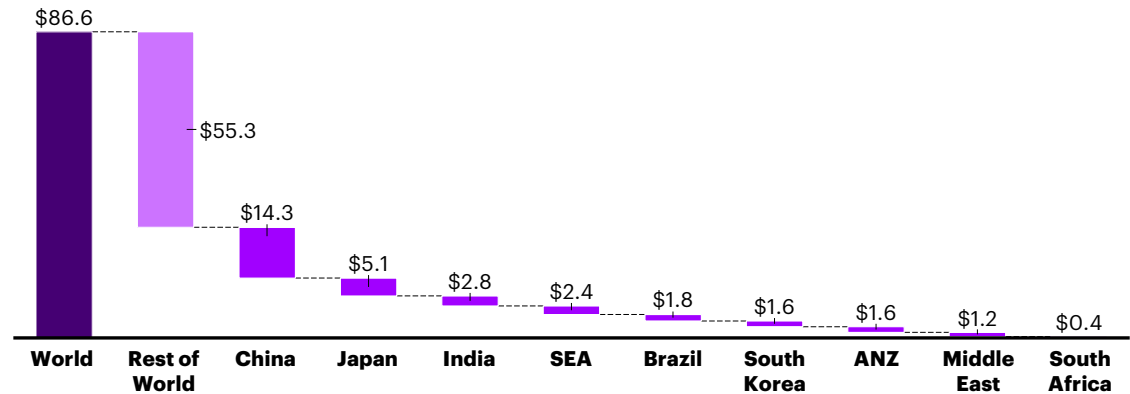
Our study is focused on the evolution of societies across 14 countries (Figure 10), including: Australia, Brazil, China, India, Indonesia, Japan, Malaysia, New Zealand, Saudi Arabia, Singapore, South Africa, South Korea, Thailand and United Arab Emirates. These countries account for 36% (US\$31.3 trillion) of total global GDP in 2019.

In order to better understand how the 2020 global crisis has accelerated the shift in how we live our lives, and the corresponding impact it has on the society and businesses, we followed a three-pronged research approach.

First, we developed a proprietary lifestyle framework to examine the changes occurring at the intersection of how we socialise, work, move, learn, consume and protect ourselves.

FIGURE 10:
Country Scope of Our Study

Nominal GDP, 2019 (US\$ trillion)



Source: Oxford Economics

Second, we conducted extensive research to test our hypotheses around emerging new lifestyles. This involved:

- Analysis of proprietary business and consumer trends research that has been developed by Accenture (e.g., Accenture Consumer Pulse Research, Business Futures, Fjord Trends and The Circular Economy Handbook);
- Analysis of key macroeconomic, demographic, environmental and social development indicators across 14 countries;
- Engaging with an external partner to explore workforce migration and skills trends for select countries;
- Performing text analytics on high-frequency data (e.g., Google Mobility Trends) and trending keywords.

Finally, we conducted a series of video interviews with futurists, innovative business leaders and academics to validate and refine the shifts expected to be long-lasting versus those that are likely to be temporary or transitory. These also informed our future outlook for five lifestyle shifts and their implications on businesses. Some of the experts we interviewed include the CEO of a national electricity company in Queensland, Australia; an ecological economist in Surrey, the United Kingdom; a landscape architect in Texas, the United States; a positive psychology practitioner in Singapore and a global futurist from the United Kingdom.



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Acknowledgements

The authors would like to thank Jenni Lai, Amy Chng, Lydia Pretty, Astrid Goh, Ser Han Neo, Karina Gan, Adelyne Loke, Grace Phan and Mark Purdy for their work and contributions.

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