RESEARCH METHODOLOGY
VANSON BOURNE

QUALITATIVE: ENGAGED
40+ EXPERTS & ACADEMICS

EXPERTS
40+ influential global decision-makers, experts and think-tank leaders across multiple industries interviewed by Institute for the Future. Questionnaire created to validate and further explore this discussion via Vanson Bourne

QUANTITATIVE:
3,600 DIRECTOR, C-SUITE RESPONDENTS ACROSS 18 COUNTRIES

INDUSTRIES
Financial Services
Insurance
Retail
Manufacturing
Media & Entertainment
Life Sciences/Biotech
Oil & Gas
Telecom/MSPs
Other Commercial

GLOBAL REACH
18 COUNTRIES

AMERICAS
USA, Argentina, Brazil, Mexico

APJ
Australia, China, India, Japan, Singapore

EMEA
France, Germany, Italy, Russia, South Africa, Switzerland, The Netherlands, UAE/Saudi Arabia, United Kingdom
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SECTION 1:
INFORMATION GENERATION
TECHNOLOGY’S IMPACT ON BUSINESS

Figure 1: “Which of the following technological advances in the last 5-10 years have impacted the way your organization does business?”
Base: all respondents (3600)

93% felt the impact of technology on their business in the last 5-10 years

Emerging markets such as China (82%) have been affected by mobile technology more than developed markets such as Japan (38%)

96% believe that new technologies such as mobile devices, social networking, cloud and Big Data have forever altered the rules of business

<table>
<thead>
<tr>
<th>Technology</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile devices</td>
<td>66%</td>
</tr>
<tr>
<td>Data analytics</td>
<td>51%</td>
</tr>
<tr>
<td>Cloud computing</td>
<td>45%</td>
</tr>
<tr>
<td>Social media</td>
<td>40%</td>
</tr>
<tr>
<td>Internet of Things</td>
<td>34%</td>
</tr>
<tr>
<td>Data visualization</td>
<td>34%</td>
</tr>
<tr>
<td>Real-time analytics</td>
<td>33%</td>
</tr>
<tr>
<td>Wearable technology</td>
<td>30%</td>
</tr>
<tr>
<td>I don’t know</td>
<td>3%</td>
</tr>
<tr>
<td>Not been impacted</td>
<td>4%</td>
</tr>
</tbody>
</table>
TECHNOLOGY'S IMPACT ON CUSTOMER EXPECTATIONS

Our customers want access to services faster than ever: 55%
Our customers want 24/7 access and connectivity: 53%
Our customers want access on an increasing number of multi-channel platforms: 50%
Our customers want a personalized experience: 47%
Our customers want greater transparency into interactions with our business: 38%
Our customers want to collaborate and share with other customers more easily: 25%
Our customers' expectations have not changed: 7%

93% say technology has changed customer's expectations

Figure 2: “How have recent advances in technology transformed the expectations that customers have of your organization?”
Base: all respondents (3600)

Future

Want 24/7 access and connectivity: 55%
Want access to services faster than ever: 53%
Want access on an increasing number of multi-channel platforms: 46%
Want a personalized experience: 45%
Want greater transparency into interactions with our business: 33%
Want to collaborate and share with other customers more easily: 22%
Expectations will not change: 4%
Don't know: 5%

Figure 3: “Thinking about the next 5-10 years, what ways do you expect customer/consumer expectations to change?”
Base: all respondents (3600)
Figure 4: “To what extent do you agree with the statement: “The rapid adoption of mobile, social, cloud and big data technologies is dramatically changing consumer behaviors and creating a new digital world”
Base: all respondents (3600)
Over the next 5 years, digital technologies will have a direct impact on the way we do business with our customers (73%)

Digital technologies are already having a direct impact on the way we do business with our customers (68%)

Valuable insights are making us rethink how we do business (65%)

Experiences a high demand for increased speed of delivery for products/services (64%)

Our current decision making would be improved by having the most salient data available to us at the point we need it (63%)

Believe encryption and data security techniques will be a central component of future investments in information technologies (62%)

Successfully strengthened its brand through the use of new technology (59%)

Totally trust the accuracy of information and insight produced by my organization (54%)

We know we can get more valuable insights from information and data, but don’t know how (9%)

Our adoption of technology is always reactive to competitor activities (49%)

Struggles to balance cybersecurity risks with demands for ease of access (44%)

Figure 5: Analysis of respondents that agree that valuable insights from information are making them rethink the way they do business. Base: all respondents (3600)

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CURRENT ABILITY TO DEAL WITH DATA

With these megatrends comes an increasing volume of data to be transferred, processed and analysed.

Figure 6: “How would you rate your organization’s ability to take captured data and translate it into useful insights and information helpful to decision making around business performance, customer engagement and product innovation?”
Base: all respondents (3600)

<table>
<thead>
<tr>
<th>Rating</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very good</td>
<td>24%</td>
</tr>
<tr>
<td>Good</td>
<td>47%</td>
</tr>
<tr>
<td>Average</td>
<td>23%</td>
</tr>
<tr>
<td>Poor</td>
<td>5%</td>
</tr>
<tr>
<td>Very poor</td>
<td>1%</td>
</tr>
</tbody>
</table>

71% can transform data into useful insights and information...

...78% in emerging markets compared with 65% in developed markets.
EFFECT OF ABUNDANCE OF INFORMATION

Figure 7: “Which of the following best characterizes the effect the abundance of information now available to your organization is having on how you do business?”
Base: all respondents (3600)

- Markedly improving our ability to do our job: 36%
- Helping us, but we are not yet able to turn the "learning" into sizeable, actionable results: 38%
- Resulting in information overload, making it even harder for my organization to make decisions: 14%
- My organization does not have an abundance of information: 7%
- Don’t know: 5%

62% are better able to do their jobs in Mexico, compared with 28% in the US and 15% in Japan.
SECTION 2:
MOVING STRATEGY FORWARD
Figure 8: “Considering both internal and external forces, where do you currently see the demand for the better use of data and insight coming from?” Base: all respondents (3600)

Internally, the highest demand for better use of data & insight comes from the C-suite/board level as well as finance and IT departments.
A CUSTOMER-ORIENTED TECHNOLOGY STRATEGY

Figure 9: “Which of the following do you think a forward-thinking technology strategy must be?” Respondents were only able to select top three attributes
Base: all respondents (3600)

- Customer-focused: 47%
- Innovative: 39%
- Adaptive: 33%
- Secure: 27%
- Connected: 27%
- Brand-focused: 22%
- Bold: 20%
- Open: 17%
- Predictive: 17%
- Transparent: 15%
- Inclusive: 15%
- Profit driven: 11%
- Don’t know: 4%

A customer focused technology strategy is 4x more important than a profit-driven strategy and 2x more important than security.
MAJOR TECHNOLOGY TRENDS FOR THE FUTURE

Figure 10: Thinking about the next 5-10 years, what major technology trends do you anticipate changing the way your business operates internally? Base: all respondents (3600)

73% say advances in technology will continue to transform customers’ expectations of business.

90% say major technology trends will change the way their business operates.

Respondents in Australia, India, Mexico, the Netherlands and South Africa believe automation will outrank big data.

- Big data analytics: 43%
- Automation: 37%
- Cybersecurity: 36%
- Hybrid cloud: 27%
- Smart communities: 24%
- Internet of Things applications: 24%
- Bring Your Own X Employees to develop IT solutions: 22%
- Wearable technology: 19%
- DevOps: 15%
- Robotics: 14%
- None will impact or don’t know: 10%
SECTION 3:
SIX KEY BUSINESS ATTRIBUTES
In the changing business environment that is shaped by the information generation, there are required strategic attributes or attitudes for success.

**SIX ATTRIBUTES FOR SUCCESS**

**REDEFINING TO SURVIVE - ATTRIBUTES BUSINESS MUST ADOPT**

- Predictively spot new opportunities
- Demonstrate transparency and trust
- Innovate in an agile way
- Deliver a unique and personalized experience
- Always on, operating in real time
- Pursue continuous learning

These six have been tested against each other using a ranking and a points allocation question for both now and 5-10 years time.
Figure 11: Analysis of business attribute prioritisation for today, showing percentages of respondents that put the driver in their top three and the percentages that ranked the attribute first (not showing the results for ‘sustain relevance’)

Base: all respondents (3600)

- **Predictively spot new opportunities**
  - Percentage of respondents putting driver in top three: 60%
  - Percentage of respondents putting driver in first place: 28%

- **Demonstrate transparency and trust**
  - Percentage of respondents putting driver in top three: 56%
  - Percentage of respondents putting driver in first place: 18%

- **Innovate in an agile way**
  - Percentage of respondents putting driver in top three: 55%
  - Percentage of respondents putting driver in first place: 18%

- **Deliver a unique and personalized experience**
  - Percentage of respondents putting driver in top three: 45%
  - Percentage of respondents putting driver in first place: 14%

- **Always on, operating in real time**
  - Percentage of respondents putting driver in top three: 38%
  - Percentage of respondents putting driver in first place: 11%

- **Pursue continuous learning**
  - Percentage of respondents putting driver in top three: 23%
  - Percentage of respondents putting driver in first place: 6%

*Predictively spotting new opportunities ranks highest globally except in Switzerland and Netherlands where demonstrating transparency and trust leads*
Figure 12: Analysis of business attribute prioritisation for the next 5-10 years, showing percentages of respondents that put the attribute in their top three and the percentages that ranked the attribute first (not showing the results for 'sustain relevance')

Base: all respondents (3600)

In the next 5-10 years, the priority rank remains the same... 

...except innovating in an agile way becomes the 2nd most important moving ahead of transparency and trust
THREE TIERS OF IMPORTANCE

A final method of comparison used is for the respondents to allocate 100 points between them. Using this and the previous ranking questions, the six attributes can be subdivided into three tiers of importance:

**MOST IMPORTANT:**
- Predictively spot new opportunities
- Demonstrate transparency and trust
- Innovate in an agile way

**VERY IMPORTANT:**
- Deliver a unique and personalized experience
- Always on, operating in real time

**LESS IMPORTANT:**
- Pursue continuous learning

Figure 13: Analysis showing average point allocation for the six business attributes, both now and in 5-10 years time. Respondents had 100 points to allocate between these six attributes in the two timeframes (not showing the results for 'sustain relevance')

Base: all respondents (3600)
Fewer than 4 in 10 report that their organization is addressing each attribute organization-wide. Only 22%-31% believe that they are addressing these attributes extremely well.

Figure 14: Analysis of organizations that believe their organization addresses each attribute extremely well (not showing 'sustain relevance')
Base: all respondents. Respondents were only shown the options that their organization is current doing (3600)

Figure 15: Analysis of to what extent organizations are addressing each attribute (not showing sustain relevance)
Base: all respondents (3600)
FEW ADDRESS THESE VERY WELL AND COMPANY-WIDE

Organizations in **China, India, Mexico, Brazil, South Africa and Australia** are ahead of the curve

- Predictively spot new opportunities: 12%
- Innovate in an agile way: 9%
- Demonstrate transparency and trust: 14%
- Deliver a unique and personalized experience: 11%
- Always on, operating in real time: 12%
- Pursue continuous learning: 16%

**Figure 16:** Analysis showing percentage of respondents that believe their organization can address each attribute both organization-wide and extremely well (not showing 'sustain relevance')

Base: all respondents (3600)
SECTION 4: PREDICTIVELY SPOTTING NEW OPPORTUNITIES

IN THE FOLLOWING SECTIONS, EACH ATTRIBUTE WILL BE INVESTIGATED IN FURTHER DETAIL
CURRENT CAPACITY TO PREDICTIVELY SPOT NEW OPPORTUNITIES

Figure 17: “How would you categorize how your company is addressing each of these business attributes to stay competitive and succeed in this new digital world?” Showing results for predictively spotting new opportunities
Base: all respondents (3600)

- Do this organization-wide: 34%
- Doing this but not organization-wide: 49%
- Not started doing this: 17%

Emerging markets are doing this more widely across organizations – China (51%), Mexico (50%) and Brazil (50%)
Life science and financial services are the most likely to be doing this organization-wide (both 38%)
## Areas of Predictive Insight

Figure 18: "Is your business able to generate insight and predict new opportunities in any of the following areas?"

Base: all respondents (3600)

<table>
<thead>
<tr>
<th>Area</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finding cost savings</td>
<td>43%</td>
</tr>
<tr>
<td>Consumer trends</td>
<td>40%</td>
</tr>
<tr>
<td>Identifying operational inefficiencies</td>
<td>39%</td>
</tr>
<tr>
<td>Improving customer service</td>
<td>38%</td>
</tr>
<tr>
<td>Identifying new revenue streams</td>
<td>34%</td>
</tr>
<tr>
<td>Buying/buyer-intention patterns</td>
<td>32%</td>
</tr>
<tr>
<td>Tailoring services to customers</td>
<td>31%</td>
</tr>
<tr>
<td>Identifying investment opportunities</td>
<td>30%</td>
</tr>
<tr>
<td>Producing accurate overviews</td>
<td>29%</td>
</tr>
<tr>
<td>Shifts in working environment</td>
<td>24%</td>
</tr>
<tr>
<td>Anticipating competitor behavior</td>
<td>19%</td>
</tr>
<tr>
<td>No or don't know</td>
<td>7%</td>
</tr>
</tbody>
</table>
SECTION 5:
DEMONSTRATE TRANSPARENCY AND TRUST
CURRENT CAPACITY TO DEMONSTRATE TRANSPARENCY AND TRUST

Figure 19: "How would you categorize how your company is addressing each of these business attributes to stay competitive and succeed in this new digital world?" Showing results for demonstrate transparency and trust
Base: all respondents (3600)

- Do this organization-wide: 35%
- Doing this but not organization-wide: 52%
- Not started doing this: 14%

Emerging markets (34%) place higher than developed markets (22%) – with Mexico (48%), Brazil (47%) and South Africa (46%) in the lead.

Life sciences/biotech organizations are most likely to be doing this organization-wide (43%).
**IMPACT OF BETTER TRANSPARENCY**

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, being more transparent significantly improves trust</td>
<td>42%</td>
</tr>
<tr>
<td>Yes, being more transparent somewhat improves trust</td>
<td>45%</td>
</tr>
<tr>
<td>No, transparency has no impact on trust</td>
<td>8%</td>
</tr>
<tr>
<td>Don't know</td>
<td>5%</td>
</tr>
</tbody>
</table>

87% believe that improving transparency has a significant effect on customer trust.

Respondents in Japan were the least likely to believe this (15%).

Figure 20: “Do you believe that your organization’s level of transparency is linked to wider customer trust in the business?”
Base: all respondents (3600)
SECTION 6:
INNOVATE IN AN AGILE WAY
CURRENT CAPACITY TO INNOVATE IN AN AGILE WAY

Figure 21: "How would you categorize how your company is addressing each of these business attributes to stay competitive and succeed in this new digital world?" Showing results for innovate in an agile way
Base: all respondents (3600)

- Do this organization-wide: 25%
- Do this but not organization-wide: 58%
- Not started doing this: 17%

83% have now started doing this in some part of their organization.

Telecoms/MSPs and financial services are most likely to be doing this company-wide (27%).
HOW TO INCREASE INNOVATION

Figure 22: "What steps could your organization take to foster the adoption of innovative technology?"
Base: Respondents who believe that their organization's technology strategy is currently innovative or needs to be, or don't know (3286)

- Increase cooperation between departments: 46%
- Encourage employees to come up with more ideas: 45%
- Increase the budget for IT innovation: 41%
- Empower people to see a bigger "global picture": 38%
- Increase budget for salaries to attract better talent: 30%
- Contact and seek advice direct from IT vendors: 25%
- Less of a blame culture, scared of failing: 23%
- Having a less risk-adverse board: 21%
- Proven success on a small scale: 18%
- Less pressure on IT, freeing up bandwidth: 14%
- Outsource innovation to external parties: 10%
- Don't know: 6%

India, Russia, South Africa and Switzerland are the only countries where business leaders’ top response was “encouraging employees to come up with more ideas.”
SECTION 7:
DELIVER A UNIQUE AND PERSONALIZED EXPERIENCE
Current Capacity to Deliver a Unique and Personalized Experience

Figure 23: "How would you categorize how your company is addressing each of these business attributes to stay competitive and succeed in this new digital world?" Showing results for delivering a unique and personalized experience

Base: all respondents (3600)

- Do this organization-wide: 27%
- Doing this but not organization-wide: 55%
- Not started doing this: 18%

Countries most likely to be doing this organization-wide are South Africa (47%), Mexico (42%) and Australia (35%)

Telecoms/MSPs are the most likely to be doing this organization-wide (35%)
SECTION 8:
ALWAYS ON, OPERATING IN REAL TIME
CURRENT CAPACITY TO BE ALWAYS ON, OPERATING IN REAL TIME

Do this organization-wide: 29%
Doing this but not organization-wide: 52%
Not started doing this: 19%

Emerging markets are more likely to do this organization-wide (34%, vs. 25% in developed) – with South Africa (45%), Mexico (44%) and China (40%) most likely.

Media and entertainment companies are the least likely to have started at all (30%).

Figure 24: “How would you categorize how your company is addressing each of these business attributes to stay competitive and succeed in this new digital world?” Showing results for always on, operating in real time
Base: all respondents (3600)
24/7 ACCESS TO PRODUCTS AND SERVICES

Brazil and South Africa rated highest in providing 24/7 connectivity and access to their customers (both 58%) while those in Switzerland rated lowest (23%)

Figure 25: "Does your organization currently provide 24/7 connectivity and availability/access to products and services for customers?"
Base: all respondents (3600)
CONSEQUENCES OF NO 24/7 ACCESS

Figure 26: "What consequences has your organization experienced as a result of inability to provide 24/7 access to products and services for customers/consumers?"
Base: all respondents (3600)

- Loss of business to a competitor: 27%
- Loss of revenue: 25%
- Loss of customer confidence/loyalty: 25%
- Loss of a new business opportunity: 25%
- Loss of customers: 24%
- Loss of an incremental business opportunity: 22%
- Loss of repeat business: 19%
- Loss of employee productivity: 16%
- Damage to company brand and reputation: 14%
- Delay in product/service development: 13%
- Delay in getting products/services to market: 9%
- Damage to company stock price and/or shareholder confidence: 9%
- We have never been unable to provide this: 6%
- Not experienced or don’t know: 18%

While others do not know, 76% have experienced at least one negative consequence as a result of inability.
SECTION 9:
PURSUE CONTINUOUS LEARNING
CURRENT CAPACITY TO PURSUE CONTINUOUS LEARNING

84% say their organization has started to pursue continuous learning to some extent, although only a third do it organization-wide.

41% of those in emerging markets are doing this organization-wide compared to 29% in developed countries.

Most likely to be doing this organization-wide are Brazil (52%), Mexico (52%) and South Africa (52%).

Figure 27: "How would you categorize how your company is addressing each of these business attributes to stay competitive and succeed in this new digital world?" Showing results for pursue continuous learning
Base: all respondents (3600)
KEEPING EXECUTIVES INFORMED

Figure 28: "Does your business have a structured, systematic way for executives to stay informed on the use of business analytics and technological advances on a continuous basis?"
Base: all respondents (3600)

68% of organizations already have a structured, systematic way to keep their executives informed about analytics and technology on a continuous basis.
Figure 29: "What level of access, if any, do you have to business analytics and how it is leveraged in the business?"

Base: all respondents (3600)

- 62% have some degree of access to their organization’s business analytics, although just 22% have access to a team of data scientists
- China reports the greatest access to analytics & access to data scientists (44%)
SECTION 10
APPENDIX (ADDITIONAL QUESTIONS, REGIONAL & SECTOR ANALYSIS)
SECTION 10.1
REGIONAL BREAKDOWN - BY GEOGRAPHY
Globally **68%** agree that rapid adoption of IT megatrends have dramatically changed consumer behaviour, including **21%** who strongly agree.

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Americas</td>
<td>70%</td>
</tr>
<tr>
<td>APJ</td>
<td>67%</td>
</tr>
<tr>
<td>EMEA</td>
<td>69%</td>
</tr>
</tbody>
</table>

Figure 30: Analysis of whether rapid adoption of IT megatrends have dramatically changed consumer behaviour, split by country. Base: all respondents (3600)
ABILITY TO TRANSFORM DATA BY COUNTRY

Overall 71% said their ability to take captured data and translate it into useful insights and information is good or very good, including 24% who said it was very good.
Respondents in the US (45%), France (45%), India (43%), Germany (43%) and Singapore (43%) are the most likely to believe that the abundance of information has improved their ability to do their job. Those in Mexico (26%) are the least likely to have benefited from the abundance of information, despite having confidence in their ability to produce it – compared to a global average of 36%.
65% say that valuable insights from information is making their organization rethink how it does business. With the exception of Mexico and Switzerland, the top seven countries are the BRICS regions.
63% of business leaders believe their decision-making would be improved by having the most salient data available to them at the right time.

Figure 34: Analysis of respondents that agree their current decision making would be improved by having the most salient data available to them at the point they need it, split by country.
Base: all respondents (3600)
PILLAR-SPECIFIC
REGIONAL BREAKDOWN - BY GEOGRAPHY
Prioritization of Attributes by Region, Now vs. 5-10 Years’ Times

Figure 35: Analysis showing percentages of respondents that prioritized each pillar in their top three for now, split by region (not showing the results for ‘sustain relevance’) Base: all respondents (3600)

Figure 36: Analysis showing percentages of respondents that prioritized each pillar in their top three for 5-10 years time, split by region (not showing the results for ‘sustain relevance’) Base: all respondents (3600)
34% of business leaders globally are already *predictively spotting new opportunities* organization-wide.

<table>
<thead>
<tr>
<th>Region</th>
<th>AMERICAS: 38%</th>
<th>APJ: 35%</th>
<th>EMEA: 32%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mexico</td>
<td>50%</td>
<td>51%</td>
<td>44%</td>
</tr>
<tr>
<td>Brazil</td>
<td>50%</td>
<td>41%</td>
<td>46%</td>
</tr>
<tr>
<td>USA</td>
<td>36%</td>
<td>40%</td>
<td>48%</td>
</tr>
<tr>
<td>Argentina</td>
<td>16%</td>
<td>27%</td>
<td>13%</td>
</tr>
<tr>
<td>China</td>
<td>51%</td>
<td>52%</td>
<td>45%</td>
</tr>
<tr>
<td>India</td>
<td>41%</td>
<td>45%</td>
<td>46%</td>
</tr>
<tr>
<td>Australia</td>
<td>40%</td>
<td>63%</td>
<td>58%</td>
</tr>
<tr>
<td>Singapore</td>
<td>16%</td>
<td>39%</td>
<td>55%</td>
</tr>
<tr>
<td>Japan</td>
<td>47%</td>
<td>37%</td>
<td>37%</td>
</tr>
<tr>
<td>South Africa</td>
<td>47%</td>
<td>48%</td>
<td>44%</td>
</tr>
<tr>
<td>Germany</td>
<td>45%</td>
<td>59%</td>
<td>64%</td>
</tr>
<tr>
<td>Russia</td>
<td>55%</td>
<td>58%</td>
<td>59%</td>
</tr>
<tr>
<td>Italy</td>
<td>44%</td>
<td>12%</td>
<td>17%</td>
</tr>
<tr>
<td>UK</td>
<td>45%</td>
<td>8%</td>
<td>13%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>33%</td>
<td>33%</td>
<td>44%</td>
</tr>
<tr>
<td>UAE/Saudi Arabia</td>
<td>33%</td>
<td>46%</td>
<td>44%</td>
</tr>
<tr>
<td>France</td>
<td>14%</td>
<td>20%</td>
<td>44%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>14%</td>
<td>13%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Figure 37: Analysis of to what extent organizations are addressing the driver, *predictively spotting new opportunities*, split by country. Base: all respondents (3600)
ABILITY TO PREDICTIVELY SPOT NEW OPPORTUNITIES BY COUNTRY

Of those that are currently predictively spotting new opportunities, at least to some extent, 23% estimate that they address it extremely well.

Figure 38: Analysis of organizations that believe they can predictively spot new opportunities extremely well, split by country. Base: only asked to respondents whose organizations are currently predictively spotting new opportunities (2335)
DEMONSTRATING TRANSPARENCY AND TRUST BY COUNTRY

Globally **35%** of business leaders say they are already *demonstrating transparency and trust* organization-wide.

**Figure 39:** Analysis of to what extent organizations are addressing the driver, *demonstrate transparency and trust*, split by country

Base: all respondents (3600)
Respondents in Mexico (45%), Brazil (40%) and South Africa (39%) are far more likely to believe this is true.
Increased in Transparency by Country

Globally, 66% believe that their organization has managed to increase transparency over the last 5-10 years.

Figure 41: Analysis of respondents’ organizations that have increased their transparency over the last 5-10 years, split by country

Base: all respondents (3600)
A quarter (25%) of organizations are innovating in an agile way organization-wide — though (17%) have not yet started yet.

<table>
<thead>
<tr>
<th>Region</th>
<th>Doing this but not organization-wide</th>
<th>Do this organization-wide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Americas</td>
<td>28%</td>
<td>56%</td>
</tr>
<tr>
<td>APJ</td>
<td>25%</td>
<td>63%</td>
</tr>
<tr>
<td>EMEA</td>
<td>24%</td>
<td>60%</td>
</tr>
</tbody>
</table>

Figure 42: Analysis of to what extent organizations are addressing the driver, innovate in an agile way, split by country
Base: all respondents (3600)
ABILITY TO INNOVATE IN AN AGILE WAY BY COUNTRY

Overall, only **22%** think their organization currently can *innovate in an agile way* extremely well. This is the lowest of all six attributes.

- **AMERICAS:** 26%
- **APJ:** 23%
- **EMEA:** 18%

**Figure 43:** Analysis of organizations that believe they can *innovate in an agile way* extremely well, split by country
Base: only asked to respondents whose organizations are currently *innovating in an agile way* (2163)
Those countries where more respondents believe that their organization can innovate in an agile way are also likely to consider their current technology strategy as innovative.

<table>
<thead>
<tr>
<th>Country</th>
<th>Yes, our current technology strategy is somewhat innovative</th>
<th>Yes, our current technology strategy is very innovative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mexico</td>
<td>48%</td>
<td>60%</td>
</tr>
<tr>
<td>Brazil</td>
<td>47%</td>
<td>56%</td>
</tr>
<tr>
<td>USA</td>
<td>46%</td>
<td>47%</td>
</tr>
<tr>
<td>Argentina</td>
<td>54%</td>
<td>47%</td>
</tr>
<tr>
<td>Brazil</td>
<td>43%</td>
<td>23%</td>
</tr>
<tr>
<td>India</td>
<td>35%</td>
<td>21%</td>
</tr>
<tr>
<td>Australia</td>
<td>32%</td>
<td>30%</td>
</tr>
<tr>
<td>Singapore</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Japan</td>
<td>42%</td>
<td>59%</td>
</tr>
<tr>
<td>Russia</td>
<td>60%</td>
<td>51%</td>
</tr>
<tr>
<td>Italy</td>
<td>56%</td>
<td>56%</td>
</tr>
<tr>
<td>South Africa</td>
<td>47%</td>
<td>51%</td>
</tr>
<tr>
<td>Germany</td>
<td>56%</td>
<td>56%</td>
</tr>
<tr>
<td>France</td>
<td>51%</td>
<td>20%</td>
</tr>
<tr>
<td>UK</td>
<td>56%</td>
<td>17%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>45%</td>
<td>17%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>44%</td>
<td>14%</td>
</tr>
<tr>
<td>UAE/Saudi Arabia</td>
<td>17%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Figure 44: Analysis of the percentage of respondents who consider their organization’s strategy innovative, split by country. Base: all respondents (3600)
Overall, **27%** of organizations are already delivering a unique and personalized experience organization-wide.

**Figure 45:** Analysis of to what extent organizations are addressing the driver, *delivering a unique and personalized experience*, split by country. (Base: all respondents (3600))
ABILITY TO DELIVER A UNIQUE AND PERSONALIZED EXPERIENCE BY COUNTRY

64% of business leaders think their organization can provide a unique and personalizes experience well, but only 25% say they do it extremely well.

Figure 46: Analysis of organizations that believe they can deliver a unique and personalized experience extremely well, split by country.

Base: only asked to respondents whose organizations are currently deliver a unique and personalized experience (2065)
### Always On - Operating in Real Time by Country

29% of organizations are already *always on and operating in real time* organization-wide.

#### Regional Average Doing This Organization-wide:

<table>
<thead>
<tr>
<th>Region</th>
<th>AMERICAS</th>
<th>APJ</th>
<th>EMEA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>32%</td>
<td>29%</td>
<td>27%</td>
</tr>
</tbody>
</table>

#### Table: Percentage of Organizations Doing This by Country

<table>
<thead>
<tr>
<th>Country</th>
<th>Not started doing this</th>
<th>Doing this but not organization-wide</th>
<th>Do this organization-wide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mexico</td>
<td>8%</td>
<td>49%</td>
<td>44%</td>
</tr>
<tr>
<td>Brazil</td>
<td>9%</td>
<td>53%</td>
<td>49%</td>
</tr>
<tr>
<td>USA</td>
<td>20%</td>
<td>51%</td>
<td>51%</td>
</tr>
<tr>
<td>Argentina</td>
<td>30%</td>
<td>36%</td>
<td>48%</td>
</tr>
<tr>
<td>China</td>
<td>12%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Australia</td>
<td>20%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>India</td>
<td>12%</td>
<td>17%</td>
<td>17%</td>
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<tr>
<td>Singapore</td>
<td>18%</td>
<td>17%</td>
<td>17%</td>
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<tr>
<td>Japan</td>
<td>33%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>South Africa</td>
<td>8%</td>
<td>17%</td>
<td>17%</td>
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<tr>
<td>Russia</td>
<td>15%</td>
<td>17%</td>
<td>17%</td>
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<tr>
<td>UK</td>
<td>14%</td>
<td>17%</td>
<td>17%</td>
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<tr>
<td>Netherlands</td>
<td>18%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Italy</td>
<td>18%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>France</td>
<td>21%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>UAE/Saudi Arabia</td>
<td>34%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Germany</td>
<td>18%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>41%</td>
<td>17%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Figure 47: Analysis of to what extent organizations are addressing the driver, *always on, operating in real time*, split by country.
Base: all respondents (3600)
ABILITY TO BE ALWAYS ON AND OPERATE IN REAL TIME BY COUNTRY

26% of business leaders believe that their organization addresses being *always on and operating in real-time* extremely well

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**Figure 48:** Analysis of organizations that believe they can be always on, operating in real time extremely well, split by country

Base: only asked to respondents whose organizations are currently always on, operating in real time (2125)
30% of business leaders say their organization can act in real time, and a further significant portion (43%) say they can do so, but not always with the insights that they need.
34% of organizations are addressing the objective of pursue continuous learning organization-wide.
ABILITY TO PURSUE CONTINUOUS LEARNING BY COUNTRY

Of those who are currently addressing pursue continuous learning, **31%** overall believe they do it extremely well, more than any of the other six attributes.

Figure 51: Analysis of organizations that believe they can pursue continuous learning extremely well, split by country
Base: on asked to respondents whose organizations are currently pursuing continuous learning (2288)
SECTION 10.2
BREAKDOWN BY DEVELOPED VS. EMERGING
Globally 68% agree that the rapid adoption of IT megatrends has dramatically changed consumer behaviour, 21% strongly agree.

Figure 52: Analysis of whether rapid adoption of IT megatrends have dramatically changed consumer behaviour, split by developed and emerging countries
Base: all respondents (3600)
ABILITY TO TURN DATA INTO USEFUL INFORMATION - DEVELOPED VS. EMERGING

Figure 53: Analysis of organization's ability to take captured data and translate it into useful insights and information, split by developed and emerging countries
Base: all respondents (3600)
36% of business leaders globally say that their organization has seen a marked improvement in their ability to do their job due to the increasing abundance of information.
65% say that valuable insights from information is making their organization rethink how it does business

Figure 55: Analysis of respondents that agree that valuable insights from information are making them rethink the way they do business, split by developed and emerging countries
Base: all respondents (3600)
63% believe that their decision-making would be improved by having the most salient data available to them at the right time.
PI LLAR - S PECIFIC

BREAKDOWN BY DEVELOPED VS EMERGING
PRIORITIZATION OF ATTRIBUTES DEVELOPED VS. EMERGING, NOW VS. 10 YEARS’ TIME

Predictively spot new opportunities
- Developed: 59%
- Emerging: 60%

Demonstrate transparency and trust
- Developed: 58%
- Emerging: 53%

Innovate in an agile way
- Developed: 57%
- Emerging: 54%

Deliver a unique and personalized experience
- Developed: 43%
- Emerging: 47%

Always on, operating in real time
- Developed: 39%
- Emerging: 37%

Pursue continuous learning
- Developed: 22%
- Emerging: 25%

Figure 57: Analysis showing percentages of respondents that prioritized each pillar in their top three for now, split by developed and emerging countries (not showing the results for ‘sustain relevance’)
Base: all respondents (3600)

Predictively spot new opportunities
- Developed: 62%
- Emerging: 63%

Demonstrate transparency and trust
- Developed: 56%
- Emerging: 48%

Innovate in an agile way
- Developed: 60%
- Emerging: 60%

Deliver a unique and personalized experience
- Developed: 45%
- Emerging: 50%

Always on, operating in real time
- Developed: 37%
- Emerging: 35%

Pursue continuous learning
- Developed: 19%
- Emerging: 24%

Figure 58: Analysis showing percentages of respondents that prioritized each pillar in their top three for 5-10 years’ time, split by developed and emerging countries (not showing the results for ‘sustain relevance’)
Base: all respondents (3600)
Overall 34% say that they are already predictively spotting new opportunities organization-wide

Figure 59: Analysis of to what extent organizations are addressing the driver, predictively spotting new opportunities, split by developed and emerging countries

Base: all respondents (3600)
Of organizations that are currently doing this, only 23% estimate that they address it extremely well. Emerging countries are almost 1.5X more likely to report they are doing this extremely well compared to developed countries.
DEMONSTRATING TRANSPARENCY AND TRUST DEVELOPED VS. EMERGING

The most likely throughout their entire business are Mexico (48%) and Brazil (47%). Globally 35% are able to demonstrate transparency and trust organization-wide

Figure 61: Analysis of to what extent organizations are addressing the driver, demonstrate transparency and trust, split by developed and emerging countries
Base: all respondents (3600)
ABILITY TO DEMONSTRATE TRANSPARENCY AND TRUST BY DEVELOPED VS. EMERGING

The global average for being able to demonstrate transparency and trust well, is 27%. Respondents in Mexico (45%), Brazil (40%) and South Africa (39%) are far more likely to be positive about their ability.
INCREASES IN TRANSPARENCY
DEVELOPED VS. EMERGING

Overall 66% believe that their organization has managed to increase transparency over the last 5-10 years.

Figure 63: Analysis of respondents’ organizations that have increased their transparency over the last 5-10 years, split by developed and emerging countries.
Base: all respondents (3600)
INNOVATING IN AN AGILE WAY
DEVELOPED VS. EMERGING

**Figure 64:** Analysis of to what extent organizations are addressing the driver, *innovate in an agile way*, split by developed and emerging countries

*Base:* all respondents (3600)
Overall, only 22% think that their organization can currently innovate in an agile way extremely well. This is the lowest of all attributes. Mexico, Brazil, China and India skew the averages upwards.

Figure 65: Analysis of organizations that believe they can innovate in an agile way extremely well, split by developed and emerging countries.

Base: only asked to respondents whose organizations are currently innovating in an agile way (2163)
Countries where more business leaders believe that their organization can innovate in an agile way are also likely to consider their current technology strategy as innovative.
27% of business leaders *deliver a unique, personalized experience* organization-wide.
Figure 68: Analysis of organizations that believe they can deliver a unique and personalized experience extremely well, split by developed and emerging countries. Base: only asked to respondents whose organizations are currently deliver a unique and personalized experience (2065).
Globally, **29%** are *always on, operate in real time* organization-wide.

**Figure 69:** Analysis of to what extent organizations are addressing the driver, *always on, operating in real time*, split by developed and emerging countries. Base: all respondents (3600)
One quarter (26%) of business leaders globally believe that their organization addresses being *always on and operating in real time* extremely well.

**Ability to be always on and operate in real time developed vs. emerging**

Figure 70: Analysis of organizations that believe they can *be always on, operating in real time* extremely well, split by developed and emerging countries. Base: only asked to respondents whose organizations are currently *always on, operating in real time* (2125)
30% are ‘always on’ and can act in real time. Developed countries are less likely to be able to act in real time than those from emerging countries. China (93%), Mexico (90%) and Brazil (86%) are the most likely to say that their organization does this.

Figure 71: Analysis of whether the business has the ability to utilize information and act in real time, split by developed and emerging countries

Base: all respondents (3600)
34% of organizations pursue continuous learning across the entire business

*Further figures in notes

Figure 72: Analysis of to what extent organizations are addressing the driver, pursue continuous learning, split by developed and emerging countries
Base: all respondents (3600)
Pursuing Continuous Learning
Developed vs. Emerging

Of those who are currently addressing *pursue continuous learning*, **31%** overall believe they do it extremely well.

![Bar Chart](chart.png)

**Figure 73:** Analysis of organizations that believe they can *pursue continuous learning* extremely well, split by developed and emerging countries

Base: only asked to respondents whose organizations are currently *pursuing continuous learning* (2288)
SECTION 10.3
SECTOR BREAKDOWN
68% agree that rapid adoption of IT megatrends have dramatically changed consumer behaviour, including 21% who strongly agree.

Figure 74: Analysis of whether rapid adoption of IT megatrends have dramatically changed consumer behaviour, split by sector
Base: all respondents (3600)
Overall 71% said their ability to take captured data and translate it into useful insights and information is good or very good, including 24% who said it was very good.

Figure 75: Analysis of organization's ability to take captured data and translate it into useful insights and information, split by sector
Base: all respondents (3600)
36% of organizations have benefited from the abundance of information

<table>
<thead>
<tr>
<th>Sector</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Media and entertainment</td>
<td>50%</td>
</tr>
<tr>
<td>Life sciences/biotech</td>
<td>40%</td>
</tr>
<tr>
<td>Telecoms/MSPs</td>
<td>40%</td>
</tr>
<tr>
<td>Insurance</td>
<td>39%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>38%</td>
</tr>
<tr>
<td>Retail</td>
<td>37%</td>
</tr>
<tr>
<td>Other commercial</td>
<td>37%</td>
</tr>
<tr>
<td>Financial services</td>
<td>35%</td>
</tr>
<tr>
<td>Oil and gas</td>
<td>32%</td>
</tr>
</tbody>
</table>

Figure 76: Analysis of respondents that have seen a marked improvement in their ability to do their job due to the increasing abundance of information, split by sector. Base: all respondents (3600)
65% of business leaders say that having insight changes the way they do business

Figure 77: Analysis of respondents that agree that valuable insights from information are making them rethink the way they do business, split by sector. Base: all respondents (3600)
63% believe that their decision making could be made better with up-to-date data available at the right time.

Figure 78: Analysis of respondents that agree their current decision making would be improved by having the most salient data available to them at the point they need it, split by sector.

Base: all respondents (3600)
PILLAR-SPECIFIC

SECTOR BREAKDOWN
PREDICTIVELY SPOTTING NEW OPPORTUNITIES BY SECTOR

34% of organizations are able to *predictively spot new opportunities* organization-wide.

<table>
<thead>
<tr>
<th>Sector</th>
<th>Not started doing this</th>
<th>Doing this but not organization-wide</th>
<th>Doing this organization-wide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Life sciences/biotech</td>
<td>15%</td>
<td>46%</td>
<td>38%</td>
</tr>
<tr>
<td>Financial services</td>
<td>15%</td>
<td>47%</td>
<td>38%</td>
</tr>
<tr>
<td>Retail</td>
<td>16%</td>
<td>49%</td>
<td>36%</td>
</tr>
<tr>
<td>Other commercial</td>
<td>15%</td>
<td>50%</td>
<td>35%</td>
</tr>
<tr>
<td>Insurance</td>
<td>21%</td>
<td>45%</td>
<td>34%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>15%</td>
<td>52%</td>
<td>33%</td>
</tr>
<tr>
<td>Telecoms/MSPs</td>
<td>11%</td>
<td>57%</td>
<td>32%</td>
</tr>
<tr>
<td>Oil and gas</td>
<td>32%</td>
<td>45%</td>
<td>24%</td>
</tr>
<tr>
<td>Media and entertainment</td>
<td>27%</td>
<td>52%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Figure 79: Analysis of to what extent organizations are addressing the driver, *predictively spotting new opportunities*, split by sector. Base: all respondents (3600)
ABILITY TO PREDICT NEW OPPORTUNITIES BY SECTOR

Only **23%** of all business leaders say that their organization is able to address *predictively spotting new opportunities* extremely well.

![Bar chart showing the percentage of business leaders by sector who believe their organization can predictively spot new opportunities extremely well.](EMC2_image)

- **Insurance:** 33%
- **Life sciences/biotech:** 30%
- **Telecoms/MSPs:** 25%
- **Oil and gas:** 25%
- **Other commercial:** 24%
- **Financial services:** 23%
- **Manufacturing:** 19%
- **Media and entertainment:** 18%
- **Retail:** 17%

Figure 80: Analysis of organizations that believe they can *predictively spot new opportunities* extremely well, split by sector. Base: only asked to respondents whose organizations are currently *predictively spotting new opportunities* (2335)
Globally **35%** are able to *demonstrate transparency and trust* organization-wide

<table>
<thead>
<tr>
<th>Sector</th>
<th>Not started doing this</th>
<th>Doing this but not organization-wide</th>
<th>Do this organization-wide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Life sciences/biotech</td>
<td>5%</td>
<td>52%</td>
<td>43%</td>
</tr>
<tr>
<td>Telecoms/MSPs</td>
<td>7%</td>
<td>53%</td>
<td>40%</td>
</tr>
<tr>
<td>Insurance</td>
<td>11%</td>
<td>49%</td>
<td>40%</td>
</tr>
<tr>
<td>Other commercial</td>
<td>13%</td>
<td>52%</td>
<td>37%</td>
</tr>
<tr>
<td>Financial services</td>
<td>12%</td>
<td>55%</td>
<td>35%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>13%</td>
<td>55%</td>
<td>32%</td>
</tr>
<tr>
<td>Retail</td>
<td>15%</td>
<td>55%</td>
<td>30%</td>
</tr>
<tr>
<td>Media and entertainment</td>
<td>24%</td>
<td>47%</td>
<td>29%</td>
</tr>
<tr>
<td>Oil and gas</td>
<td>24%</td>
<td>51%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Figure 81: Analysis of to what extent organizations are addressing the driver, *demonstrate transparency and trust*, split by sector

Base: all respondents (3600)
ABILITY TO DEMONSTRATE TRANSPARENCY AND TRUST BY SECTOR

27% say they demonstrate transparency and trust extremely well

Figure 82: Analysis of organizations that believe they can demonstrate transparency and trust extremely well, split by sector
Base: only asked to respondents whose organizations are currently demonstrating transparency and trust (2277)
**INCREASES IN TRANSPARENCY BY SECTOR**

25% organizations have become far more transparent, and a further 42% say they have become slightly more transparent in the last 5-10 years.

Figure 83: Analysis of respondents’ organizations that have increased their transparency over the last 5-10 years, split by sector. Base: all respondents (3600)
66% believe that their organization has managed to increase transparency over the last 5-10 years.

Figure 84: Analysis of to what extent organizations are addressing the driver, innovate in an agile way, split by sector

<table>
<thead>
<tr>
<th>Sector</th>
<th>Not started doing this</th>
<th>Doing this but not organization-wide</th>
<th>Do this organization-wide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telecoms/MSPs</td>
<td>61%</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Financial services</td>
<td>58%</td>
<td>27%</td>
<td>15%</td>
</tr>
<tr>
<td>Retail</td>
<td>55%</td>
<td>26%</td>
<td>19%</td>
</tr>
<tr>
<td>Other commercial</td>
<td>59%</td>
<td>26%</td>
<td>15%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>60%</td>
<td>25%</td>
<td>15%</td>
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<tr>
<td>Insurance</td>
<td>55%</td>
<td>25%</td>
<td>20%</td>
</tr>
<tr>
<td>Life sciences/biotech</td>
<td>53%</td>
<td>24%</td>
<td>28%</td>
</tr>
<tr>
<td>Oil and gas</td>
<td>56%</td>
<td>19%</td>
<td>27%</td>
</tr>
<tr>
<td>Media and entertainment</td>
<td>53%</td>
<td>18%</td>
<td>18%</td>
</tr>
</tbody>
</table>
Only 22% think that their organization can currently innovate in an agile way extremely well. This is the lowest of all attributes.

Figure 85: Analysis of organizations that believe they can innovate in an agile way extremely well, split by sector.
Base: only asked to respondents whose organizations are currently innovating in an agile way (2163)
Sectors where more say that their organization can innovate in an agile are also likely to consider their current technology strategy as innovative.

<table>
<thead>
<tr>
<th>Sector</th>
<th>Yes, our current technology strategy is somewhat innovative</th>
<th>Yes, our current technology strategy is very innovative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Life sciences/biotech</td>
<td>28%</td>
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<tr>
<td>Telecoms/MSPs</td>
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</tr>
<tr>
<td>Manufacturing</td>
<td>22%</td>
<td>55%</td>
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<tr>
<td>Financial services</td>
<td>24%</td>
<td>52%</td>
</tr>
<tr>
<td>Insurance</td>
<td>23%</td>
<td>51%</td>
</tr>
<tr>
<td>Other commercial</td>
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<td>49%</td>
</tr>
<tr>
<td>Retail</td>
<td>22%</td>
<td>49%</td>
</tr>
<tr>
<td>Media and entertainment</td>
<td>24%</td>
<td>43%</td>
</tr>
<tr>
<td>Oil and gas</td>
<td>15%</td>
<td>42%</td>
</tr>
</tbody>
</table>

Figure 86: Analysis of the percentage of respondents who consider their organization’s strategy innovative, split by sector
Base: all respondents (3600)
**DELIVERING A UNIQUE & PERSONALIZED EXPERIENCE BY SECTOR**

82% of business leaders say their organizations have started addressing the objective for a more personal user experience – but only 27% do it organization wide.

![Bar chart showing the percentage of organizations addressing the driver, delivering a unique and personalized experience, split by sector.](chart.png)

Figure 87: Analysis of to what extent organizations are addressing the driver, delivering a unique and personalized experience, split by sector. Base: all respondents (3600)
ABILITY TO DELIVER A UNIQUE AND PERSONALIZED EXPERIENCE BY SECTOR

Despite being the most likely to be working on delivering a more personalized experience, those in the life sciences/biotech industry (24%) and telecoms (19%) are the least likely to believe that their organizations are extremely good at it. Retail (31%) are the most confident, followed by financial services (28%) *global figures in notes

Figure 88: Analysis of organizations that believe they can deliver a unique and personalized experience extremely well, split by sector
Base: only asked to respondents whose organizations are currently deliver a unique and personalized experience (2065)
29% of organizations are addressing the driver of *always on, operating in real time* organization-wide.
ABILITy TO BE ALWAYS ON AND OPERATE IN REAL TIME BY SECTOR

One quarter (26%) of business leaders globally believe that their organization addresses this

Figure 90: Analysis of organizations that believe they can be always on, operating in real time extremely well, split by country
Base: only asked to respondents whose organizations are currently always on, operating in real time (2125)
30% are ‘always on’ and can act in real time. 43% report that they can sometimes act in real time, but don't always have the insights they need.

Figure 91: Analysis of whether the business has the ability to utilize information and act in real time, split by sector
Base: all respondents (3600)
34% of organizations *pursue continuous learning* across the entire business.
ABILITY TO PURSUE CONTINUOUS LEARNING BY SECTOR

31% overall believe they do it extremely well, more than any of the other attributes.

Figure 93: Analysis of organizations that believe they can pursue continuous learning extremely well, split by sector. Base: only asked to respondents whose organizations are currently pursuing continuous learning (2288)
SECTION 10.4
SUSTAIN RELEVANCE
CURRENT CAPACITY TO SUSTAIN RELEVANCE

Figure 94: “How would you categorize how your company is addressing each of these business attributes to stay competitive and succeed in this new digital world?” Showing results for sustain relevance
Base: all respondents (3600)

- Do this organization-wide: 28%
- Doing this but not organization-wide: 54%
- Not started this yet: 18%
SUSTAINING RELEVANCE BY COUNTRY

Figure 95: Analysis of to what extent organizations are addressing the driver, sustain relevance, split by country
Base: all respondents (3600)

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SUSTAINING RELEVANCE BY SECTOR

Figure 96: Analysis of to what extent organizations are addressing the driver, sustain relevance, split by sector
Base: all respondents (3600)

- Not started doing this
- Doing this but not organization-wide
- Do this organization-wide
SUSTAINING RELEVANCE DEVELOPED VS. EMERGING

Business leaders in Brazil (91%) and Mexico (90%) are the most likely to say that their organization addresses this

*global figures in notes

Figure 97: Analysis of to what extent organizations are addressing the driver, sustain relevance, split by developed and emerging countries
Base: all respondents (3600)
### ABILITY TO SUSTAIN RELEVANCE BY COUNTRY

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMERICAS:</td>
<td>29%</td>
</tr>
<tr>
<td>Brazil</td>
<td>29%</td>
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<tr>
<td>USA</td>
<td>24%</td>
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<tr>
<td>Argentina</td>
<td>23%</td>
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<tr>
<td>Italy</td>
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<tr>
<td>UAE/Saudi Arabia</td>
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<tr>
<td>Germany</td>
<td>16%</td>
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<tr>
<td>Switzerland</td>
<td>14%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>9%</td>
</tr>
</tbody>
</table>

Figure 98: Analysis of organizations that believe they can sustain relevance extremely well, split by country
Base: only asked to respondents whose organizations are currently sustaining relevance (2119)
ABILITY TO SUSTAIN RELEVANCE BY SECTOR

Unusually, those in life sciences/biotech industry, along with business leaders in the retail sector, are the least likely to have confidence in their organization’s current ability to sustain relevance (both 21%).

*global figures in notes

Figure 99: Analysis of organizations that believe they can sustain relevance extremely well, split by sector
Base: only asked to respondents whose organizations are currently sustaining relevance (2119)
ABILITY TO SUSTAIN RELEVANCE
DEVELOPED VS. EMERGING

Business leaders in emerging countries are 1.5X more likely to report that their organization currently addresses *sustaining relevance* extremely well. Japan (8%) and the Netherlands (9%) are the least likely to believe their organization is very good at this, compared to 22% globally.

Figure 100: Analysis of organizations that believe they can sustain relevance extremely well, split by developed and emerging countries
Base: only asked to respondents whose organizations are currently sustaining relevance (2119)
SECTION 10.5
ADDITIONAL QUESTIONS
Figure 101: Which of these best describes the technology evolution in your organization over the last 5-10 years?
Base: all respondents (3600)
DATA PLATFORMS AND CHALLENGES

Around half of organizations store data and runs applications using on-premise infrastructure (49%), private cloud (46%), and hybrid cloud (28%). The biggest challenges associated with effectively making data and information actionable are security concerns (35%) and lack of in-house expertise (34%).

Figure 102: "Which of the following platforms does your organization use to run applications or store data?" Base: all respondents (3600)

Figure 103: Which of the following currently limit your organization’s ability to effectively use the data and information you acquire in an actionable manner? Base: all respondents (3600)