

# Identify and develop future markets

Identify and  
monitor conceivable  
market developments  
at an early stage

Think through  
perspectives of  
a market with a  
heterogeneous  
team

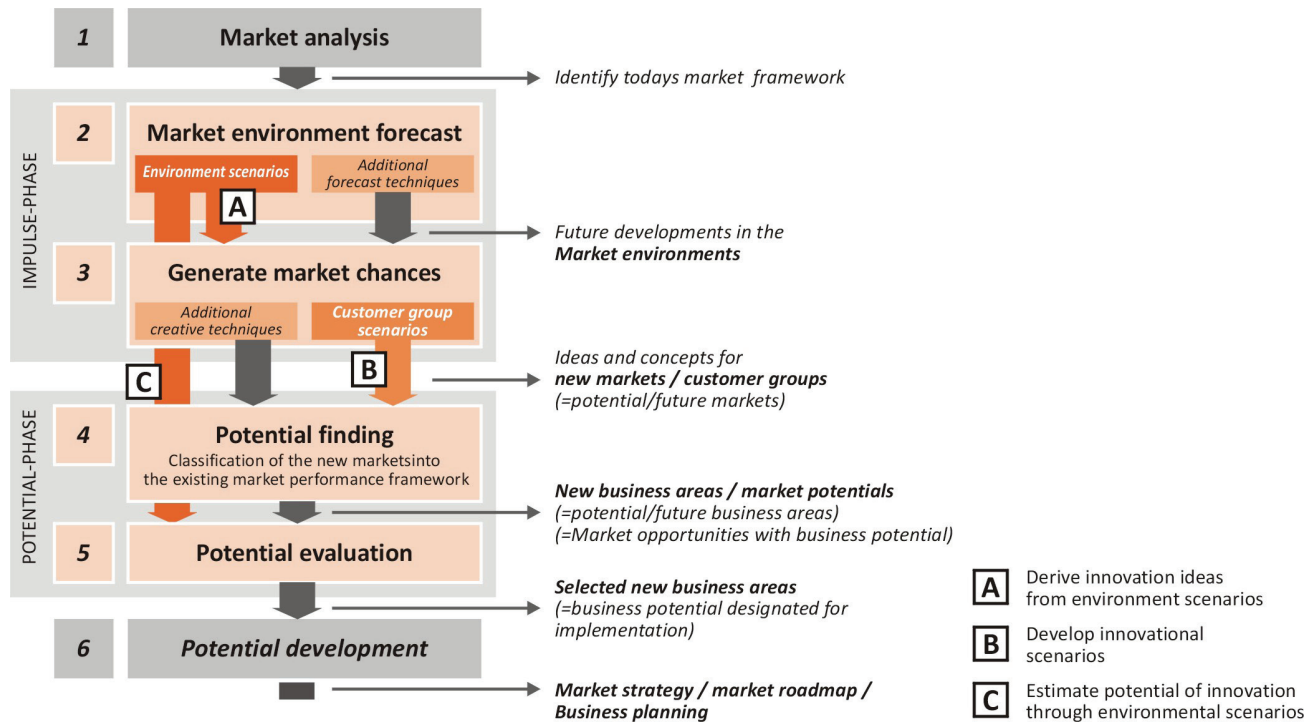
Develop strategies  
for new markets or  
market launches

Develop and  
combine scenarios  
for regional  
markets

Estimate  
market potential  
for individual  
segments

Identify and  
describe future  
customer groups

Environment-  
Monitoring through  
region-specific  
assessment



Identify and develop future markets

## Enter with scenarios future market potentials

Most approaches to market research focus on the current market framework - i.e. the markets currently addressed by the company as well as the markets that exist today but are not (yet) addressed - the potential markets. In our case, the focus is on identifying potential and, in particular, future markets. The basic procedure comprises six phases, which can be combined in different ways:

**Market analysis (phase 1):** Here, an analysis of the current market is carried out, ultimately using the familiar tools of market research: How large is the market under consideration? How do we estimate the market development? How mature is the market?

**Market environment foresight (phase 2):** The aim here is to get an idea of the market under consideration and its environment. It is important not to focus on today's market, but to cover the future market framework, which can be the overall market or a new market segment. In practice, the spectrum ranges from market environment scenarios to regional scenarios to customer group scenarios.

**Generation of market ideas (phase 3):** Most ideas for market innovations arise from market opportunities described in the context of environment foresight. For this purpose, the various forms of market environment scenarios can be used, but also other foresight techniques. It is also possible to develop market ideas directly in the form of market scenarios. These scenarios then describe how the company itself could position or behave in relation to the new

market. Alternative market entry strategies are an example of this.

**Potential identification (phase 4):** Here, the market ideas are linked to the existing or potential market services so that their business potential becomes clear. The term market potential is often used here in a simplified form. These are determined, for example, in a product-market matrix. The result - similar to product development - is new business areas, i.e., market ideas with business potential.

**Evaluation of potential (phase 5):** This phase involves evaluating market ideas with their fundamental business potential and finally making a selection. In addition to classic marketing tools, various scenarios are used to determine the suitability for expected market environments or preferred strategic approaches - or to test the robustness of the market ideas.

**Potential development (phase 6):** New markets can be developed in different ways. In the sense of a top-down approach, new market development can be embedded in the development of a market strategy, which is then later condensed into a market roadmap. However, it is also conceivable to integrate new marketing projects directly into roadmaps or plans.





*AOK Schleswig-Holstein*

### **Future development potential of AOK Schleswig-Holstein's insured groups**

As part of its marketing and sales activities, AOK SH uses product management based on specially defined groups of insured persons. For the three strategic core groups of insured persons, trends in the environment were identified, evaluated and summarized in a trend report. In addition, scenarios were developed in each case to show the development potential of the policyholder groups in the future. Supported by an additional long-term forecast model, options for action were identified for the AOK SH and strategic guidelines were developed for individual groups of insured persons.



*Behr-Hella Thermocontrol GmbH:*

### **The future of electronics in vehicle interiors**

The market for automotive electronics is characterized by high dynamics. In order to be able to operate successfully in this environment, it is necessary to recognize significant changes at an early stage and to take measures. Against this background, BHTC aimed to implement an independent trend monitoring system. The necessary foundations were laid by developing future scenarios. With the help of Szenario-Management™, alternative future images of the mobility environment were developed and evaluated in terms of their probability on the basis of trends. By linking these images with supplementary product scenarios, the most relevant vehicle concepts of the future were identified and the central search fields for monitoring technology trends were derived from these.



*BMW Motorrad*

### **The future of the global motorcycle market**

BMW Motorrad is the only large-series manufacturer of high-displacement motorcycles in Germany and at the same time a global supplier with a share of international business of over 80 percent. Therefore, as part of its „Strategy 2030,“ BMW Motorrad asked itself what changes in the global motorcycle markets could be expected in the future and how it should prepare for them. In a project together with the ScMI and the IZT, various scenarios were thought out in advance and initial consequences for BMW were derived. In addition, an assessment was made of which scenarios in various market regions are already formative today - or are likely to be so in the future. In addition, the scenarios form the basis for continuous market monitoring via a repetitive scenario assessment.



*Robert Bosch GmbH, Diesel Systems*

### **Global market outlook for diesel passenger cars and Light Duties on the basis of regional scenarios for Europe, USA, India and China**

The Bosch Group is a leading international technology and services company with around 360,000 associates worldwide. As part of a comprehensive future process, scenarios for diesel markets in Europe, the U.S., India, and China were developed and condensed into global visions of the future. These environmental scenarios were linked with various strategy alternatives so that opportunities and risks of the individual approaches became clear and the strategic alignment could be supported. At the same time, the scenarios form the basis for a monitoring process involving the four core regions.



*Covestro AG:*

### **Development of global scenarios to support strategic investment planning**

Covestro AG, formerly Bayer MaterialScience, develops, produces and markets polymer materials at around 30 sites in Europe, Asia and the Americas. As part of the „Global Scenarios 2015+“ project, scenarios were developed to describe possible developments in global investment conditions. In this context, regional scenarios were developed for 6 geo-regions (EU, USA, Middle East, CIS, India, China) and condensed into an overall picture. Based on the global scenarios, existing investment options for the construction of a new production plant were evaluated. This made it possible to make a well-founded assessment of the opportunities and risks and to evaluate the robustness of individual options.



*Gebrüder DORFNER GmbH & Co.*

*Kaolin- und Kristallquarzsand-Werke KG:*

### **The future market environment for kaolin products in the paper, paint, ceramics and glass sectors**

The DORFNER group of companies is an independent and autonomous family business. The more than 300 different quality products processed with modern technology and specifically modified are supplied to more than 3,000 customers in 42 countries as well as to different industries and application areas. As part of a Scenario Conference™, uncertainties regarding the future development of various sales markets as well as the industry were illuminated and condensed into alternative future scenarios. Based on these scenarios, specific alternative courses of action for DORFNER could be evaluated and integrated into the strategy process.



MAN Truck & Bus AG

### **Implementation of a Szenario-Konferenz™ »Bus-based travel in Europe 2030«**

MAN Truck & Bus AG is one of the leading manufacturers of commercial vehicles in Europe, with production sites in four European countries as well as in South Africa and India. MAN manufactures trucks from 7.49 to 44 tons gross vehicle weight, heavy special vehicles up to 250 tons gross train weight, city buses, intercity buses, and coaches (complete buses and chassis) as well as diesel and natural gas engines. In order to be prepared for possible changes in bus travel, the bus division initiated the project »The future of bus-based travel in Europe«. In this project, several alternative scenarios were developed with the support of various experts from the automotive industry, other cross-sector industries, and representatives of relevant associations from the bus and tourism sectors. This was done in a two-part Szenario-Konferenz™. The resulting future scenarios were evaluated by the participants and subsequently prepared in a study report..



Media-Saturn Systemzentrale GmbH

### **Development of market environment scenarios**

Media Saturn is the parent company of the dual chain comprising Media Markt and Saturn. It evolved from the first Media Markt store, which opened in 1979, and employs around 28,000 people in approximately 450 stores across Europe. In view of the manifold changes in the market environment, scenarios were developed and resulting strategic options for action were identified.



PERI GmbH, Weissenhorn

### **Development of a strategic thrust of PERI for the Korean market based on environment and strategy scenarios**

PERI GmbH was founded in 1969 by Artur Schwörer and is the largest international manufacturer and supplier of formwork and scaffolding systems with sales of approx. 1.3 billion euros. Within the scope of a strategy project, environment scenarios were initially developed that show the development perspectives of the Korean market up to the year 2025. The scenarios were developed at a Szenario-Konferenz™ in Korea, which was held in English and partly in Korean. Subsequently, alternative strategy scenarios were developed during the strategy conference in Korea and checked for their robustness with the help of the environment scenarios. This approach provided PERI with a basis for defining a strategic thrust for the formwork and scaffolding systems business in the Korean market. .



Schott AG, Mainz:

### **Future scenarios and market potential assessment for a business segment**

SCHOTT is an international technology group that develops and produces specialty materials, components and systems to improve living and working conditions. Its main markets are the household appliance industry, optics, electronics, pharmaceuticals and solar energy. With production and sales facilities in 37 countries, the SCHOTT Group is present close to its customers in all important markets. 18,400 employees generate global sales of 2 billion euros. The foreign share of sales amounts to 76 percent of sales. Expenditure on research and development in the last fiscal year amounted to 120 million euros, or 6 percent of sales. The new product rate was 22 percent of sales. SCHOTT's corporate headquarters and main plant are located in Mainz. Alternative future scenarios were developed for one business segment and used for a market potential estimate.

## **Imprint**

### **Publisher:**

Scenario Management International AG  
Zukunftsmeile 2, 33102 Paderborn  
Phone: +49 (5251) 871888-0  
Email: [info@scmi.de](mailto:info@scmi.de)  
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Dr. Alexander Fink, November 2019

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