

Energizing Global Growth: Understanding the Changing Consumer



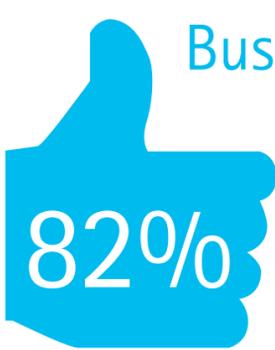
Accenture research shows that global businesses that capitalize on consumer behavior changes can achieve greater growth.

Non-financial companies need to find **US\$5 trillion** in revenue each year.

Median consensus revenue growth for 2012 to 2014 is 4.6%, higher than the forecast average of 3.3% p.a. in developed economies.



Business confidence may be unfounded



82% of survey respondents are confident in their business's ability to grow profitably in the next three years.

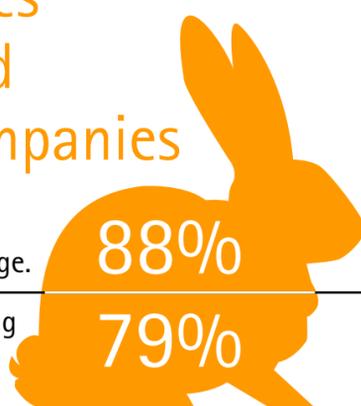


44% Less than a quarter of S&P Global 1200 companies have had revenue growth that exceeded growth in developed economies in each one of the last three years.

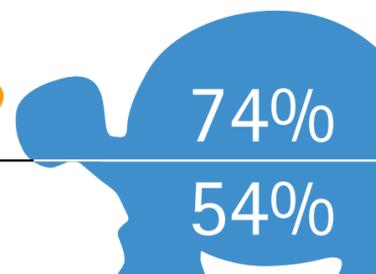
Striking differences between fast- and slow-growing companies

More likely to:

See opportunity in consumer behavior change.
Invest in consumer-facing activities to capture opportunities.



Fast¹



Slow

¹ Fast-growth companies' revenues grew by 6% or more last year.

Emerging-market consumers changing faster

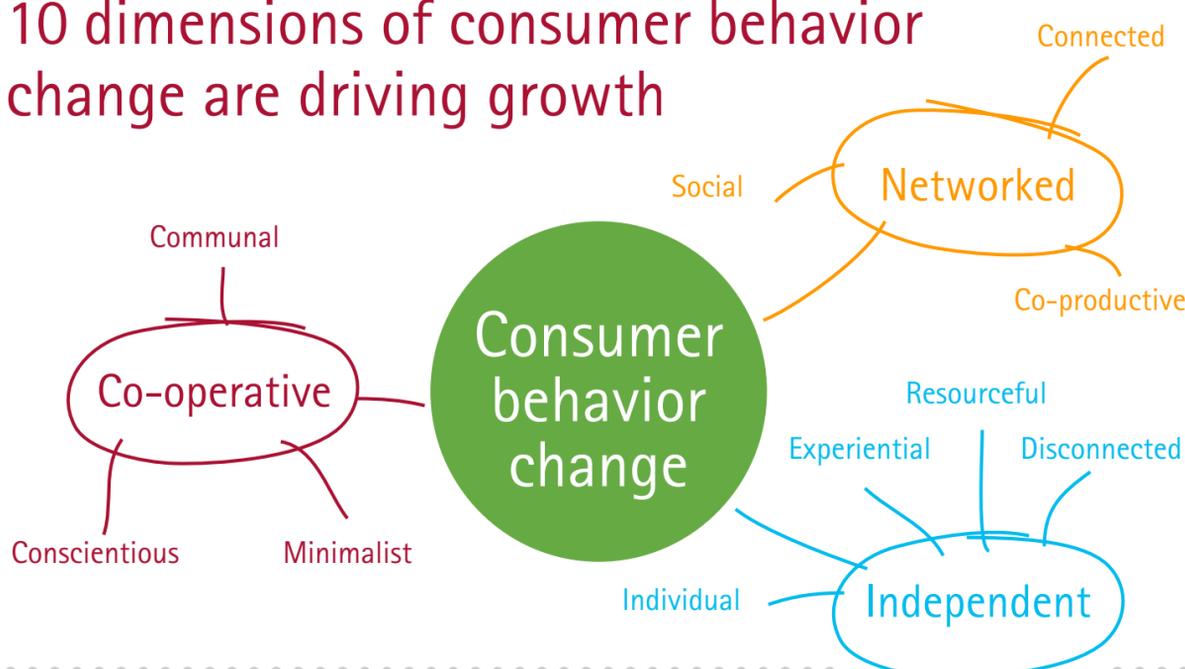
More likely to:

	Emerging	Developed
Buy things that express their personality.	54%	20%
Consider the environmental impact of what they buy.	64%	32%
Increase their interaction with companies online.	62%	25%

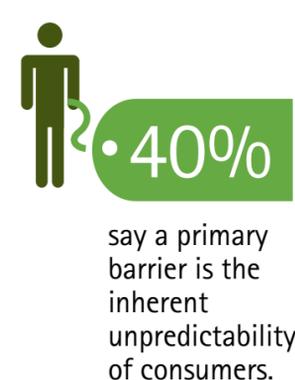
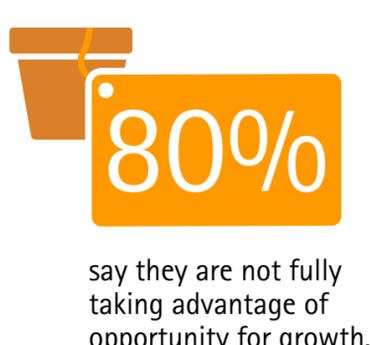
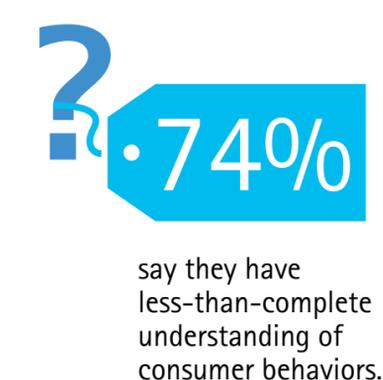
Three traits of industry growth leaders

- 1 Use technology to observe and respond to changes in consumer behavior.
- 2 Recognize and exploit market disruptions to enhance their business models.
- 3 Organize to scale their responses to consumer insight rapidly.

10 dimensions of consumer behavior change are driving growth



Companies challenged by changing consumers



A growing opportunity



By aggregating estimates of market size for industries and sectors associated with behavior change, the research indicates a growth opportunity of US\$2.4 trillion over the four-year period from 2012 to 2016.

Consumer behavior-driven markets are expected to grow at **three-and-a-half times the rate** of emerging economies, and **10 times the rate** of developed economies between now and 2016.

About the research

www.accenture.com/globalgrowth

Surveyed **10,000** online consumers.

Surveyed **600** business executives.

Surveys covered **10** countries (Brazil, China, Germany, India, Indonesia, Japan, South Africa, Turkey, United Kingdom, United States).

Analysis of the world's top **3,000** listed companies by market capitalization.

Sources: Accenture global executive survey, Accenture global consumer behavior survey, Capital IQ, Oxford Economics, Accenture analysis.

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