#TechVision

Technology Vision 2022

Meet Me in the Metaverse

The continuum of technology and experience, reshaping business

Executive Summary

Voices of Change

From insights to action, the path to extraordinary value starts here.

accenture

On an ordinary day in 2030, a construction foreman is operating a road roller at a worksite in California.

He and his coworker talk as they direct a construction robot to lay down asphalt on a section of Highway 1. Suddenly, his assistant appears as a hologram on the edge of the site, waving him over to confirm the work summary of the day and to remind him that it's time to meet with the city inspector for another project. He walks over to the construction site's mobile office, puts on his VR headset, and finds himself in the lobby of the virtual City Planning Department.

His AI assistant reappears to direct him towards the virtual conference room where his meeting will be held. Upon his entry, the room transforms to look like the inspection site (an overpass they recently completed) using a real-time feed from a drone onsite. Architectural drawings from the State of California Contractor Cloud are laid over the live footage, and the foreman and inspector begin to assess the work. Upon approval by the inspector, he sends his assistant to submit the applications for the next round of construction permits. Then he pops off his headset, and heads back out to the worksite.

Welcome to the "**Metaverse Continuum**" – a spectrum of digitally enhanced worlds, realities, and business models poised to revolutionize life and enterprise in the next decade.

This continuum is bringing the next major wave of digital change to enterprises, and leaders need to start making big leaps forward in how they think about their business – today. Soon, they will be at the intersection of many new worlds, from building new physical and virtual realities to providing services in environments created by others. Like in the scenario above, people will actively live in and jump between these worlds on a daily basis. Our foreman starts his day physically building a road in a digitally and robotically enhanced construction site, and ends it in an office in the metaverse, a virtual environment created by the City Planning Department, which lets him travel between geographies in seconds for government inspections. And this is just the beginning.

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The physical world is coming alive environment by environment, each with its own capabilities and rules. Today we already have small-scale intelligent physical worlds like smart factories, intelligent cruise ships, and automated ports – tomorrow we will see these grow into entire smart neighborhoods, cities, and countries, where massive digital twins mirror physical reality. And the digital world is expanding too. Soon, new consumer spaces in the metaverse will transport us to almost any type of world we can imagine, letting us relax, entertain ourselves, or socialize over long distance. And major companies will shift part of their operations to the metaverse as well, maintaining their own internal virtual environments so employees can work from anywhere and collaborate in exciting new ways. With opportunity proliferating across all these new worlds, to best serve customers and partners alike enterprises will need a strategy to operate across the full spectrum.

This way of life seems futuristic for now, but it's already on its way here.[1]

Seeing signals of profound change, the Accenture Technology Vision found it apt to set its sights farther forward than ever before. The building blocks of the Metaverse Continuum are taking shape today, but will coalesce over the next decade to create an entirely new enterprise landscape. The 20s will see ambitious enterprises bringing shape to these new physical and digital realities, as well as worlds co-populated by people and AI, industries made possible by new computers, and more.

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Why Metaverse Continuum?

You've probably heard the word "metaverse" over the last year, evoking a science fiction future of a persistent and shared virtual reality space. The truth is, right now a lot of early metaverses are being built with many different initial focuses and ideas for how to get it right. Some are for enterprises, some for consumers. Each has different platforms, partners, and technologies at its core.

Eventually this spectrum of ideas will coalesce into a more broadly unified experience, but the range of business areas that it will impact will only grow. Just as the internet evolved beyond simple websites to underpin the majority of today's businesses, it would be wrong to think the experience of the metaverse will be constrained to digital space.

That is why we've introduced the "Metaverse Continuum." Accenture looks at the metaverse as an evolving and expanding continuum on multiple dimensions:

- Comprises multiple technologies including extended reality, blockchain, artificial intelligence, digital twins, and smart objects – including cars and factories, and edge computing.
- Encompasses the "virt-real" – the range of experiences, from purely virtual to a blend of virtual and physical.
- Describes the spectrum of emerging consumer experiences and the business applications and models across the enterprise that will be reimagined and transformed.

98%

of executives believe continuous advances in technology are becoming more reliable than economic, political, or social trends in informing their organization's long-term strategy.

For some, it's already starting. A Chinese news agency, Xinhua, has unveiled a virtual newsroom with an AI news anchor who can deliver breaking news to audiences 24 hours a day.[2]

Amazon Sidewalk was activated, instantly creating smart neighborhoods, and extending the reach of existing smart devices far beyond their original range.[3] And Vail Ski Resort in Colorado has built a digital twin of its resort, an intelligent virtual world mirroring their physical mountain, including details like real-time snowfall, years of weather data, and critical mountain infrastructure. They're also automating the physical mountain, investing in remote monitoring and automatic snow guns which can activate based on the weather. With this tech-focused strategy that crosses the digital and physical worlds, Vail is able to increase the predictability of ski conditions and expects these efforts to eventually let them extend their typical season by 25%.[4]

As developments like these challenge our basic assumptions about technology and business, we are entering a new landscape where there are not yet rules or expectations – creating a rich opportunity to build and shape the worlds of tomorrow.

Consider this: Enterprises that deploy human-like AI aren't just reaping the benefits of automation, they are pioneering new forms of collaboration between humans and machines. Smart materials and edge capabilities are transforming what people expect from their physical environments. Enterprises selling goods in a metaverse environment are delivering fundamentally different products, and what's more, they are piloting new modes of commerce and creating best practices for the future of the internet. All the companies building – and building in – these new worlds are bringing ideas and precedents to them, shaping how people will soon live, where businesses will find opportunity, and what it will mean to be a responsible business in these environments.

For now, it may seem that the future we're rocketing toward holds more questions than answers. How will companies conduct business and sell products, and how will consumers buy them in these new worlds? How will human interaction unfold in the metaverse, and how will that reshape what we look for outside of it? What does the world of work look like when organizations become more distributed or autonomous? How do we manage a supply chain that cuts through different physical worlds where some cities are smart and some are not? In many ways, the new worlds companies are starting to build have no history or legacy – no right way to do anything. This means immense opportunity, but also that companies pushing these boundaries will be operating far ahead of policy and regulation.

Enterprises will find themselves on the front lines of establishing trust and safety and defining the human experience in these new places. Trust will be paramount to adoption of the new experiences leaders are beginning to build. Considerations (and concerns) already held today around privacy, bias, fairness, and human impact are becoming far more acute as the line between people's physical and digital lives further blurs. Enterprises that wish to lead in this space will shoulder the mantle of building a "Responsible Metaverse," and the actions and choices they make today will set the standards for all that follow.

It leaves companies at a critical moment to decide their path forward. These new frontiers of technology will redefine the entire context of every business, shaping how they will operate and create value for decades to come. Those who shy away from the uncertainty ahead will soon find themselves operating in worlds others have defined – playing by someone else's rules. But bold companies will embrace the uncertainty and wield it as opportunity.

The simple truth is, there's never enough time to think about the future, but that won't stop it from happening. As the foundations of the Metaverse Continuum are constructed, early entrants are staking out key positions and partnerships while investing in the technology backbone that will secure leadership in this new landscape. Inevitably, every executive will need to ask: What will my role be in this new continuum?

Answering this – and acting on it – won't be easy; it's a journey riddled with uncertainty well outside the norms of what most companies are comfortable with. But the chance to shape the next decade of business, to build new worlds, and to explore the brand-new markets that these worlds create doesn't come often.

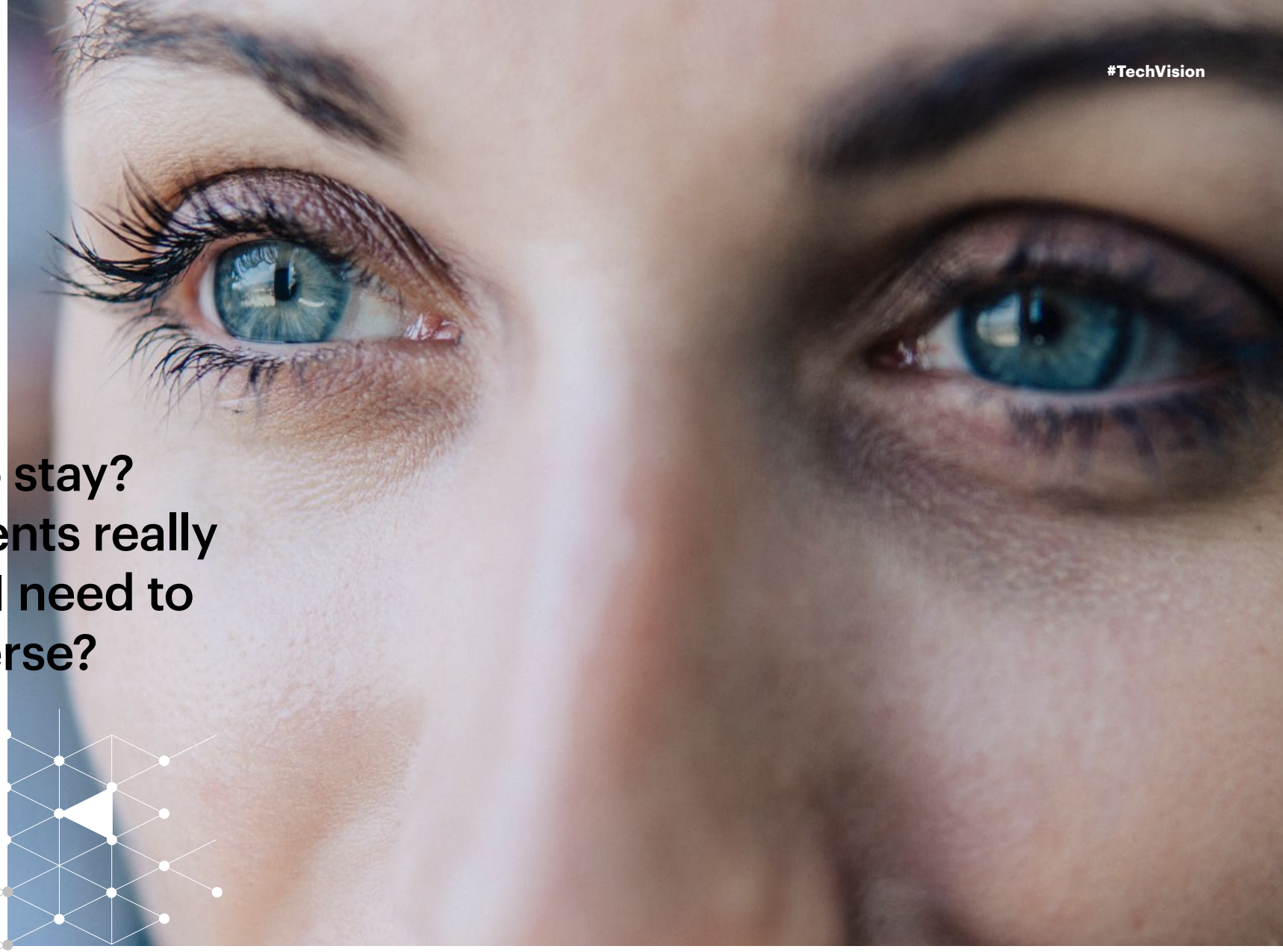
Your future is starting today, are you ready for it?

Architecting Tomorrow's Continuum, Today

In 2021, Gucci created The Gucci Garden Experience to sell virtual products and sold a virtual-only digital twin of a Gucci purse for a higher price than its real-world counterpart.[5,6]

A Travis Scott Fortnite concert had 27.7 million unique attendees – far more than a typical concert venue can accommodate.[7] And in the last 12 months Decentraland – a user-owned Ethereum-based virtual world – saw 21,000 real estate transactions worth $110 million.[8]

These are early signals of the Metaverse Continuum, and a clear sign that enterprises need to think about tomorrow's business differently; it's imperative they heed the call of change and start taking action today. Recall that 20 years ago many enterprises were wondering *if* they needed a presence on the web – a question that seems quaint now that every public company has augmented its sales, operations, or products with digital technology in some form. With the future on the horizon, we are hearing echoes of that question again: Is remote work here to stay? Do physical environments really need to be smart? Do I need to care about the metaverse?



Is remote work here to stay? Do physical environments really need to be smart? Do I need to care about the metaverse?

> The answer to these questions and others is a resounding "yes."

Just like in the early years of the web, businesses are racing toward a future utterly different from the one they were designed for. Over the next decade we will witness a complete transformation of nearly every environment that enterprises currently do business across. The way the internet operates and how we experience the digital world; the technology that propagates across the physical world and the command it gives us over our environment; how human-like, collaborative, and productive our interactions with machines can be; and even the very outer limit of computers' capabilities, are all being upended.

The ground is transforming beneath us and many of the competitive moats and advantages businesses have worked hard to erect are beginning to recede. This doesn't mean your current business is going away – just as an online web presence didn't remove the need for physical locations. But like enterprises back then needed to create new revenue streams, rethink how they augment their operations, and contend with a host of new and disruptive competitors, businesses today will also need to reimagine every dimension of their enterprise from operating models to their core value proposition. And forward-thinking leaders are already getting started.

Consider how in late 2021, Square founder Jack Dorsey renamed the company to "Block," signaling its focus on the future.[9] Shortly after, the company announced plans to build an open bitcoin mining system, aiming to make bitcoin mining more distributed and efficient, and to address challenges commonly faced by the bitcoin mining community like mining rig availability, high prices, and power consumption.[10] While the company is one of the largest digital payments solutions on the market today, it's clear they believe the future of payments may soon start to change – or at least get bigger.

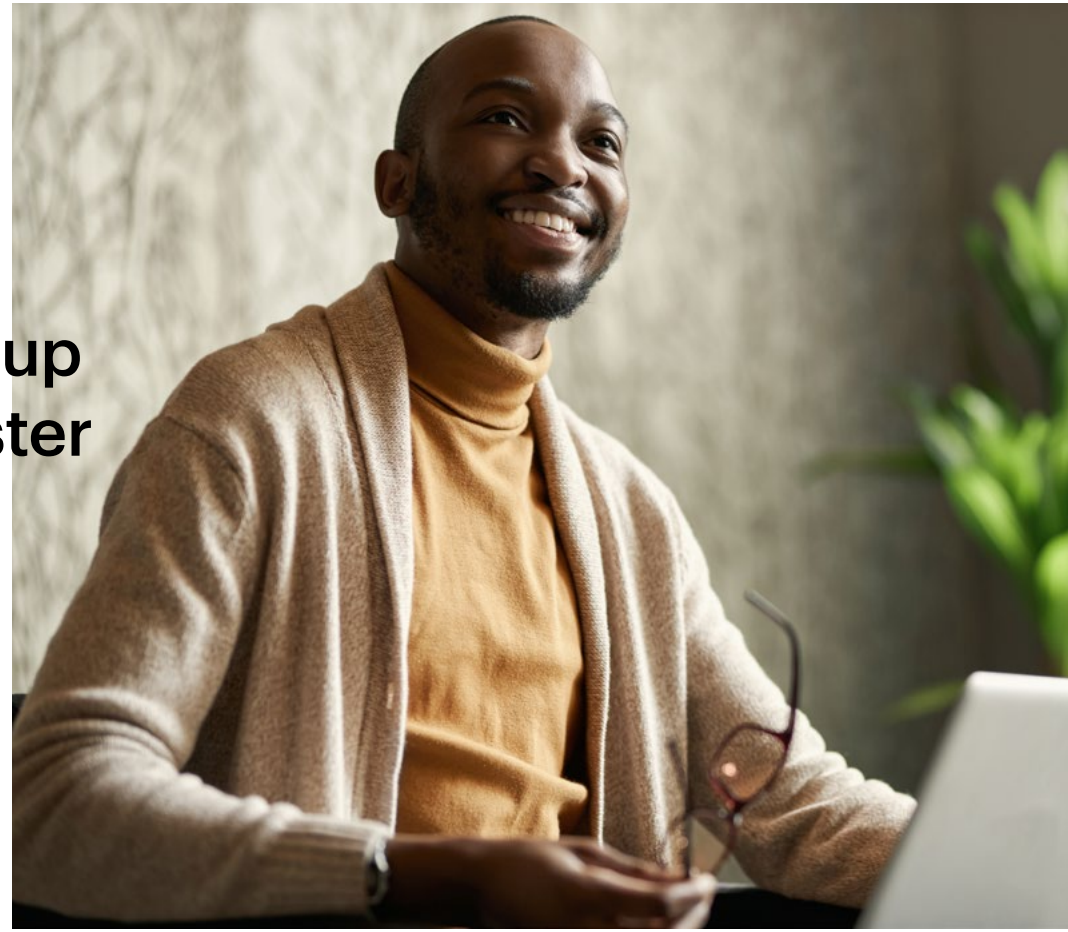
Or think about Tesla. First the company succeeded in proving the viability of selling electric vehicles in today's automotive market. But now their technology investments and projects are all steps to build pieces of a future that no one is selling against yet: a world of smart cities filled with electric and autonomous vehicles. Their vision of the future drives and informs the machines they build and sell today, and the resulting successes in today's market are beta tests for their leadership in tomorrow's world of autonomous vehicles.

Similar to the beginning of the digital era, the companies that accelerate through the next wave of technology disruption will be those who readily embrace the changes the future holds. The good news? This time enterprises have greater warning of what's to come and there's still time to get ahead – but they need to start making decisive technology investments today. The goal is to ignite the digital foundation enterprises have been steadily putting in place: finally picking partners to build a digital twin, going beyond data and analytics to use AI in more visible and collaborative ways, or launching the "moonshot" project that increasingly feels mission critical. Only with a mature and well-oiled digital engine will enterprises be prepared to participate in, or even build, the new business environments and worlds everyone will soon need to be part of.

This past year Honeywell launched the largest quantum computing company in the world – a new venture with Cambridge Quantum called Quantinuum.[11] This journey started years ago when Honeywell's leaders looked at the technology and hardware capabilities they had, eyed the far-off field of quantum computing, and had the brazenness to say *we can build that world*.[12] Now the incubation effort is being spun out into an independent enterprise that Honeywell maintains a controlling interest in. The hope is the endeavor will become the launchpad for future generations of industry from financial services to material sciences – a new world where intractable problems become solvable through the capabilities of quantum computing.[13] Honeywell still maintains and operates their core business today, but they are also an investor, customer, and supplier of Quantinuum – effectively planting the seeds of their future.

Companies today have the chance to become enterprise and technology leaders for decades to come. But like Block, Tesla, and Honeywell, they will need to shift from augmenting their business with technology to being technology-driven and future-forward by design. What you choose to do next is critical:

Will you set yourself up as the next Blockbuster or the next Amazon?



Four Building Blocks of the Metaverse Continuum

Without realizing it, some businesses have already started adopting future-forward mindsets, and in the process created the building blocks that will become the Metaverse Continuum.

A new generation of technology leaders was forged in the COVID-19 crisis. Over the last 12 months Accenture identified a special class of companies – called leapfroggers – that began rapidly implementing digital strategies to navigate the pandemic. They, along with existing digital leaders, found that the advantage provided by their technology investments led to outperforming competition by 4–5x over the last year.[14]

Far from being slowed down, when faced with new challenges and constraints many companies had a taste of what it's like to architect new revenue streams and new ways of working and living – and from their efforts, the foundation of tomorrow's market is starting to be built.

Look at Christie's Auction House, which was used to having large in-person art auctions as their primary source of revenue. In the pandemic this became an impossibility. The logical alternative was to host digital-based auctions instead, and Christie's did make this part of their new model, but they also took a risk on something new: NFTs.[15] Non-fungible tokens were a burgeoning art form, one atypical for Christie's as the NFT pieces were not physical and existed exclusively on blockchains. In 2021, Christie's hosted its first NFT auction – a piece by the artist Beeple titled *Everydays: The First 5000 Days*.[16] In that auction they accomplished two firsts: They sold the most expensive piece of digital art in history (the work went for $69.3 million) and became the first auction house to accept cryptocurrency as payment. By simultaneously validating a new form of art and digital currency to its customers, it became a leader in shaping how commerce will be done in purely digital worlds – a future they've since doubled down on. Just one year after their first auction, Christie's has now surpassed $100 million in NFT sales.[17]

Disney also adapted to the pandemic with a bold shift to something new. The company started releasing highly anticipated films on Disney+ and in theaters at the same time, letting subscribers pay a Premier Access fee to stream the movie from their homes.[18] Disney's annual report details that Premier Access content significantly increased revenue from the company's DTC (direct-to-consumer) division, and in 2022 the company plans to increase spending on produced and licensed content by 32%, largely to support DTC expansion. And the company launched the "Mickey and Friends NFT Collection" in January, allowing fans a new way to engage with the brand.[19]

Rather than reverting to pre-pandemic ways as soon as possible, Disney is continuing to experiment with, and prepare for, worlds where they will be expected to provide omnichannel entertainment options that span physical theaters, streaming platforms, or even metaverses and beyond.

While

14%

of executives report the pandemic is continuing to disrupt their organization's business plans and operations, another

86%

report that their organization has adapted to the disruption of the pandemic and has found a new normal.

What companies are starting to realize is that in their drive to survive during the pandemic they have accelerated the future. The pivots and inventions they made are becoming the foundations for the new worlds that are starting to take shape. Though the challenges of the pandemic still weigh heavily on businesses today, we are starting to adapt to our new reality, and leaders are taking a more deliberate approach to shaping what comes next.

These companies and those that join them as leaders will evolve and shape the emerging Metaverse Continuum in ways that, for now, we can only speculate about. Each has its own idea for what the optimal future looks like, but it would be a mistake to believe these efforts are mutually exclusive. In some cases, companies' ambitions will irreconcilably conflict, but in others they will amplify one another.

In this Vision, we explore how today's technology innovations are becoming the building blocks of our collective future. The trends investigate the entire continuum, from the virtual to the physical, across humans and machines alike, identifying where ambitious enterprises can find rich opportunity by uprooting themselves from today and planting themselves firmly in the future.

First in ***WebMe*** we explore how the internet is being reimagined. The last two years spurred enterprises to explore new modes of digital experience and pushed people to live virtually to an extent they never expected. Now the metaverse is emerging as a natural evolution that reconciles how the internet is designed today with what we will demand from it going forward. The advent of the metaverse, and underlying efforts to reimagine how data shapes our digital experiences, will challenge businesses to rethink their presence online and become a part of shaping the next platform revolution as they build new ways to connect to customers, partners, and their digital workforce.

But the value of new virtual worlds would be capped if not for parallel changes that anchor them in the physical one. The ***Programmable World*** tracks how technology is being threaded through our physical environments in increasingly sophisticated ways. It projects how the convergence of 5G, ambient computing, augmented reality, smart materials, and more are paving the way for businesses to reshape how they interact with the physical world. As technology becomes part of the fabric of our environment, it allows us to treat our environment more like technology – unlocking an unprecedented fidelity of control, automation, and personalization.

When it comes to populating new worlds, humans are the primary residents. But we are also tracking the emergence of ***The Unreal*** – a trend where our environments and businesses are increasingly filled with machines that are passably human. "Unreal" qualities are becoming intrinsic to the artificial intelligence, and even the data, that enterprises aspire to integrate into mission-critical functions. At the same time, people are coming face-to-face with bad actors using this technology – from deepfakes to bots and more – igniting a growing concern that may turn into the biggest hurdle for enterprises

looking to grow their use of AI. Like it or not, enterprises have been thrust into the forefront of a world questioning what's real, what isn't, and if the line between those two really matters.

Finally, we are on the precipice of resetting the boundaries of traditional industries as we begin ***Computing the Impossible***. The outer limit of what is computationally possible is being disrupted as a new class of machines emerges. Quantum, biologically-inspired, and high performance computers are each allowing companies to tackle grand challenges that once defined and shaped the very core of their industries. As problems once considered impossible become ever more solvable, business leaders will be pushed to reimagine some of the most basic assumptions about their enterprise.

We stand at a unique precipice in time. Not because there are new technologies to master, but rather that competing in this next decade will require something more than just increasing technology and innovation skills. It will require a truly competitive vision – both for what these future worlds will look like and also what your enterprise will need to become to succeed in them. Technology points us in the right direction, but the rest is up to you.

Technology points us in the right direction, but the rest is up to you.

Our Four Technology Trends for 2022

WebMe

Putting the Me in Metaverse

The internet is being reimagined as metaverse and Web3 efforts transform the underpinning and operation of the virtual world.

Programmable World

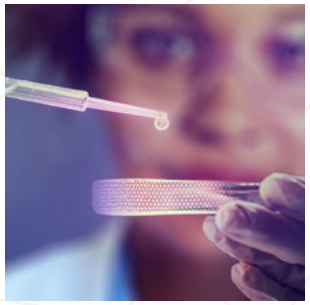
Our Planet, Personalized

Control, customization, and automation are being enmeshed into the world around us, making the physical as programmable as the digital.

The Unreal

Making Synthetic, Authentic

As AI-generated data and synthetic content convincingly mimic what is "real," authenticity is the new north star.



Computing the Impossible

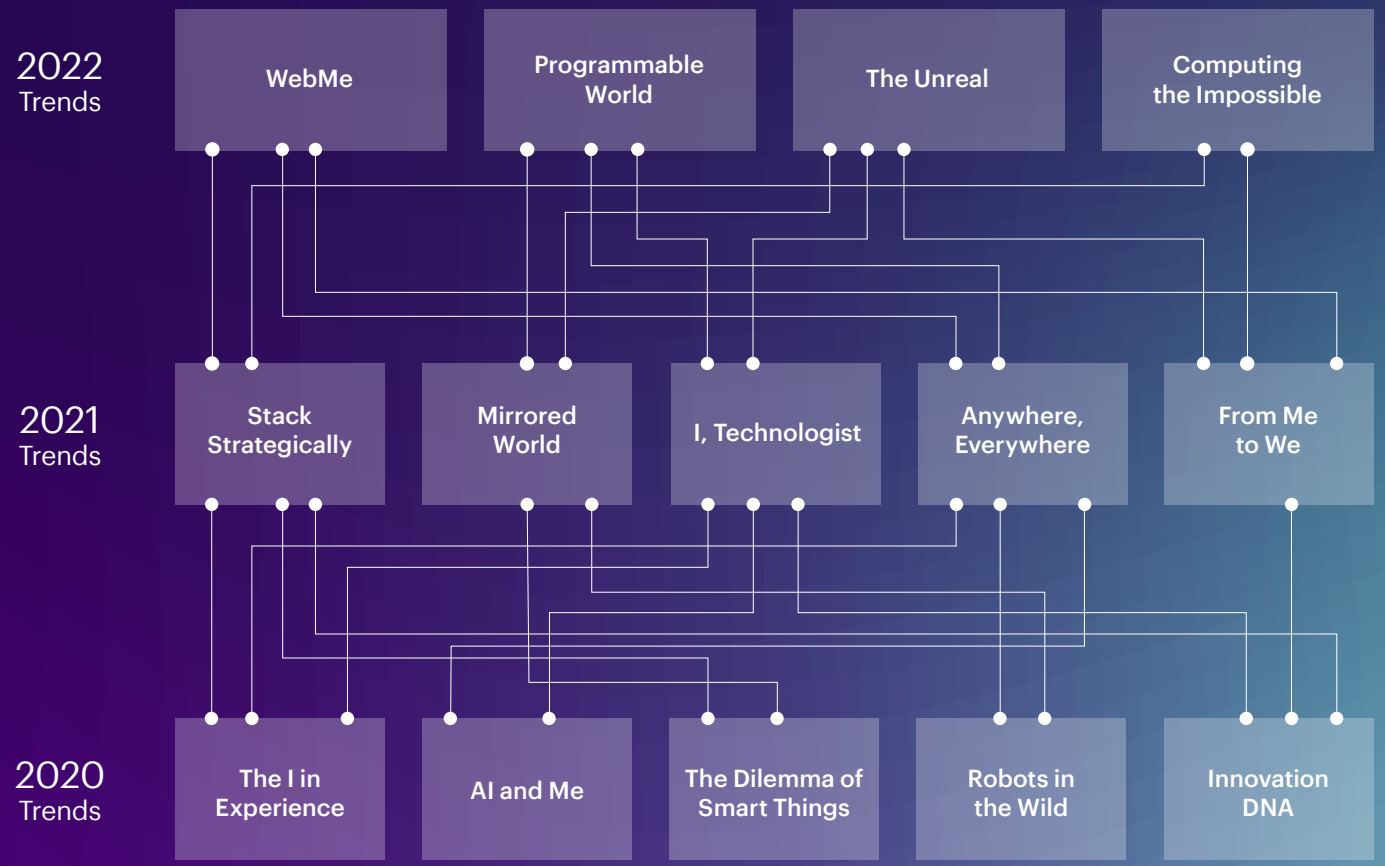
New Machines, New Possibilities

A new generation of computers are solving some of the world's most intractable problems, leading to one of the biggest technological disruptions of our time.

Completing the Picture

Accenture's Technology Vision report comprises a three-year set of technology trends, currently including trends from 2020 and 2021.

It's important to recognize that each year's trends are part of a bigger picture. Tracking how they evolve over time offers a glimpse into how they may continue to grow in the future.



2021 trends

Stack Strategically

Architecting a Better Future

A new era of industry competition is dawning – one where companies compete on their architecture.

Mirrored World

The Power of Massive, Intelligent, Digital Twins

Growing investments in data, AI, and digital twin technologies are giving rise to a new generation of business and intelligence: the mirrored world.

I, Technologist

The Democratization of Technology

Natural language processing, low-code platforms, robotic process automation, and more are democratizing technology, putting powerful capabilities into the hands of people all across the business.

Anywhere, Everywhere

Bring Your Own Environment

It's time for enterprises to transform remote work from an accommodation, to an advantage.

From Me to We

A Multiparty System's Path Through Chaos

The global disruption of COVID-19 ignited a scramble for enterprises to reimagine their partnerships – and multiparty systems gained newfound attention.

2020 trends

The I in Experience

Helping people choose their own adventure

Redesign digital experiences with new models that amplify personal agency. Turn passive audiences into active participants by transforming one-way experiences into true collaborations.

AI and Me

Reimagine the business through human and AI collaboration

Take a new approach that uses artificial intelligence to bring out the full power of people. Move beyond deploying AI for automation alone and push into the new frontier of co-creation between people and machines.

The Dilemma of Smart Things

Overcome the "beta burden"

Address the new reality of product ownership in the era of "forever beta." Transform pain points into an opportunity to create an unprecedented level of business–customer partnership.

Robots in the Wild

Growing the enterprise's reach - and responsibility

Build new models of interaction and impact as robotics move beyond the walls of the enterprise. Companies in every industry will unlock new opportunities by introducing robots to the next frontier: the open world.

Innovation DNA

Create an engine for continuous innovation

Tap into the unprecedented scale of disruptive technology available today. Build the capabilities and ecosystem partnerships necessary to assemble the organization's unique innovation DNA.

About the Technology Vision

For more than 20 years, Accenture has developed the Technology Vision report as a systematic review across the enterprise landscape to identify emerging technology trends that will have the greatest impact on companies, government agencies, and other organizations in the coming years. This year the trends look further out into the future than ever before, while remaining relevant across industries and actionable for businesses today.

Accenture Labs and Accenture Research collaborate on the annual research process, which includes:

- Input from the Technology Vision External Advisory Board, a group of more than two dozen experienced individuals from the public and private sectors, academia, venture capital, and entrepreneurial companies. In addition, the Technology Vision team conducts interviews with technology luminaries and industry experts, as well as many Accenture business leaders from across the organization.
- A global consumer survey to capture insights into the use of, interactions with, and beliefs about technology in people's everyday lives. In addition, Accenture conducts a global survey of C-level executives and directors to understand their perspectives and use of emerging technologies across their organizations.
- Experiential research and data science to analyze technology developments and advancements.

As a shortlist of themes emerges from the research process, the Technology Vision team works to validate and refine the set of trends. The themes are weighed for their relevance to real-world business challenges. The Technology Vision team seeks ideas that transcend the well-known drivers of technological change, concentrating instead on the themes that will soon start to appear on the C-level agendas of most enterprises.

Technology Vision 2022 Editorial & Research Team

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Survey Demographics

Business and Consumer Surveys

Accenture Research conducted a global survey of 24,000 consumers to capture insights into their use of, interactions with, and beliefs about technology in their everyday lives. In addition, Accenture conducted a survey of 4,650 C-level executives and directors across 23 industries to understand their perspectives and use of emerging technologies across their organizations. The surveys were fielded from December 2021 through January 2022 across 35 countries.

35 COUNTRIES

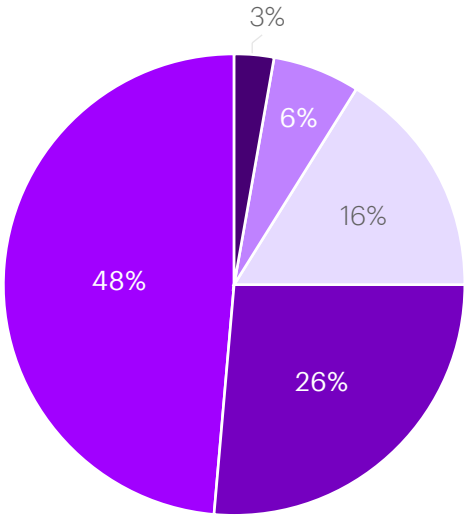
1 Argentina
2 Australia
3 Austria
4 Belgium
5 Brazil
6 Canada
7 Chile
8 China
9 Colombia
10 Denmark
11 Finland
12 France
13 Germany
14 India
15 Indonesia
16 Ireland
17 Italy
18 Japan
19 Malaysia
20 Mexico
21 Netherlands
22 Norway
23 Poland
24 Portugal
25 Russia
26 Saudi Arabia
27 Singapore
28 South Africa
29 Spain
30 Sweden
31 Switzerland
32 Thailand
33 United Arab Emirates
34 United Kingdom
35 United States

INDUSTRIES

Aerospace & Defense	2%
Automotive	2%
Banking	9%
Capital Markets	3%
Central Government (CA)	2%
Chemicals	2%
Communications	6%
Consumer Goods & Services	9%
Education (Higher)	2%
Energy	2%
Federal Government (US)	4%
Healthcare Payor	2%
Healthcare Provider	6%
High Tech	4%
Industrial Goods & Equipment	7%
Insurance	8%
Media & Entertainment	2%
Natural Resources	2%
Public Service	7%
Retail	9%
Software & Platforms	2%
Travel	2%
Utilities	4%
Total	100%

REVENUES (USD)

$50 billion or more	3%
$20 to $49.9 billion	6%
$10 to $19.9 billion	16%
$5 to $9.9 billion	26%
$1 to $4.9 billion	48%



ROLES

Chief Digital Officer	1%	Chief Purchasing Officer	1%
Chief Executive Officer	4%	Chief Security Officer	2%
Chief Finance Officer	7%	Chief Strategy Officer	5%
Chief Human Resources Officer	3%	Chief Supply Chain Officer	1%
Chief Information Officer	16%	Chief Technology Officer	16%
Chief Information Security Officer	3%	Director of Business Function	3%
Chief Innovation Officer	14%	Director of Technology	6%
Chief Marketing Officer	6%	Director, IT	5%
Chief Operating Officer	7%	Director, Line of Business	<1%

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