

Observatoire des futurs
EM Strasbourg

Expectations and Behaviors of Consumers and Citizens

EM Strasbourg BUSINESS SCHOOL
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Expectations and Behaviors of Consumers and Citizens

1. Definition and Relationships with Other Factors

Connection to Uberization and Industry 2030/Key Questions for the Future

- Consumers adopt technology and new business models if they create value (economic benefit, well-being, etc.). New technologies are changing and thus behaviors and consumption systems (disruptive innovations).

- Identify potential new business models resulting from future consumer expectations

2. Summary of the Retrospective Analysis

Retrospective in General and for Uberization and Industry 2030

- Rise in purchasing power (doubled between 1970 and 2010), but a perception that it is declining and possible stagnation in the long term
- Consumer adoption of new technologies driven by the value they provide and increased skills (SoLoMo: widespread social, local, and mobile; Atawadac: Any Time, Anywhere, Any Device, Any Content)
- Predominance of the consumer experience (a blend of rationality and emotion)
- Desire for both premium and low-cost options
- Customer empowerment: Putting power in the hands of consumers
- Brands: From vertical to horizontal, from exclusivity to inclusivity, and brand switching

Current Trends

In General and for Uberization and Industry 2030

- GDPR and the “privacy by design” model to restore consumer trust
- “Theoretically” responsible and low-impact consumption (local, made in France, fair trade, organic, etc.)
- Desire for proximity (to save time, not to foster social connections)
- New sales models: subscriptions for consumer products (10 percent of consumers owned a smart speaker in 2019, compared to 3 percent in 2018), pay-per-use, virtual reality (falling technology costs), etc.



3. Summary of Prospective Exploration

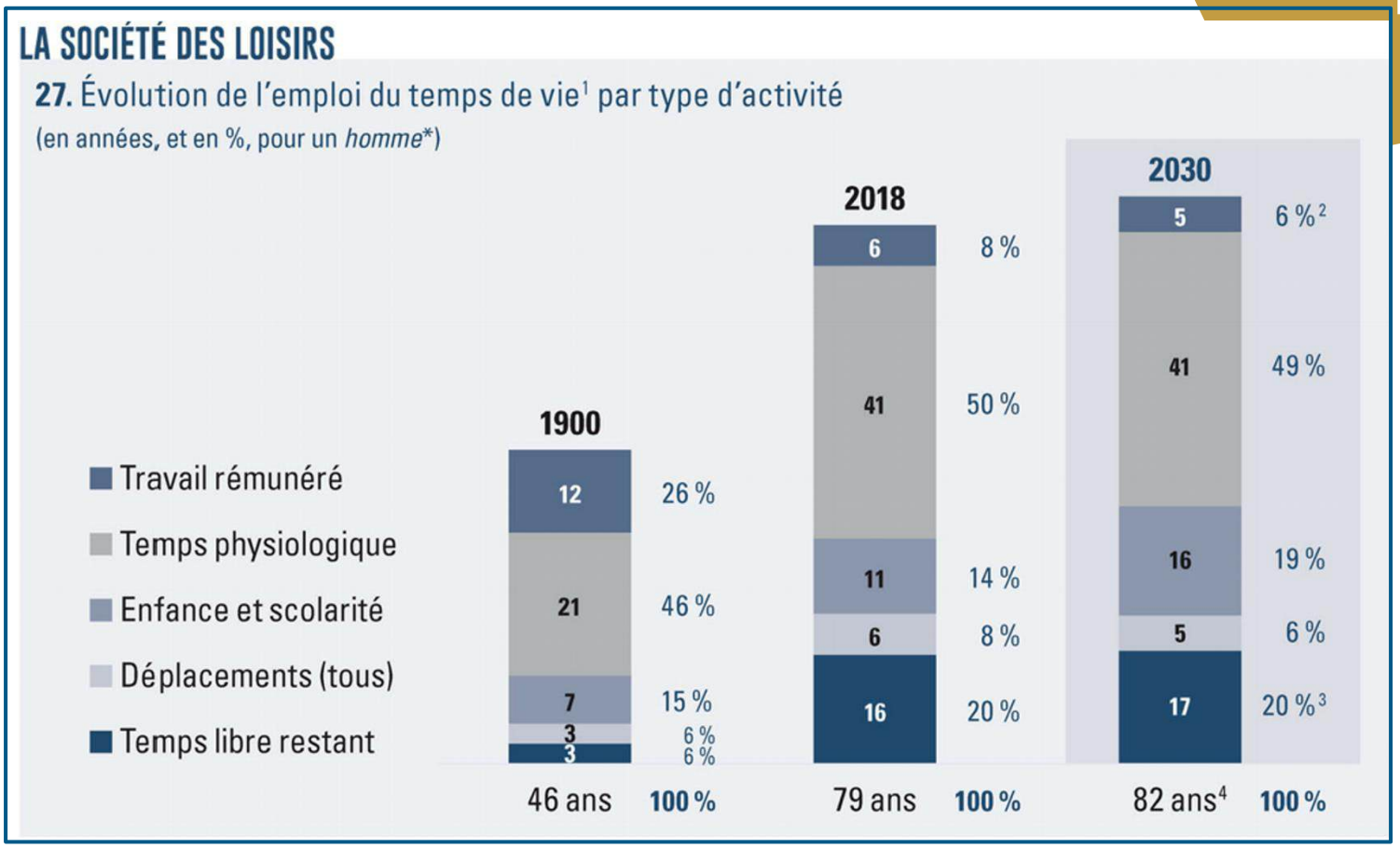
Major Trends / Constants

- **Population growth:** +1 billion people by 2030 (+4 million in France, with migration toward the south)
- **Societal changes:** individualization, anomie, feminization, environmentalism, and “technologization” (source: Francoscopie 2030)
- **Significant increase in leisure time** (and a feeling of not having enough time!)
- Continued growth of e-commerce (approximately +15 percent per year). €100 billion in France in 2019, representing 8 percent of retail sales.

Uncertainties

- **Tech-friendly or tech-phobic?**
- **The virtual world is gradually replacing the real world** (dematerialization, yes, but uncertainty regarding consumer experiences)
- **Adoption of the sharing economy and widespread adoption of C2C** (rental, swap)
- **Use rather than ownership**

Free Time for Consumption



Source: Francoscopie 2030, p. 158

Seeds of Change

- **Skepticism toward product offerings** (ratings, reviews, etc.)
- **The "augmented consumer"** (real-time information—think "Shazam for shopping"—that saves time when shopping)
- **Consumption driven by influencers and advertising** (fashion, sports, home, tech, and leisure). Other sectors in the long term (food, capital goods, etc.) or "branded influencer fatigue"?
- **Resistance to algorithmic systems** (filter bubbles, distortion, etc.)

Controversies

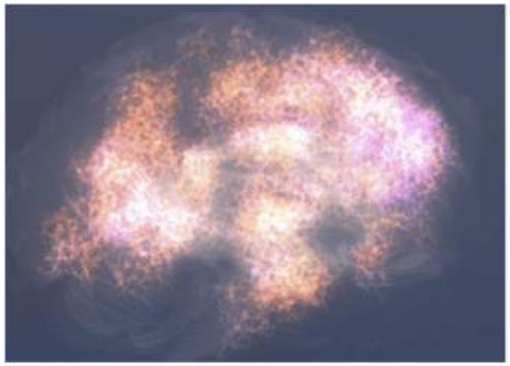
- **Personalization-privacy paradox:** wanting personalization while avoiding the sharing of personal data (e.g., self-tracking, etc.)
- **Neurotechnologies:** improvements in cognitive processes and emotion management, as well as marketing tools (e.g., wearable electroencephalographs—Brainwear, enhanced facial recognition, Alexa, etc.),
- **Will prices rise** (due to extreme **online and offline personalization**, anticipation of consumer needs, and responsible consumption) or fall (due to increased competition, reduced production costs, etc.)?
- **New "sustainable" technologies:** a factor driving up or down costs?
- **Reverse big data:** Consumers are leveraging big data to better understand brands

Disruptions

- **Sustainable consumption:** the end of packaging, regulation and restrictions on transportation (particularly air travel)
- **Widespread prosumerism** (energy, food, and 3D printing of everyday objects) and **the rise of consumer-owned brands**
- **Transhumanism** (enhancement of human capabilities through technology) by 2029 (?)
- **Changes in distribution models:** online retail > 50 percent of retail sales in France; the decline of mass retail (hypermarkets, shopping malls, etc.).

Self-Quantification: A Disruptive Innovation?

A wearable device to track cognitive performance and emotions



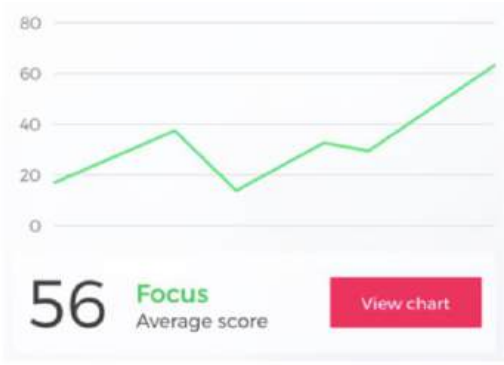
Knowledge is power

Your brain is the center of your experiences and abilities. Whether you are an individual bio-hacker or an employer wanting to improve the workplace, understanding how the brain responds to daily life can increase personal and professional productivity and wellness.



A wearable for your brain

EMOTIV's wearable EEG devices make brain data accessible for everyday use and self-quantification. Track your brain throughout your day like you would track your steps and optimize your cognitive potential.



Track and optimize

EMOTIV's Performance Metrics measure your brain's cognitive and emotional states and give you objective feedback on your brain state in the moment and over time. Improve focus, reduce stress or deepen a meditation practice with valuable insights about your own mind.

Source : Emotiv.com



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