

The Three Streams of Digital Disruption. Eye-opening Findings from Science

The digitalization has unfolded its disruptive power in three streams and is much further down the road as most of us would think.

Managers, be aware of the three streams of digital disruption and start adapting your marketing strategies now!

1

Stream 1: Digitalization of Communication

2

Stream 2: Digitalization of Consumption

3

Stream 3: Digitalization of Products

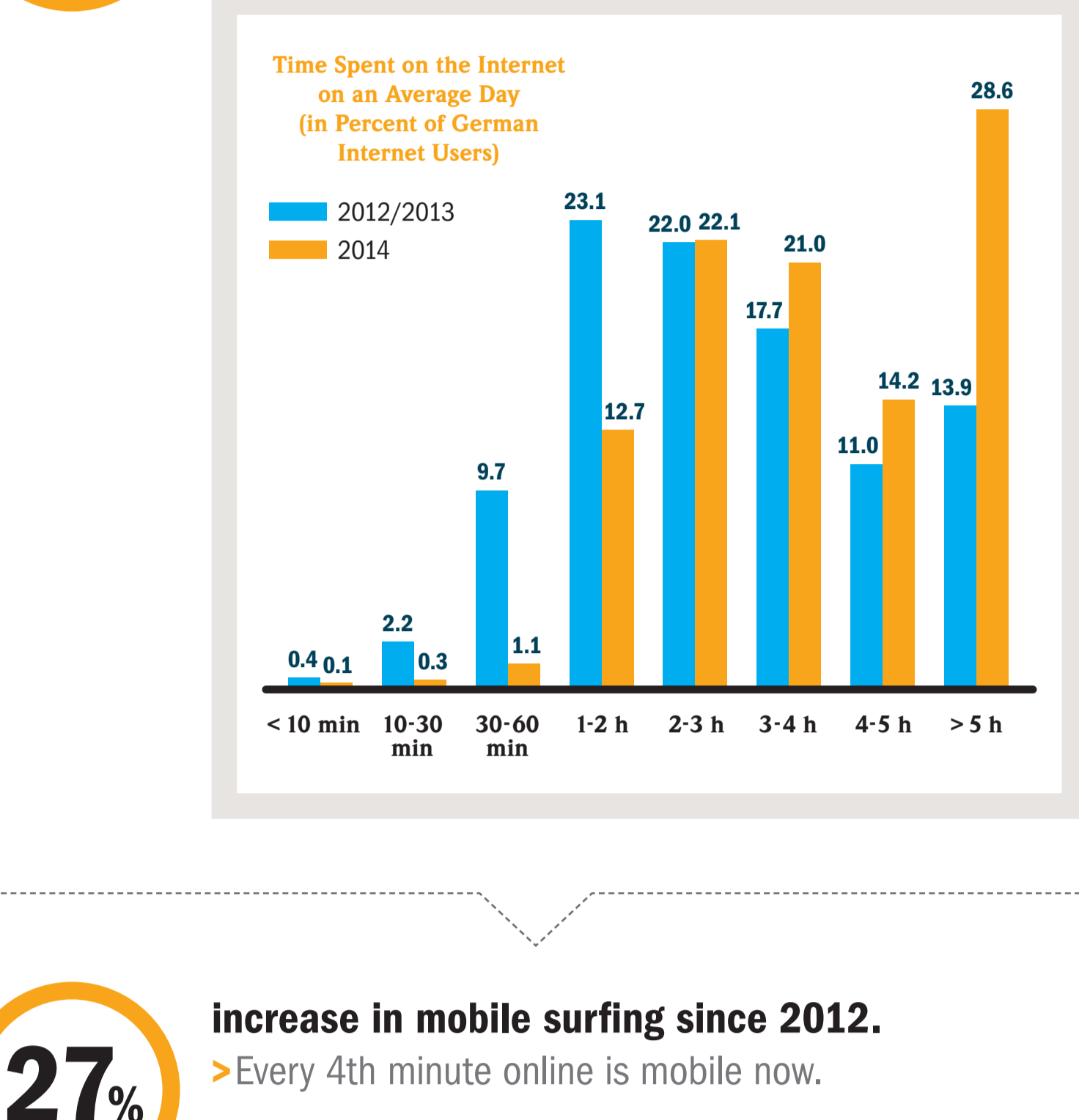
1

Digitalization of Communication

37%

of all our daily communication is digital already.

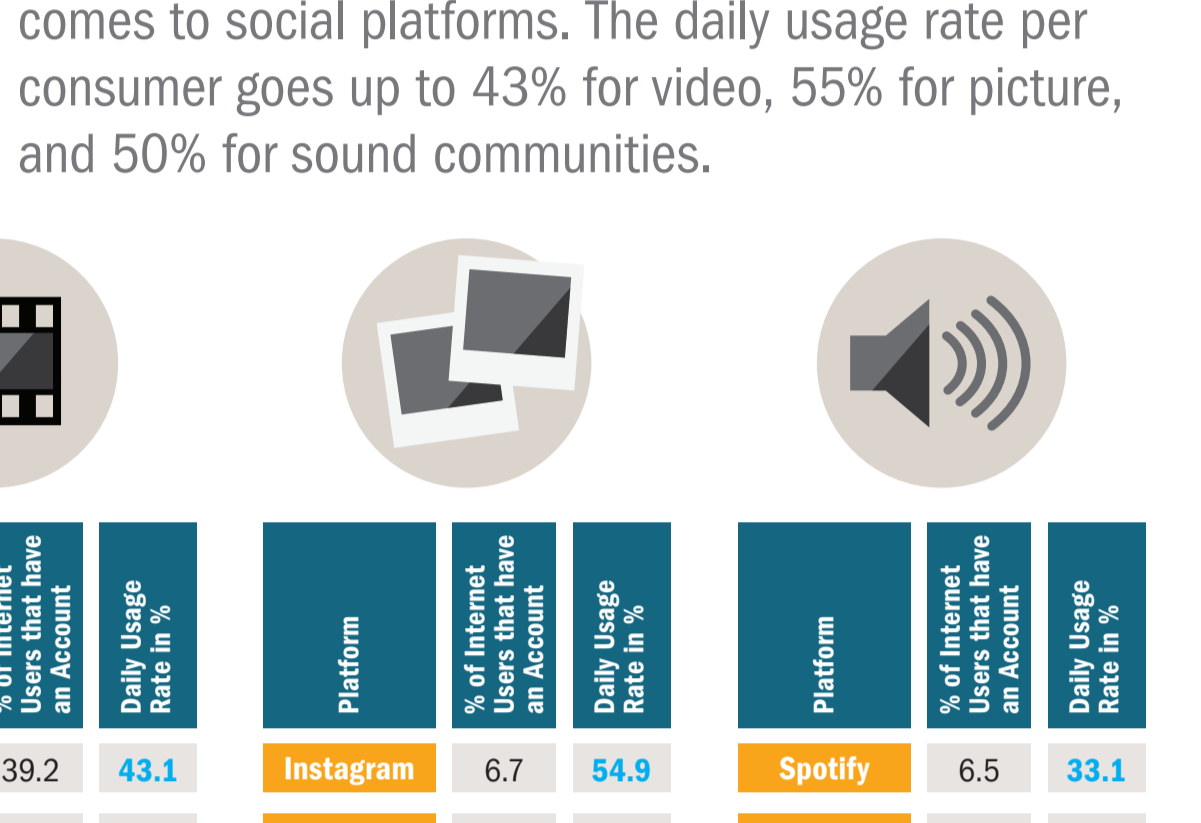
> We use digital phones, computers, smartphones, e-readers, tablets, consoles, TVs, messengers, apps, email, logging devices, and uncountable other devices to communicate with each other.



1h

increase in daily surfing time since 2012.

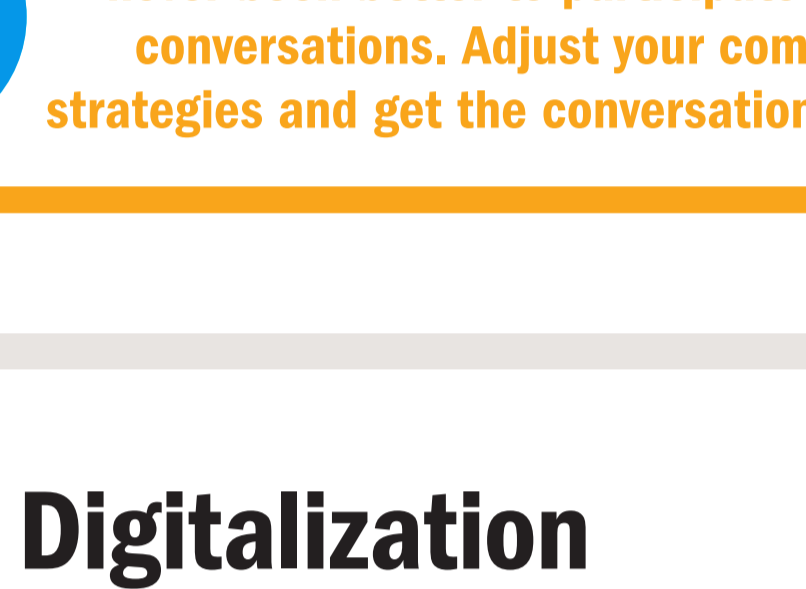
> Average Internet usage increased to 4h 35 minutes per user per day.



27%

increase in mobile surfing since 2012.

> Every 4th minute online is mobile now.



171%

growth for Spotify since 2012.

> Media networks are the current hot spots when it comes to social platforms. The daily usage rate per consumer goes up to 43% for video, 55% for picture, and 50% for sound communities.

| Platform | % of Internet Users that have an Account | Daily Usage Rate in % |
|-------------|--|-----------------------|
| YouTube | 39.2 | 43.1 |
| My Video | 8.4 | 25.9 |
| Clipfish | 5.5 | 25.9 |
| Vimeo | 1.9 | 25.7 |
| Dailymotion | 1.6 | 21.5 |
| Vine | 0.6 | 37.2 |
| Instagram | 6.7 | 54.9 |
| Picasa | 4.3 | 22.4 |
| Flickr | 2.1 | 24.6 |
| Pinterest | 1.5 | 32.0 |
| Photobucket | 0.6 | 27.2 |
| Spotify | 6.5 | 33.1 |
| Sound-Cloud | 2.6 | 26.2 |
| last.fm | 2.3 | 16.1 |
| Simfy | 0.5 | 50.0 |
| MyLuxe | 0.3 | 39.5 |

Eye-opener 1: Managers, chances have never been better to participate in consumer conversations. Adjust your communication strategies and get the conversation started today!

2

Digitalization of Consumption

41%

of all decision-relevant shopping information comes from digital sources.

> These sources are the Internet, mobile devices, digital television, digital newspapers, digital radio, digital telephones, and increasingly more connected devices.

Percentage of Information Coming from Digital Sources for Consumption Decisions

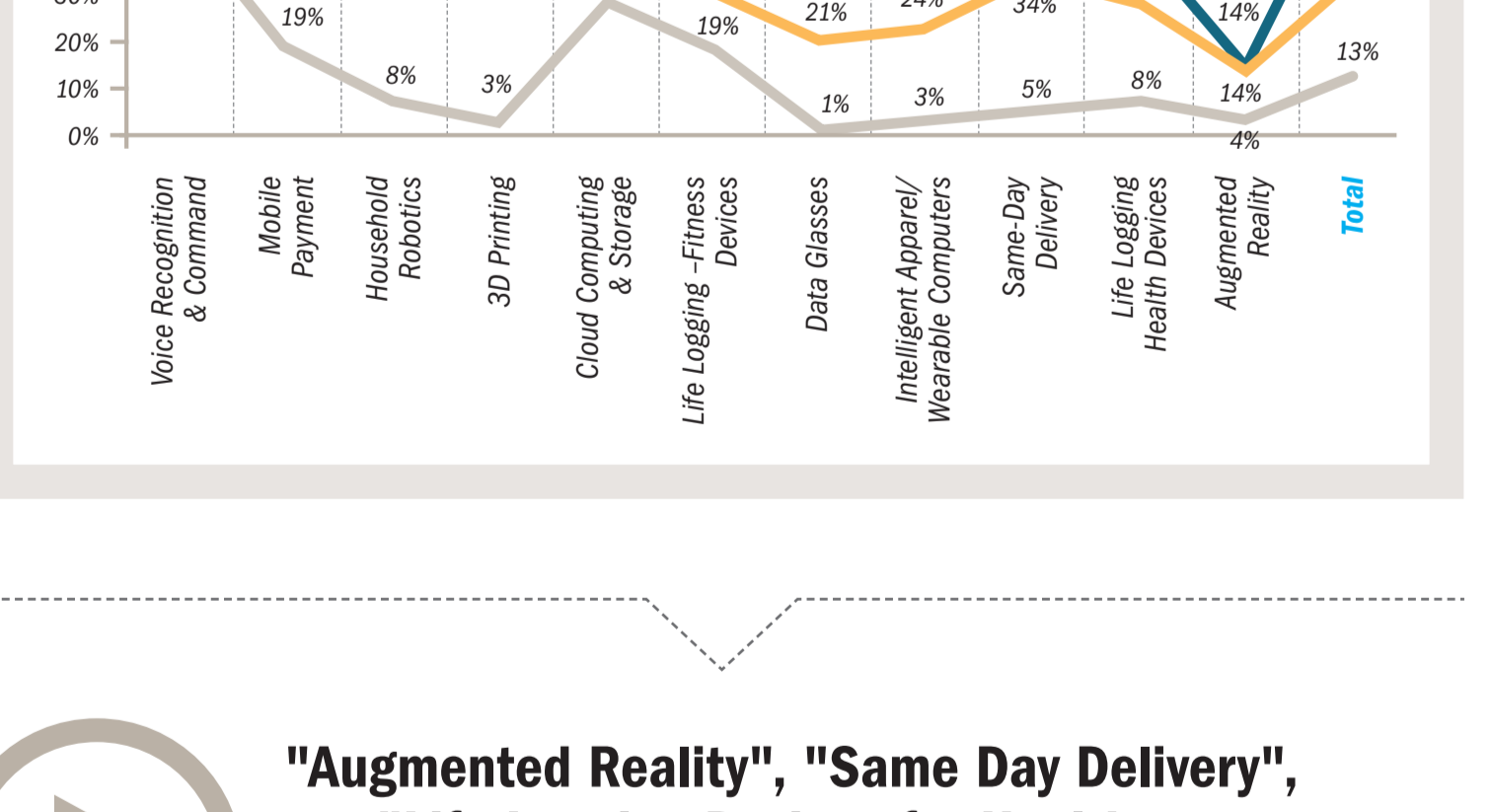


25%

of all decision-relevant shopping information comes from either the Internet or social media.

> TV, print, and radio are by far not the most effective media channels anymore.

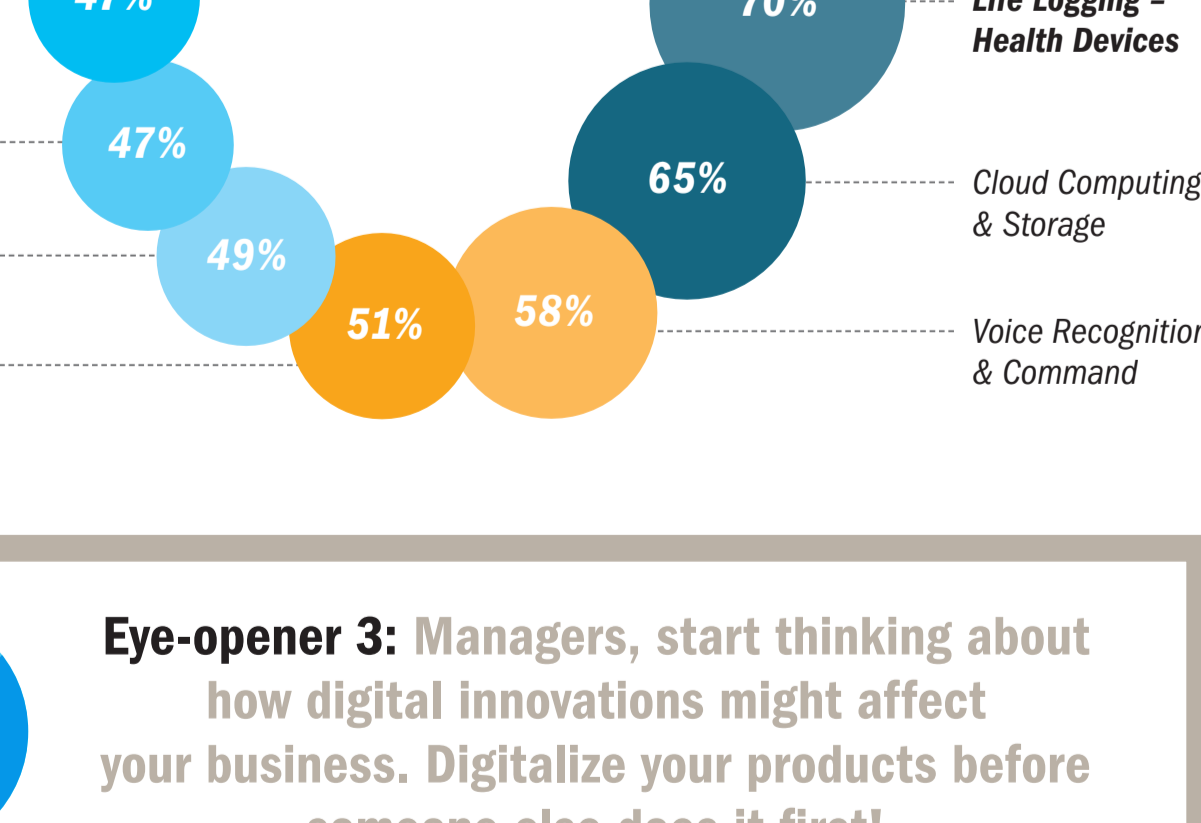
Importance of Different Information Sources for Purchase Decisions in Germany



2.6x

more influential, that is what online shopping information is compared to shopping information from TV.

> However, media spending on television is still 2.9 times higher than media spending on online marketing!



41%

of all first-time product and service purchases are through digital channels.

> For the travel industry this rate goes even up to 80%.



Eye-opener 2: Managers, adjust your marketing budgets and make also sure your distribution strategy is up to date!

3

Digitalization of Products

33%

of consumers already consider digital future technologies relevant for their personal lives.

> And that's although they can't buy most of them yet! We've collected awareness, usage, and relevance for the 11 most promising future technologies.

"Augmented Reality", "Same Day Delivery", and "Life Logging Devices for Health Care Purposes" are the most relevant future technologies for tech-savvy consumers.

Eye-opener 3: Managers, start thinking about how digital innovations might affect your business. Digitalize your products before someone else does it first!

THE DATA

Large-scale, representative survey among German consumers with:

Download the full report here for free:

<http://www.socialmediathinklab.com/german-digitalization-consumer-report-2014/>

SOURCES

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The **Digitalization Think:Lab** is a joint initiative of the Marketing Center of the University of Münster and Roland Berger Strategy Consultants.

The **Marketing Center of the University of Münster** is home of the first German marketing department, founded back in 1968. Since then it has always been one of the top marketing research outlets worldwide with published results in all major marketing science journals. Today, almost 50 researchers and six professors produce a constant stream of new marketing insights for the markets of tomorrow.

Roland Berger Strategy Consultants, founded in 1967, is one of the world's leading strategy consulting firms. 2,700 employees from 51 offices in 36 countries successfully advise clients around the world and make their companies ready for the digital future.

The research of the Digitalization Think:Lab has been mentioned by:

