



# DHS DK

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September 02.2004

Pulsen på  
markedet,  
Trends og  
Markedsdrivere

# STYLE-VISION & SOME OF OUR CLIENTS

We anticipate **consumer needs** before they arise and provide our clients with **key directions** so they can create products, services and communication **to meet those needs**.



## **Founders:**

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## **PERSONAL CARE & FOOD**

CIBA SPECIALITY CHEMICALS, Switzerland  
DANISCO, Denmark  
ESTEE LAUDER Inc., USA  
FIRMENICH, Switzerland  
HENKEL, Germany  
LINDT & SPRUNGLI AG  
L'OREAL, MATRIX, USA  
PROCTER & GAMBLE, USA  
SHISEIDO, JOICO LABORATORIES INC., USA  
UNILEVER, Holland

## **FASHION & INTERIORS**

DUPONT DE NEMOURS INTERNATIONAL S.A.,  
Switzerland  
EGE, Denmark  
NIKE Inc., USA  
NYLSTAR, Italy  
POMPEI A.D, US  
SAMSUNG, CHEIL INDUSTRIES, Korea  
VICTORIA'S SECRET, USA  
VF CORPORATION - VIVES VIDAL VIVESA, Spain  
ZOFFANY, UK

## **AUTOMOTIVE & ELECTRONICS**

BENQ CORPORATION, Taiwan  
FORD, USA  
PEUGEOT, France  
TOYOTA, Japan

## **SERVICES & CONSULTING**

CCL CAMBRIDGE CONSULTANTS, UK  
MCKINSEY & COMPANY, Inc  
REGIE RADIO MUSIC, France  
SAATCHI & SAATCHI, USA  
TFWA Tax Free World Association, France  
TTF TAIWAN TEXTILE FEDERATION, Taiwan

**More on [www.style-vision.com](http://www.style-vision.com)**

# 1. Morgendagens menneske – Creative Man?

*Hvor meget betyder identifikationen af fremtidens borgere og kunder?*

*Hvilken indflydelse har det på forbruget?*

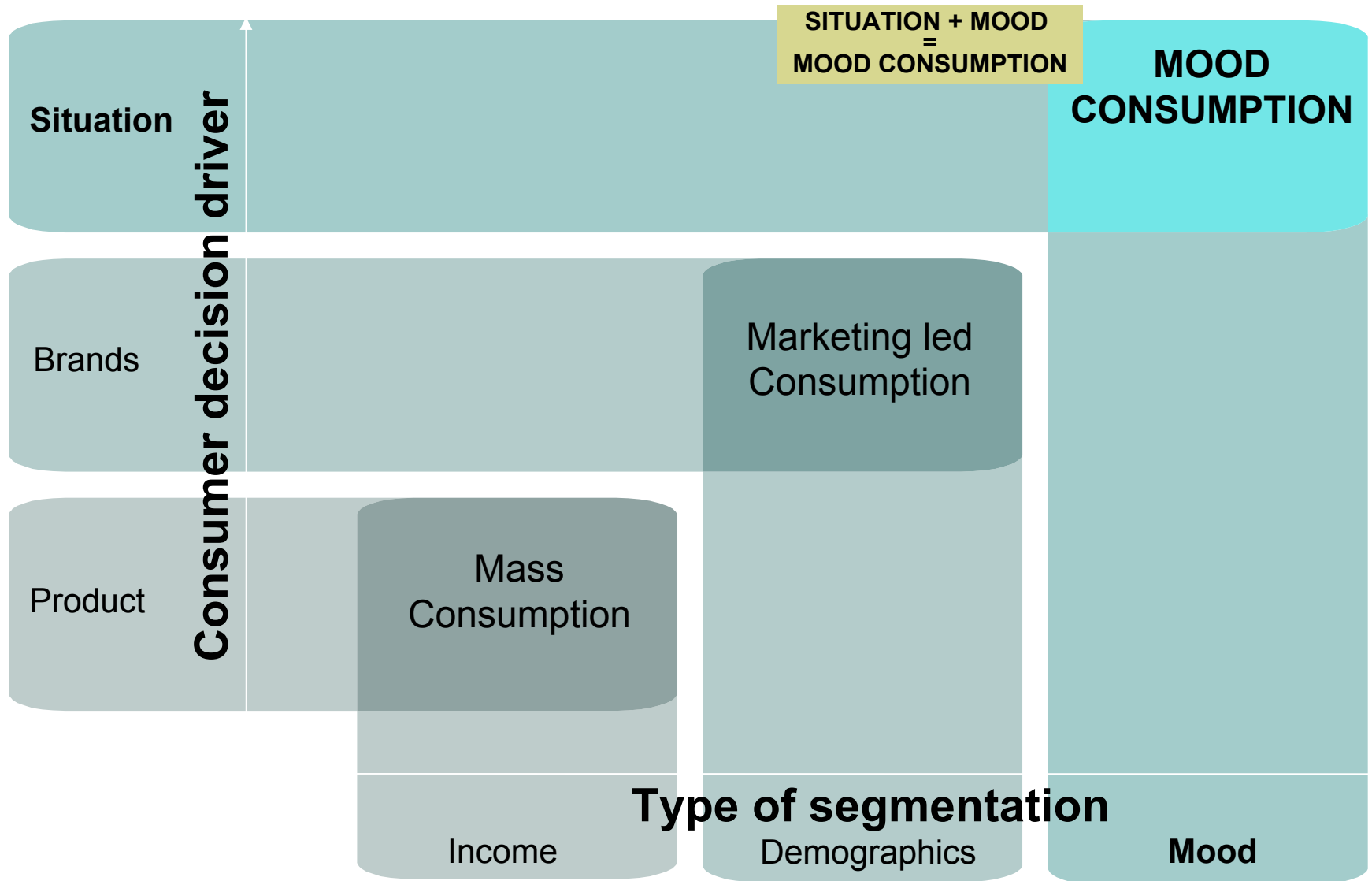
*Hvad skal udbyderne foretage sig i den forbindelse?*

*Er creative man morgendagens menneske, og er det overhovedet muligt at sætte sådanne etiketter på?*

**The Creative man of tomorrow will be a MOOD consumer. MOOD consumption will change the way we do business in the future.**

# 1. The consumer of tomorrow.

## THE 3 MAJOR SHIFTS LEADING TO MOOD CONSUMERS



## 2. Kunderne efterspørger oplevelser

*Hvor stor er effekten af oplevelsesøkonomien?*

*Hvordan finder man den formel, der skal til for at kunne være succesfuld i oplevelsesøkonomien?*

**Consumers want an experience.  
To be successful you need to let  
them co-create these  
experiences.**

## **2. Consumers want an experience – why?**

### **CO-CREATION THE CONSUMER IS AN ARTIST!**



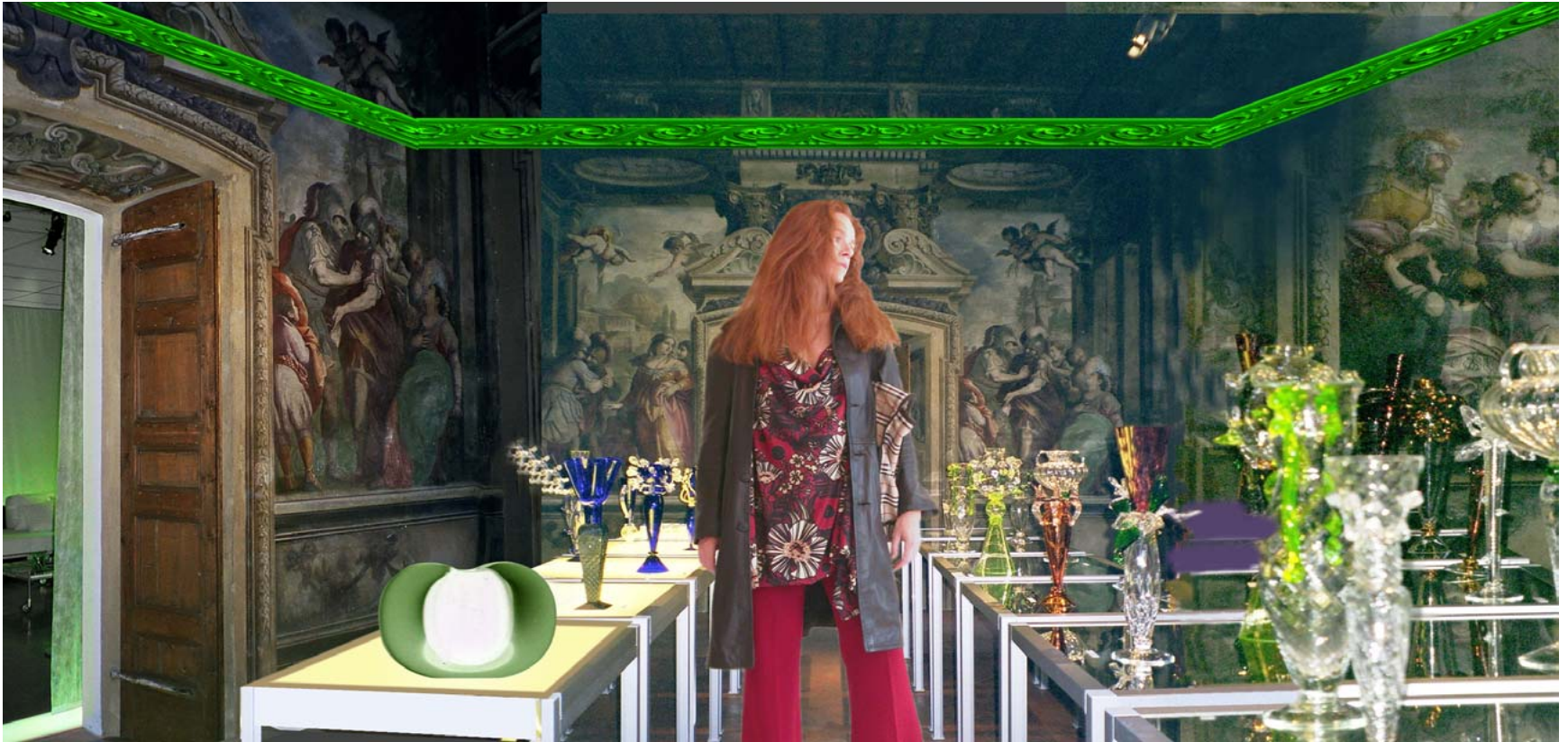
**It's not about rapacious, indiscriminate and passive consumption but making targeted, and proactive acquisitions.**

The consumer is the creator, the brand is just the palette. We are entering an age of pro-consumerism, where instead of swallowing advertising whole (this bag will make you a smarter/chicer/more successful person), we are choosing products according to our own personal set of values. Not that long ago, people were happily Prada people or Gucci people or Dior people - now that is far too reductive. The traditional Brand is dying. Brands and retailers have to convince people they understand our individuality. Brands and retailers shall enter into dialog with us, curate a palette of suggestions and engage us to build up our own brand, our own story.

**"New corporate marketing strategies must focus on the market rather than the marketer, the message rather than the messenger, the buyer rather than the seller" (David Arnold. The Handbook of Brand Management)**



## 2. Consumers want an experience – how? CO-CREATION THE CONSUMER IS AN ARTIST!



Theatre and its audience: so often a missed opportunity! Examples for inspiration:

- New changing rooms - NIKE
- Fashion / home interiors shop during the day turns into party venue at night - USA
- Calming or energizing projections in clinics and hospitals - PHILIPS

## 2. Consumers want an experience: a benchmark case

**BACCARAT**  
Crystal “palace” 2003





### 3. Den bevidste/kritiske/politiske kunde

*Er den politiske kunde en reel størrelse eller blot en medie-opfindelse?  
Har den politiske forbruger nogen reel indflydelse på forbrugsmønstrene?*

**The conscious/critical/political  
consumer exists and he will  
become more powerful...**

### 3. The conscious/critical/political consumer – why? **POWER VOTE WITH YOUR WALLET!**

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**Call it Control. Call it Power. Call it Influence. Call it Passion. We are about to reveal more of it!**

Consumers are people. People are voters. A voting consumer will decide what government or brand to vote for. If a brand creates a good campaign, we will consider to vote for it. If a foreign government acts against our beliefs, we will boycott that country's products; like the US consumers who stopped buying Champagne. If we receive bad service, we will call in the media. Brands, retailers and CEO's will be discussed as intensely as politicians were in their former times. Some people will abstain from voting and become "anti-consumers" or act out of hatred or anger like "adbusters" or the anti-globalization movement. Others will swear life-long loyalty towards their favorite brand; like "I love Apple!"

**In the future we will all try to take a stand.**

### 3. The conscious/critical/political consumer – how? POWER VOTE WITH YOUR WALLET!



**Examples for inspiration:**

- **ITALY:** underground movement - Cacciatori di Briciole (container raids)
- **ITALY:** everyday.eat – a charity focused on rejected products
- **FASHION TREND:** trashy, aggressive but passionate spirit: the paradox of Punk Royal (underground fashion brand) and its signature "fuckyouwe'refulloflove"

### 3. The conscious/critical/ political consumer: an anti-benchmark case

COCA COLA  
Dasani Water 2004



## 4. Nye købestærke kundegrupper

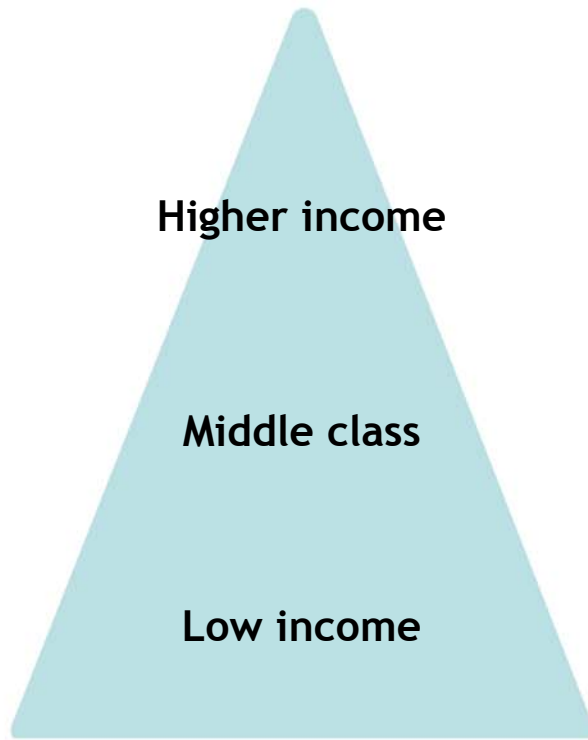
*Ændrer de forskellige kundegrupper reelt ved forbrugsmønstret?*

*Skal man målrette sine produkter til særlige kundegrupper?*

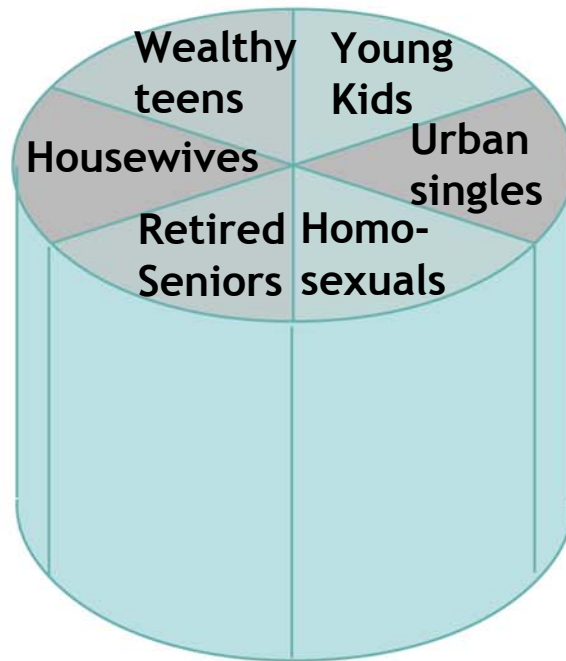
**Can consumer segmentation work?  
Yes - but only with a focused and  
flexible methodology.**

## 4. Can consumer segmentation work?

### TRADITIONAL STATIC SEGMENTATION FAILS TO UNDERSTAND MODERN CONSUMERS



MASS  
CONSUMPTION



MARKETING LED  
CONSUMPTION



MOOD  
CONSUMPTION



# 4. Can consumer segmentation work? How?

## MOOD SEGMENTATION

**PSYCHE**  
psychological & emotional  
state of mind



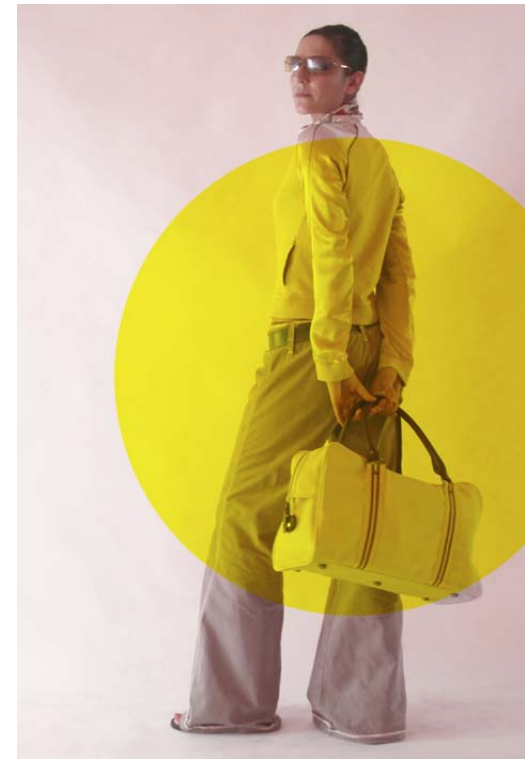
what's on my mind?

**SEMANTICS**  
evolving communication &  
motivations



how do I communicate?

**SENSES**  
design & sensorial evolution  
sight, smell, taste, touch



... and how do I sense?

## 5. Danskere vil stadig have discount

*Er discount bølgen kommet for at blive for altid?  
Hvorfor adskiller danske kunder sig så meget på dette punkt  
fra de øvrige europæiske landes?*

**Yes, why not?  
If you can't be the cheapest,  
make it simple...**

## 5. Danish Discount – why?

### **SIMPLICITY LESS IS MORE!**



**We want freedom from difficulty, hardship or effort. We value convenience and reject complexity.**

**We are all time-poor and option-rich - we don't have the hours necessary to go through all the options out there and decide what we want. We all want an editor, be it a store owner or a personal shopper. Simplifying the consumable does not reduce its worth but improves it. Many people don't want more features on their mobile phones, they want fewer. Above all, we want less stress.**

## 5. Danish Discount – how?

### SIMPLICITY LESS IS MORE!



**Simplicity means quick results with minimum effort or cost. Examples:**

- **UK: Marks & Spencer** pre-packed fresh ingredients pack
- **IDEA:** drink your cappuccino and read the paper while shopping
- **PRADA:** The Interactive shop in New York with RFID technology

## 5. Danish Discount: a benchmark case

**Easyjet 1995**



## 6. Hitter e-handel virkelig?

*Hvor meget vil e-handel ændre tillidsforholdet mellem sælgere og forbrugere?*

*Hvilken indflydelse har det på forbruget?*

*Hvad skal leverandørerne foretage sig i den forbindelse?*

*Har det nogen betydning i forhold til ansvarsfordelingen mellem kunden og leverandøren, mellem køber og sælger?*

# **E-commerce a hit?**

# **Yes! If you overcome two main challenges**



## **6. E-commerce a hit? – first challenge**

### **COMPASSION COMMUNITY & VALUABLE LIFE!**

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**We want to feel included in a community, to have a sense of belonging. We want to feel part of a tribe, of a network.**

**We often hesitate between two contradictory positions: shall we pursue our pure self satisfaction or should we be more giving to society? Providing a feeling of community and intimacy is how business reaches people. You need to get us to enter into your story and take it over and tell it back to ourselves. That's how you hook us. This is why, for example, brands like Burberry, Asprey and Dunhill concentrate on pushing their heritage and history: it's a good narrative. People can become characters in it, which leads to personal investment, which leads to real investment - purchasing.**

## 6. E-commerce a hit? a benchmark case

**GAP**  
**Casting Call 2003**



## **6. E-commerce a hit? – second challenge**

### **TRUST TRUTH & TRANSPARENCY!**

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**We want brands to be obliged, responsible and ethically correct. We want them to regain our trust through honesty, integrity and clarity.**

**We actually need to trust. What can we trust? Politicians ? Products? Companies? Advertising?**

**Traditional advertising is dying. Television killed it. Education killed it. The enormous amount of products available killed it, by simply numbing the target audience. Mr Topmodel X is not going to make people buy sunglasses - at least in the old world (Europe and America) he is not. Retailers, on and off-line, need to think more creatively to regain consumer trust.**

## 6. E-commerce a hit? a benchmark case

ebay 1995



## 7. Forbruget er blevet globaliseret

*Hvilken indflydelse har globaliseringen på forbruget?*

*Hvad skal udbyderne foretage sig i den forbindelse?*

*Er det muligt at forudse forbrugstendenser, når udbuddet teoretisk bliver næsten ubegrænset?*

**Global consumption –  
it's a small world...**

## 7. Global consumption – it's a small world...

### A RECENT NEWS STORY

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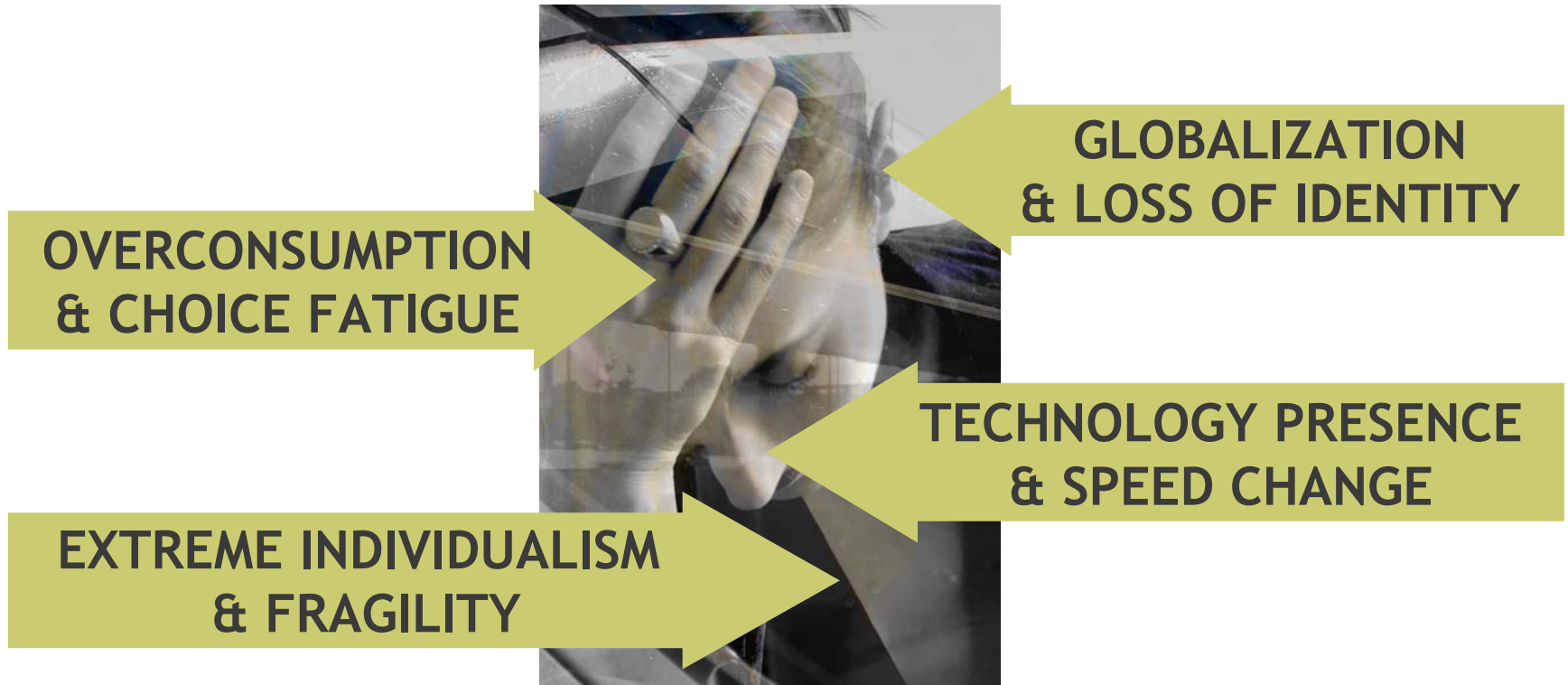
**CHINA: Consumers Getting More Sophisticated – Report**  
06 Aug 2004 **Source: [just-style.com](http://just-style.com)**

“The fact that they are putting quality before price means that the Chinese consumer is becoming more sophisticated.”

A new report suggests Chinese consumers have developed discerning tastes, and that quality, service and variety beat value when it comes to choosing both brands and shopping destinations.



## 7. Global consumption – it's a small world... THE SAME CHALLENGES FOR US ALL



## **7. Global consumption – it's a small world...**

### **THE SAME MEGA TRENDS AFFECTING US ALL**

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**1. SIMPLICITY**

**2. TRUST**

**3. CO-CREATION**

**4. COMPASSION**

**5. POWER**

# THANK YOU!

