

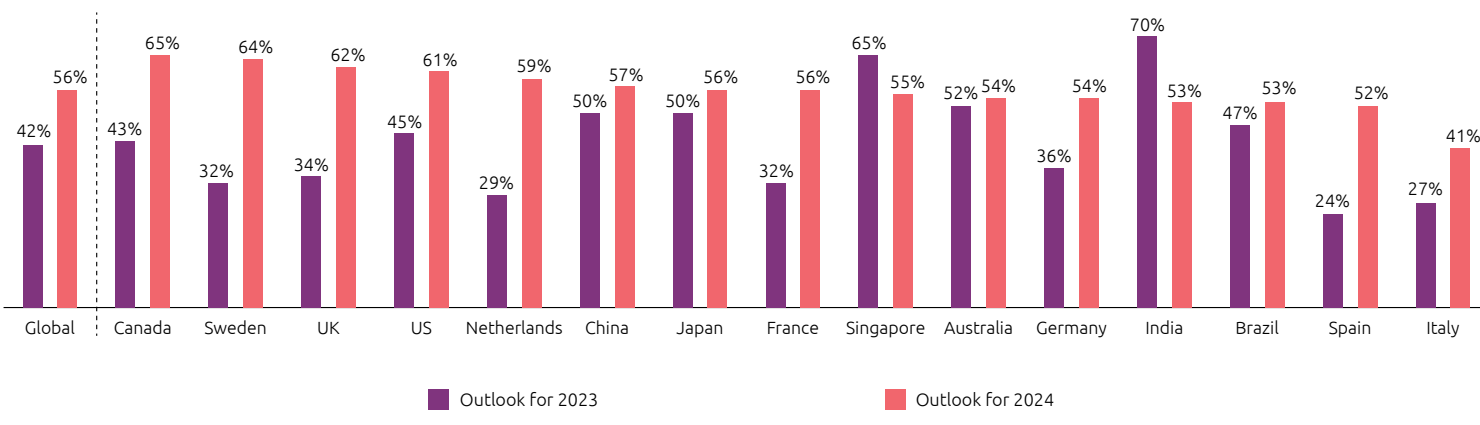
# Embracing a brighter future

INVESTMENT PRIORITIES FOR 2024

## Business leaders are increasingly optimistic and are driving investment in key areas

More business leaders than last year are optimistic about their organizations' performance

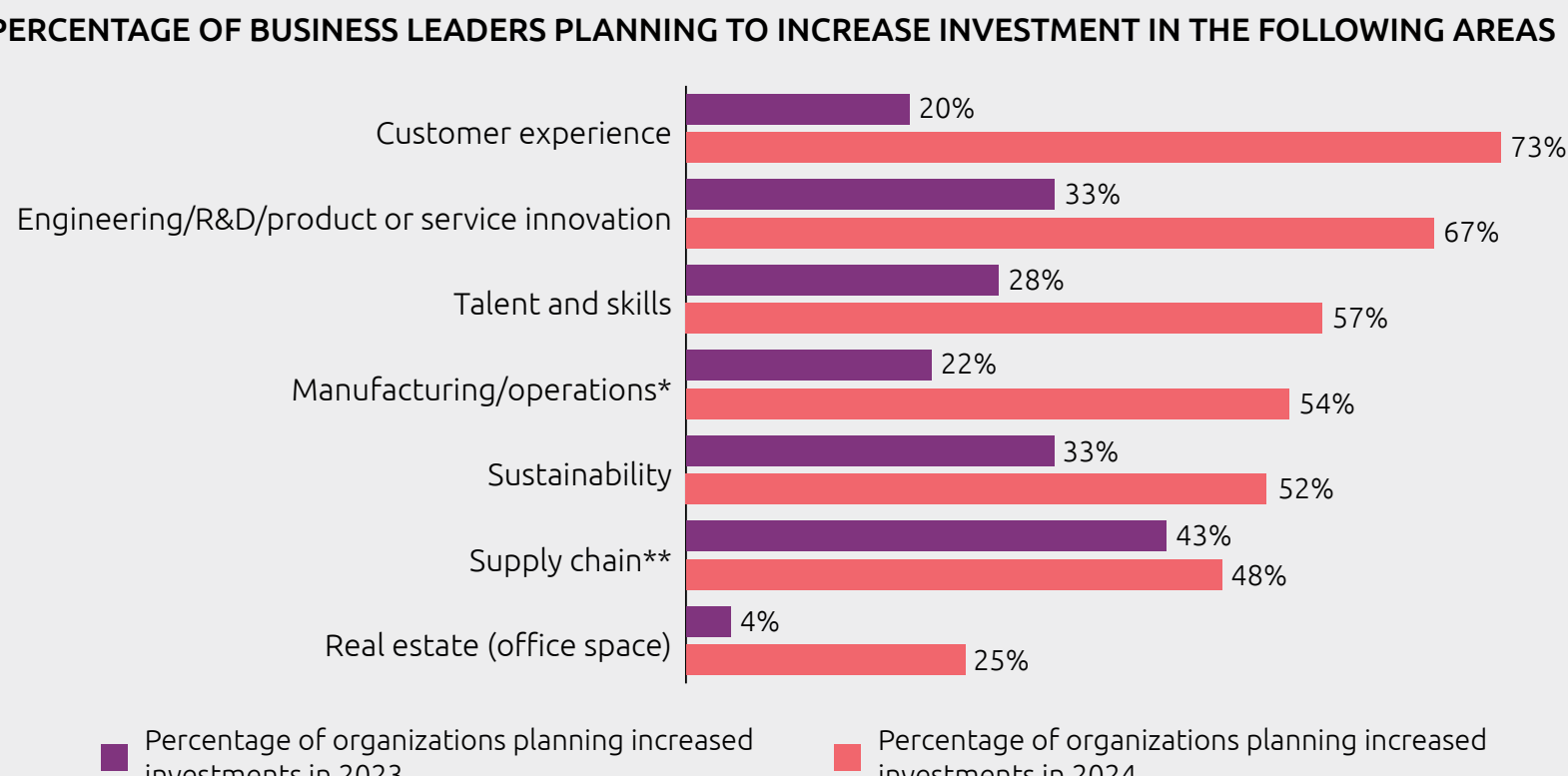
PERCENTAGE OF BUSINESS LEADERS WHO ARE OPTIMISTIC ABOUT THE OUTLOOK FOR THEIR ORGANIZATION, GROUPED BY COUNTRY OF PRIMARY RESIDENCE



Source: Capgemini Research Institute, Global Investment Research Edition 2, November 2023, N=2,000 business leaders; Capgemini Research Institute, Global Investment Research Edition 1, November 2022, N=2,000 business leaders.

Owing to this optimism, organizations plan to increase investment in multiple areas in 2024

PERCENTAGE OF BUSINESS LEADERS PLANNING TO INCREASE INVESTMENT IN THE FOLLOWING AREAS

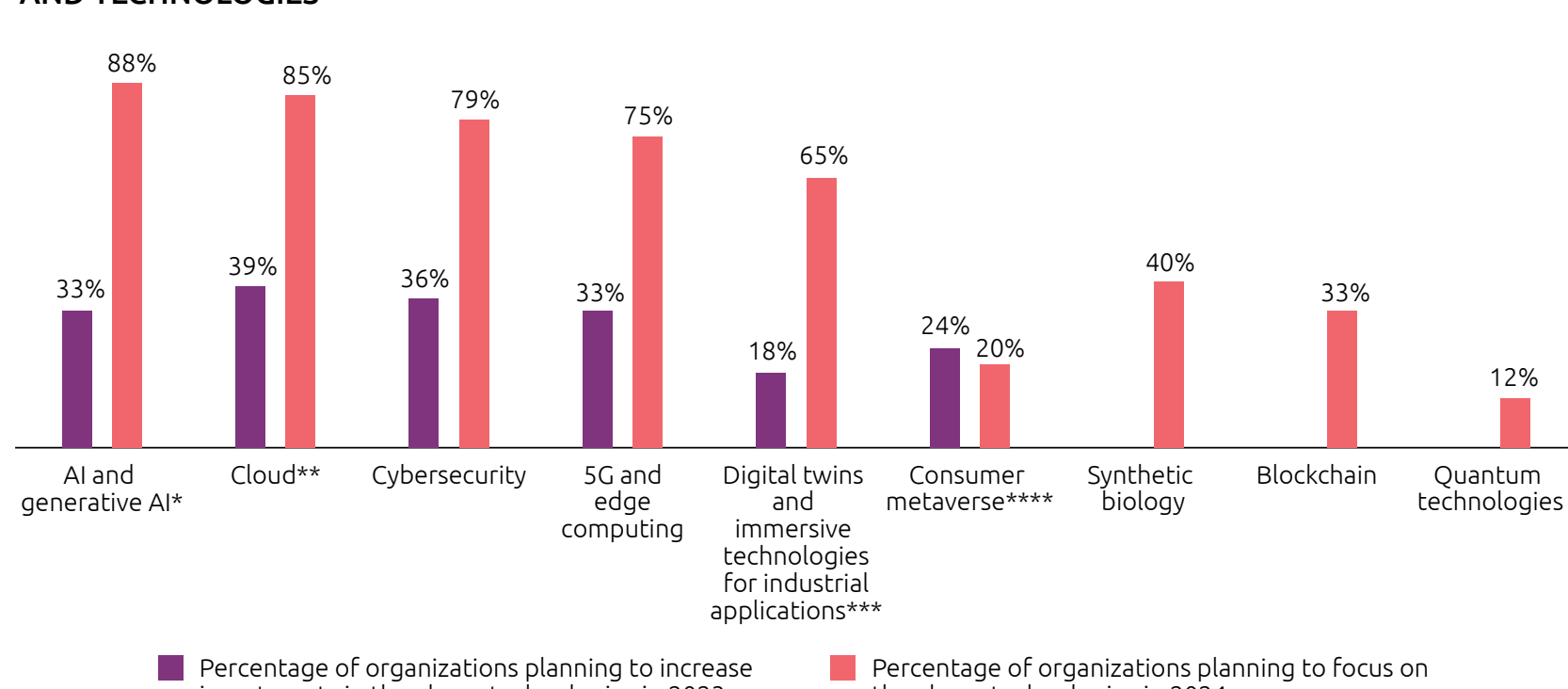


\*Only for manufacturing companies; N=1,087 business leaders. \*\*Only for organizations with supply chain networks; N=1,407 business leaders.

Source: Capgemini Research Institute, Global Investment Research Edition 2, November 2023, N=2,000 business leaders; Capgemini Research Institute, Global Investment Research Edition 1, November 2022, N=2,000 business leaders.

Digital investments will increase for 8 in 10 organizations in 2024, with a majority planning to focus on AI/generative AI, cloud, and cybersecurity

PERCENTAGE OF BUSINESS LEADERS PLANNING TO FOCUS ON THE FOLLOWING DIGITAL TOOLS AND TECHNOLOGIES



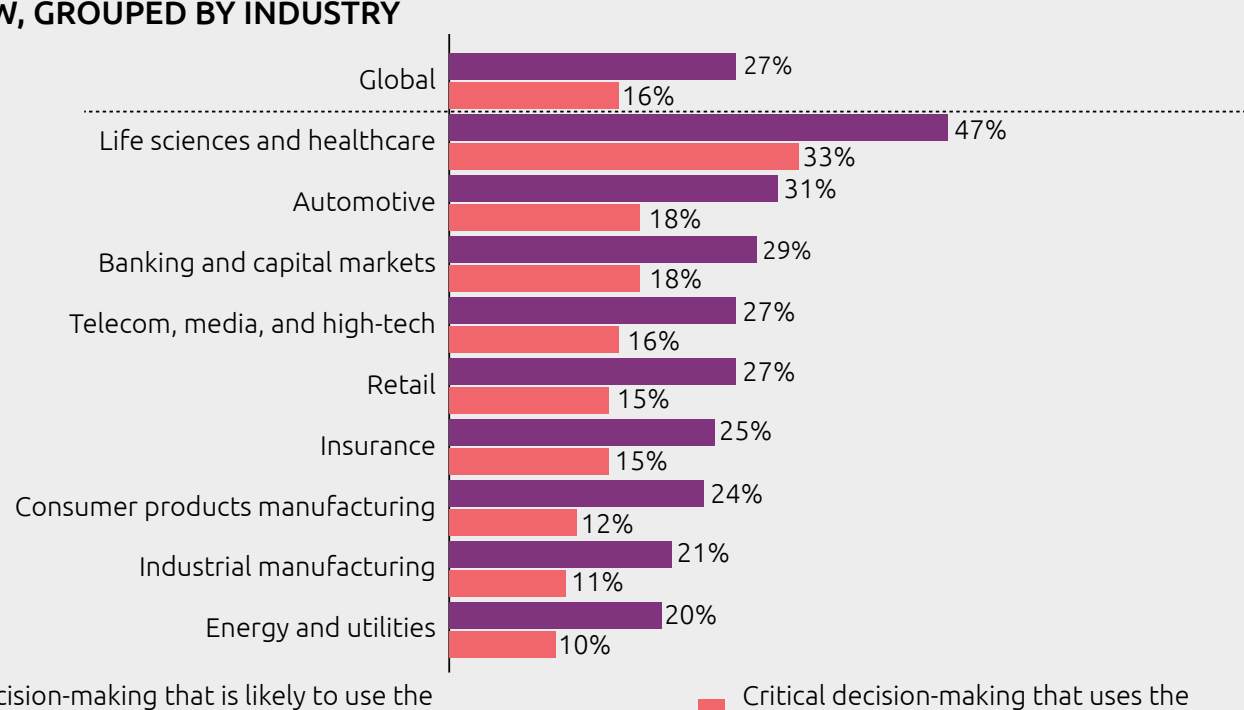
Note: \*Data for "Intelligent automation (AI/ML/cognitive technologies etc.)" in Edition 1 research; \*\*Data for "IT infrastructure and Cloud" in Edition 1 research; \*\*\*Data for "operational technologies such as digital twins, automation, operational visibility, etc." in Edition 1 research; \*\*\*\*Data for "Immersive tech such as metaverse, web 3.0, etc." in Edition 1 research.

Synthetic biology, blockchain, and quantum technologies were not asked about in the research for Edition 1.

Source: Capgemini Research Institute, Global Investment Research Edition 2, November 2023, N=2,000 business leaders; Capgemini Research Institute, Global Investment Research Edition 1, November 2022, N=2,000 business leaders.

## AI will play a more prominent role in critical decision-making

PERCENTAGE OF CRITICAL DECISIONS MADE THROUGH THE ASSISTANCE OF AI – TODAY AND IN FIVE YEARS FROM NOW, GROUPED BY INDUSTRY



Source: Capgemini Research Institute, Global Investment Research Edition 2, November 2023, N=2,000 business leaders.

**57%**

of business leaders believe that generative AI offers an immense opportunity in terms of **innovation** and new **revenue streams**

**56%**

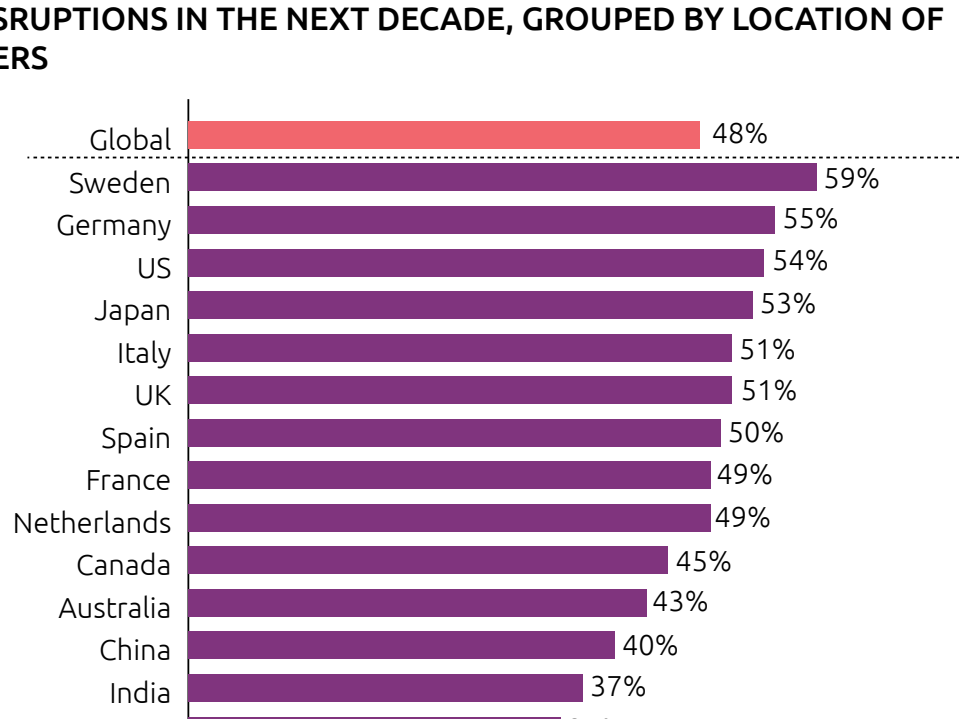
of business leaders emphasize on a **human-centric and -augmented** approach to generative AI

**61%**

of organizations concur that the EU's approach to **regulating AI** will reduce uncertainty

## Climate change is an existential threat that organizations must address

PERCENTAGE OF BUSINESS LEADERS WHO SAY THAT CLIMATE CHANGE WILL CAUSE THE MAJORITY OF OPERATIONAL DISRUPTIONS IN THE NEXT DECADE, GROUPED BY LOCATION OF ORGANIZATIONAL HEADQUARTERS



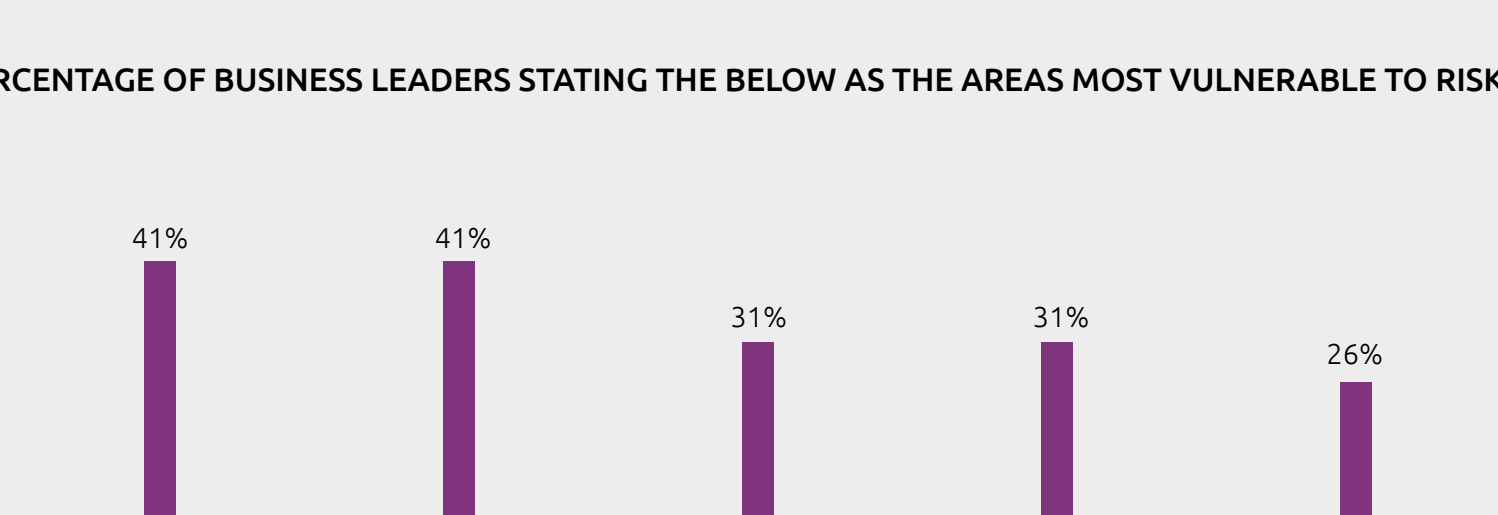
Source: Capgemini Research Institute, Global Investment Research Edition 2, November 2023, N=2,000 business leaders.

**Economic incentives** help drive sustainability and clean tech investments

Organizations are questioning the macroeconomic growth paradigm

## Business leaders still see supply chain as an area of acute vulnerability

PERCENTAGE OF BUSINESS LEADERS STATING THE BELOW AS THE AREAS MOST VULNERABLE TO RISK



\*Question posed only to organizations with supply chain networks.

Source: Capgemini Research Institute, Global Investment Research Edition 2, November 2023, N=2,000 business leaders; N=1,407 business leaders from organizations with supply chain networks.

**49%**

of organizations are **investing in other emerging economies** to reduce reliance on China

**45%**

of business leaders state that a significant portion of their sourcing/production will be **friend-shored** in future

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