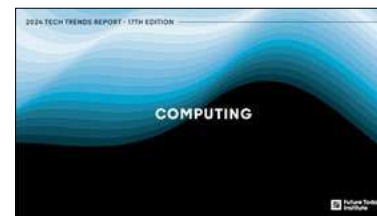


# NEWS - INFORMATION

# FUTURE TODAY INSTITUTE'S 2024 TECH TREND REPORT

Our 2024 edition includes more than 700 trends, which are published individually in 16 volumes and as one comprehensive report with all trends included.

Download all sections of Future Today Institute's 2024 Tech Trends report at <http://www.futuretodayinstitute.com/trends>.





## THE YEAR AHEAD: TECH SUPERCYCLE

The theme for our 2024 report is Supercycle. In economics, a “supercycle” refers to an extended period of booming demand, elevating the prices of commodities

and assets to unprecedented heights. It stretches across years, even decades, and is driven by substantial and sustained structural changes in the economy.

We believe we have entered a technology supercycle. This wave of innovation is so potent and pervasive that it promises to reshape the very fabric of our existence, from the intricacies of global supply chains to the minutiae of daily habits, from the corridors of power in global politics to the unspoken norms that govern our social interactions.

Driving this seismic shift are the titans of technology and three of their inventions: artificial intelligence, biotechnology, and a burgeoning ecosystem of interconnected wearable devices for people, pets, and objects. As they converge, these three macro tech segments will redefine our relationship with everything, from our pharmacists to our animals, from banks to our own bodies. Future Today

Institute’s analysis shows that every technology—AR/ VR/ XR, autonomous vehicles, low Earth orbit satellites, to name a few—connects to the supercycle in some way.

The ramifications are stark and undeniable. As this tech supercycle unfurls, there will be victors and vanquished, those who seize the reins of this epochal change, and those who are swallowed whole. For business leaders, investors, and policymakers, understanding this tech supercycle is paramount.

In this 17th edition of FTI’s annual Tech Trends report, we’ve connected the supercycle to the more than 700 trends we’ve developed. Our research is presented across 16 technology and industry-specific reports that reveal the current state of play and lists of influencers to watch, along with detailed examples and recommendations designed to help executives and their teams develop their strategic positioning. The trends span evolutionary advancements in well-established technologies to groundbreaking developments at the forefront of technological and scientific exploration. You’ll see emerging epicenters of innovation and risk, along with a preview into their transformative effects across various industries.

We’ve visually represented the tech supercycle on the report’s cover, which is an undulating image reminiscent of a storm radar. Vertical and horizontal lines mark the edges of each section’s cover. When all 16 section covers converge, the trends reveal a compounding effect as reverberating aftershocks influence every other area of technology and science, as well as all industries.

It’s the convergence that matters. In isolation, trends offer limited foresight into the future. Instead, the interplay of these trends is what reveals long-term change. For that reason, organizations must not only remain vigilant in monitoring these evolving trends but also in cultivating strategic foresight—the ability to anticipate future changes and plan for various scenarios.

Our world is changing at an unprecedented rate, and this supercycle has only just begun.

A handwritten signature in black ink that reads "Amy Webb".

**Amy Webb**

Chief Executive Officer  
Future Today Institute

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## TOP HEADLINES

**The news ecosystem is at an inflection point. The adoption of generative AI in business and entertainment media is actively shaping consumer expectations for news.**

**01 Generative AI is mainstream**

While algorithms won't completely replace human creators in the near term, they are lowering the barrier to creating compelling content.

**02 Digital traffic dynamics are shifting**

Websites built on search will need to contend with rapidly shifting consumer behavior, driven by a flood of algorithmic content and changing search modalities.

**03 Publishers are losing power in the content value chain**

Technology companies are poised to claim a greater share of the content value chain wielding multimodal LLMs, giant troves of scraped data and the power of AI summarization.

**04 Foundations are the new hedge funds, offering an influx of cash to fund journalism**

News organizations, especially public media and local outlets, are counting on those grants to hire staff and grow.

**05 Trust is essential for media businesses, but it is at near-historic lows**

The ability for legacy publishers to succeed will hinge on their ability to maintain the trust of audiences.

# STATE OF PLAY

Emerging technologies like generative AI are shaping the future of content creation, distribution and monetization.

Generative AI went mainstream in 2023, igniting fears that algorithmic content would flood the internet and relegate writers to the dustbin of history. In the year ahead, the initial frenzy around ChatGPT, prompt hacking and AI-backed product launches will fade, but the information ecosystem will never be the same.

As technologists search for new applications of AI, the media value chain is being reshaped. The barriers to creating compelling content are falling because of AI-enabled editing tools—which include text editors that can draft paragraphs from bullets and video editors that can synthesize a sizzle reel from a few words.

Norms of digital distribution shaped over the last decade are crumbling. There is no longer a dominant social network for news. Search traffic with generative summaries are poised to replace the traditional list of links. That concern is on top of a shift in Google's core algorithm that has reduced the visibility of news websites.

At the same time, the fundamentals of the information economy remain challenging. The move to reader revenue has kept lots of publishers afloat, but it remains to be seen how much growth is possible. There is substantial excitement around philanthropic funding models for journalism, but nonprofit newsrooms still need to prove their relevance to audiences.

# KEY EVENTS

MARCH 2023

## LLM explosion

Generative AI fever hits with the release of multiple LLMs (large language models), including GPT-4.0.

MAY 10, 2023

## Generative search from Google

The launch of Search Generative Experience highlighted how AI might change news discovery.

DECEMBER 13, 2023

## Axel Springer + OpenAI partner

The German media house became the first global publisher to reach a licensing deal integrate its journalism into OpenAI's products.

APRIL 12, 2023

## NPR quits Twitter

NPR's departure emphasized the dramatic shift in the social network's tone and leadership.

MAY 18, 2023

## Section 230 remains intact

The Supreme Court ruled technology platforms aren't liable for user-generated content.

# LIKELY NEAR TERM DEVELOPMENTS

## THE PACE OF CHANGE ACCELERATES

Journalists are accustomed to the breakneck pace of change: Adjusting to rapid developments has been the watchword of media organizations for more than a decade. The year ahead will test whether news leaders have learned to search for disruption or whether they've gotten complacent. Barriers to creating compelling content will fall. The operating assumptions that let many digital publishers thrive on reach will crumble. There will be a race to derive value from existing content, either by licensing it to tech companies or building publisher-owned LLMs. New categories of devices will demand new publishing formats. Successful news organizations will triage these competing threats to find opportunity; too many publishers will do nothing and find their relevance diminished.



### Evolution in copyright law

Generative AI tools have outstripped settled law. Expect to see litigation challenging whether crawling content to train a large language model constitutes fair use. The impacts of that legal wrangling could be compounded by new laws or regulations.



### New modes of search and discovery

Generations Z and Alpha have different consumption patterns than older generations. These differences are especially stark when looking at how younger users find news. Publishers need to tailor their strategies to reach those potential consumers.



### Fragmented information access

Not everyone can afford a news subscription. As paywalls at premier publishers get tighter, essential reporting may not reach the communities that need to see it. This is of particular concern for the 2024 US presidential election.



### Subscription fatigue

The conversion to a subscription economy is happening in news but also in retail, gaming, automobiles, and more. All those programs are competing for a finite share of consumer spending, so publishers need to ensure they are essential to remain competitive.



### New European regulations

The EU's Digital Services Act, in effect since August, introduced substantial changes to the regulatory framework for tech platforms. Its obligations may shift how platforms operate, just as a Canadian law caused Meta to drop news from its platform last year.



### Easier content creation

Expect to see a new suite of productivity tools aimed at transforming the creative process. Those tools will have a cultural—and economic—impact as they lower the barriers to publishing text, photos, and videos. Legacy creators will struggle to adapt.

## 11 MACRO SOURCES OF DISRUPTION



Technology



Media & Telecom



Demographics



Environment



Government



Public Health



Education



Geopolitics



Infrastructure



Economy



Wealth Distribution



# WHY NEWS & INFORMATION TRENDS MATTER TO YOUR ORGANIZATION

## **Search and discovery is relevant to all**

Any business that publishes online—effectively, anyone with a website—needs to understand how consumers search for and discover new information. The shifting search and social media landscape is particularly important for publishers but is broadly relevant because those changes will quickly impact other industries.

## **Businesses cannot operate without journalism**

A growing body of research shows that losing local news outlets leads to more corruption, less competitive elections, and weaker government finances in impacted regions. Business leaders need to follow news and information trends so they can maintain the health of their operating environment.

## **Consumption highlights consumer behavior**

The way news is read, watched, and listened to offers tremendous insights into how consumers will interact with technology more broadly. The pervasiveness of news makes it a good barometer for understanding how consumers will adapt to new devices and media formats.

## **Content verification**

The ease of creating content with AI tools means that it is more important than ever to verify the authenticity of facts, images, and videos that circulate online. Journalists aren't the only ones responsible for fact-checking—any organization that publishes content online or takes strategic actions based on open-source information needs to do it.

## **Sustainable news funding is essential**

It is critical to understand how the economics of news will continue to support impactful reporting. The last five years saw a substantial shift in how publishers fund themselves, with renewed emphasis on digital subscriptions and foundation support. Those developments have important repercussions for the entire media value chain.

## **Understanding the dynamics of trust**

Trust is an essential asset for all businesses, but news organizations must pay special attention to their credibility. Tracking trends in news and information can help an organization understand and respond to the ways that technology is driving audiences to become more polarized and distrustful.

# OPPORTUNITIES & THREATS

## Threats

Reader revenue programs will face growing competition in a market saturated with subscription products. Publishers may fail to diversify their revenue streams because of the industry consensus to keep pursuing audience revenue.

Search engines that incorporate generative AI or voice interfaces may send less referral traffic to news websites. That will curtail one of publishers' strongest tools for reaching new audiences, restricting future growth.

Device manufacturers and platforms may use LLMs to generate and distribute news directly to their users. The result would be a dramatic shift in the media value chain, threatening to displace publishers' core offering.

Trust in institutions—and in news media in particular—remains near historic lows. News organizations that lose credibility won't be able to build audiences to sell advertising or to convert consumers to subscribers.

Resource-constrained publishers struggle to track the innovation related to content creation and distribution happening across domains. Their organizational culture makes it difficult to respond to multidisciplinary challenges.

## Opportunities

Legacy publishers have a deep archive of content that can be used for training large-language models. The demand for data to train LLMs could increase the value of those archives, creating a new revenue stream for publishers.

Brands that maintain durable relationships with consumers will thrive in a low-trust environment. Publishers that have built trust over decades can translate that across distribution channels with thoughtful product development.

Emerging devices will demand new programming formats. Creators and publishers that act on that opportunity early will be able to set norms and negotiate better deals with platform companies than those that delay action.

Technologists across the world are seeking ways to enhance and apply AI tools like ChatGPT. That means media companies have an unprecedented number of potential partners to work with on product development.

Many open-source alternatives to AI models licensed by tech giants like Google, Microsoft, and OpenAI are available. The propagation of open-source language models could allow news organizations to innovate with greater control.

# INVESTMENTS AND ACTIONS TO CONSIDER

1

Assess the value contained within your archives. Is there an opportunity to license that content or use it to train your own large language model? Does that content have specific biases that should be addressed before it could be used in production? Is the archive already digitized or is it analog?

2

Ask how your organization would respond to a trust crisis: What would you do if your website was used to launch a coordinated misinformation campaign? How would you recover from a mistake that impacts consumers' perception of your brand? An internal exercise could expose operational gaps before they have consequences.

3

What skills will your organization need in the next 5-10 years? How will you be able to train or recruit staff who can support and execute on your goals?

4

Understand the audiences you are trying to reach and invest in building direct relationships. If your strategic plan calls for an audience of younger users, how will you measure that goal? Once you start making inroads with that audience, what tactics will you use for keeping them engaged?

5

Build partnerships with a local university to identify and create technical infrastructure. Connections with academic institutions can help to make sense of state-of-the-art research and create a talent pipeline for your organization.

6

Identify the tasks most vulnerable to automation within your organization. Would deploying an AI tool to automate that work increase operational risk? How would your consumers respond if they learned that certain text was generated by an algorithm? Honestly answering those questions could help triage pilot projects.

# CENTRAL THEMES

## Weakening legacy organizations

The information ecosystem is less resilient because of waves of consolidation and layoffs that have buffeted publishers. More than half of the local newspapers in the United States are owned by just seven companies. 2023 was a brutal year, with more media layoffs recorded by July than any year on record, according to career services company Challenger, Gray & Christmas.

Across the media landscape, legacy players and digital upstarts are redoubling their efforts to build audience-funded recurring revenue streams. That work is essential, but it is a long way from reversing the losses that publishers—especially those providing local news—have suffered over the last decade and half.

As a result, organizations are forced to make difficult choices between forward-looking innovation and core operations. While it's easy to defer investing in emerging technologies and platforms, the strategic imperative is to act on the trends nearing an inflection point.

## Pivot to audience revenue

Subscriptions power media outlets, from multibillion-dollar media giants like The New York Times to individual passion projects on Substack. They are a preferred tactic with news organizations because they align publishers' economic interests with their audience.

Publishers are getting more efficient at converting readers to subscribers—and understanding how to retain them once they've signed up. Those insights are essential for news organizations striving to remain sustainable.

At nonprofit news organizations, which generally don't charge for subscriptions or have a paywall, audience revenue is also an important source of support. At those organizations, the challenge is demonstrating the value of recurring support without the help of a paywall.

Whether it's a subscription or a recurring donation, news organizations need to focus on providing an essential service. That's the best way to ensure consumers stay engaged and remain willing to pay, even as more and more

other industries launch subscription programs to compete for readers' limited funds.

## Preserving civic information

Widening news deserts in the United States make it harder to find basic coverage of local governments. The influx of philanthropic funding to news is driven, in large part, by a desire to reverse that decay.

"The philanthropic sector recognizes the need to strengthen American democracy," said John Palfrey, president of the MacArthur Foundation, in the launch announcement for the \$500 million Press Forward coalition, to be used for local journalism. "Progress on every other issue, from education and health care to criminal justice reform and climate change, is dependent on the public's understanding of the facts."

Another, less discussed, need is preserving open access to essential information about basic services and emergency situations—information that can be difficult to find because of the quality of government websites and other official sources. The current wave of

philanthropic funding for news isn't directly addressing this issue, but emerging broadcast standards could help.

## Focus on value, not tools

Nearly every day a new startup launches with a novel application of AI. Those tools increasingly seek to change how would-be creators operate. While some products will truly disrupt the information ecosystem, it is far too early to know which ones will have a durable impact.

Instead of focusing on the specific application of technology, look for whether it offers a fundamental shift in how value is created. An AI-enhanced word processor may reduce writer's block and streamline the writing process. Rather than analyzing the ethics of publishing AI-powered suggestions, news organizations should consider the implications of inviting tech companies into their value chain: How might a magazine's distinctive voice be impacted if its writers use the same off-the-shelf editing algorithm that another publication uses? How will pre-publication data be used in other products or services?

# ONES TO WATCH

**Ashley Alvarado**, who leads community engagement and strategic initiatives for Southern California Public Radio, for pursuing innovative ways to engage audiences with public media.

**Keith Axline, Spencer Cavanaugh, and Eric Mack**, co-founders of JournoDAO, for prototyping ways that journalists can engage with Web3 technologies.

**Scott Brodbeck**, founder of a local news network serving the Washington, D.C., metro area, for experimenting with GPT-4 to scale local news operations with low-code automation.

**Meredith Broussard**, data journalist and journalism professor at New York University, for academic research on applications of AI to investigative reporting and the creation of ethical AI.

**Feli Carrique**, executive director of the News Product Alliance, for coordinating a community of news innovators, including launching a new certificate for News Product Management.

**Jon Cohrs, Chris Wood, and Willa Köerner**, members of The New York Times R+D team, for work on spatial audio, including creating a guide for podcast producers to use the technology.

**Liz Danzico**, design executive at Microsoft, for contributing to the development of Bing's AI interface and working with news organizations to consider how they need to evolve.

**Jessica Davis**, senior director for AI product at Gannett, for pursuing AI-powered newsroom automation solutions across the publisher's network.

**Lebo Diseko**, South African correspondent for the BBC World Service and Nieman Fellow, for research into new modes of audience engagement and how journalists can protect democracy.

**Evelyn Douek**, assistant professor of law at Stanford Law School, for leading scholarship on how online speech is regulated by social platforms and tech companies.

**Dr. Magdalena Fuentes**, professor at NYU, for research around how AI can improve the quality of closed captions and transcriptions by better describing ambient sound.

**Uli Köppen**, head of the AI+Automation Lab at the German public broadcaster Bayerischer Rundfunk, for prototyping and exploring the future of public service broadcasting.

**Joy Mayer**, director of Trusting News, a project that trains journalists and conducts research intended to help bolster trust in and credibility of news organizations.

**Miranda Marcus**, leader of BBC labs, for managing the broadcaster's innovation incubator that explores new ways technology can support newsgathering and distribution.

**Surya Mattu**, leader of the Digital Witness Lab at Princeton University, for work supporting technologies investigating misinformation and how algorithms make decisions.

**Dr. Swapneel Mehta**, founder of research collective SimPPL, for facilitating partnerships to understand local news audience analytics and the spread of disinformation.

**Dr. Arvind Narayanan**, professor of computer science at Princeton University, for leading a research project about algorithmic amplification on social media.

**Michael Newman**, director of transformation at Graham Media Group, for leading a project that experimented with using generative AI to improve the quality of comments sections.

**Josh Raab**, former director of Instagram and TikTok at National Geographic, for studying how journalists can understand social algorithms as part of a Knight-Wallace fellowship.

**Zach Seward**, the New York Times' first Editorial Director of A.I. Initiatives. In that role, he will play an outside role shaping the norms for how one of the world's largest news organizations uses AI tools.

**Felix M. Simon**, doctoral student at the Oxford Internet Institute and Knight News Innovation Fellow, for researching the blind spots in newsrooms' AI guidelines.

**Agnes Stenbom**, founder of Schibsted's inclusion lab, for advancing research into responsible AI usage and for prototyping ways outsiders can get involved with the future of news.

**Dr. Benjamin Toff**, senior research fellow at the Reuters Institute for the Study of Journalism, for leading research into declining trust in news in communities around the world.

**Johanna Wild**, founder of Bellingcat's investigative tech team, for nurturing the ecosystem of developers and tools that can improve the quality of investigative journalism.

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Sam Guzik is a Senior Expert Advisor specializing in the future of news, content, distribution, and strategy. His career includes a broad range of experience in product management, strategic foresight, scenario forecasting, audience

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Sam leads the product strategy for a large public media company. Passionate about building a sustainable future for local news, Sam has demonstrated results by creating innovative, engaging, and impactful journalism — and thinking about the business model to support that work. His career includes a broad range of experience in product management, strategic foresight, scenario writing, audience engagement, and leadership in legacy news organizations.

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# ABOUT FUTURE TODAY INSTITUTE

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## About Us

Founded in 2006, Future Today Institute is an advisory firm specializing in strategic foresight, driving corporate strategies that lead to long-term success and resilience.

Future Today Institute partners with global business leaders to navigate disruptive change and uncertain futures with confidence. We fuel actionable strategic decisions that prepare you to take on global challenges, create sustainable value and ensure long-term growth.

As the global leaders in strategic foresight, our rigorous data- and research-driven methodology positions us to anticipate the unexpected and develop strategically driven roadmaps to manage risks and take advantage of opportunities today, tomorrow and into the future.

We empower leaders to make better decisions about the future, today.

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# METHODOLOGY

Future Today Institute conducts in-depth qualitative and quantitative research throughout the year to identify emerging trends. We review patent and trademark filings, pre-print and published scientific papers, investment rounds, online search trends, macroeconomic data, publications from governments worldwide, news mentions, influencer posts and other sources, and we use a proprietary system to identify patterns, which are then grouped into nodes and evaluated using a set of standardized indicators. Qualified trends are further scored for their trajectory, momentum and timing. Additionally, we harness the deep subject matter expertise of our Future Today Institute network, leading to valuable insights about the topics we cover.

In continuous publication since 2007, Future Today Institute's annual report includes maturing and emerging trends grouped into two categories: industry and technology. Industry trends reflect the ways in which technology is shaping the future of an entire industry. Technology trends are specific developments within one arena, such as artificial intelligence. Covering a wide range of technologies across industry sectors creates a holistic view of change and provides leaders with a clear understanding of their potential impact. Trends are published as individual Industry and Technology reports, as well as in one combined report with all of our research.

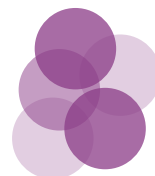
Monitored regularly, trends help executives recognize emerging threats and opportunities in the near-term and enable them to develop perspectives, strategies and plans for the future.

## Future Today Institute's Strategic Foresight Methodology



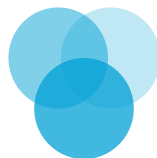
### SIGNALS & LONG-TERM TRENDS

**What is  
INFLUENCING  
the future?**



### GLOBAL MACRO SCENARIOS

**What is  
THE future?**



### STRATEGIC

**What is  
YOUR ORG'S  
future?**



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