Customer Foresight Practice

How to Access Future Markets Through Extraordinary People

What kinds of persons are involved in trends and how to find innovative or visionary customers when developing brands and products for tomorrow's markets? This article systematizes different methods corresponding to the tasks practitioners are confronted with. An exemplary case study illustrates how the trend receiver approach can contribute in international practice situations. The democratization of future competencies and new research potentials due to influencers are also discussed.

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Identifying trends as early as possible is essential for good corporate management. But whom to consult when long-term decisions need to be made and products and services have to be developed that will only be coming to market in a few years' time? It seems obvious that asking a representative sample is not the best option in this case. Another option is to talk to trend gurus or ask strategy consultants for help. So who can provide credible and trustworthy trend information on the relevant topics of strategy, brand, products, services and communication? Who can help to make future customer expectations more tangible? And how can this information finally be translated into action?

These questions inevitably lead to the paradox that although the future is unpredictable, companies must courageously launch products, services and organizational changes today in order to be prepared for tomorrow's markets. This is mainly because of long development and production times, e.g. in the construction or home appliance industry. Also, new retail networks or technical systems could be involved. But precisely where decisions or strategic plans are more long-term and market conditions and customer expectations are developing with a particular dynamic, the proven methods of customer insight research often come up against their limits: Today's customers are very much anchored in today's world and often lack creative vision, conclusive or surprising association skills, as well as projection and innovation power.

Customer foresight is a concept for strategic customer-based projection or trend research and aims to improve the strategy and decision-making processes of companies. Customer foresight can be conceived as an interaction with projected future markets via selected customers – by understanding their wishes and attitudes, ideas and visions, as well as their perception of signals and drivers of change.

Customer foresight research expands the possibilities of customer insight research. Ideally, studies use and go beyond today's user and customer experience, opening up realistic 'possibility spaces' and drawing pictures of a potential future.

Customer foresight is currently emerging as a new term and research field that holds potential for improving many areas of consumer, innovation and strategy research. This gives rise to some fundamental questions: Which business goals benefit from customer foresight studies? How relevant are personality patterns and people's ways of thinking and perceiving? How to identify suitable persons and how best to engage in the dialogue about wishes and projections towards future everyday life, brands and products?

First of all, this article provides an overview and a practical guideline on how, based on the evolvement of future living and consumption situations, persons that are especially aware of these situations can be clustered and assigned to different research goals. Five different approaches that practitioners may apply are presented along with their characteristics, recruitment criteria and recruitment methods. The trend receiver concept is addressed in particular and exemplified by a case study from the author's practical experience. Finally, the rising importance of influencers for customer foresight is discussed.

Structuring Existing Approaches in the Field of Customer Foresight

Within the field of customer foresight, a variety of terms and concepts are used, but frequently applied with little structure or logic. So how to systematize terms and methods? A simple question is helpful here: What differences are there between life and consumption today and tomorrow, e.g. between 2020 and 2025?

Fig. 1: Planning for the Future

How far do we plan?

Companies are confronted with a strategic paradox, especially when long lead times cause uncertainty about future market and consumption patterns: Decisions have to be made today although the future is unpredictable. Thus it is about a 'ride into the fog' which demands convincing and encouraging projections, imaginations and visions.

- Long-term scenarios: up to 20 years
- Long-term sales planning: 10 years (5 years in depth)
- Product development: 5–7 years
- Service development / communication: up to 18 months*

DECISION REQUIRED TODAY

Source: Hofmann, 2014.

Much of what we see today is still likely to be there tomorrow: the majority of buildings and streets, patents and laws, but also values such as democracy, freedom and justice and motives such as appreciation or curiosity. At the same time, a lot of new developments are emerging: innovative technologies, inventions, new products or services, new behaviors, attitudes or ways of communicating.
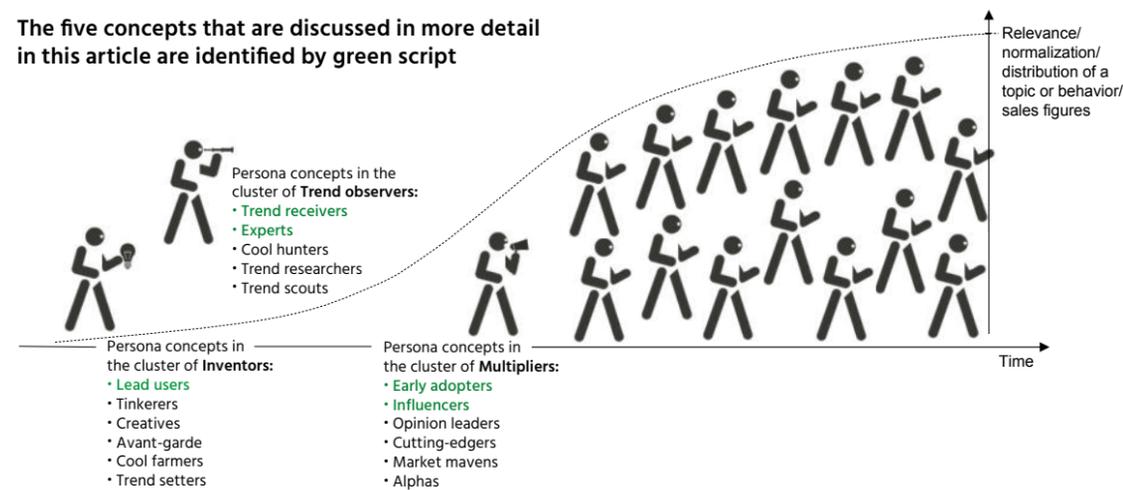
The future is a mixture of continuity and change. For detecting and understanding the change dynamics in customer expectations, it is therefore indispensable to combine trend and innovation theories with research on motives, values, and consumer insights.

Referring to concepts from motivation psychology (Heckhausen & Heckhausen, 2010; Karmasin, 2004; Reiss, 2000) as well as consumer insight and value research (Föll, 2007; Inglehart & Baker, 2000), motive and value sets are conceived as fluid paradigms (Hofmann, 2014). On the one hand, motives and values act as stabilizers in the stream of changes in the technical, economic, social, legal and esthetical world. Some new products and services serve ancient wishes and motives, only in a modified manner. On the other hand, motive and value sets are not fixed; cultural change is manifested in subtle changes in motive and value sets. Therefore, new lifestyles and consumer behaviors are never totally new or completely disruptive, but neither are they just 'new wine in old wineskins'.

In customer foresight practice, it is particularly fascinating to research people who elicit change – because they combine things that were previously separated, thus bringing something new into the world or spreading an invention. Also relevant are people who are

Fig. 2: Typology of "Agents of the New"

The five concepts that are discussed in more detail in this article are identified by green script

Relevance/ normalization/ distribution of a topic or behavior/ sales figures

Persona concepts in the cluster of **Trend observers:**
- Trend receivers
- Experts
- Cool hunters
- Trend researchers
- Trend scouts

Persona concepts in the cluster of **Inventors:**
- Lead users
- Tinkerers
- Creatives
- Avant-garde
- Cool farmers
- Trend setters

Persona concepts in the cluster of **Multipliers:**
- Early adopters
- Influencers
- Opinion leaders
- Cutting-edgers
- Market mavens
- Alphas

Time

Source: Hofmann, 2011.

Fig. 3: Value creation by 'Agents of the New'

Where 'Agents of the New' contribute to value creation

AGENTS	Vision, Strategy and Planning	Product and Service Development	Communication
LEAD USER		Lead users have context-specific needs and expertise that help to improve products and services.	
TREND RECEIVER	By combining own context specific customer experience with imagination, projection and reflection skills, trend receivers help envision future markets and support strategic decisions in different stages of the product development process, including communication strategy and planning.		
EXPERT	Experts have professional knowledge in a specific field and frequently have a profound understanding of industry developments. Their context-specific knowledge contributes to product, service and communication development and strategy processes.		
EARLY ADOPTER		Early adopters serve as role models and therefore help with the diffusion of trends and products.	
INFLUENCER			Influencers communicate to their followers and influence opinions and perceptions as well as usage and purchasing behavior among their audience. Some offer their own products or co-create with companies.

Source: Hofmann, 2020.

aware of change dynamics in an early phase and can assess the changes and potential of the 'new'. Therefore, focusing on the various "agents of the new" (Hofmann, 2011), with persona concepts and procedures to identify relevant persons as discussion partners, forms the basis for valid customer foresight questions and studies.

A closer look at manifold concepts from different academic fields (see, e.g., Barck, 2010; Gladwell, 2002; Gloor & Cooper, 2007; Zandl & Leonard, 1992; for an overview and analysis of 20 noted concepts see Hofmann, 2011) leads to a typology of the 'agents of the new' and distinguishes three overarching categories (see Fig. 2): "inventors" who are thinking up and designing the new, "multipliers" who are early users spreading the new and "trend observers" who are perceiving and reflecting invention, diffusion, and normalization processes.

Among the multitude of persona concepts and identification procedures

of discussion and study participants, five approaches are selected and an overview is presented (Table 1). Criteria for this selection are: covering different areas of business tasks, publication in acknowledged research contexts, application in various practice situations and availability of guidance for practitioners in terms of characteristics and recruitment processes.

This typology (see Table 1) offers practitioners the possibility of using the persona profiles and methods in a tailored manner: Thus, for the enhancement of an existing product lead users are recommended (Eisenberg, 2011; von Hippel, 2006). A lead user in the field of outdoor sports equipment, for example, may already have made changes to their gear that have the potential to become relevant to many customers. In contrast, when diffusion (Rogers, 2003) and communication goals are set, suitable influencers can be involved to place a product in the

right context and to promote and anchor it in the relevant market segments.

Different business situations require different ways of integrating "agents of the new" (see also Hoffmann, Kopalle, & Novak, 2010 and Vernette, & Hamdi-Kidar, 2013). So, here are some examples in which visionary competence is needed and trend receivers become the persona profile of choice: if an attractive vision of autonomous driving is to be developed for future everyday life; if it comes to questions of the long-term development of a brand or product of an energy provider, an airline, a real estate company, a bank, a social media platform or a furniture manufacturer; if answers have to be found in the context of how awareness of sustainability might change and impact spending or what effects topics such as data protection or mental health have on individual purchasing behavior. Trend receivers are valuable conversation partners regarding these topics as they combine

Table 1: Focused Persona Concepts and Tools for Identification Processes

	CHARACTERISTICS	RECRUITMENT CRITERIA	RECRUITMENT METHOD & PLACE
Lead User: "LU face needs that will be general in a marketplace – but face them months or years before the bulk of that marketplace encounters them, and Lead Users are positioned to benefit significantly by obtaining a solution to their needs." (von Hippel, 1986)	1. Extreme dissatisfaction with current products/services 2. High expected benefit from new solution 3. Innovative & trend-leading behavior 4. Created innovative solutions	· Innovative mindset · Product-related knowledge · Dissatisfaction with current solutions · Took action to solve their problems · Willing and able to work in a team	· Screening survey · Pyramiding · Signaling/broadcasting · Netnography · Crowdfunding · Communities · Databases, networks · Screening interview · Lead user conference
Trend Receiver: "TRs are individuals who perceive changes and potentials of the new in a specific domain in a highly sensitive and differentiated way." (Hofmann, 2014)	1. Context experience: TR have a thorough understanding of the given context due to their own consumption and usage experience and thus know the motives and values of consumers first-hand. 2. Self abstraction ability: Using individual preferences and emotions as reference points, TR understand the needs and patterns of other consumer groups. 3. Curiosity and heterogeneity: Interested in consumer habits, lifestyle issues and the differentiation among social backgrounds, TR have a strong curiosity about people from backgrounds to which they do not belong. They are networked in many ways and have access to different ways of thinking and diverse and international sources of information. 4. Selection competence: Having a strong desire to understand causes and correlations, TR have sharpened their competence to filter and perceive which structures, motives and values remain stable and to what extent new behavior patterns can develop. They have the ability to recognize analogies and paradigms. 5. Biographical discontinuities: TR often exhibit biographical discontinuities. They are sensitive to complexity and changes in life. 6. Communication competence: An above-average communication competence enables TR to translate perceptions into a precise and descriptive language and to respond precisely to questions they are asked.	· Correspondence to TR search profile, which is tailored to given research task, based on 6 general Trend Receiver characteristics (see coloumn left) · Willing to share thoughts	· Desk research and reflection of available networks · Pyramiding · Semi-structured screening interview · Different intermediaries and their personal and professional contacts · Conferences, publications, social media etc. (involving subsequent contact and screening interview)
Expert: "Experts have an academic degree and in-depth professional knowledge in a very specific field. They can bring the highest value to the innovation process when the need is clearly defined, but the solution is missing." (Bogner et al., 2002)	1. Professional in-depth knowledge in the area of interest 2. Paired with own usage experience and regular interaction with customers 3. Exceptional professional skills 4. Ability to envision and pursue solutions for specific problems 5. Innovative mindset 6. Income from the specific field of expertise	· Professional experience in the relevant field · Innovativeness, out-of-the-box thinking · Solution-oriented mindset · Open to sharing expertise	· Desk research · Personal contacts · Screening interviews · Technology networks · Universities/scientific institutions/publications
Early Adopter: "The EA is among the first to buy a new product. Through conveying a subjective evaluation of the innovation to near-peers by means of interpersonal networks, the early adopter decreases perceived risk around an innovation in the mainstream market." (Rogers, 2003)	1. Open to new: among the first to try out new products 2. Sociable: sharing time and information with others; well integrated in peer groups 3. Respectable: role model for many members of a social system 4. Well-educated and informed about new technologies and trends	· Scaling high on EA scale · Favorable attitude towards change and risk · Owner of a relatable product · Passionate about innovations in the relevant industry	· Screening survey · Personal contacts · Interviews · Own customer base · Online communities/product enthusiast communities
Influencer: Influencers are "the individuals who were likely to influence other persons in their immediate environment." (Katz & Lazarsfeld, 2005)	1. Active: attends events, is involved in communities, spends a lot of time out, follows the news in the field of interest, reads a lot 2. Connected: interacts with large amounts of people through personal contact or in social networks 3. Impactful: their opinion is important for several people who tend to be affected by this opinion when making decisions	· High level of extraversion, willingness to share information · Central position in broad social network · Knowledge about social media, industry, innovations, lifestyle, user needs	· Social media research · Personal contacts/invitation · Screening survey · Contests · Customer base · Online communities/product enthusiast communities

Source: Hofmann, 2020.

everyday experiences with a given product or service with a far above-average skill level in observing, reflecting, associating and projecting.

In order to support practitioners in developing the appropriate study design and identifying the right dialogue partners, the five focused concepts can be systematized by assigning them to different areas of business and research tasks (see figure 3).

The Identification and Involvement of Visionary Customers by the Trend Receiver Approach

How to apply this structure and typology? One case from the author's practical experience illustrates how visionary customers are identified and involved in projects concerning future lifeworlds and markets. The case study focuses on autonomous driving from a market and customer perspective. It concerns the field of "Vision, Strategy and Planning", but the field of "Product and Service Development" is addressed as well as various aspects of desirable future car and mobility situations were discussed.

Before presenting the case in detail, the approach and the general characteristics of trend receivers need to be described. Trend receivers are consumers "who perceive changes and potentials of the new in a specific domain in a highly sensitive and differentiated way" (Hofmann, 2014, p. 98). They are best found by a tailored search profile and pyramiding processes involving suitable intermediaries (Hofmann, 2010; Schweitzer, Hofmann, & Meinheit, 2019; von Hippel, Franke, & Prügl, 2009). The six characteristics (specified in table 1) that proved to be particularly typical of trend receivers across diverse topics and industries are: context experience, self abstraction ability, curiosity and heterogeneity, selection competence, biogra-

phical discontinuities and communication competence. These characteristics enable trend receivers to identify developments much better than ordinary customers from a representative sample and allow them to assess trends in their relevance, identify new things early and provide a coherent description of a possible or desirable everyday life in a few years' time.

Visionary competence is a domain-specific ability. This implies that practitioners can prepare a tailored trend receiver search profile by specifying the mentioned characteristics with further aspects that correspond to the project and research task. Thus, requiring personal user experience ensures that the projections are based on everyday experience (see characteristic "context experience"). Or, as a further example, esthetic competencies need to be integrated in the search profile if topics of design and impression are researched. Also, in the following case study a specifically developed search profile was applied for the identification of the trend receivers.

"Easy Rider" Study – Autonomous Driving From the Market and Customer Perspectives

Few topics hold so much disruptive power for automobile manufacturers, mobility providers and related industries as the topic of 'autonomous driving'. Since 2013, in particular, Audi's market and trend research has aimed to understand potentials and concerns from the customer's point of view. Not an easy task, since everyday mobility with semi-autonomous or fully autonomous cars would differ significantly from that of today. While various quantitative broad-based surveys primarily revealed great fears and strong rejection, we sought more reflected ideas of future driving and mobility situations.

The intention was to gather clues and answers to the question of what an attractive car and mobility environment could look like when considering expanded technical possibilities. First and basically, it was discussed how customers would benefit most from semi-autonomous cars. But the question which kind of offers would be attractive under conditions of fully autonomous driving was also considered. This included new aspects with regard to interior and exterior design, looking at the car as a mobile space and media interface and thus gaining valid insights for brand management. Different drivers of change were reflected, factors that

Management Summary

Markets and customer expectations are subject to changes and companies need to sense and shape upcoming potentials. This article examines the possible applications of customer foresight and shows its potential for finding a vision and developing strategies, brands and products. It provides guidance for practical application by systematizing concepts and characteristics of persons involved in the emergence and evolvement of trends and by assigning different customer foresight approaches to distinct business tasks. How this contributes in international business practice is exemplified by a trend receiver case study. Lastly, the democratization of future competencies and new potentials due to influencers are discussed.

might slow down or accelerate the evolvement of autonomous driving were identified, and a possible roadmap on the basis of projected lifeworlds and mobility scenarios was developed.

The full scope of this comprehensive research involved multiple studies and components that are all interconnected and lead to a single resulting picture of the future. The trend receiver method is central in this research process and delivers substantial and guiding results for the other research components as well.

Figure 4 shows the iterative study design of the 'Easy Rider' research project in which, parallel to wide-ranging desk research, a behavioral economic analysis and a cultural and innovation history analysis were included. Furthermore, expert interviews were conducted with city planners and pilots. And a scenario analysis was carried out with 29 trend receivers in the USA, Germany and China (for a detailed, yet anonymous list of the professional profiles of the 29 trend receivers see Schweitzer et al., 2019). The findings and impulses arising from the various research strands were continuously interwoven; hypotheses on user behavior arising in discussions with trend receivers were quantified in the second part of the study in cooperation with the research institute of a partner university (see also Hahn, Hofmann, Bilgram, Schwarz, Meinheit, & Füller, 2016).

The trend receivers were identified by means of a tailor-made search profile and various intermediaries. Initially, individual in-depth interviews were conducted; between these individual interviews, the content and structure of the interview guideline were continuously adapted. Hypotheses on, and descriptions of, desirable future mobility situations and vehicle characteristics evolved along this iterative process. The condensed interim results were fi-

Fig. 4: Iterative Study Design of the 'Easy Rider' Research Project
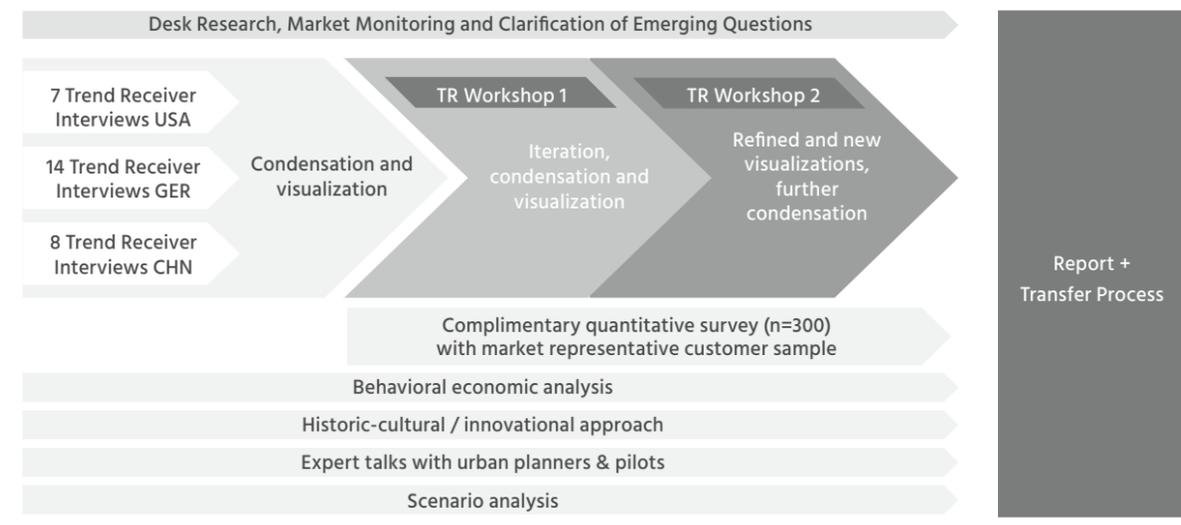
Source: Hahn, Hofmann, Bilgram, Schwarz, Meinheit, & Füller, 2016.

nally converted into twelve use cases and were visualized. In workshops with individual and group formats (see figure 4) these representations were then questioned, discarded, enriched and refined. Thus, for example, it was established how customers might use the time gained in the car if they no longer had to drive and, ultimately, even the steering wheel would disappear, and which qualities new mobile devices and future space and screen designs would have to bring to life.

The results in the form of a presentation with professionally visualized future projections were used at various levels from specialized departments to the Board of Management and in various areas such as Audi design, pre-development, brand strategy and product marketing. It influenced, amongst others, the concept car AICON (see figure 5) as well as the further examination of the future topic of autonomous driving.

This case study shows how trend receivers may be identified and involved in practice. This allows the integ-

ration of visionary customers into vision finding and strategy, brand, product and service development processes. This method is especially recommendable if the research topic involves mid-term and long-term market developments and if market conditions are likely to change substantially.

Customer Foresight in the Age of Influencers

While not all of the five mentioned customer foresight methods can be examined here in the same detail, I will add some thoughts on the role of influencers. Influencers can be suitable collaboration partners for companies especially in the case of short-term business tasks and when newly emerging customer preferences and lifestyles are to be used for communication processes. But the growing impact of influencers also evokes new dynamics and potentials for customer foresight in general.

In recent years, influencers have gained considerable attention and sig-

nificance, more than any other trend-sensitive group, first and foremost because they have turned the advertising industry upside down. By integrating products into their living environments, taking photos and videos of them, posting them in social media – especially Instagram and YouTube – in their feeds and stories and thus actively promoting them, they signal what they consider cool, trendy, good or powerful. Their followers can thus gain a differentiated assessment of the developments regarding various industries and brands.

There are very large differences between individual influencers. While many are rather superficially oriented and only showcase what companies send to them, not demonstrating any specific trend expertise of their own, others act out of a real conviction and precise market knowledge. Unlike conventional trend experts, they also actively contribute with their work to implementing what they themselves see as particularly

Fig. 5: 'Easy Rider' workshop (Source (left): Gravity GmbH, https://www.audi.com/de/company/research/audi-innovation-research/trend-receiver.html) and concept model Audi AICON (Source right): https://www.audi.com/de/experience-audi/models-and-technology/concept-cars/audi-aicon.html)

promising for the future. Using their influence on followers they combine trend diagnosis and trend development, causing the dynamics of 'self-fulfilling prophecies'.

One can thus speak of both democratizing the examination of the future and democratizing the influence on the future. The boundaries between influencers who are reflective and knowledgeable and consumers who pay increased attention to what might be gaining relevance are blurred. This provides new opportunities for costumer foresight research. The pool of reflective influencers is interesting for the identification of relevant and suitable trend receivers as they sometimes fulfil the relevant characteristics identified above. In fact, experience with social media and familiarity with the mechanisms of influence has become part of many trend receiver search profiles – depending on the given questions.

Projecting these developments, it can be stated: The more democratized future competence becomes, the more self-evident and influential customer foresight will be. Thus, the method and the underlying mind-set may be applied to strategic questions and vision finding as well as the refined development and communication of products and services.

Discussion

When lead times are long and market conditions are likely to change dynamically, classical customer insight research has its limitations. When assumptions on the incalculable and less tangible changes in customer expecta-

tions and behavior are needed, customer foresight creates a valid basis for an informed look at the future by offering companies tools for broadening and objectifying their vision-finding and development processes of strategy, brand, product and communication.

In specific business situations practitioners have to reflect on some basic questions: What is the given business task and what are the precise research questions the company needs to get answers to? This leads to a methodical differentiation: Are topic and time horizon likely to involve significant changes in customer expectations? If the answer is "no", customer insight research with a representative sample is probably a good choice. If the answer is "yes", it is a case for customer foresight research.

For this mandate, the present article examines the emergence and evolvement of trends and clusters existing persona concepts by a typology of agents of the new ': the extraordinary people that are, more than the average consumer, involved in understanding and forming tomorrow's markets. Assigning different 'agents of the new' to different business tasks is supported by systematizing existing approaches. This allows to give guidance for method selection and for the identification of suitable dialogue partners. How custo-

mer foresight may contribute in practice is exemplarily shown by a trend receiver case study.

This illustrates that practitioners should accept the challenge of pursuing their own conceptual and reflective process: Whom do we need to consult and how can we find these people? How should we organize and perform the dialogue? How can we involve internal stakeholders and decision makers? How do we need to visualize the resulting statements and projections towards future lifeworlds and products? How can we transfer the results into the company and its different value creation processes?

And lastly, the requirements, potentials and tools of customer foresight presented here obviously need to be further reflected on by practitioners and researchers alike. Questions that should be considered: the relation of customer fo-

resight and other ways of foresight and trend research; the boundaries between customer insight and customer foresight research; how various methods of customer foresight differ; comparison of tailored search profiles and standardized scales in terms of quality and efficiency; and transfer tools for customer foresight results. Topics like 'reflective influencers', 'democratization of future competence' or the potential of customer foresight for governments, institutions and NGOs also provide much food for thought and research.

Customer foresight has a good chance of gaining further momentum. Naturally, the interaction with drivers of change and projected future everyday life and markets remains uncharted territory. So it is all the more important that companies boldly and skillfully access people from outside when sensing and shaping upcoming potentials.

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Main Propositions

1. Customer foresight helps companies to sense and shape upcoming potentials through interaction with extraordinary customers.

2. Different types of 'agents of the new' are involved in understanding and forming tomorrow's markets.

3. These persona concepts and corresponding methods can be clustered and assigned to various strategic business tasks.

4. Companies can significantly benefit from customer foresight research when developing their vision, strategy, products and communication.

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Lessons Learned

1. Practitioners consideration is needed if Customer Insight or Customer foresight approaches are the appropriate tool of choice. The latter is the case, if the dynamic of change is high and the expected time to market is long. In that case special skills are required.

2. Practitioners need to define the research goals precisely and select the corresponding method carefully.

3. Depending on the research targets, customers with innovative competence (e.g. lead users), visionary competence (e.g. trend receivers) or communicative competence (e.g. influencers) have to be integrated into processes of product and brand development.

4. Practitioners reflect and tailor the complete research process. Internal stakeholders have to be involved and the transfer and anchoring of the outcomes in the organization has to be ensured.

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