

GLIMPSE
TOMORROW

System Overlord

OCTOBER 2015

SYSTEM OVERLORD

A world influenced by the power of data, restricted access, and a high division of wealth

It's Sunday morning, and that means it's time for Kevin to do his shopping. Normally, shopping for staples like toothpaste is easy, but today Kevin is filled with anticipation. You see, he really wants to try the new Premium Whitening Colgate, and is hoping his past purchasing behavior indicates he is eligible to upgrade to this SKU. But Amazon's streamlined No-Click request system has eliminated browsing altogether—it uses his search history and shopping data to provide just a single product option. When his regular toothpaste, Classic Crest, arrives the next day, he can't help but feel disappointed. Although shopping for essentials has never been easier, Kevin wonders how he will ever access the right to purchase that ultra-premium Giant bicycle when he can't even get his hands on a new toothpaste.

With the collapse of net neutrality in 2018, big businesses seize control of bandwidth and forever change how people use the web. Using vast amounts of data, big corporations perfect consumer segmentation and inadvertently restructure the entire social class system in the U.S. **Now, privilege and priority are given to those with the most appealing consumption data rather than race, age, or income.**

Where consumers once chose from hundreds of products online, Amazon, Alibaba, and other digital retailers mercilessly downsize categories and disclose only the “best” options to each visitor based on their consumption rankings. To fit this new model, the world's top brands partner with GE's consulting division to dramatically optimize their products and services. **As a result, markets can often be served by just two offerings: a high-performance class and a high-value class.**

Homogeneity provided by our benevolent digital overlords, is the new normal but secretly despised. Hackers create and sell fake purchase histories to consumers looking to move up the ranks. Most shopping becomes involuntary and loses any sense of pleasure. As a result, many people seek outlets for expression offline, paying more attention to authentic, unfiltered “content” that pops up around them. Investment in the performing arts peak as artists and vanguards take a strong stand against publishing online. Replacing traditional marketing with analog games and events, entrepreneurs cultivate passionate fan bases on everything from bespoke refrigerators to concierge healthcare.

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Sector Implications in this world

TRANSPORTATION

- A host of new delivery startups emerge, unseating traditional logistics businesses.
- As technology reduces the need for many types of travel, personal vehicles become sources of entertainment and real-world connection.

RETAIL

- Retailers optimize assortments to reduce the paradox of choice previously experienced in most categories.
- Without access to big data, most specialty retailers are squeezed out. Strong community engagement strategies are required for smaller startups to grow.

MANUFACTURING

- Manufacturers work directly with retailers to deliver the right products. Functional innovation becomes a core competency.
- As brands struggle for relevancy in this world, the manufacturer's role in the supply chain is elevated.

FOOD

- Diets are dramatically simplified as retailers simplify food choices.
- Personal data is used to control calories, replacing traditional dieting trends.
- Technologies like IBM's Watson mature to automate innovation development.

EDUCATION

- With most jobs replaced by software, educators emphasize creative thinking as the key differentiate for human talent.
- Coding skills are required for most jobs.

BRANDING

- Marketing dollars are cut tremendously, as the lack of choice limits the need for advertising.
- Successful brands communicate their value outside of retail platforms through original content and experiential campaigns.

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Thought Starters

1. How does your organization need to evolve to succeed in this world?
2. Where do your products/services fit into a binary structure of high value or high performance? What adjustments would you need to make to win?
3. As stores develop an unparalleled understanding of consumers, how would your retail relationships change?
4. What new capabilities or technologies do you or your organization need to develop?
5. What unexpected competitors would you see in this world?
6. As retailers and ISPs control communications, how does your brand connect with consumers?



Want to use this scenario today?
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