

# The Future of the United States (FOTUS)

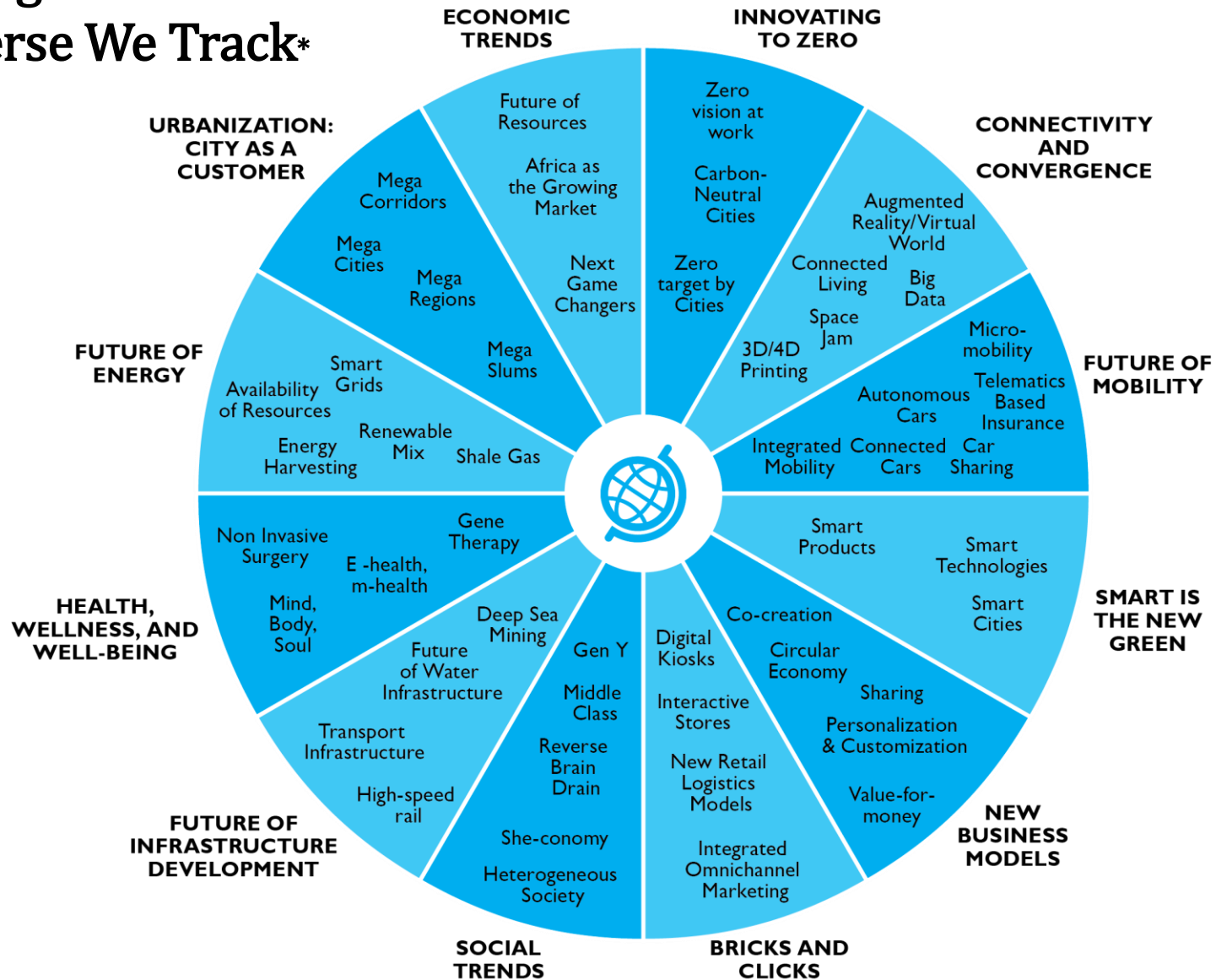




**“America is another name for  
opportunity.”**

Ralph Waldo Emerson

# Mega Trends Universe We Track\*



*\*This list is not exhaustive*

# About the Research

Our team set out to provide our current and future clients a thorough perspective on where the worlds largest economy will develop to over the coming years. In the course of our research we found a tale of both extreme promises as well as specific challenges facing America that for a forward thinking company will provide an incredible depth of analysis to help shape your United States strategy

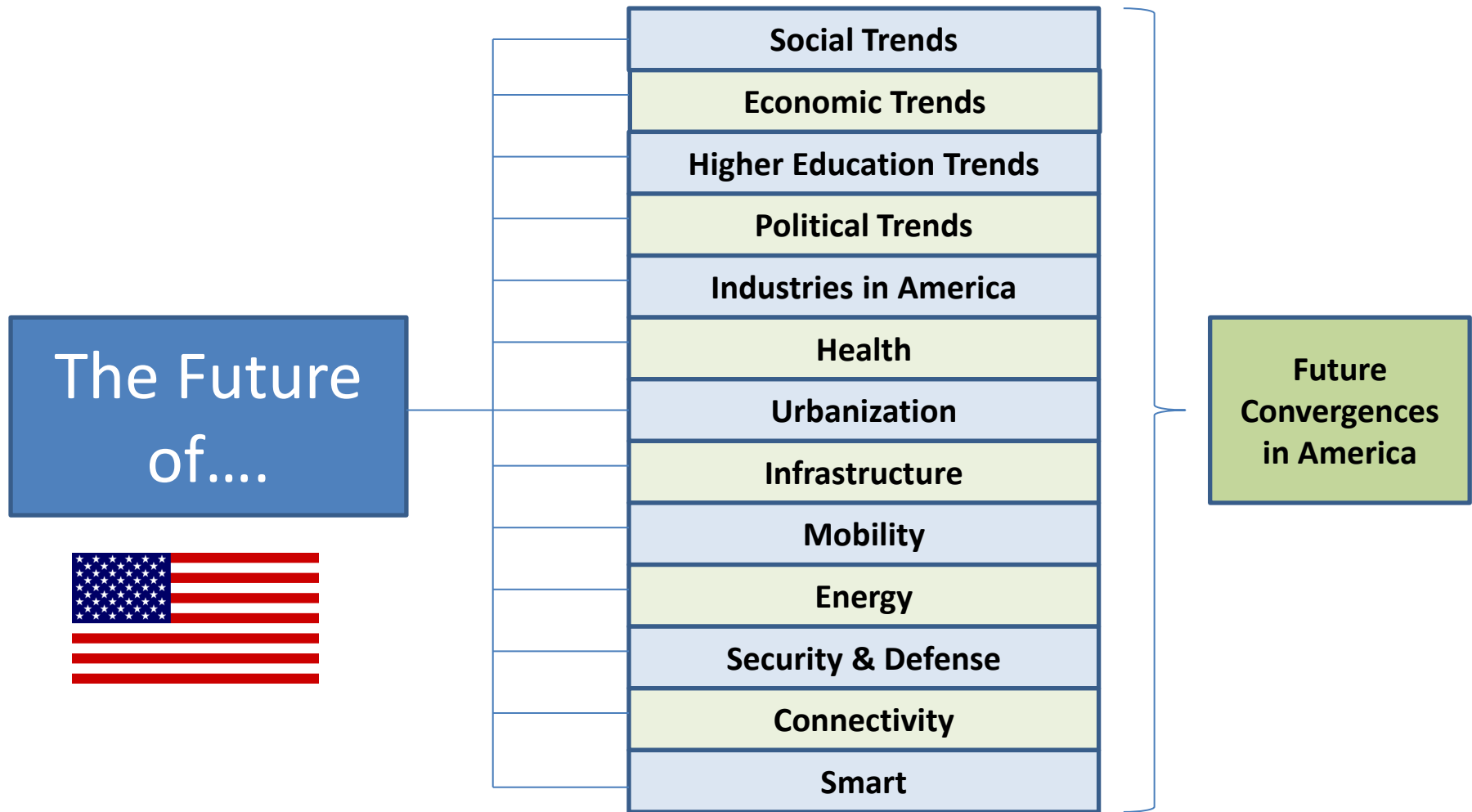
TEN Team Members  
Involved

1200 Hours of  
Research

180 Pages of New  
Content

Graphic in  
here

# Topics We Cover in FOTUS



# 2025 FOTUS SelectHeadlines

Natural gas will have replaced coal as the main source of electricity in the US by 2035.

About 50% of employers offer wellness programs aimed at improving health, mitigating risk factors for serious illnesses and lowering insurance costs

High speed rail development in the US faces a \$1.5 trillion budget gap.

Job automation and early career unemployment will contribute to an 11% decrease in median HH income by 2050.

Manufacturing will be the largest US industry in 2025, with more than \$6 trillion in output

Increasing income polarization will contribute to shrinking the US from 10% to 4% of the global middle class.

24% of US retail will be online in 2025, further driving the adoption of omni-channel retailing

320,000 vehicles will be fully automated by 2025 in the US; 50% will be highly automated.



# How Will the Findings Help Me?

You are having difficulty finding white space growth in the United States

Your industry is fundamentally changing due to convergences in America

New business models evade you but not others

You have no U.S specific plan beyond 3 or 5 years

You have a sub optimal innovation pipeline

You have no plan for the changing face of America

# 60%

Percentage of companies that will not see a ten year anniversary

Our clients understand that effective Mega Trend planning supports long term **sustainable** growth and drives a culture of **innovation**

This acts as a form of **insurance policy** against future disruptive events that could impact growth both positively and negatively

# Example Content





# The City will be 2025's Most-connected Customer

## Mega Predictions for 2025

1  
**Mega City**  
(New York City)

5  
**Mega Regions**

2  
**Mega Corridors**

Mega urban areas have large populations and elevated economic activity.

Urbanization

Suburbanization

86.7%  
of total US population in 2025

## Smart



Energy

Mobility

Technology

Citizens



Building

Infrastructure

Healthcare

Government

Cities investing in **smart technologies** will forge new avenues for commerce and collaboration.



## City as a Customer

In 2025, the **top 100 cities** with highest GDPs will produce **75.0%** of total US GDP, wielding considerable economic power.

Source: Census.gov; UN ESA; Frost & Sullivan

# Millennial Portrait

As Millennials age into management roles and political positions, they will wield significant influence in shaping American society, business, and government.

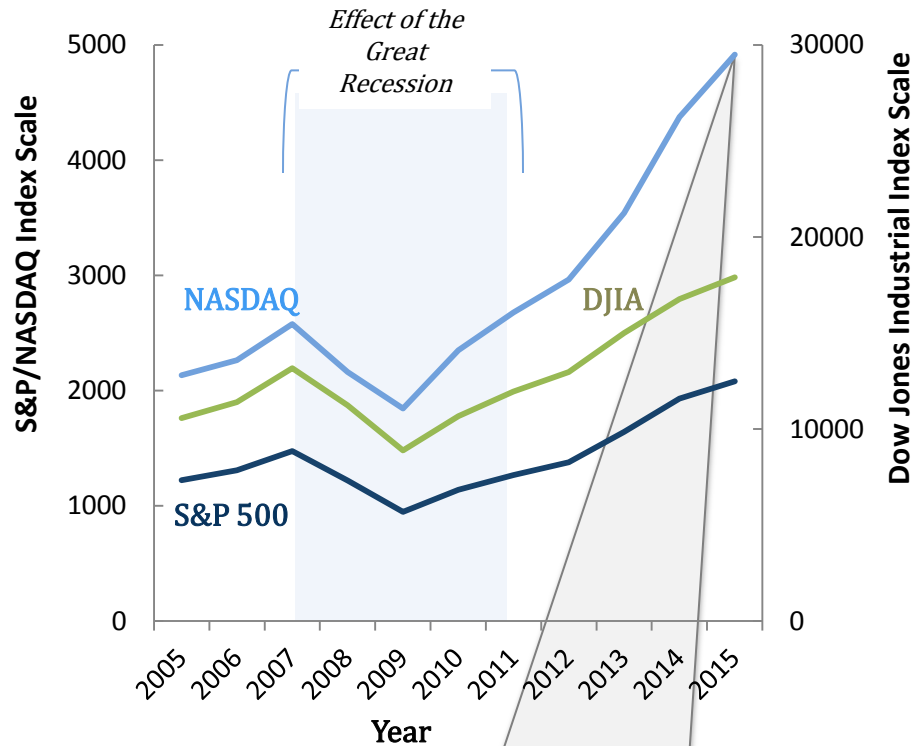
Profile	Work	Attitudes	Technology
<p><b>Marrying later:</b> 21% are married, compared with 42% for Baby Boomers at the same age</p> <p><b>Live in cities:</b> Gravitate toward urban areas and prefer to rent</p> <p><b>Smaller paychecks:</b> Currently have lower income levels, 13% are living with their parents</p> <p><b>Spending less:</b> Savvy shoppers looking for a deal, less likely to own a car</p> <p><b>Most liberal age group:</b> Even those who identify as Republican are considerably less conservative</p> <p><b>Less religious:</b> Less likely to believe that religious values are important to the country's success</p>	<p><b>Socially aware:</b> Generation most focused on corporate social responsibility</p> <p><b>Benefits focused:</b> 63% say that benefits packages are important to staying with an employer</p> <p><b>Entrepreneurial:</b> More likely to start their own businesses compared to other generations; 29% of all entrepreneurs in 2011 were Millennials</p>	<p><b>More tolerant:</b> 45% agree that preferential treatment will support minority upward mobility</p> <p><b>Concerned about financial future:</b> Almost half feel that they will be worse off than their parents; however minorities have a more positive outlook</p> <p><b>Sense of fairness and benefit sharing:</b> Greater desire to advance the welfare of the group</p> <p><b>American un-exceptionalism:</b> Less likely to believe the US is the best country on earth</p> <p><b>Less capitalistic:</b> Less positive about capitalism; more favorable towards socialism</p>	<p><b>Technologically savvy:</b> Unconcerned about letting software guide daily decisions and embrace the opportunities technology offers</p> <p><b>Always accessible:</b> 80% sleep with their cell phone next to their beds; spend 1.8 hours a day on social media sites</p> <p><b>Value self expression:</b> 75% have a social network profile and 20% have posted a video of themselves online</p> <p><b>Expect customization:</b> Products, interfaces, and media must be curated, have personalized offerings, and be on demand</p>

Source: Pew Research Center, Brookings Institute, Nielsen, Frost & Sullivan.

# Indicators Point to a Recovering but Precarious Economy

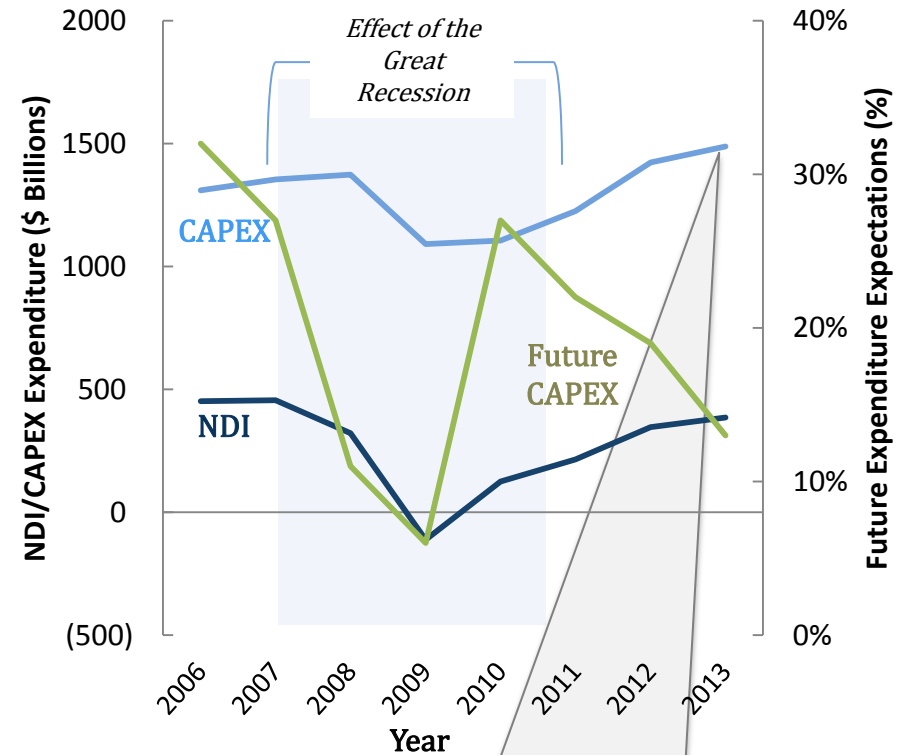
The NASDAQ and major stock indices are above pre-recession levels, but swift growth is not necessarily positive for the US economy, and may foretell impending bubble bursts.

Stock Exchange Indicators, US, 2005–2015



Stock indices show climbs to above pre-recession levels and could indicate impending bubble bursts. These bursts may be driven by indefinitely low interest rates, overvalued tech stocks and IPOs, and continued investment in junk bonds.

Private Expenditure Indicators, US, 2006–2013



According to available data, both CAPEX and NDI (which accounts for CAPEX depreciation) are stabilizing, as some business takes advantage of low interest rates. However, the percent of companies anticipating future CAPEX spend has been declining.

Source: BLS, Annual Capital Expenditures Survey; NASDAQ; DJIA; S&P 500; MarketWatch; Frost & Sullivan

# US New High-Speed Rail (HSR) Development

There is a \$1.52 Trillion budget gap between US high-speed-rail plans and reality

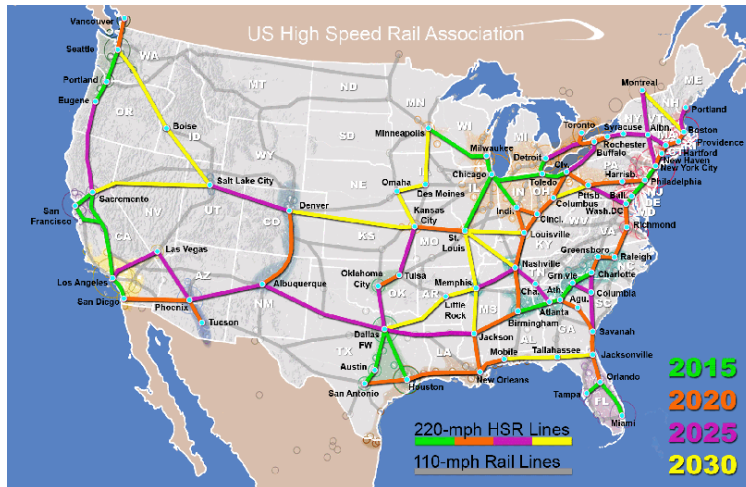
## THE GOAL

A 17,000-mile high-speed rail network by 2030

## THE PROBLEM

The budget needed over the next 15 years is \$1.53 trillion (\$102 billion/year). The total federal funding allocated to HSR projects is \$10.1 billion.

## Proposed HSR Lines, US, 2030



## US HSR network Compared to Other Regions, 2015

Country/ Region	Total miles of HSR track	Miles of HSR track/ million residents	Miles of HSR track/ million sq. miles	Miles of HSR track/ region GDP (\$T)
USA	454	1.44	119.47	27.15
Europe	9,380	12.63	2,386.77	508.40
East Asia	15,784	10.13	4,057.58	1,004.90
Russia & Mid-East	1,220	4.93	157.21	412.16

The cost to construct a high speed rail system is **roughly the same as what the US spends on highways every 5 years**, although it has a much lower associated maintenance cost than the US national highway system.

Sources: US High Speed Rail Administration, Bureau of Transportation Statistics, Frost and Sullivan.

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- Hispanic and immigrant communities

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- “Macro-to-micro”—Strategic Recommendations and Predictions

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#### Conclusion

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# Pricing & Additional Information

# Pricing Options

**Level ONE:**  
Full Report / One Hour Phone Briefing

***\$9,500***

**Level TWO:**  
Full Report / Two Hour In Person Presentation + Q&A

***\$15,000***

**Level THREE:**  
Full Report / Executive Phone Briefing / Two Day FOTUS Strategy Workshop

***\$45,000***

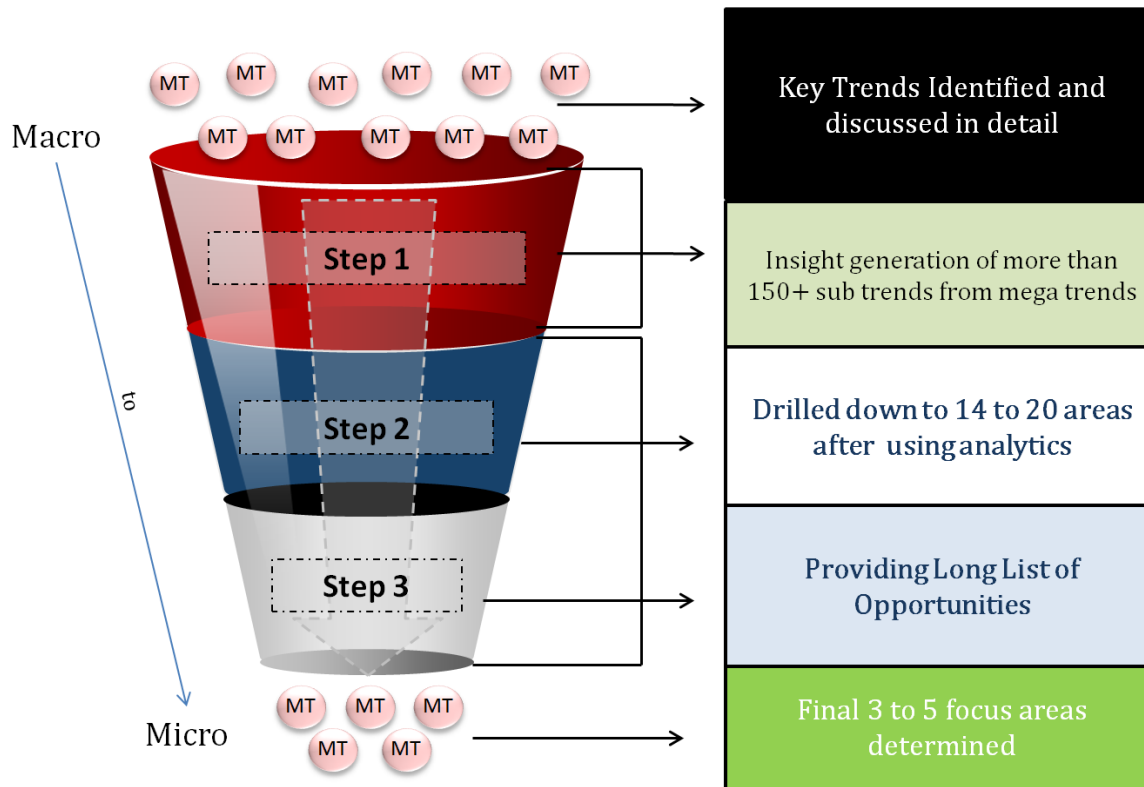
**Level FOUR:**  
Full Report / ALL Mega Trends Content Subscription for 12 months  
/ Two Day Trends Strategy Workshop (on area of choice)

***\$75,000***

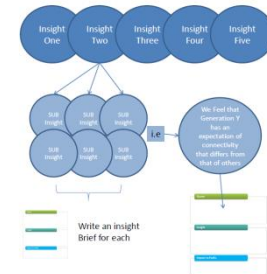


# Workshop Overview

The two day workshop uses a process we call “Macro to Micro”. The process is designed to immerse our client into an areas such as “Global Mega trends”, “Future of the United States” and use a filtering process to determine specific outcomes that will drive growth



BREAKOUT 6:  
Insight Briefs Example



BREAKOUT SESSION 3:  
Insight Analysis



The Issue Vector is a tool to provide a more structured approach to the brainstorming of strategic options. The Vector ensures that there are right main categories of growth actions into which any ideas can be mapped.

# What We Do

*Subscription Package or Independent*

## Visionary Content

Mega trends reports, market insights, and articles

## Visionary Briefings

Tailored thought-leader speeches and keynote discussions

## Visionary Workshop

Interactive session uniting company focus on innovation

## Visionary Challenge

Client-specific consulting project centered on a defined question

Note: Any stage can be requested individually by our clients. Subscription to Visionary Content is not required, but recommended.

A selection of our clients:



# Current Hot Focus Areas from VIG



**Future of Work**



**Future of Smart Cities  
and Living Labs**



**New Business Models**



**Future of Retail: Bricks  
and Clicks**



**Future of Logistics and  
Supply Chain**



**Future of Mobility**



**Future of the United  
States**




**Future of Mobile  
Robots**

# Contact Information

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