

# Geschichte der Zukunft

## Von Trendsignalen zu strategischen Innovationsentscheidungen

Bonn / Bremen, 05. April 2005  
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Zentralbereich Innovationen

# Der reife Kunde



### Trend Development

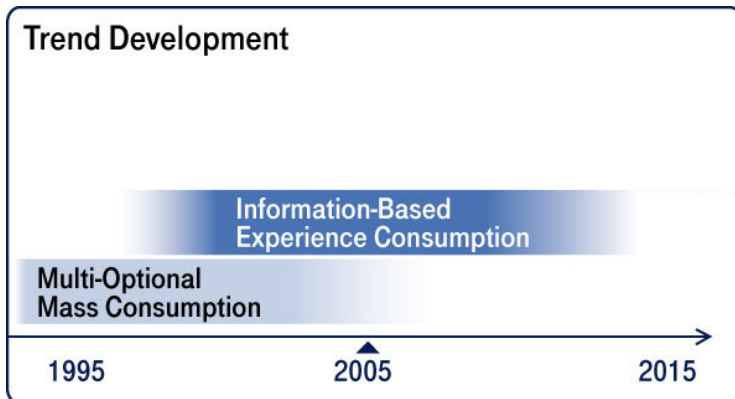
Multi-Optional  
Mass Consumption

1995

2005

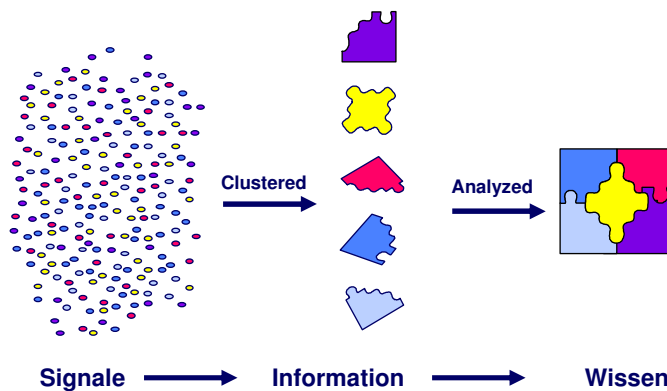
2015

# Der reife Kunde



# Vorgehen Trendforschung

Übersetzung von Signalen zu Informationsclustern in verwertbares Wissen für eine zeitnahe und resultatorientierte Entscheidungsunterstützung.



# Der reife Kunde

Future Consumption Is Sensitive to Time and Environment

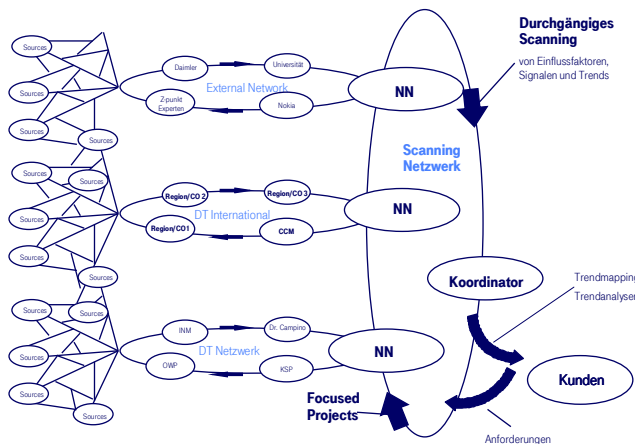


## Trend Development



# Themenscanning

Durch nicht institutionalisiertes Scanning-Netzwerk kann themenspezifisches Expertenwissen identifiziert, gesammelt und eingefordert werden.

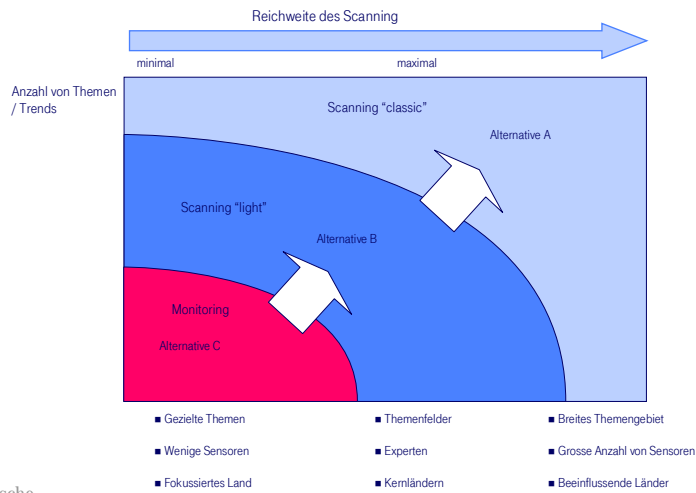


### Scanning Netzwerke

- ein themenorientiertes aufgestelltes Netzwerk unterstützt die Identifizierung von Veränderungsbereichen
- bei gepushten Informationen sind nur 20-25% Ergebnis relevant

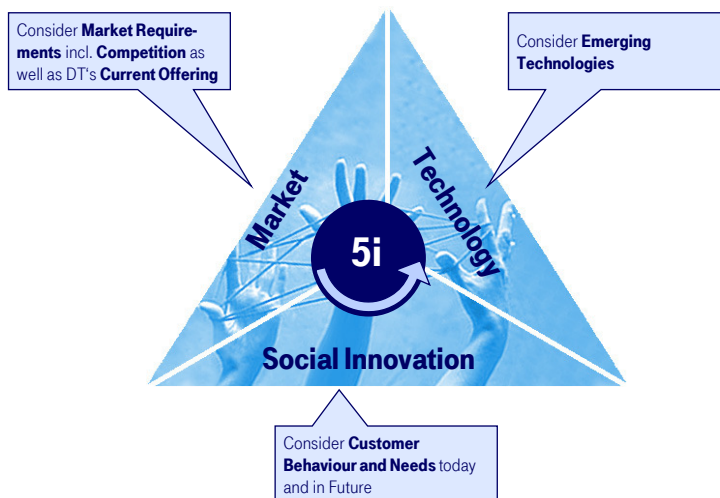
# Scanning Netzwerk

Zwei Grundsätzliche Prinzipien sind möglich: Fokussiert und 360°. Entscheidend sind hier die Ressourcen und das zur Verfügung stehende Budgetet.



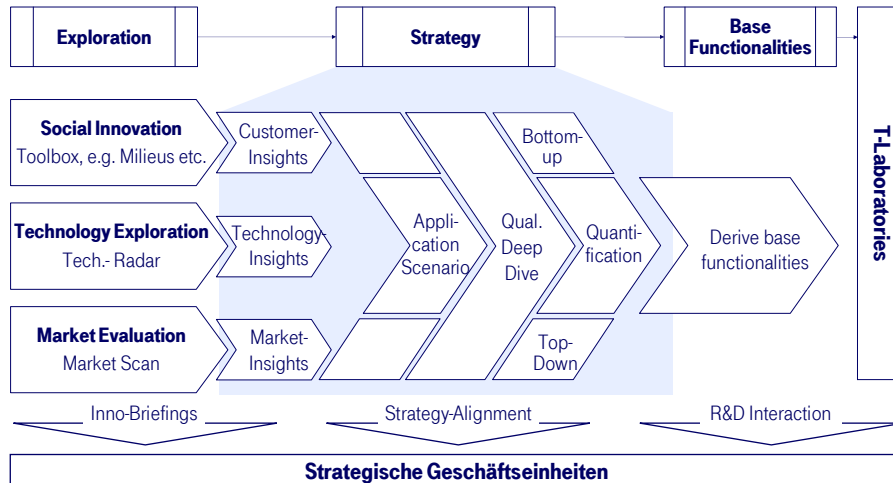
# Rahmen Innovations-Aktivitäten

Integration von Kundenverhalten und -bedürfnissen, Markterfordernissen und technologischen Entwicklungen ergeben die Kerninnovationsfelder der Telekom.



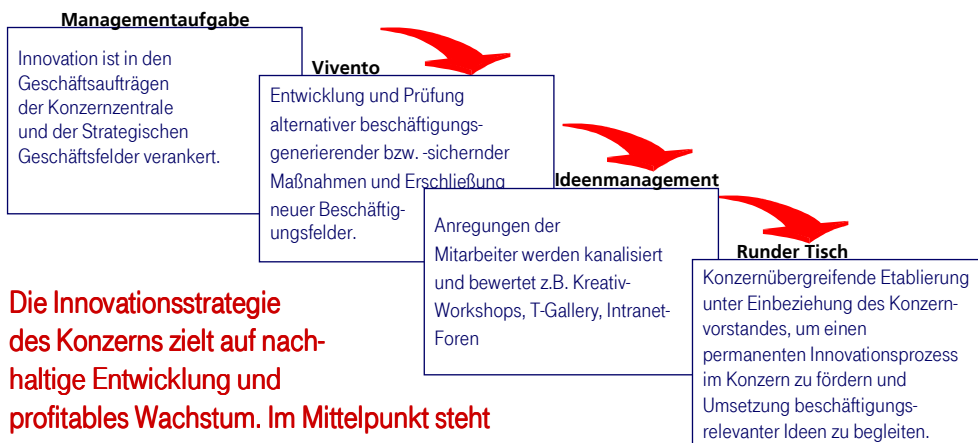
# Innovation Strategie Prozess

Vernetzung der "Insights" zu Anwendungsszenarien der Zukunft! Nach Bewertung von Marktpotentialen, Identifizierung der Basisfunktionalitäten.



# Integration ins Innovationsmanagement

Nutzung innovativer Ideen der Mitarbeit im Konzern mit beschäftigungsförderndem Charakter auf unterschiedlichsten Ebenen.



# Back-up

## The Mature Consumer

### Experienced and Well-Informed Consumers Transform the Patterns of Consumption



#### Trend Description

- **Consumers are Maturing: Increasingly Informed and Opinionated**  
Most consumers today have more experience, and are better informed, more discriminating, and more self-confident than previous consumer generations. Their brand loyalty is vanishing and their purchasing behaviour is becoming more difficult to foresee.
- **Mature Consumers Change Their Behaviour: They Avoid the Middle**  
On the one hand, they purchase expensive brand name products that emphasise their personality. On the other, they buy no-name products that satisfy everyday needs as cheaply as possible.
- **Luxury Redefined: Extraordinary Emotions and Experiences**  
Even if they show a high degree of rationality, mature consumers' enthusiasm can still be won with emotional surplus value. For them, luxury is more about sensuality, emotions and experiences than material goods.

#### Meaning for ICT

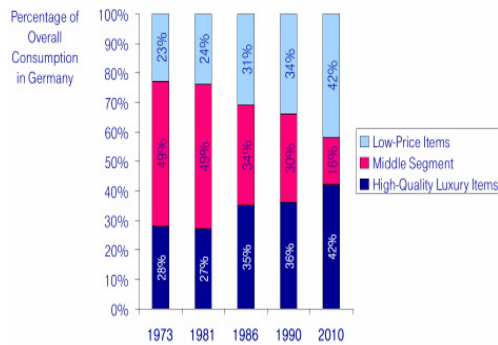
- **Information Environments for Intelligent Consumption**  
- need of information environment for fast and autonomous buying decisions, e.g. location based services that provide tailor-made discount offers or local "best-price" information.  
- RFID will become a primary tool providing product-related online information to empower offline shopping
- **Maturing ICT Product Portfolio and Sales Strategies**  
Differentiated price models, online shops and cost saving services should be supplemented by premium products and presentations.
- **ICT as Enabler for Product-Related Experiences**  
ICT itself can integrate sensual luxury as Apple computers have successfully demonstrated. Sharing of experiences with other product users will become a standard application in the world of the Mature Consumer.

# Der reife Kunde

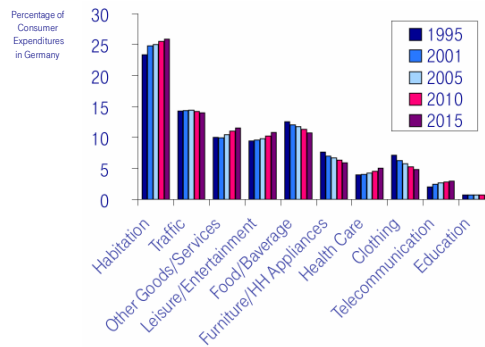
## Consumption Grows Primarily at the Fringes: Luxury and Discount Segments Grow, Middle Segments Disappear



**Polarisation of Consumer Markets in Germany 1973-2010**



**Change in Consumer Expenditures in Germany 1995-2015**



# The Mature Consumer

## Experienced and Well-Informed Consumers Transform the Patterns of Consumption



### Trend Description

- Consumers are Maturing: Increasingly Informed and Opinionated**  
 Most consumers today have more experience, and are better informed, more discriminating, and more self-confident than previous consumer generations. "Mature consumers" have recognized their market power. They see through the strategies of manufacturers and brands, and don't let themselves be blinded by marketing. They consider themselves sovereign in the world of consumption and are continually optimising. Their brand loyalty is vanishing and their purchasing behaviour is becoming more difficult to foresee.
- Mature Consumers Change Their Behaviour: They Avoid the Middle**  
 The Standard Product in the middle segment does not fulfil the specific needs of the mature consumer. On the one hand, they purchase expensive brand name products that emphasise their personality. On the other, they buy no-name products that satisfy everyday needs as cheaply as possible. For Mature Consumers, the paradoxical switch between discount and high-end segments presents no contradiction. Rather it is the expression of personal freedom of choice and lifestyle.
- Luxury Redefined: Extraordinary Emotions and Experiences**  
 Even if they show a high degree of rationality, mature consumers' enthusiasm can still be won with emotional surplus value. For them, luxury is more about sensuality, emotions and experiences than material goods. The rising expenditures on culture, entertainment and experiences illustrate this postmaterialistic shift in the overall patterns of consumption.

### Meaning for ICT

- Information Environments for Intelligent Consumption**  
 Mature Consumers want total access to information about products, prices and special offers. Because they value their information sovereignty, they need an information environment for fast and autonomous buying decisions, e.g. location based services that provide tailor-made discount offers or local "best-price" information. RFID will become a primary tool providing product-related online information to empower offline shopping based on integrated mobile solutions.
- Maturing ICT Product Portfolio and Sales Strategies**  
 With the arrival of the Mature Consumer, the middle segment vanishes - with consequences for the positioning, sales and distribution of ICT products. Differentiated price models, online shops and cost saving services should be supplemented by premium products and presentations. To gain a competitive advantage, the ICT-shop of the future should be a space devoted to lifestyle support rather than just a communications supermarket.
- ICT as Enabler for Product-Related Experiences**  
 As the interface between consumers and businesses, ICT must facilitate the emotional services around a product. Furthermore, ICT itself can integrate sensual luxury as Apple computers have successfully demonstrated. Social aspects will also gain importance. Sharing of experiences with other product users will become a standard application in the world of the Mature Consumer.

# The Mature Consumer

## Future Consumption Is Sensitive to Time and Environment



### Trend Development



#### 1995: Multi-Optional Mass Consumption

This is a phase of great variety and a wide range of standard products. Mass consumption goods become affordable to large parts of the population. Choice is everything (if sometimes overwhelming) and the price must be right.

#### 2005: Information-Based Experience Consumption

ICT access to worldwide consumer markets and product information empowers consumers. Brand experiences and emotional product presentations fascinate buyers. Consumption becomes an event in itself.

#### 2015: Context-Sensitive Customisation

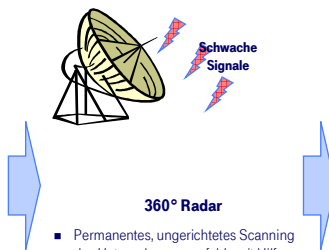
Based on sophisticated ICT solutions, product offers are based on the actual context of the individual consumer (their mood, their time and environment, financial resources and convenience demands). Consumers can choose between a wide variety of distribution channels (offline, online and assisted shopping) for each product segment. E.g. some car buyers desire the experience of "high-touch brand worlds," while others simply purchase their new car at an online auction.

# Strategische Frühaufklärung

Identifiziert, verdichtet und analysiert frühzeitig mögliche Einflüsse aus einem stetig komplexeren Unternehmensumfeld.

### Problemstellung

- Auftreten von Diskontinuitäten in immer schnellerer Abfolge:
  - Schnelllebigkeit von Konsumentenwünschen und Marken
  - Erhöhte Heterogenität der Konsumentenmärkte
  - Technologische Entwicklung
  - Globalisierung und gleichzeitig Konvergenz - das Wettbewerbsumfeld wird komplexer
- Diskontinuitäten können einen erheblichen Einfluss auf die Wertentwicklung des gesamten Unternehmens haben
- Ankündigung durch schwache Signale in einer Vielzahl von möglichen Quellen
- Je früher schwache Signale erkannt werden, desto größer ist der Handlungsspielraum



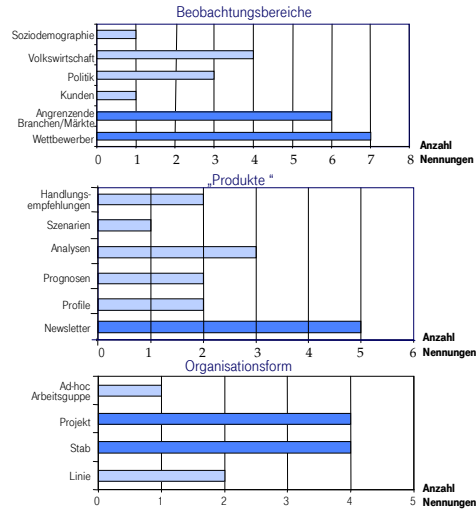
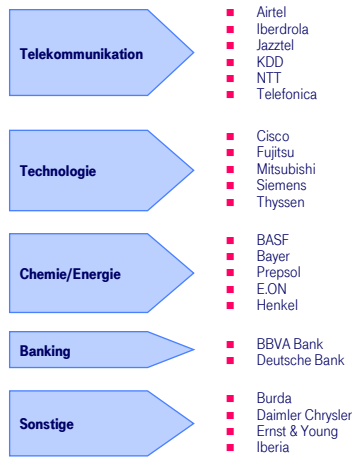
- Permanentes, ungerichtetes Scanning des Unternehmensumfelds mit Hilfe von:
  - Persönlichen Kontakten / Experten
  - Fachpublikationen
  - Tagungen / Konferenzen
  - Internet / Datenbanken
  - Scouts

### Idealtypischer Ansatz der Frühaufklärung

- Systematische und umfassende Entwicklung von Trendlandschaften:
  - Erfassung und Sammlung schwacher Signale
  - Verdichtung zu Trends
  - Identifizierung und Evaluation „echter“ relevanter Diskontinuitäten
  - Ableitung von Handlungsoptionen für den strategischen Planungs- und Führungsprozess
- Institutionalisierung durch Prozess und breite Beteiligung im Unternehmen:
  - Permanent ablaufender Prozess
  - Enge Verknüpfung mit der strategischen Planung und dem Strategie-Controlling
  - Top-Management Commitment
  - Idealtypisch Input aller Mitarbeiter
- Umfassende IT-Unterstützung des Prozesses durch breit zugängliches Tool

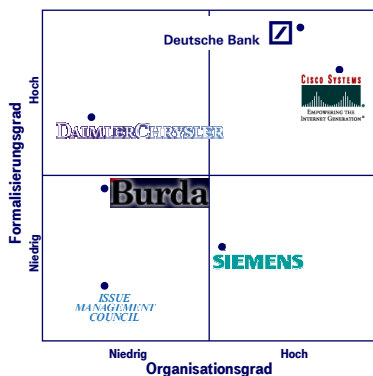
# Benchmarking (1)

Unternehmensbenchmarks zeigen keinen einheitlichen Ansatz, sondern eine Vielzahl unterschiedlicher Beobachtungsbereiche, Produkte und Organisationen



# Benchmarking (2)

Ansätze zur Trendanalyse werden auf verschiedene Art verfolgt. Eine durchgängig systematische strategische Frühaufklärung konnte nicht identifiziert werden



## Wesentliche Erkenntnisse

- Diverse Ansätze, aber keine systematische umfassende Lösung
- Wesentliche Aspekte sind:
  - Bildung von Communities und Netzwerken (DaimlerChrysler, Issue Management Council, Burda)
  - Bereitstellung von dedizierten Ressourcen (Cisco, Deutsche Bank, Siemens)
  - Schaffung von Schnittstellen zur strategischen Planung (Burda, Cisco, DaimlerChrysler)
  - Austausch in Foren/Gremien (Issue Management Council - Allianz, Celanese, Telekom Austria)
  - Zugriff auf externe Experten/ Informationsquellen (Burda, Deutsche Bank, Siemens)

# Integration & Communication- I.Learning

**Have an integrated process in place and communicate the process.**

To Intelligence providers

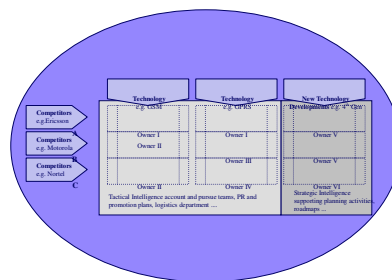
- Supports the identification of intelligence pieces
- Have only one contact person for information delivery to avoid pieces fall between the cracks

To Intelligence customers

- Supports the flow of information
- Have only one contact person for inquiries to avoid confusion – gate keeper

To other Intelligence professionals

- leverage on each others knowledge
- avoid duplication
- achieve internal consistency in approach



# Integration & Communication

**Some Lessons Learned – "Do's"**

- Communicate extensively between the different network members
- Feed back gathered knowledge and success stories
- Educate analyst and network members on `how to do it`
- Set task priorities
- Include knowledge into the job description
- Encourage exchange of knowledge
- Facilitate joined project
- Find knowledge champions for the networks

# Integration & Communication

## Some Lessons Learned – “Don'ts”

- Produce nice to know knowledge
- Overload network members with tasks
- Start effort unless key decision makers committed
- Compete for recognition of results
- `Everyone goes for everything` approach
- Low visibility of network leader
- No transparent network approach to participants
- Knowledge stays with the producer and the user