RETHINK, REINVENT, REALIZE.

How to successfully scale digital innovation to drive growth

HIGH TECH
OUR PREMISE AND RESEARCH QUESTION

When it comes to digital transformation, scaling innovation pilots is critical.

Yet many clients tell us that they are struggling with this very step – and feel that they might get stuck with “piecemeal projects” that don’t deliver significant value.

Can we find key best practices that could help them overcome their challenges, and drive real change, for real new growth?
SURVEY AT-A-GLANCE

- **n=1,350** companies with 1bn+ in revenue
- **60%** C-suite respondents
- **13** industries and **17** countries

HIGH TECH AT-A-GLANCE

- **n=122** companies with 1bn+ in revenue
- **56%** C-suite respondents
- **12** countries

Source: Accenture 2019 Industry X.0 Survey
OUR KEY FINDINGS

Companies are scaling nearly 57 percent of all digital PoCs, but only about two out of ten companies are doing it successfully.

What’s the difference?
The leading 20 percent manage their scaling efforts differently.

Following the four best practices of these “Champions” is a recipe to succeed at innovating for digital transformation.

A SURPRISE!
(we didn’t expect to find that many companies trying to scale!)

THE REASON TO READ!
(these best practices are what readers will come for)
Q: **WHAT’S THE CURRENT STATUS IN SCALING DIGITAL INNOVATION?**

A: **THINGS ARE SPEEDING UP – IN SURPRISING WAYS.**
Product Design is an obvious priority for High Tech companies as companies focus on improving product features and usability. Digital/Physical Security is a close second.

* “innovation priority” = percentage of respondents who are prioritizing digital innovation in these business areas

Source: Accenture 2019 Industry X.0 Survey

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**HIGH TECH COMPANIES ARE SCALING DIGITAL POCs ACROSS BUSINESS FUNCTIONS**

### SCALING INTENSITY*

<table>
<thead>
<tr>
<th>Business Function</th>
<th>High Tech</th>
<th>Cross-Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product &amp; Service Design</td>
<td>58.6%</td>
<td>59.8%</td>
</tr>
<tr>
<td>Production &amp; Operations</td>
<td>54.7%</td>
<td>58.4%</td>
</tr>
<tr>
<td>Supply Chain &amp; Logistics</td>
<td>57.1%</td>
<td>59.2%</td>
</tr>
<tr>
<td>Sales &amp; Aftersales Service</td>
<td>54.2%</td>
<td>58.7%</td>
</tr>
<tr>
<td>Digital/Physical Security</td>
<td>58.4%</td>
<td>59.0%</td>
</tr>
<tr>
<td>Continuous Customer Engagement</td>
<td>56.3%</td>
<td>60.8%</td>
</tr>
</tbody>
</table>

* "scaling intensity" = ratio of avg. number of proof of concepts scaled to avg. number initiated in each business function

Source: Accenture 2019 Industry X.0 Survey
HIGH TECH COMPANIES RECOGNIZE THE NEED FOR INNOVATING AT SCALE TO:

- Deliver **innovative and personalized experiences for customers** and workforce, and;

- Unlocking **new operational efficiencies with robust supply chains & operations**
Use of customer data for design and digitized order management are key outcomes for high tech companies...

Top 10 outcomes targeted by High Tech companies through scaling of digital PoCs

<table>
<thead>
<tr>
<th>Outcome</th>
<th>% of respondents who achieved this outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater use of customer data in design</td>
<td>47%</td>
</tr>
<tr>
<td>Digitized purchase order management</td>
<td>47%</td>
</tr>
<tr>
<td>Predictive maintenance/servicing of assets</td>
<td>47%</td>
</tr>
<tr>
<td>Reduced design update cost</td>
<td>44%</td>
</tr>
<tr>
<td>Greater supply chain flexibility</td>
<td>44%</td>
</tr>
<tr>
<td>Physical site security (gating, intrusion detection etc.)</td>
<td>44%</td>
</tr>
<tr>
<td>Digital, interactive user interfaces</td>
<td>44%</td>
</tr>
<tr>
<td>Greater use of generative design</td>
<td>43%</td>
</tr>
<tr>
<td>Greater modularity in product/service design</td>
<td>43%</td>
</tr>
<tr>
<td>Improved quality standards</td>
<td>43%</td>
</tr>
</tbody>
</table>

Source: Accenture 2019 Industry X.0 Survey
...AND THEY ARE CHOOSING AI, CLOUD AND BIG DATA ANALYTICS TO DRIVE THESE OUTCOMES

Top 3 technologies leveraged to facilitate scaling, by function

<table>
<thead>
<tr>
<th>PRODUCT &amp; SERVICE DESIGN</th>
<th>PRODUCTION &amp; OPERATIONS</th>
<th>SUPPLY CHAIN &amp; LOGISTICS</th>
<th>SALES &amp; AFTERSALES SERVICE</th>
<th>DIGITAL/PHYSICAL SECURITY</th>
<th>CONTINUOUS CUSTOMER ENGAGEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>RANK 1</td>
<td>RANK 1</td>
<td>RANK 1</td>
<td>RANK 2</td>
<td>RANK 2</td>
<td>RANK 1</td>
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<tr>
<td>RANK 3</td>
<td>RANK 3</td>
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<td>RANK 1</td>
<td>RANK 1</td>
<td>RANK 1</td>
<td>RANK 1</td>
</tr>
</tbody>
</table>

AI/Al-powered Automation
AI Assistants
3D printing
Mobility
IIOT Sensors & Transmitters
Immersive Experience
Industrial Robotics
Big Data Analytics
Digital Twin
Cloud
Blockchain
Autonomous Vehicles
Machine Learning/Deep Learning
Quantum Computing
Cyber Security Protocols

Source: Accenture 2019 Industry X.0 Survey
Q: WHAT ABOUT SCALING SUCCESS – DOES EVERYONE SEE IT?

A: NO. SOME COMPANIES RACE AHEAD, OTHERS STRUGGLE.
SO, WHO’S SCALING THE BEST?

The High Tech industry has marginally lower percentage of Champions compared to the global average

**Percentage of champions in each industry = 100 x (The number of champions in a particular industry)/(Total number of companies surveyed in that particular industry)**

- **CHAMPIONS**
  - Earn RODI higher than industry ROIC and industry RODI; scale more than 50% of their digital Proof-of-Concepts

- **CONTENDERS**
  - Earn RODI lower than industry ROIC and lower than industry RODI; scale more than 50% of their PoCs

- **CADETS**
  - Earn RODI lower than industry ROIC and lower than industry RODI; scale less than 50% of their PoCs

Source: Accenture 2019 Industry X.0 Survey
High Tech Champions achieve nearly 5 times the RODI clocked by Contenders; proving that its not how much you scale, but how you scale that matters

**Returns on Digital Investment (RODI)**

RODI = Returns on Investment (Net Gain/Total Investment) from scaled digital PoCs across all the key business functions.

We asked executives about the average RODI they expected before scaling digital PoCs, and the RODI they finally achieved.

**HIGH TECH**

<table>
<thead>
<tr>
<th>Champions</th>
<th>RODI expected</th>
<th>RODI achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>32.7%</td>
<td>29.0%</td>
<td></td>
</tr>
</tbody>
</table>

**CROSS-INDUSTRY**

<table>
<thead>
<tr>
<th>Champions</th>
<th>RODI expected</th>
<th>RODI achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>22.2%</td>
<td>25.4%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contenders</th>
<th>RODI expected</th>
<th>RODI achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.8%</td>
<td>5.7%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contenders</th>
<th>RODI expected</th>
<th>RODI achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.1%</td>
<td>6.4%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cadets</th>
<th>RODI expected</th>
<th>RODI achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.5%</td>
<td>7.2%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cadets</th>
<th>RODI expected</th>
<th>RODI achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.4%</td>
<td>9.7%</td>
<td></td>
</tr>
</tbody>
</table>

Source: Accenture 2019 Industry X.0 Survey
WHAT’S STOPPING CONTENDERS AND CADETS FROM BECOMING CHAMPIONS?

LIKE CHAMPIONS, CONTENDERS AND CADETS TOO FACE ALIGNMENT AND INFRASTRUCTURE DEFICITS. WHILE CHAMPIONS OVERCOME THESE, OTHERS CONTINUE TO GRAPPLE WITH THEM.
SECURING FUNDING FOR DIGITAL REINVENTION PROJECTS FROM THE BOARD IS STILL NOT EASY

EXTENT TO WHICH SECURING FUNDING FROM THE BOARD FOR DIGITAL REINVENTION IS A CHALLENGE

<table>
<thead>
<tr>
<th>Extent of Difficulty</th>
<th>High Tech</th>
<th>Cross-Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>To a great extent</td>
<td>25%</td>
<td>24%</td>
</tr>
<tr>
<td></td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>To a large extent</td>
<td>37%</td>
<td>35%</td>
</tr>
<tr>
<td></td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>To a moderate extent</td>
<td>20%</td>
<td>24%</td>
</tr>
<tr>
<td></td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>To a limited extent</td>
<td>11%</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Not at all</td>
<td>7%</td>
<td>5%</td>
</tr>
</tbody>
</table>

RANK

KEY REASONS WHY BOARDS OF HIGH TECH COMPANIES REFUSE TO FUND DIGITAL REINVENTION

1. Lack of a clear digital roadmap; Inadequate ROI from digital investments
2. Poor understanding of digital reinvention within the top management
3. Foreseen immaturity of technology
4. Failure to scale digital proofs of concept (PoCs) in the past; Lack of a digital-native mindset among Board members
5. Shortage of and difficult access to digital skills
6. Shortage of budget for capital investments

Source: Accenture 2019 Industry X.0 Survey
High Tech executives’ top picks* for “biggest challenges to scaling digital PoCs”

<table>
<thead>
<tr>
<th>CHAMPIONS (CH), CONTENDERS (CT), CADETS (CA)</th>
<th>PRODUCT &amp; SERVICE DESIGN</th>
<th>PRODUCTION &amp; OPERATIONS</th>
<th>SUPPLY CHAIN &amp; LOGISTICS</th>
<th>SALES, AFTER SALES SERVICE</th>
<th>DIGITAL / PHYSICAL SECURITY</th>
<th>CONTINUOUS CUSTOMER ENGAGEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inability to align top and middle management to innovate customer value</td>
<td>CH</td>
<td>CT</td>
<td>CA</td>
<td>CH</td>
<td>CT</td>
<td>CA</td>
</tr>
<tr>
<td>Inability to align top management view on ‘digital value’</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inability to align talent pools and IT assets across key business functions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inability to align in-house innovation with agile digital ecosystems</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lack of culture to drive on-time innovation and customer experiences</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lack of culture to drive in relevant lessons from application of digital technology</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

* other options which weren’t picked often included: “Lack of adequate skills to innovate with digital technologies and platforms”, “Lack of adequate skills to translate digital proofs of concept into scaled-up action plans”, “Inadequate infrastructure to innovate relevant digital value with speed”, “Absence of culture to design, develop and deliver digital business models”, “Absence of culture to drive on-time innovation of monetizable customer-relevant experiences”, “Inadequate metrics to systematically track digital technology investments”, “Inadequate metrics to systematically track digital technology investments to assess the ROI on digital technology investments”.

Source: Accenture 2019 Industry X.0 Survey
What do companies stand to lose if they fail to organize for digital reinvention?

More than 70% of High Tech leaders fear substantial escalations in cost (>5%) alongside losing significant talent (>5%), if they fail to overcome organizational challenges.

### High Tech

<table>
<thead>
<tr>
<th>Loss in Market Cap</th>
<th>No Impact</th>
<th>1-5%</th>
<th>6-10%</th>
<th>16-20%</th>
<th>Above 20%</th>
</tr>
</thead>
<tbody>
<tr>
<td>10%</td>
<td>20%</td>
<td>40%</td>
<td>17%</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Fall in Market Share</td>
<td>No Impact</td>
<td>1-5%</td>
<td>6-10%</td>
<td>16-20%</td>
<td>Above 20%</td>
</tr>
<tr>
<td>11%</td>
<td>20%</td>
<td>29%</td>
<td>23%</td>
<td>13%</td>
<td>4%</td>
</tr>
<tr>
<td>Reduction in Revenues</td>
<td>No Impact</td>
<td>1-5%</td>
<td>6-10%</td>
<td>16-20%</td>
<td>Above 20%</td>
</tr>
<tr>
<td>10%</td>
<td>25%</td>
<td>30%</td>
<td>19%</td>
<td>12%</td>
<td>5%</td>
</tr>
<tr>
<td>Increase in Attrition Rates</td>
<td>No Impact</td>
<td>1-5%</td>
<td>6-10%</td>
<td>16-20%</td>
<td>Above 20%</td>
</tr>
<tr>
<td>8%</td>
<td>20%</td>
<td>34%</td>
<td>25%</td>
<td>8%</td>
<td>3%</td>
</tr>
<tr>
<td>Cost Escalations</td>
<td>No Impact</td>
<td>1-5%</td>
<td>6-10%</td>
<td>16-20%</td>
<td>Above 20%</td>
</tr>
<tr>
<td>6%</td>
<td>18%</td>
<td>34%</td>
<td>25%</td>
<td>15%</td>
<td>2%</td>
</tr>
</tbody>
</table>

### Cross-Industry

<table>
<thead>
<tr>
<th>Loss in Market Cap</th>
<th>No Impact</th>
<th>1-5%</th>
<th>6-10%</th>
<th>16-20%</th>
<th>Above 20%</th>
</tr>
</thead>
<tbody>
<tr>
<td>8%</td>
<td>23%</td>
<td>27%</td>
<td>24%</td>
<td>13%</td>
<td>6%</td>
</tr>
<tr>
<td>Fall in Market Share</td>
<td>No Impact</td>
<td>1-5%</td>
<td>6-10%</td>
<td>16-20%</td>
<td>Above 20%</td>
</tr>
<tr>
<td>8%</td>
<td>21%</td>
<td>28%</td>
<td>23%</td>
<td>15%</td>
<td>5%</td>
</tr>
<tr>
<td>Reduction in Revenues</td>
<td>No Impact</td>
<td>1-5%</td>
<td>6-10%</td>
<td>16-20%</td>
<td>Above 20%</td>
</tr>
<tr>
<td>8%</td>
<td>21%</td>
<td>27%</td>
<td>24%</td>
<td>15%</td>
<td>5%</td>
</tr>
<tr>
<td>Increase in Attrition Rates</td>
<td>No Impact</td>
<td>1-5%</td>
<td>6-10%</td>
<td>16-20%</td>
<td>Above 20%</td>
</tr>
<tr>
<td>8%</td>
<td>19%</td>
<td>28%</td>
<td>26%</td>
<td>14%</td>
<td>5%</td>
</tr>
<tr>
<td>Cost Escalations</td>
<td>No Impact</td>
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<td>16-20%</td>
<td>Above 20%</td>
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<tr>
<td>5%</td>
<td>19%</td>
<td>28%</td>
<td>27%</td>
<td>15%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: Accenture 2019 Industry X.0 Survey
High Tech companies have the opportunity to achieve sizeable increase in RODI, if they focus on overcoming skills and alignment deficits.

How much can companies gain if they overcome these deficits?

Incremental RODI potential if deficit is overcome:

- **Alignment Deficit**: 15.1%
- **Infrastructure Deficit**: 8.4%
- **Skills Deficit**: 15.4%
- **Partnership Deficit**: 6.5%
- **Measurement Deficit**: 6.0%
- **Cultural Deficit**: 10.5%

Source: Accenture 2019 Industry X.0 Survey
Q: HOW DO CHAMPIONS OVERCOME THESE CHALLENGES AND SCALE THEIR DIGITAL INNOVATIONS?

A: WITH 4 SPECIFIC BEST PRACTICES.
1. DEFINING THE VALUE THAT GUIDES INNOVATION EFFORTS

Champions assess the opportunities before them, and narrow in on the market opportunities they want to pursue. They then use that clarity to communicate with middle management and direct their innovation efforts to secure expected returns.

2. FOCUS ON INTERNAL CHANGE AND EXTERNAL VALUE

Champions prefer a measured approach to blend organizational change with digital transformation initiatives, creating what we call an ambidextrous organization. With a clear view of the customer value, managers and employees are less likely to feel blindsided by a digital learning curve that is too steep.
Champions recognize the enormity of integrating rapidly advancing technologies, along with talent and assets, back into their organization. In line with their ambidextrous approach, they take the vital step to re-rig the core of their organizations, seeding and growing new digital innovations organically within organizational boundaries.

Most manufacturers use the same enablers to drive innovation, such as software applications to support operations, or analytics platforms to generate better insights. However, Champions alone are masters at matching the support to the function that needs it most and will use it best.
Q: IS THERE A ROADMAP TO MATURE AS AN ORGANIZATION TOWARDS SUCCESSFULLY SCALING DIGITAL INNOVATION?

A: YES THERE IS...
... WE HAVE BUILT ONE LEVERAGING FIVE KEY ORGANIZATIONAL LEVERS

LEADERSHIP & CULTURE
ECOSYSTEM PARTNERSHIPS
SKILLSETS
TECHNOLOGY
PLATFORM
Digital Production Management along with Customer Experience Analysis are critical skills to build and scale digital PoCs in the High tech sector.

- Digital Production Management: 43% champions, 25% others
- Customer experience analysis: 42% champions, 24% others
- AI/ML Training: 41% champions, 24% others
- Digital Platform Management: 41% champions, 24% others
- Automation Expertise: 41% champions, 23% others
- UX Design: 39% champions, 28% others
- Network Architecture: 39% champions, 24% others
- Data Analysis/ Visualization: 39% champions, 26% others
- Engineering: 38% champions, 23% others
- Digital Systems Engineering: 37% champions, 27% others

% of High-Tech respondents saying “Very Important”

Source: Accenture 2019 Industry X.0 Survey
**TOP 5 PARTNERSHIPS FOR HIGH-TECH CHAMPIONS**

Channel Partners and Tech Partners are critical partnerships to build and scale digital PoCs

<table>
<thead>
<tr>
<th>Partnership</th>
<th>Champions</th>
<th>Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>Channel Partners</td>
<td>41%</td>
<td>24%</td>
</tr>
<tr>
<td>Tech Partners</td>
<td>41%</td>
<td>27%</td>
</tr>
<tr>
<td>Competitors</td>
<td>39%</td>
<td>27%</td>
</tr>
<tr>
<td>Regulatory Authorities</td>
<td>38%</td>
<td>24%</td>
</tr>
<tr>
<td>Research Clusters</td>
<td>37%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: Accenture 2019 Industry X.0 Survey
Q: WHAT CAPABILITIES DO HIGH TECH COMPANIES NEED TO BUILD AS THEY NAVIGATE ALONG THIS ROADMAP?

A: CHAMPIONS PRIORITIZE CERTAIN CAPABILITIES, AND INVEST HEAVILY IN THEM
CHAMPIONS IN HIGH-TECH WANT TO INVEST IN DIGITAL PERFORMANCE MANAGEMENT AND AUTOMATION AT SCALE

TOP 5 CAPABILITIES – HIGH TECH

- **Digital Performance Management**: 100% of respondents
- **Automation at Scale**: 96% of respondents
- **Reinvention of the Product**: 96% of respondents
- **Hyper-Personalization**: 96% of respondents
- **Big Data Analytics**: 96% of respondents

% of respondents who will invest in these capabilities

**Source**: Accenture 2019 Industry X.0 Survey
Striving to scale your own innovations?

Get in touch!

Whether you are seeking to start new initiatives the right way, help with scaling those you already have—we are ready to help you improve your outcomes by putting our knowledge to work! Please reach out to raghav.narsalay@accenture.com or arohi.sen@accenture.com at Accenture Research, or visit accenture.com/scaling-innovation

References:

David Abood, Aidan Quilligan, Raghav Narsalay, and Arohi Sen (2019), Rethink, Reinvent, Realize, downloadable from here.
KEY CONTACTS

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Arohi Sen
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arohi.sen@accenture.com
SURVEY DEMOGRAPHICS – OVERALL (n=1350)

INDUSTRY
- Consumer Goods & Services
- Industrial Equipment
- Utilities
- High Tech
- Chemicals (incl. Petrochemicals)
- Life Sciences (Pharmaceuticals/Bio-tech)
- Automotive – Auto-ancillary/Auto-parts
- Medical Technologies
- Oil & Gas
- Automotive – OEM
- Metals & Mining (Metals/Mining)
- Aerospace & Defense
- Other Natural Resources

EXEC PROFILE
- C-Suite
- Senior VP/EVP

ANNUAL REVENUE
- US$1 - 10 Billion
- US$11 - 30 Billion
- US$31 - 50 Billion
- Over US$50 Billion

GEO-SPREAD
- China, 26%
- United States, 29%
- Japan, 6%
- Germany, 5%
- France, 4%
- Brazil, 4%
- Italy, 3%
- Spain, 2%
- India, 4%
- Australia, 5%
- The Netherlands, 3%
- The United Kingdom, 6%
- United Arab Emirates, 2%
- Other, 3%
SURVEY DEMOGRAPHICS – HIGH TECH (n=122)

EXEC PROFILE

- C-Suite: 56%
- Senior VP/EVP: 24%
- VP/Director: 20%

ANNUAL REVENUE

- US$1 - 10 Billion: 81%
- US$11 - 30 Billion: 6%
- US$31 - 50 Billion: 5%
- Over US$50 Billion: 8%

GEO-SPREAD

- United States, 36%
- China, 27%
- Japan, 16%
- Germany, 8%
- Brazil, 2%
- United Kingdom, 2%
- India, 2%
- Australia, 1%
- Other, 1%

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