Realizing 2030: A Divided Vision of the Future

Global business leaders forecast the next era of human-machine partnerships and how they intend to prepare

Vanson Bourne Research Findings & Methodology

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Research **METHODOLOGY**

Quantitative research conducted by Vanson Bourne in June, July and August 2017

QUANTITATIVE

3,800

Director, c-suite from mid-size to enterprises w/key functions

- Finance
- Sales
- IT/Tech
- Customer Services
- Production & Manf.
- HR
- Marketing
- Owner/ Executive
- R & D
- Digital
- Customer Experience
- Logistics and Supply Chain

INDUSTRIES

Automotive
Financial Services
Public Healthcare
Private Healthcare
Life Sciences
Technology & Telecoms
Insurance
Manufacturing
Media & Entertainment
Oil & Gas
Retail & Consumer Products

GLOBAL REACH

17

COUNTRIES

AMERICAS

USA, Brazil, Mexico

APJ

Australia, China, India, Japan, NZ, Singapore

EMEA

France, Germany, Italy, Netherlands, UAE/ Saudi Arabia, United Kingdom, South Africa

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Section 1

Future trends – business leaders' forecast for the future

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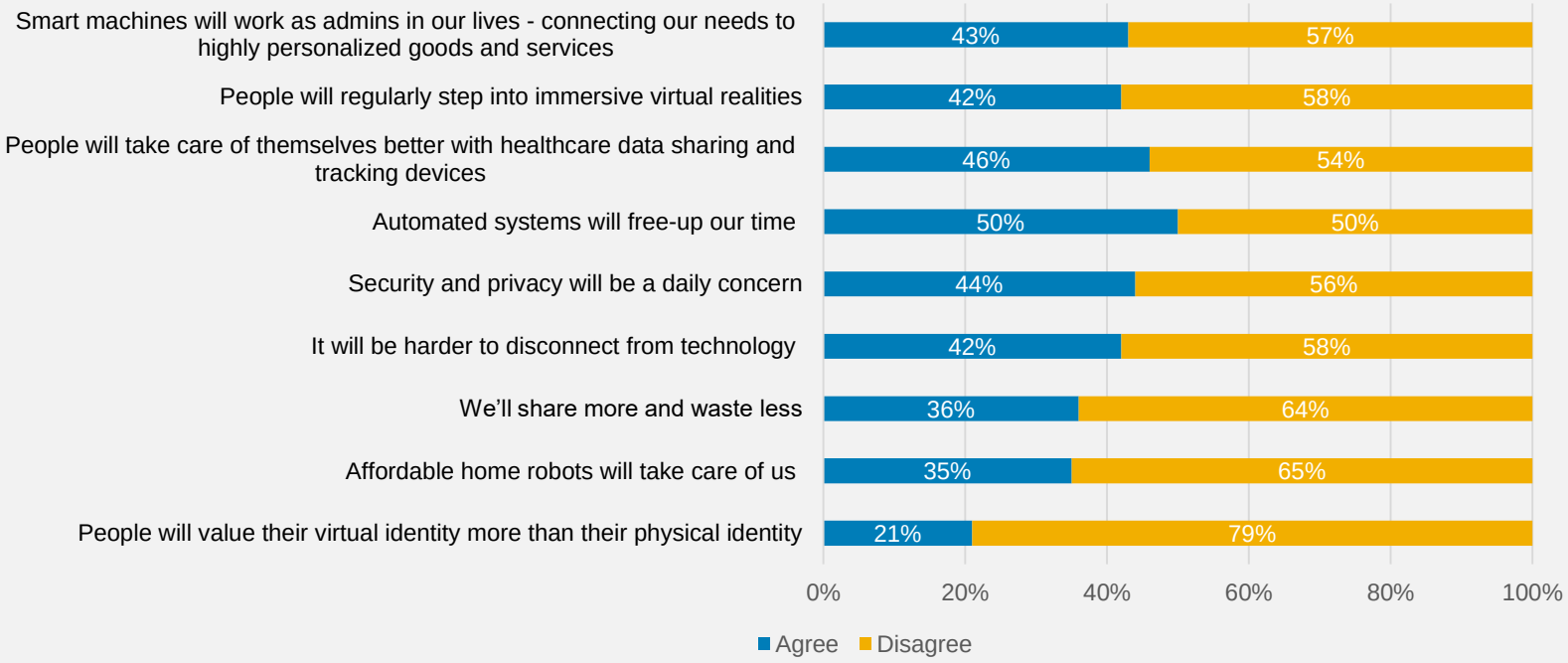
Technology changing our lives in 2030



"How do you envision technology impacting the way we live in 2030?" Base: 3800

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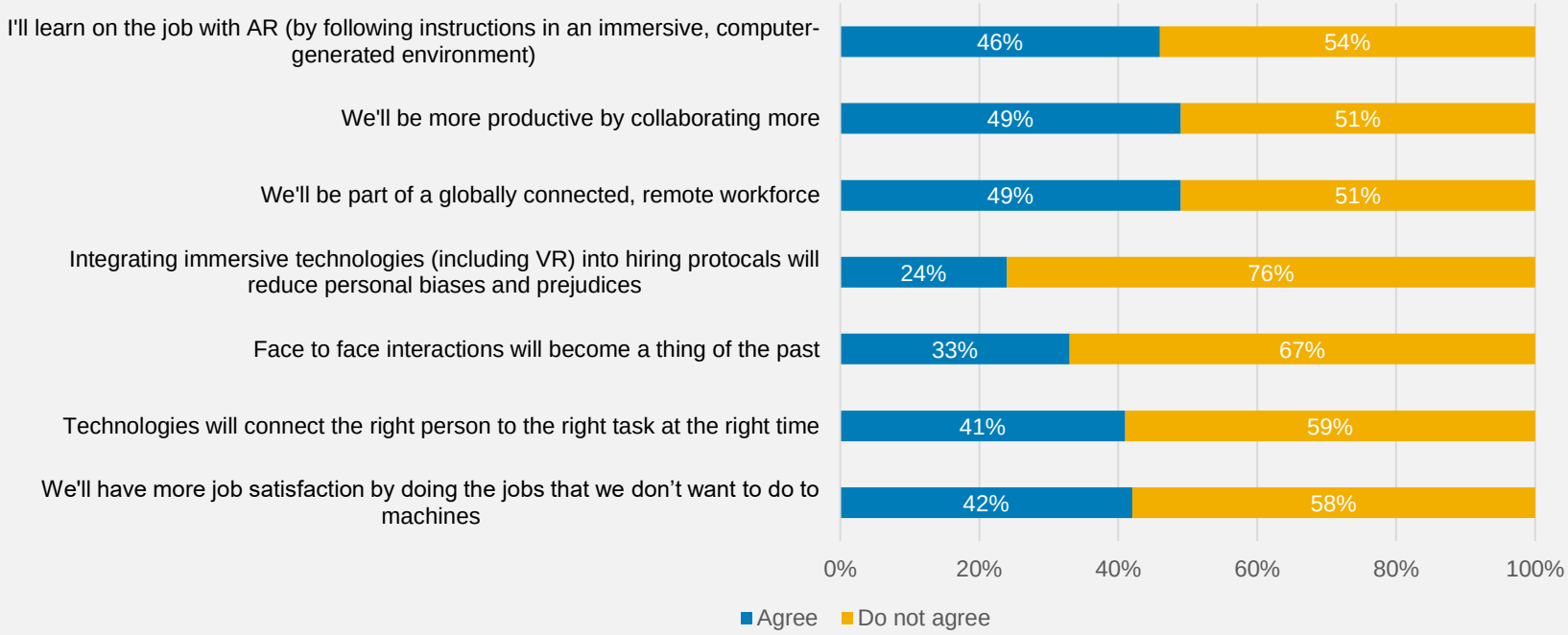
Technology changing our work in 2030



"How do you envision technology impacting the way we work in 2030?" Base: 3800. Not showing answer options "there will be no change" and "don't know"

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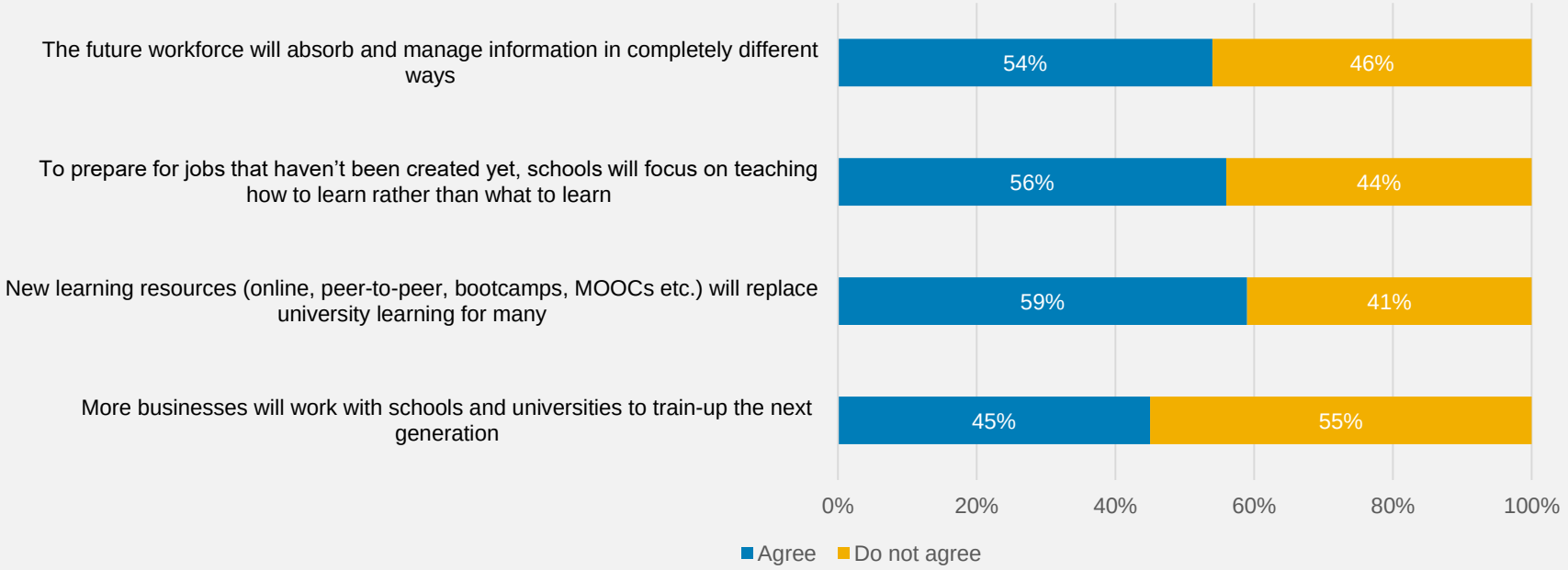
Technology changing the way we learn in 2030



"How do you envision technology impacting the way we learn in 2030?" Base: 3800. Not showing answer options "there will be no change" and "don't know"

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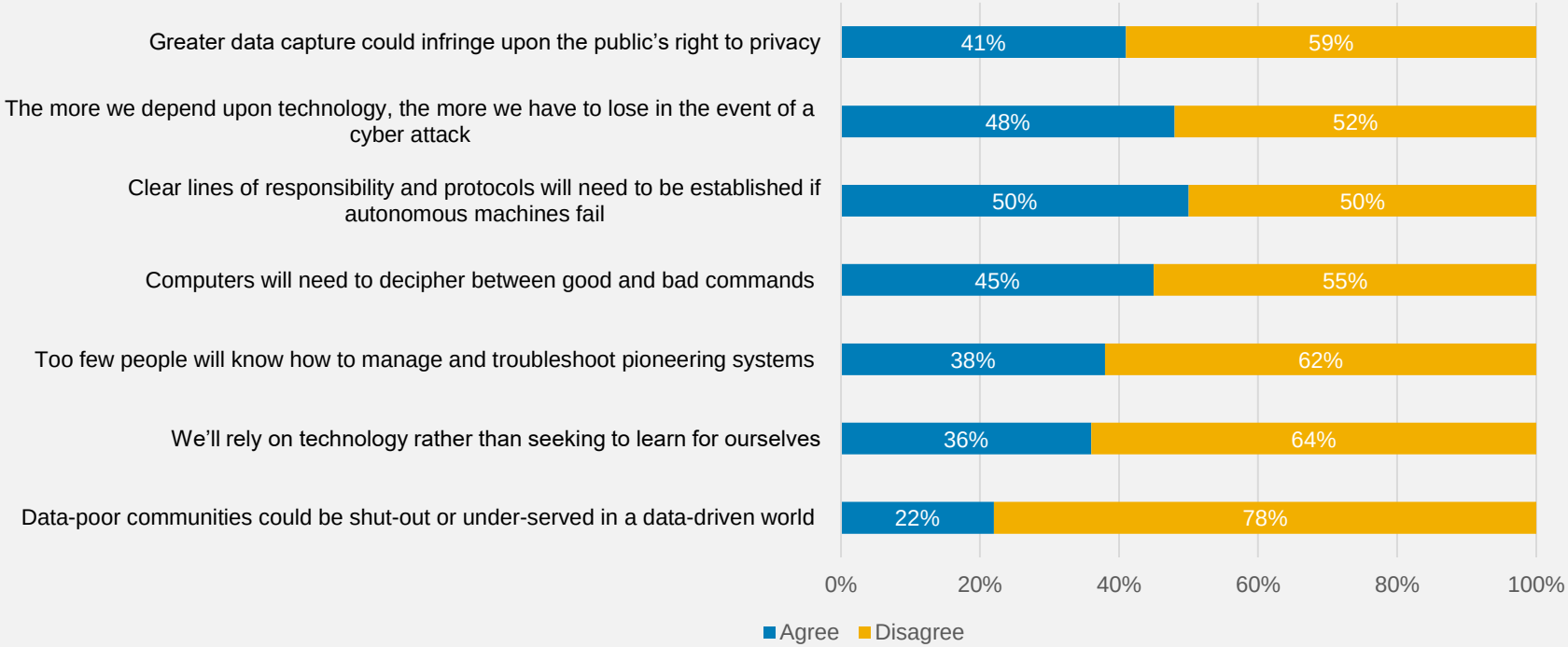
Implications of human-machine partnerships over the next 10 years



"What are the wider potential implications and risks of human-machine partnerships over the next ten years?" Base: 3800. Not showing answer options "there will be no change" and "don't know"

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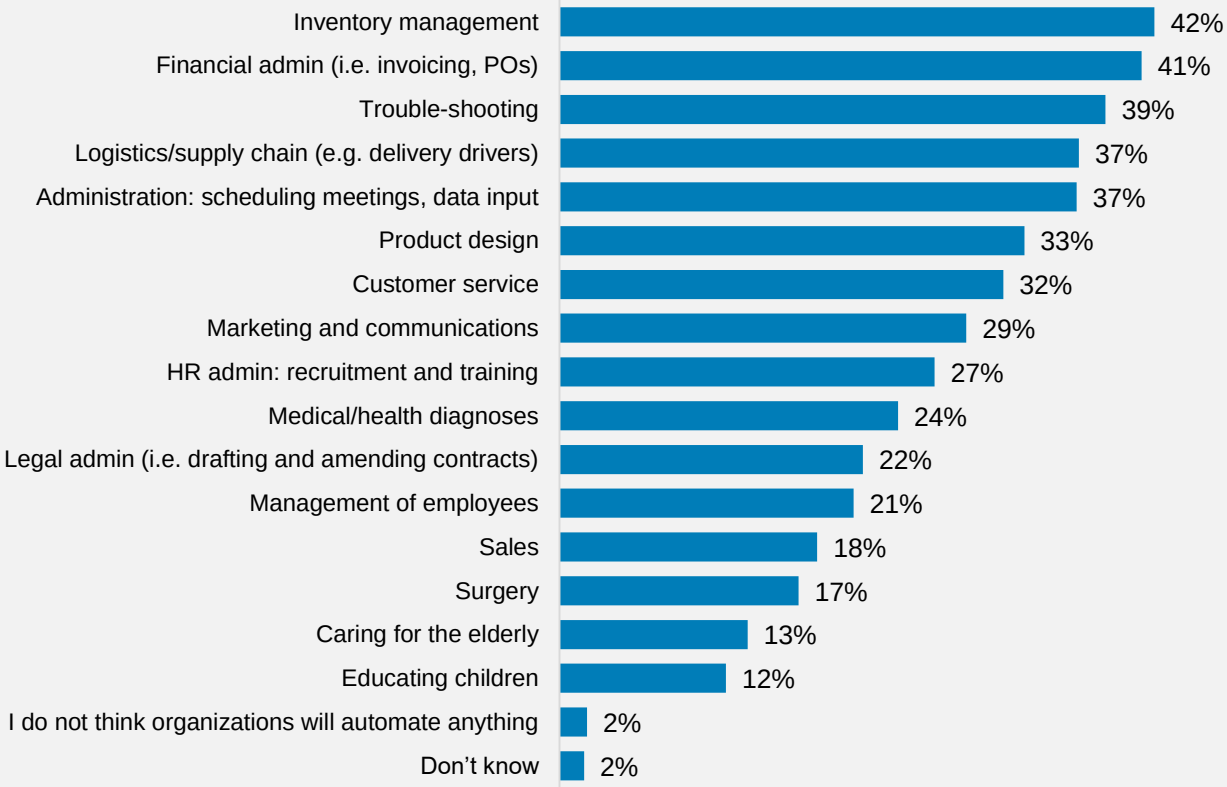
Top tasks likely outsourced to machines



Almost all **(96%)** respondents think that organizations will outsource tasks to machines/automate by 2030

On average, respondents identified **5** processes ripe for automation within their organization

"**Which tasks do you anticipate organizations will outsource to machines/automate by 2030?"** Base: 3800

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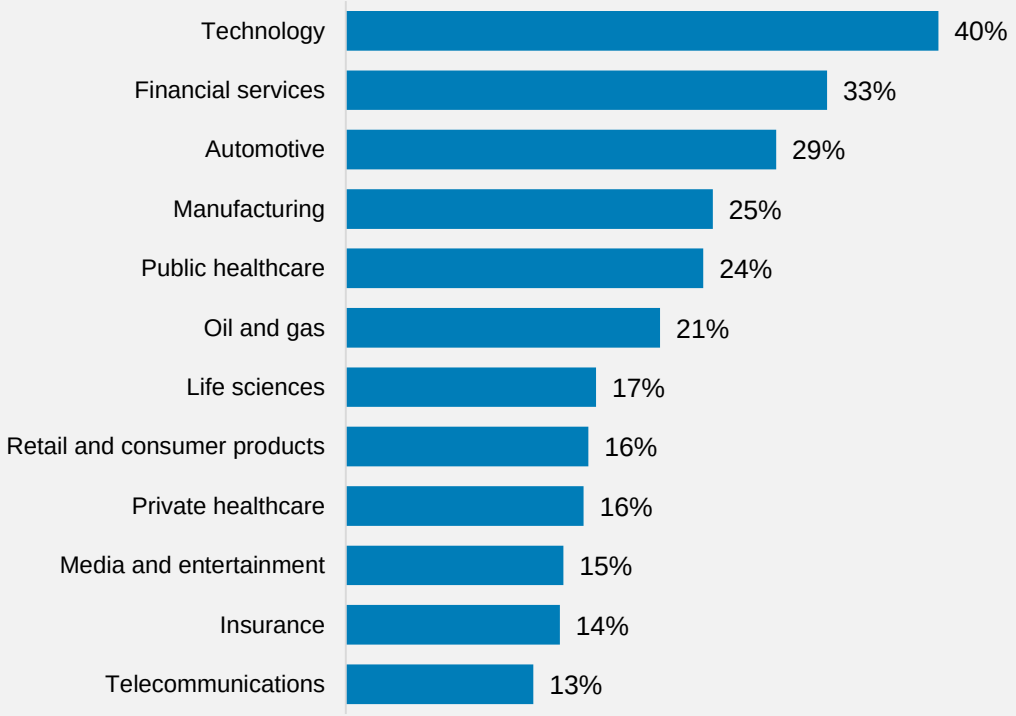
Most likely industries to be disrupted by 2030



“In your opinion, which three verticals are likely to experience the most disruption by 2030?” Base: 3800

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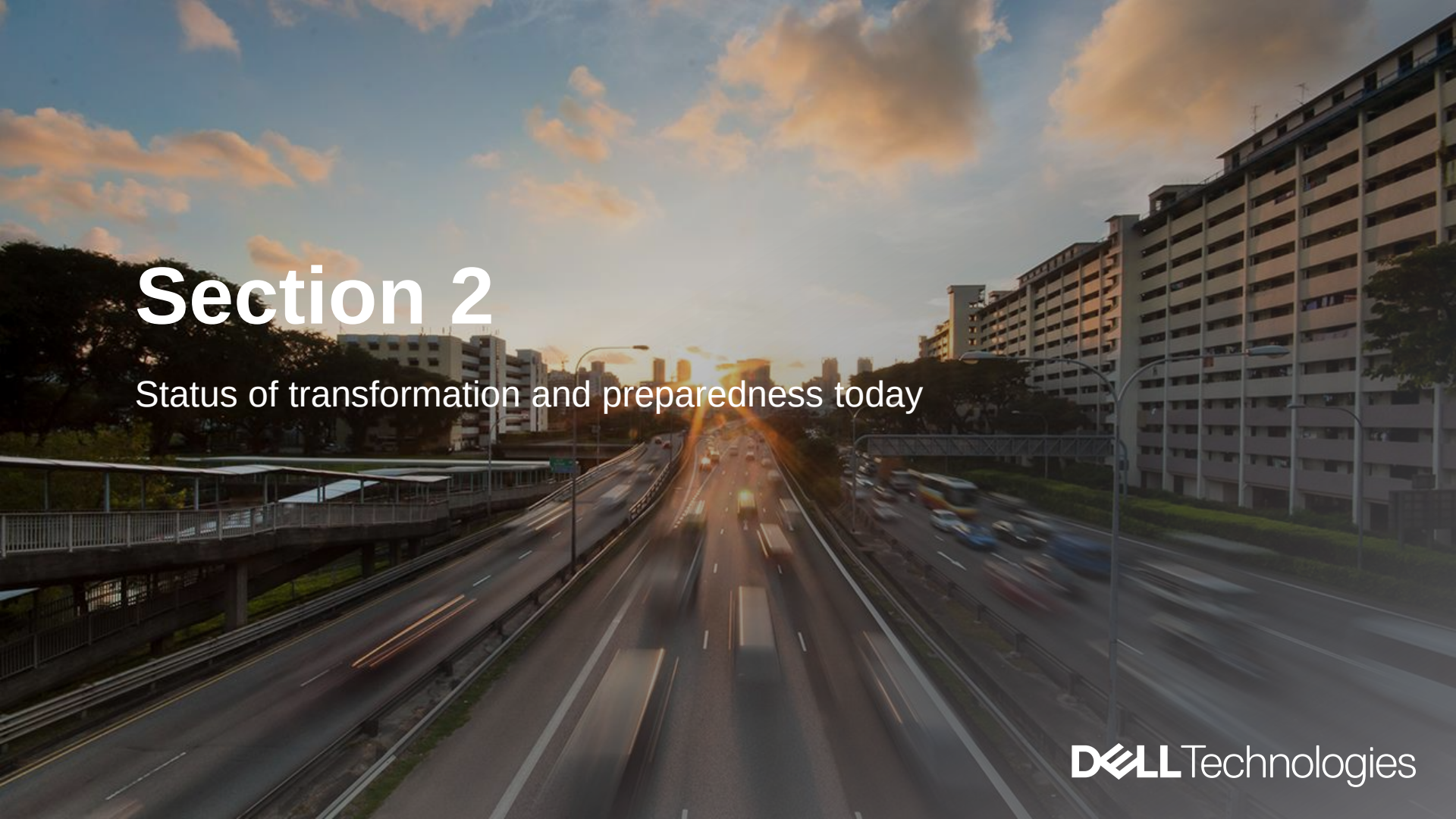

Section 2

Status of transformation and preparedness today

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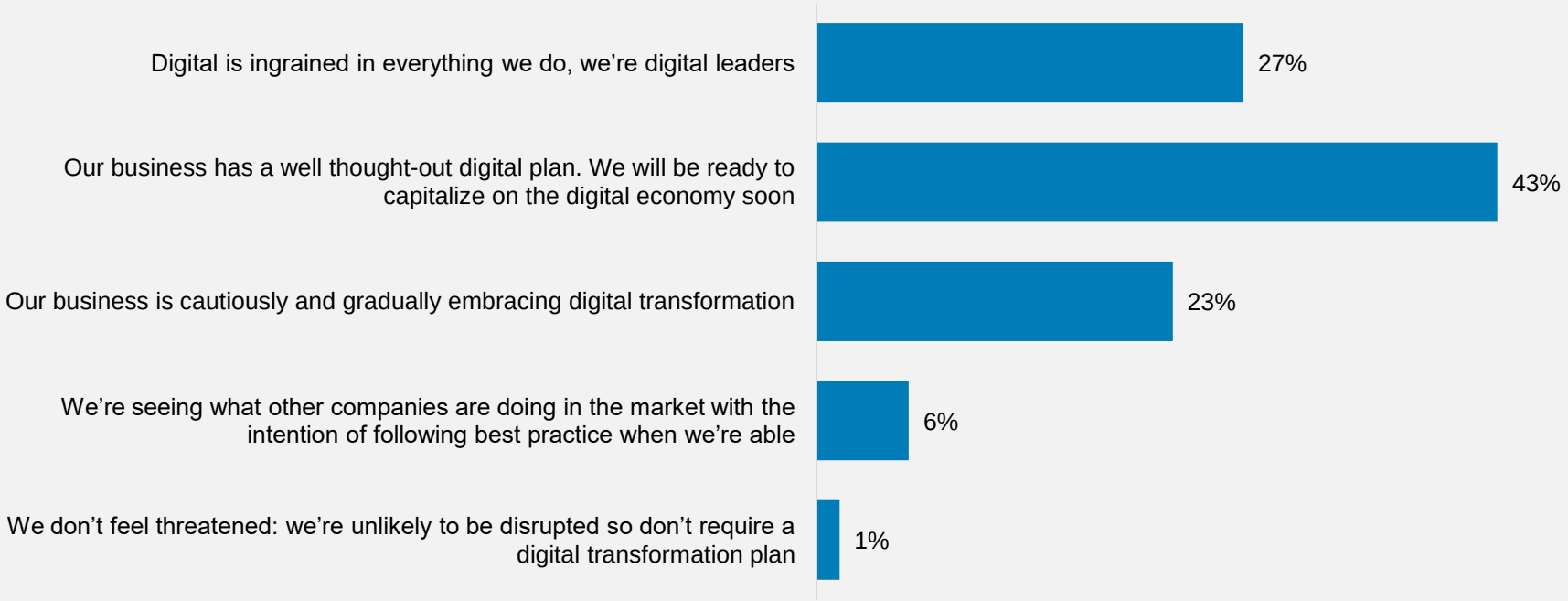
Organizations’ digital transformation approach



“How would you categorize your organization’s approach to digital transformation today?”
Base: 3800

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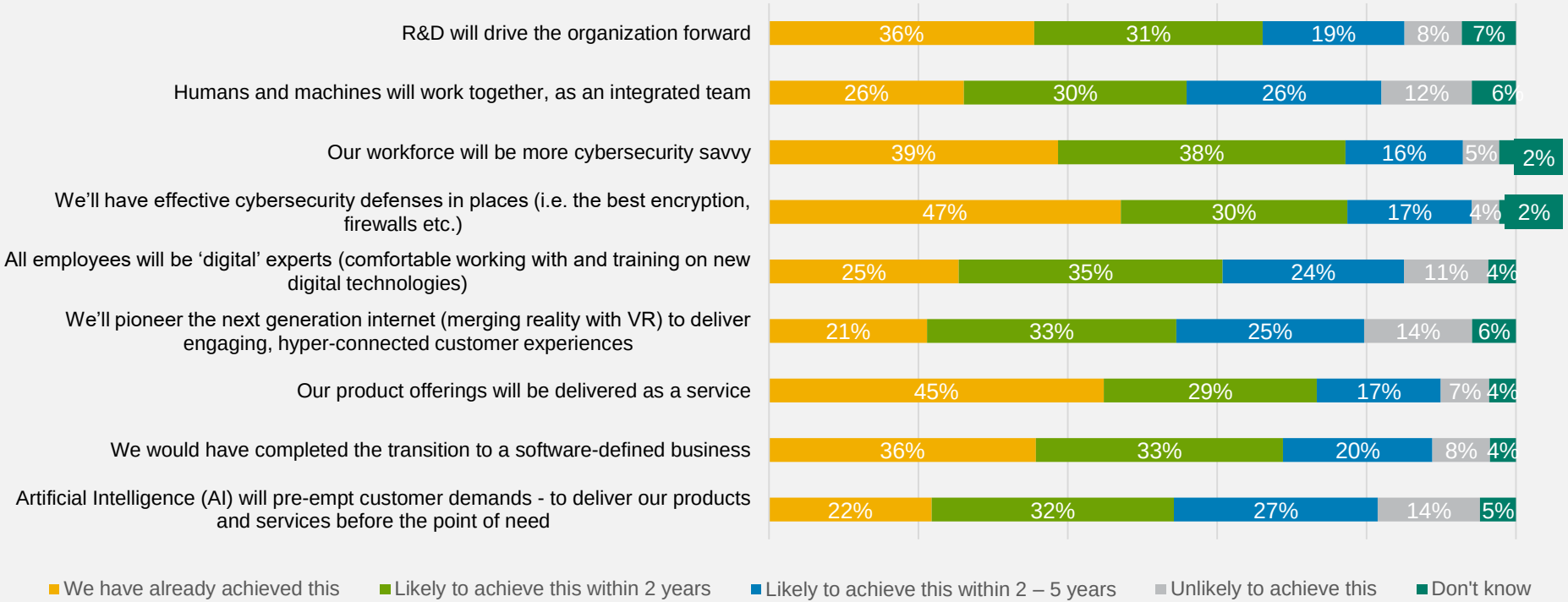
Likely achievements within five years



"**Is your organization likely to achieve the following over the next five years?"** Base: 3800

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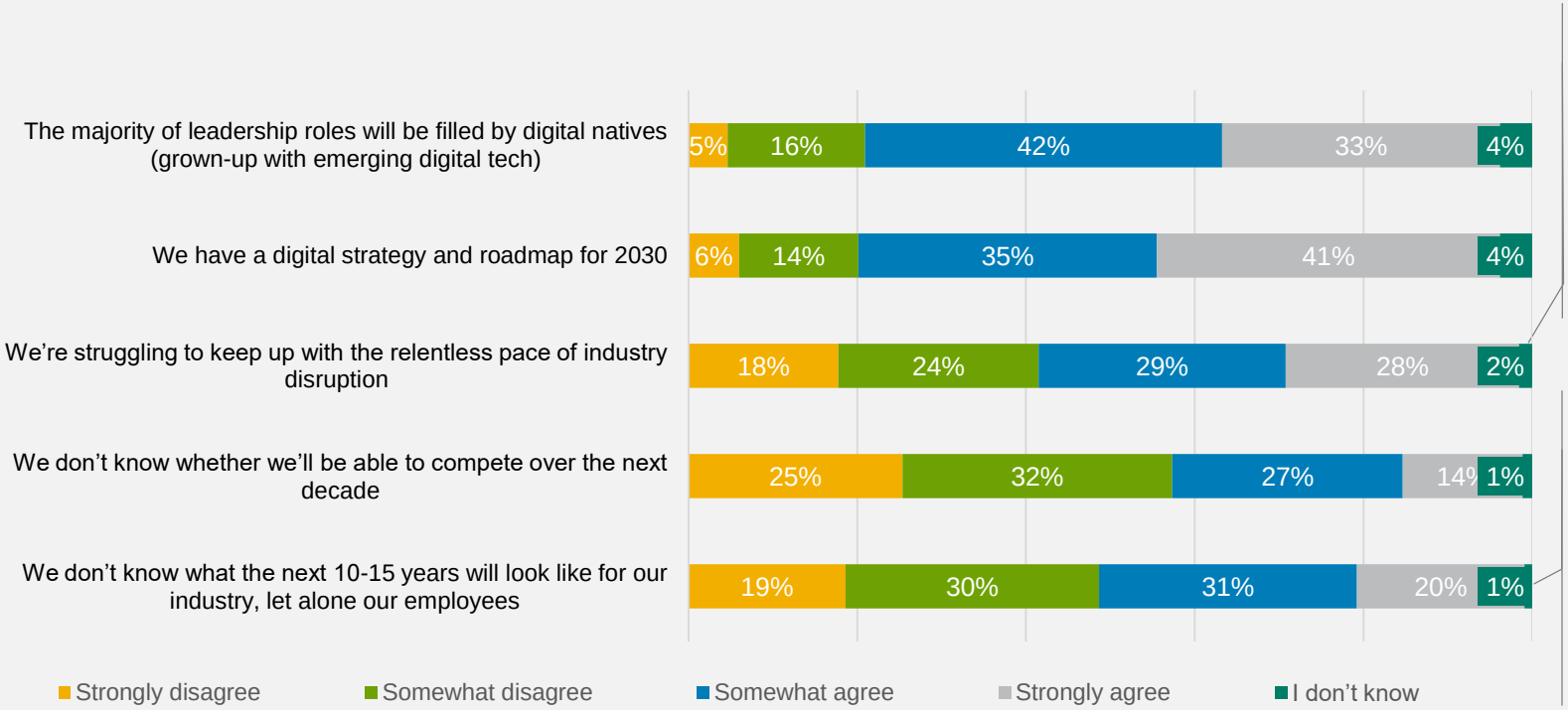
Ability to succeed in the digital era



57% are struggling to keep up with the relentless pace of industry disruption. **43% are not.**

50% don't know what the next 10-15 years will look like for their industry, let alone their employees. **50% are not.**

"To what extent do you agree with the following statements about your organization and its ability to succeed in the digital era?" Base: 3800

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Section 3

Barriers to success

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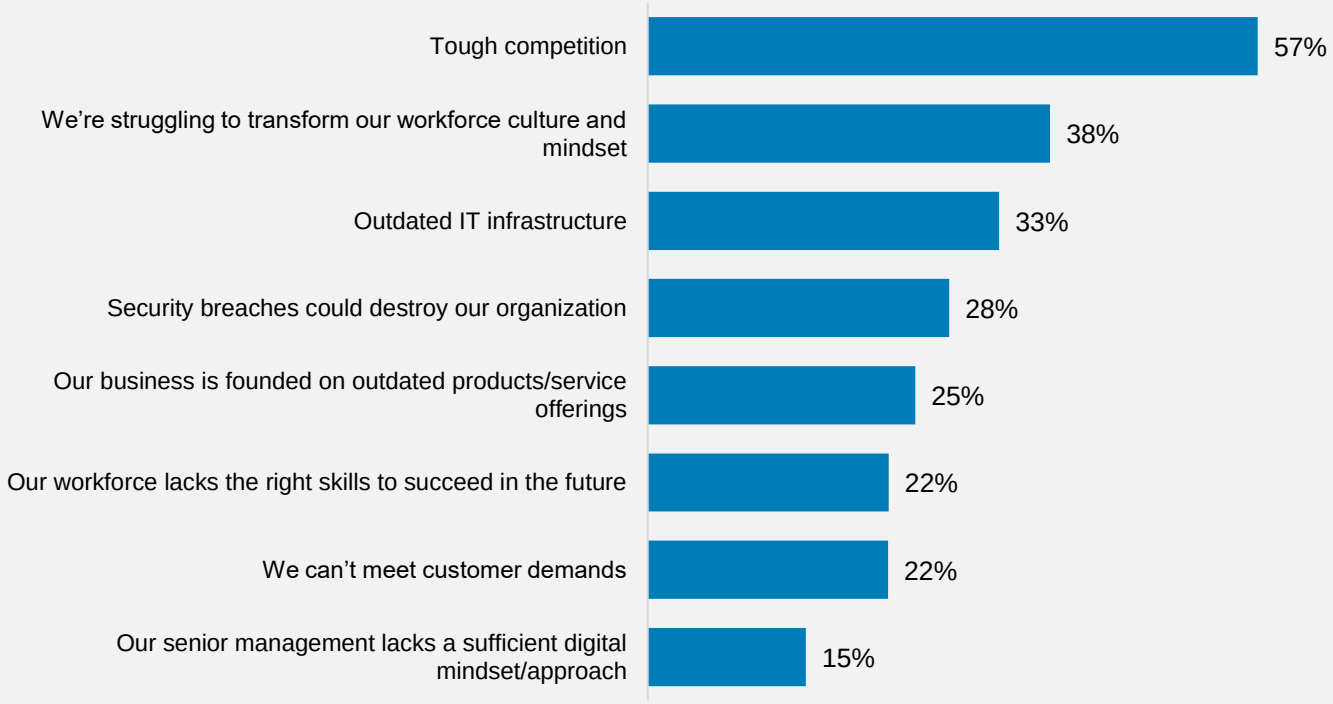
Reasons companies are struggling to compete



Of respondents who agree that they don't know whether they'll be able to compete over the next decade

"Why are you unsure your organization will be able to compete over the next decade? **(related to slide 14)**
Base: 1578

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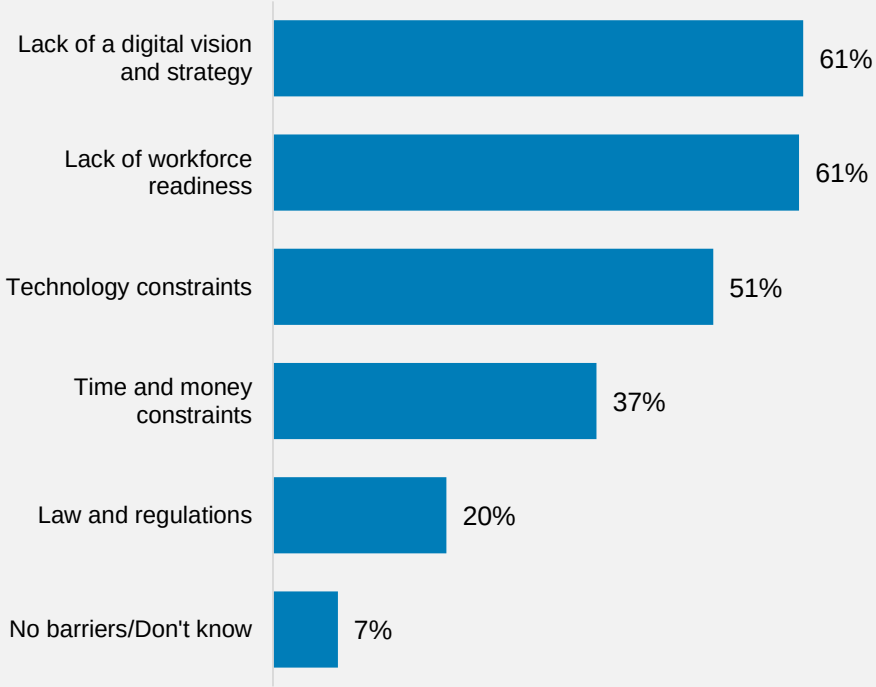
Top barriers to becoming a successful digital business in 2030



93%

say that there are barriers to their organization becoming a successful digital business in 2030 and beyond

"What will be your organization's biggest barriers to becoming a successful digital business in 2030 and beyond?" Base: 3800

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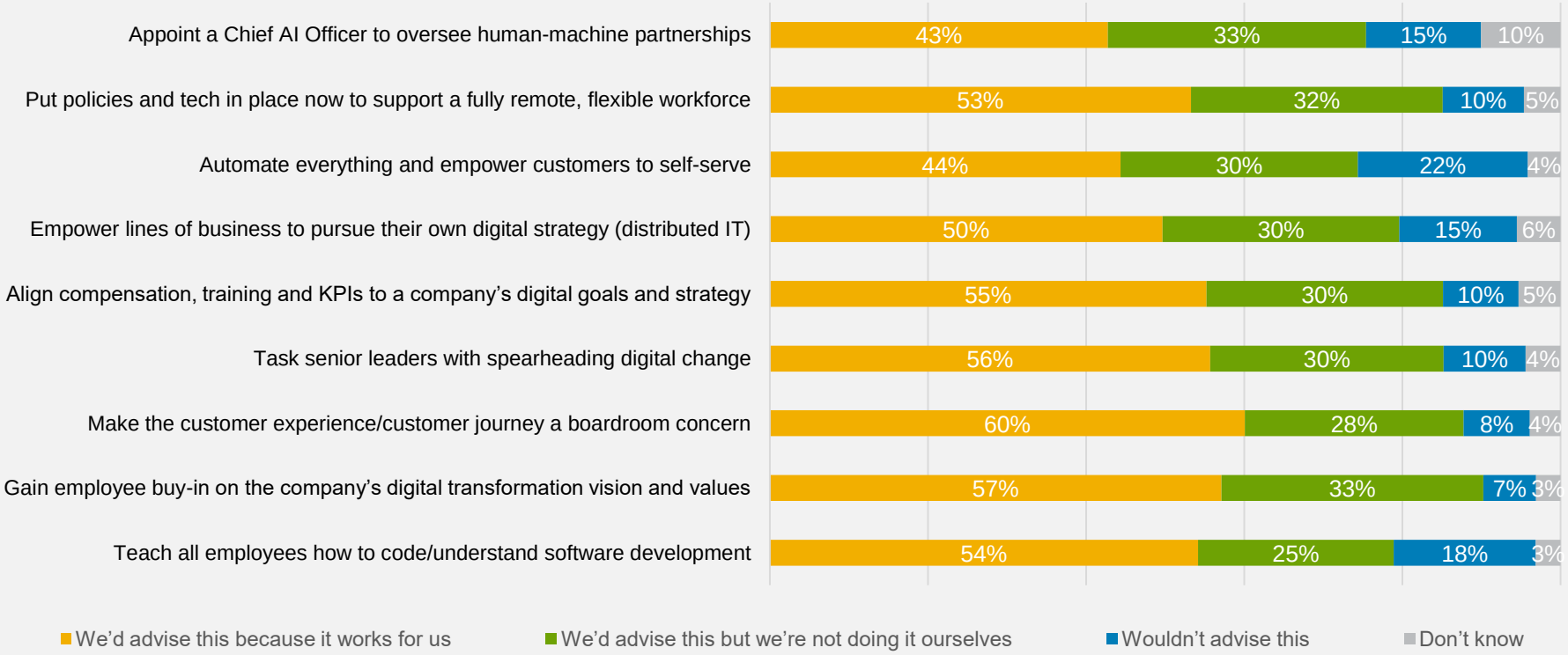
Section 4

The ideal digital organization & how leaders intend to prepare

Advice to accelerate digital transformation



"What advice would you give to others to accelerate digital transformation in their organization?" Base: 3800

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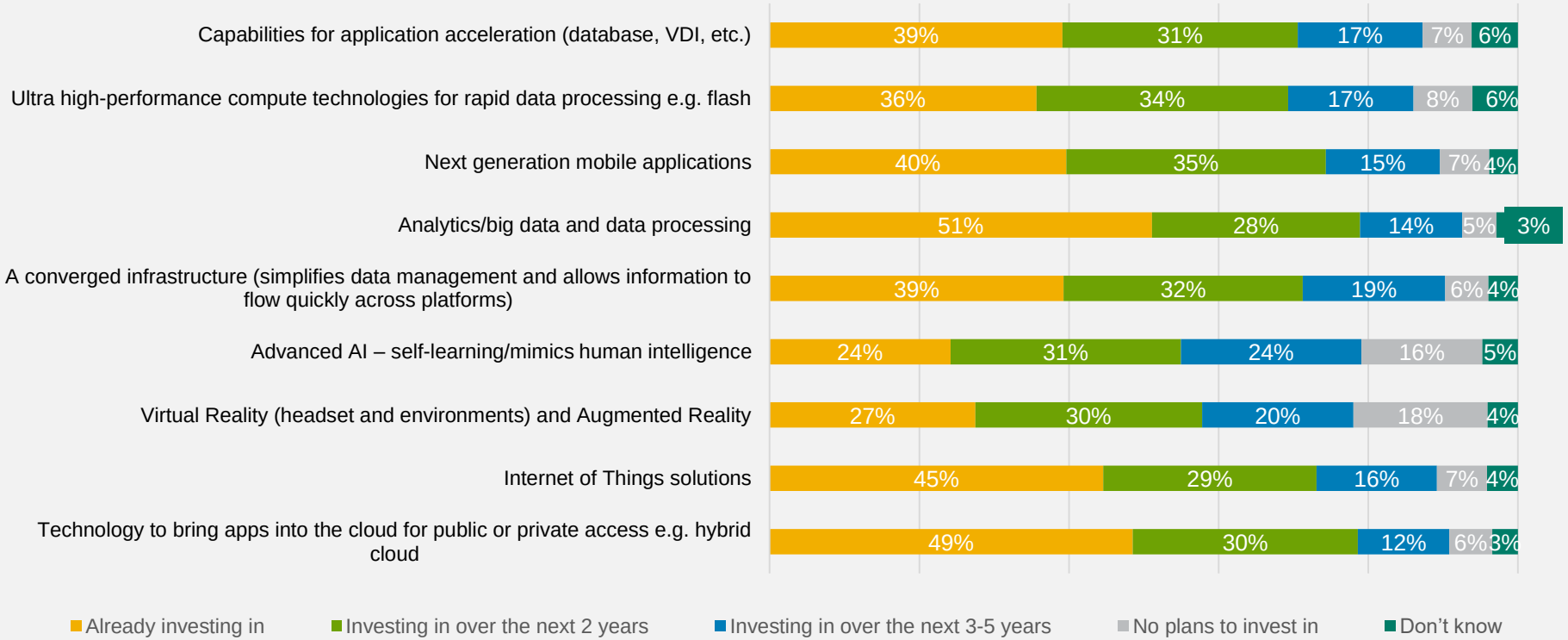
Technology investments to become a digital business by 2030



"What new innovations or solutions is your organization investing in to become a successful digital business by 2030?" Base: 3800

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Top technology investments to become a digital business by 2030

Technology investments	Percentage who will be investing over the next 5 years
1. Advanced AI – self-learning/mimics human intelligence	55%
2. Converged infrastructure	51%
3. VR / AR	51%
4. Ultra high-performance compute technologies	50%
5. Next-gen apps	50%
6. Capabilities for application acceleration	48%

"What new innovations or solutions is your organization investing in to become a successful digital business by 2030?" **(top highlights of slide 22)** Base: 3800

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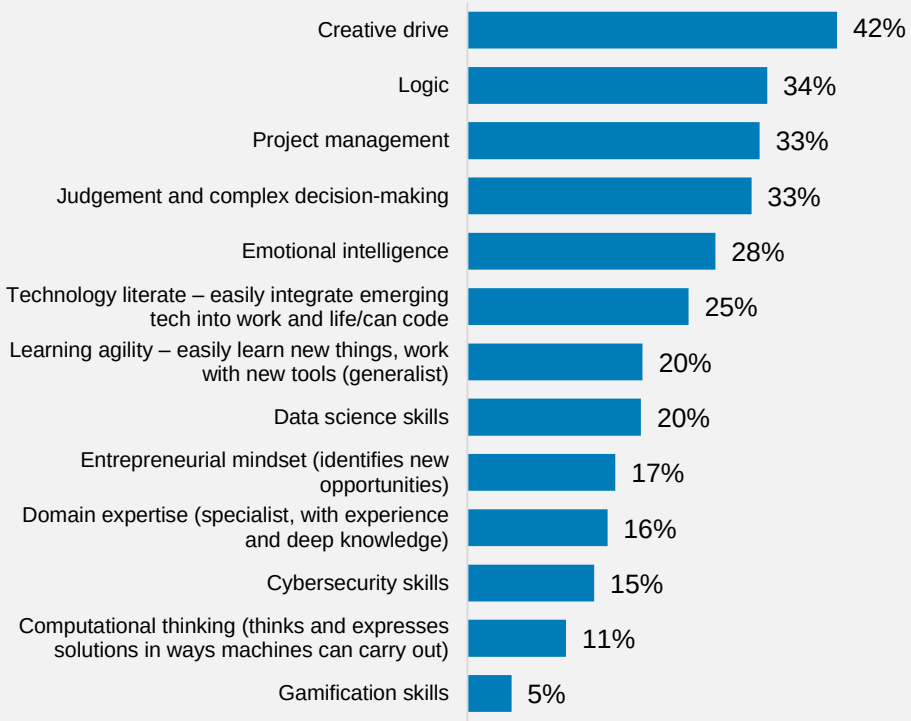
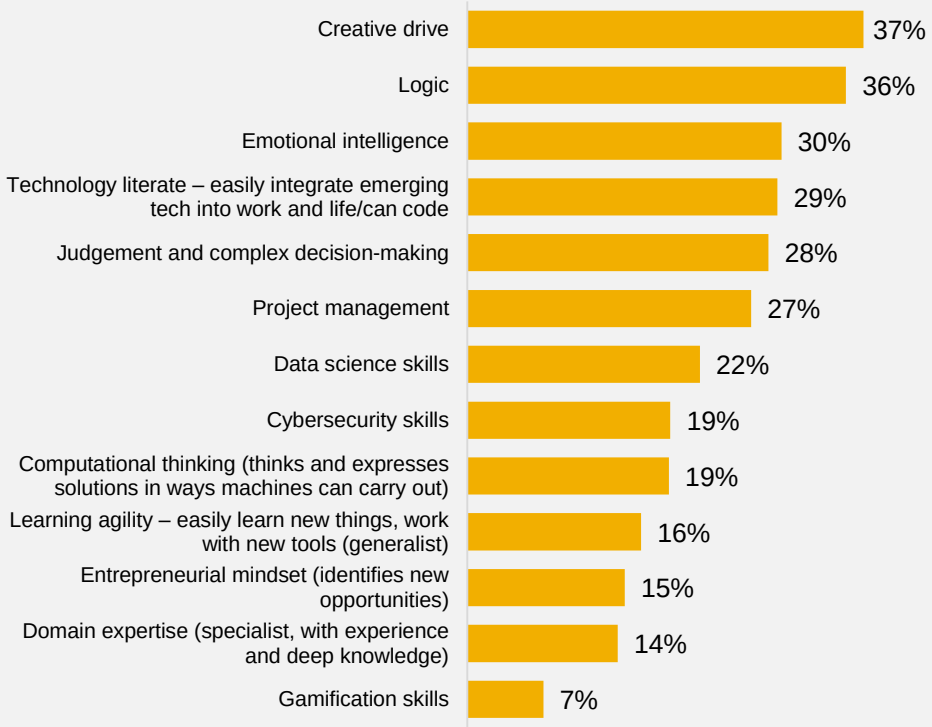
Most valued employee skills

Valued skills for 2017



Valued skills for 2030



“Thinking about today, which employee skills/competencies does your organization value the most? Combination of responses ranked first, second and third” Base: 3800

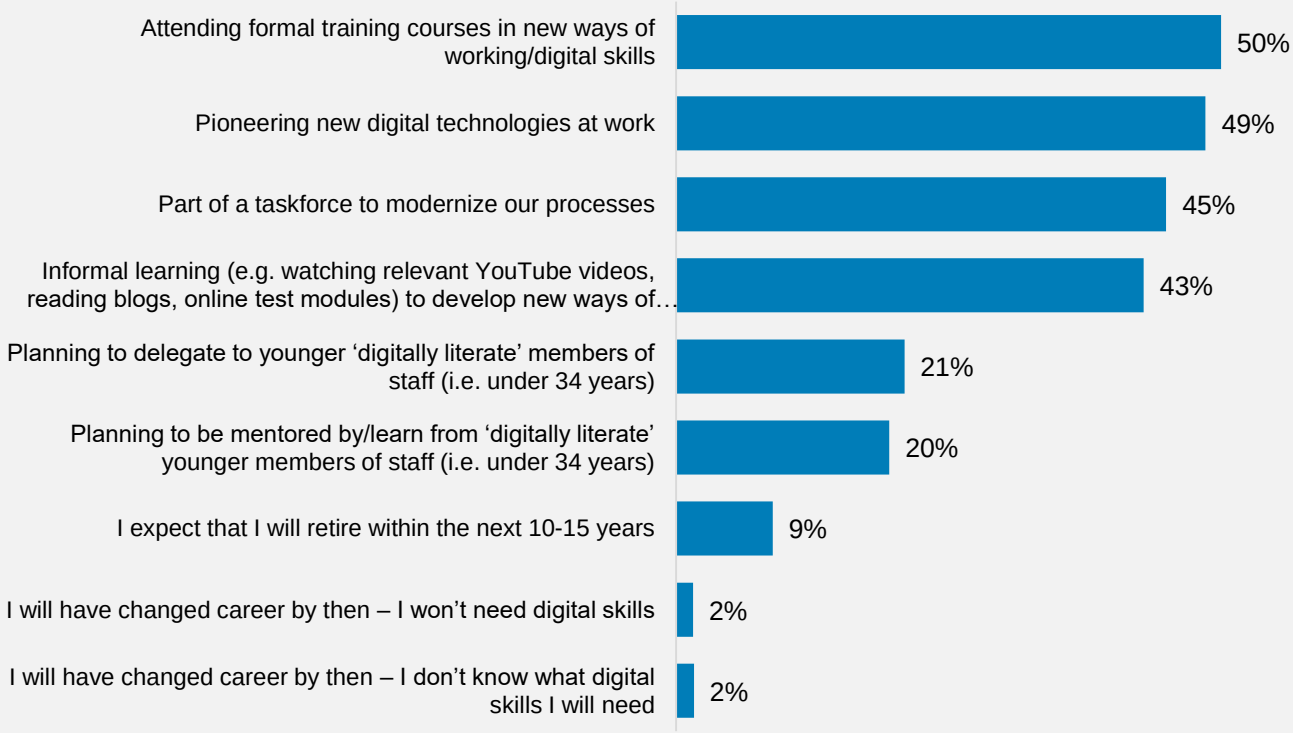
Thinking about 2030 and the era of human-machine partnerships, which employee skills/competencies do you expect your organization will value the most? Combination of responses ranked first, second and third” Base: 3800

Personal preparation for the future

52% of 25-34-year-olds are part of a taskforce to modernize their processes (compared to 24% of 55-64-year-olds)

88%

report they're personally doing something to prepare for their own and their organization's digital future



"What are you personally doing to prepare for you and your organization's digital future?" Base: 3800

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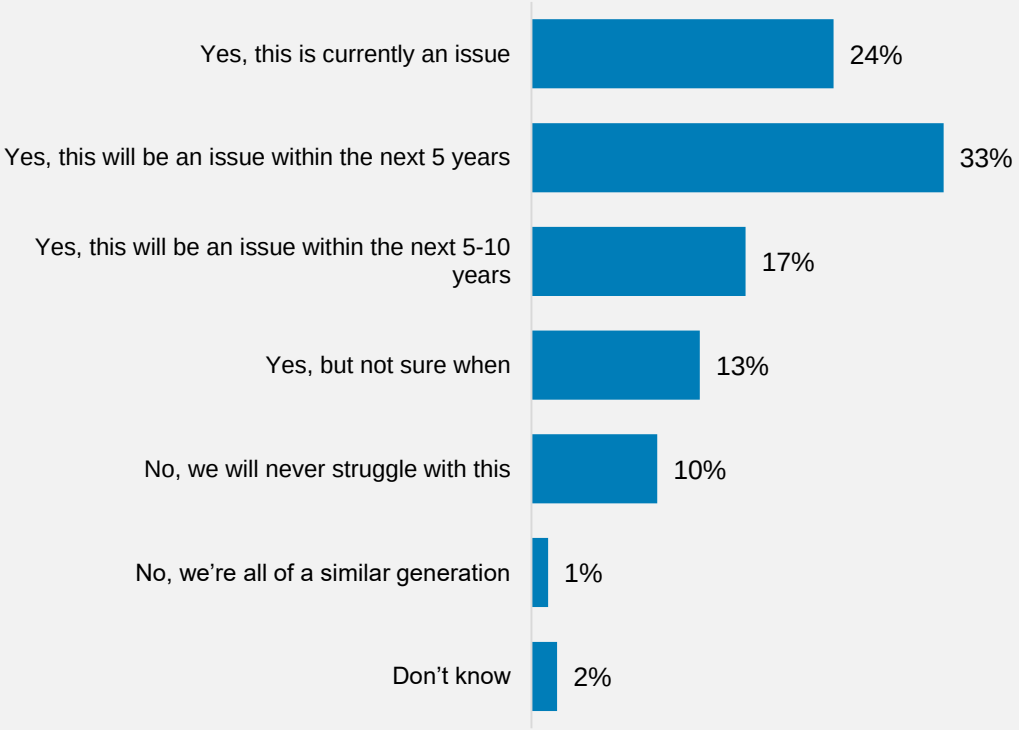
Providing equal opportunities



87% say their organization will struggle to offer equal opportunities to different generations of workers

"Over the next decade, do you think your organization will struggle to offer equal opportunities across your different generations of workers due to varied digital skill-sets and mindsets?" Base: 3800

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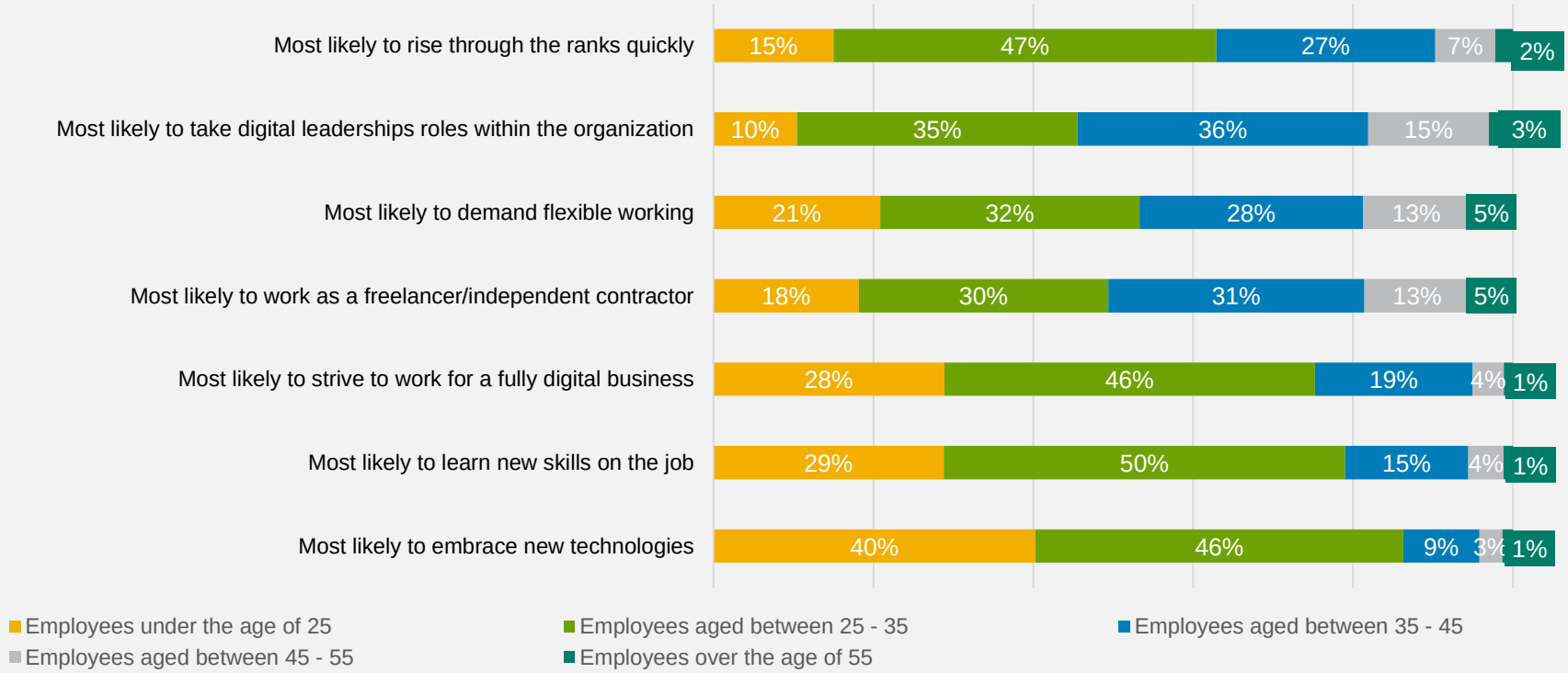
Perceived generational differences



"Which of the above generations are most likely to do the following?" Not showing those who selected 'Don't know'. Base: 3800

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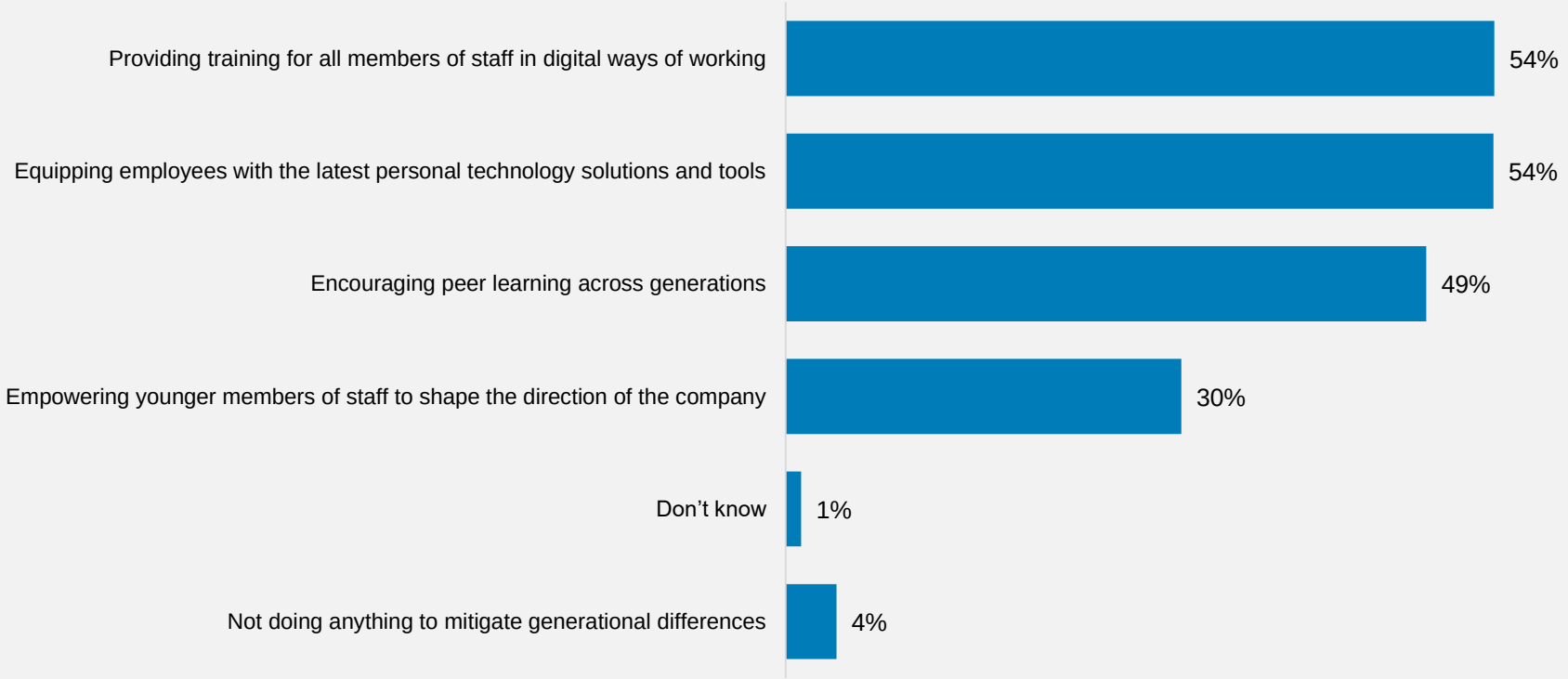
Mitigating generational differences in the workplace



“What is your company doing to mitigate top generational differences sited, across your workforce?” Base: 3295

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To learn more, visit

DellTechnologies.com/Realizing2030

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