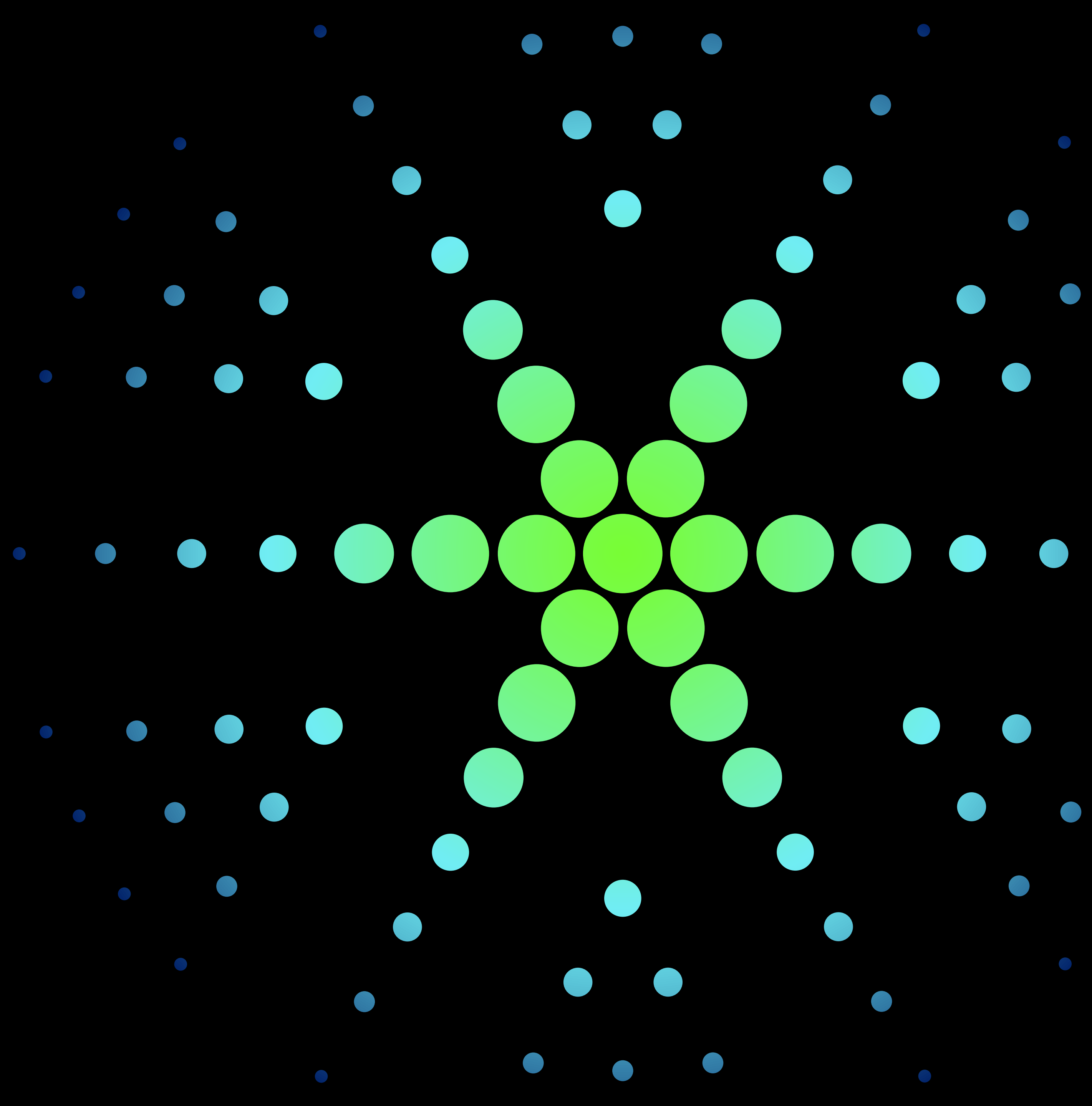


Deloitte.









Unlocking industry advantage
through tech investment

An analysis across six key industries

IndustryAdvantage™



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Industry leaders can use these insights to better triangulate where their industry peers are investing in technology capabilities and the expected value drivers.”



Diana Kearns-Manolatos
Research Leader, Technology Transformation
Deloitte’s Center for Integrated Research





Today's technology investments are expected to shape the future for businesses, but tech's impacts can vary significantly across industries.

Deloitte US analyzed key performance indicators of the value of tech investments across six industries to determine where and how leaders are seeking an industry advantage.

Technology now often enables, drives, and determines an organization's success beyond operational functions. But the same formula of tech investments won't work across all [industries](#).¹ To gain an industry advantage, organizations should look beyond the enterprise functions and focus on the strategic areas—commercial, products, operations—to determine what can give them an edge and how tech investments can help fuel that success.²

While it's generally acknowledged that tech investments power an organization's strategy, innovation, and growth, [Deloitte research](#) shows that most global organizations (81%) still use productivity and other process measures as the leading indicator of digital value.³ While that may have worked for the enterprise functions such as finance and IT, as tech investments increasingly enable these business applications—[research and development](#), customer experience, production, supply chain, and operations—leaders likely should consider a fundamentally different approach to value measurement.⁴

This report builds on over two years of research on technology and value, extracting data from two Deloitte-owned surveys. First, it draws on a proprietary value framework detailed in [Deloitte's 2023 Mapping Digital Value research](#). The analysis covers how six industries are using 46 key performance indicators (KPIs) to determine the value of their investments in seven technologies: cloud-native applications, cloud platforms, traditional AI, data analytics, zero trust security, federated security, and identity and access management (appendix, figure 1).

The results are limited to the top three KPIs, indicative of where leaders may be seeking an industry advantage from these technology investments. Second, this report also uses data from [Deloitte's 2024 Generative AI Wave 2 survey](#) based on the top three benefits industry leaders expect from Generative AI (appendix, figure 2). (See [methodology](#) for more information.)

Methodology

This research draws on more than 2,000 data points from two Deloitte studies:

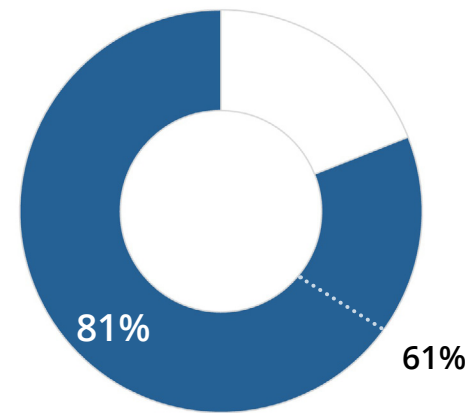
- Mapping Digital Transformation Value: In February 2023, Deloitte surveyed 1,600 global business and technology leaders across 14 countries and six industries: consumer; energy, resources, and industrials; financial services; government and public services; life sciences and health care; and technology, media, and telecommunications. The report detailed five value categories (financial, customer, process, workforce, and purpose) and 46 key performance indicators. This analysis assessed how six industries used those 46 KPIs to a greater extent when investing in six technologies: cloud-native application, cloud platform, traditional AI (AI/ML, deep learning, conversational AI), data analytics, zero trust security, federated security, and identity and access management. We then distilled 1,932 data points to the top three out of the 46 KPIs for each industry, and the eight technologies used with a difference of more than 15-percentage points compared to respondents overall.
- Deloitte's State of Generative AI in the Enterprise Q2 report: Deloitte surveyed 1,982 business and tech leaders across the same six industries and six countries between January and February 2024. We assessed the top three benefits expected from GenAI across six industries.

This report contains general information only and Deloitte is not, by means of this report, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This report is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your business. Before making any decision or taking any action that may affect your business, you should consult a qualified professional advisor.

Deloitte shall not be responsible for any loss sustained by any person who relies on this report.

Consumer vs. overall

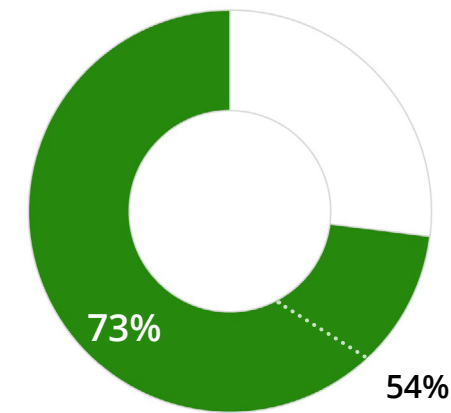
● Zero trust investors using "Customer retention rate" KPI



Consumer respondents investing in **zero trust security** capabilities are 20 percentage points more likely (81%) than those in other industries (61%) to use "**Customer retention rate**" as a KPI

Energy, resources, and industrials vs. overall

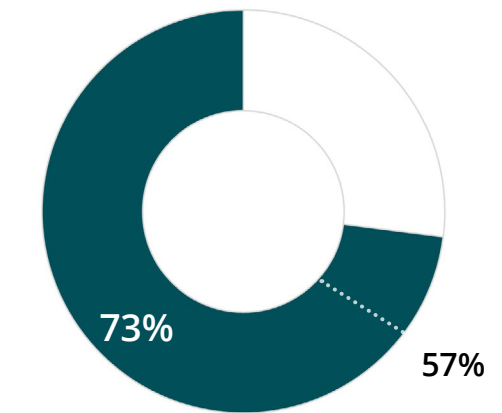
● Traditional AI investors using "Sustainability" KPI



ER&I respondents investing in **traditional AI** capabilities are 19 percentage points more likely (73%) than those in other industries (54%) to use "**Sustainability**" as a KPI

Financial services vs. overall

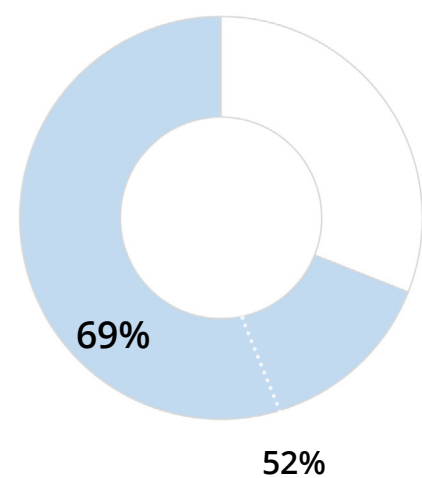
● Cloud-native application investors using "Automation spend" KPI



FSI respondents investing in **cloud-native application** capabilities are 16 percentage points more likely (73%) than those in other industries (57%) to use "**Automation spend**" as a KPI

Government and public services vs. overall

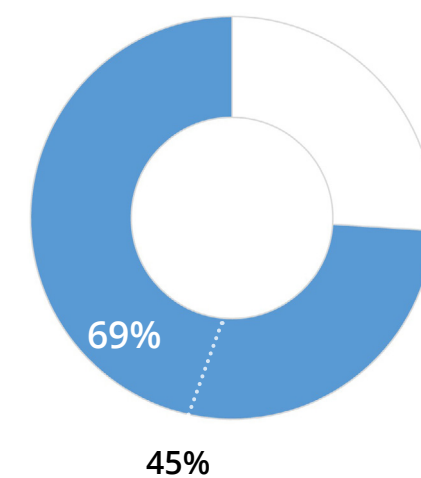
● Identity and access management investors using "Workforce diversity" KPI



GPS respondents investing in **identity and access management** capabilities are 17 percentage points more likely (69%) than those in other industries (52%) to use "**Workforce diversity**" as a KPI

Life sciences and health care vs. overall

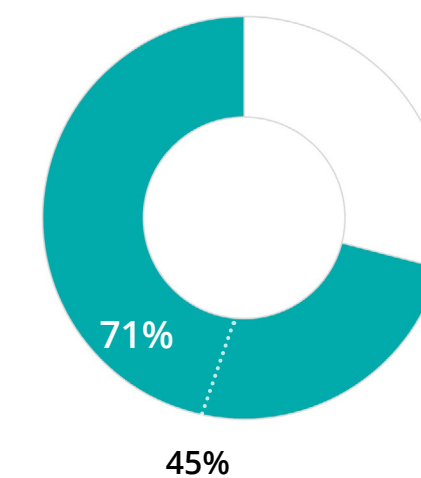
● Federated security investors using "R&D spend on digital technology" KPI



LSHC respondents investing in **federated security** capabilities are 24 percentage points more likely (69%) than those in other industries (45%) to use "**R&D spend on digital technology**" as a KPI

Technology, media, and telecommunications vs. overall

● Cloud platform investors using "Sales of new digital products" KPI



TMT respondents investing in **cloud platform** capabilities are 26 percentage points more likely (71%) than those in other industries (45%) to use "**Sales of new digital products**" as a KPI



Industries



Consumer industry respondents are investing in zero trust security capabilities and measuring the tech's impact with both short- and long-term KPIs

The consumer industry is navigating several concurrent market shifts that are reshaping the industry's future and affecting other industries as well: an evolving society, exponential technology, radical industry upheaval, extreme climate change, and shifting economic policies.⁵ Amid this disruption and transformation, many consumer organizations Deloitte surveyed have tech investments that are focused on trust—and, specifically, on zero trust security capabilities that require customer authentication or verification to protect customer data. According to Habeeb Dihi, principal, Deloitte Consulting LLP and US Cloud and CIO Advisory Services leader for retail and consumer products, “With data and privacy breaches a frequent occurrence in today's landscape, consumers are increasing their awareness about how their information is utilized, stored, and monetized.”

“Consumers increasingly prefer brands with higher reputational and trust scores, and larger, well-known brands used to have an advantage here,” he says.⁶

“*However, as privacy and security-first innovations continue to become more ubiquitous and consumer-friendly, we expect to see upstart brands be able to neutralize some of this reputational advantage over time. To that end, cybersecurity, including zero trust capabilities and multilayer threat management, is a persistent board-level topic across consumer organizations. The adage that trust takes a lifetime to build and a moment to lose is often top of mind as companies continue to invest in this space.*”

Joe Greiner, a senior manager focused on transportation, hospitality, and services technology at Deloitte Consulting LLP, echoes this point: “Transportation, travel, and hospitality enterprises think about value in completely different ways. However, they all share a focus on building and maintaining trust with the customer through reliable networks, products and services, experiences, and operations. To help gain a competitive advantage, many are accelerating their digital agendas focusing on software product development, the systematic application of AI, the amplification of the workforce, and frictionless experiences. These ambitions are likely not possible without a reliable, secure, resilient, and trustworthy foundation.”





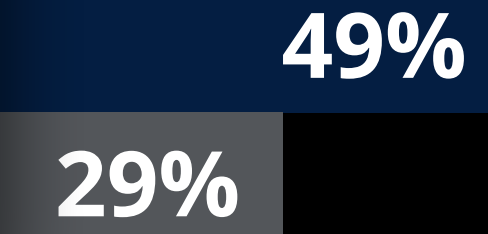
Consumer tech value signals

Consumer industry respondents are investing in zero trust security capabilities and measuring the tech's impact with both short- and long-term KPIs

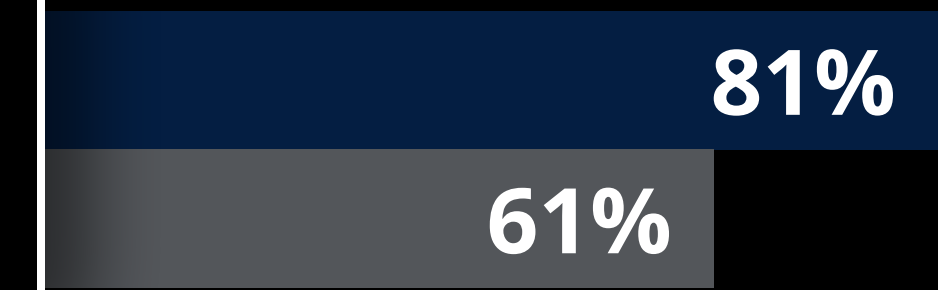
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KPI utilization

Intangible assets as a percentage of long-term assets

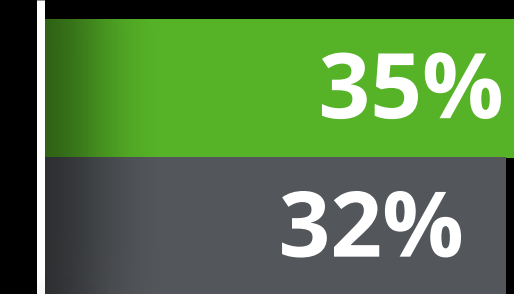


Customer retention rate



Expected benefits

Reduce costs



Shift workers from lower- to higher-value tasks



Overall

Zero trust security

Generative AI



Consumer (cont.)

Tech value signal

Consumer organizations surveyed investing in zero trust security capabilities in the value study tend to use two indicators of tech investments' value significantly more than others: intangible assets as a percentage of long-term assets, or how investment in new ideas will factor into long-term success (49% of the consumer organizations we analyzed use this indicator, compared to the 29% survey average); and customer retention rate, or how the zero trust security capabilities and other tech investments will affect customer retention (81% versus the 61% survey average).



Industry example

Christopher Ahn, a senior manager at Deloitte Consulting LLP and the Consumer Industry leader for the automotive practice, offers this example to illustrate the consumer industry's focus on cybersecurity investments: "In today's passenger cars, digital integration and connectivity necessitate robust cybersecurity. With modern vehicles having more software lines of code than fighter jets,⁷ data protection, anti-hacking measures, and passenger safety should be mandatory for car manufacturers and tech providers."



Energy, resources, and industrials respondents turn to sustainability measures for cloud, AI, and zero trust security investments

As the effects of climate change increase across industries, more organizations are directing technology investments to help achieve their sustainability goals and measure their progress. This is especially true in the energy, resources, and industrials (ER&I) industry.

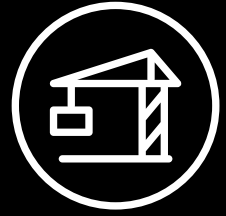
For example, consider utility companies, says Jian Wei, principal, Deloitte Consulting LLP and Deloitte US ER&I Industry Ecosystems and Alliances leader. “Due to climate change, extreme weather events have become more frequent and severe, posing a threat to power lines and equipment. Untrimmed trees and branches can cause fire hazards, power outages, and safety issues for customers and communities. To help address this challenge, utilities should allocate more budget and resources to inspect and trim the vegetation along their networks,” she says.

“They’re often using a full stack tech solution. It can include IoT remote sensing, which allows the use of satellites, drones, and helicopters to collect real-time data on vegetation conditions. This can reduce the need for sending people out and help increase the accuracy and coverage of the inspections. AI and GenAI capabilities can collect enough data to construct a 3D twin of the network and predict future vegetation growth. This data environment is cloud-native and can help the workforce to manage vegetation risk and create greater resilience. In the US, utilities spend US\$8 billion to \$10 billion a year on vegetation management.”⁸

“Cloud, AI, and other technologies are being deployed across ER&I sectors and beyond to help organizations meet their sustainability goals,” adds Rick Perez, principal, Deloitte Consulting LLP and the GenAI leader for ER&I.

“**Asset-intensive industries are at the forefront of the energy transition—deploying technologies that enable them to achieve their sustainability goals through electrification, increased reusability, and improved asset efficiency. AI technology at the edge, interconnected with cloud-native applications, can provide a scalable technology platform for progressing these objectives.**”



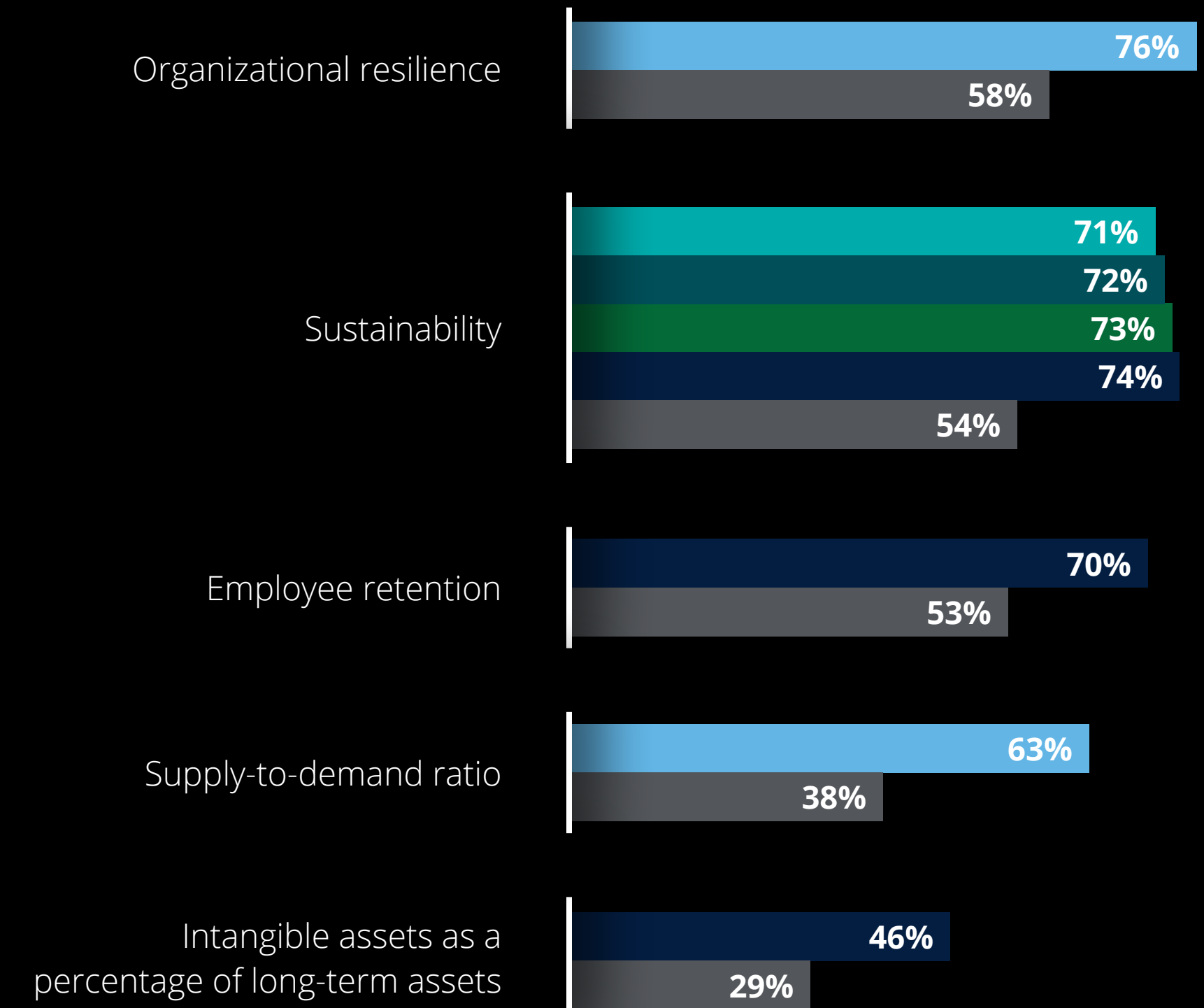


Energy, resources, and industrials (ER&I) tech value signals

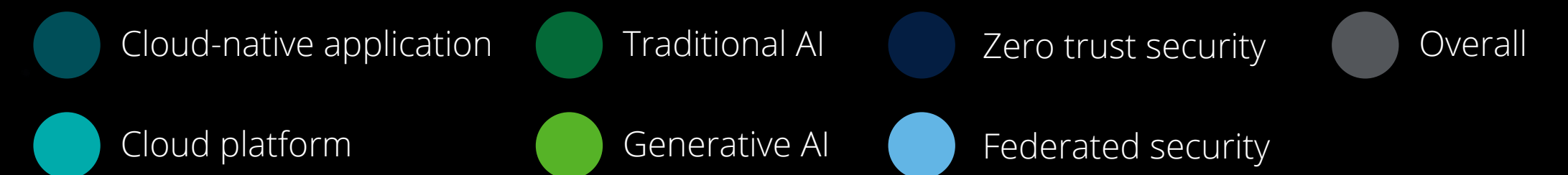
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KPI utilization



Expected benefits





Energy, resources, and industrials (cont.)

Tech value signal

ER&I leaders who participated in the value survey report that they track the sustainability impacts of their technology investments more often than respondents from any other industry for four tech capabilities—cloud platforms (71%), cloud-native apps (72%), traditional AI (73%), and zero trust security (74%)—compared to the 54% sample average. ER&I respondents who are investing in federated security also measure their tech investments' impact on organizational resilience (76%) and supply-to-demand ratio (63%), signaling their priorities to help drive an industry advantage.



Industry example

Recently, Pacific Gas and Electric Co. deployed a cloud-based energy management system that analyzes data from resources like electric vehicles and battery energy storage. Intelligent solutions like these can empower utility companies to become more efficient, achieve a clean energy future, and drive greater industry advantage.⁹



Financial services industry respondents use a broader set of KPIs for their federated and zero trust security investments, focused on assessing their impact on the bottom line

“Companies in the financial services industry have been and continue to heavily invest in digital transformation; it is often a priority to support maintaining and growing market share,” says Kevin Laughridge, principal, Deloitte Consulting LLP and Banking and Capital Markets Artificial Intelligence leader. “Investment in transformation should deliver a return,” he says. “Tech works if it helps enable business growth through greater accuracy, timeliness, customer value, or efficiency.”

Adds Nikhil Roychowdhury, principal, Deloitte Consulting LLP and Banking and Capital Markets and Cloud Strategy leader for Deloitte US: “The focus on these KPIs is often based on the need to understand if and how tech investments like cloud, AI, or cyber are moving the needle in terms of risk reduction, revenue growth, customer experience, developer productivity, or any other dimension that is deemed important to track at the enterprise level.”

“*We are seeing many leading financial services institutions taking steps to invest in a data and tooling ecosystem that can enable more self-serve visibility into these KPIs.*”



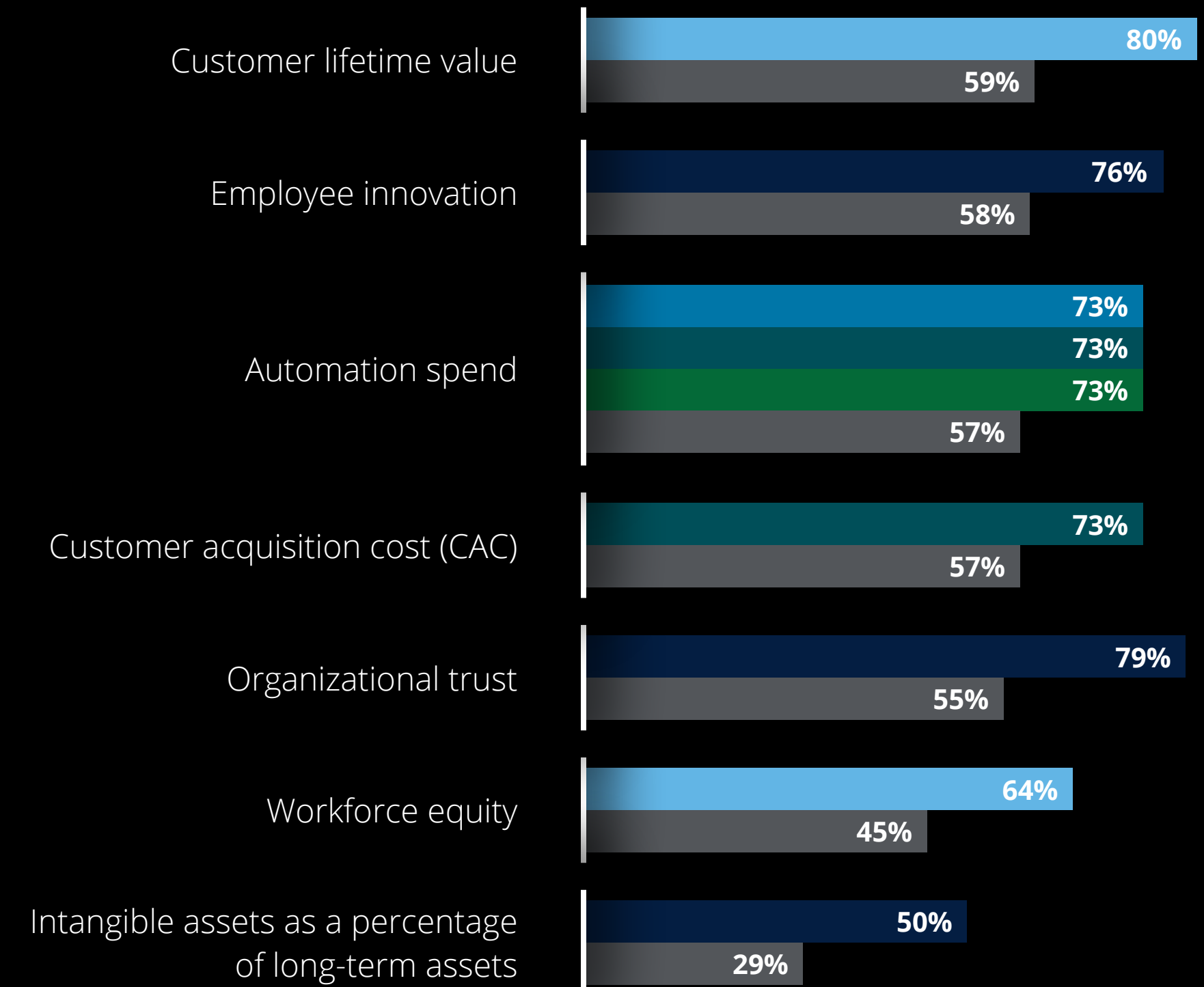


Financial services tech value signals

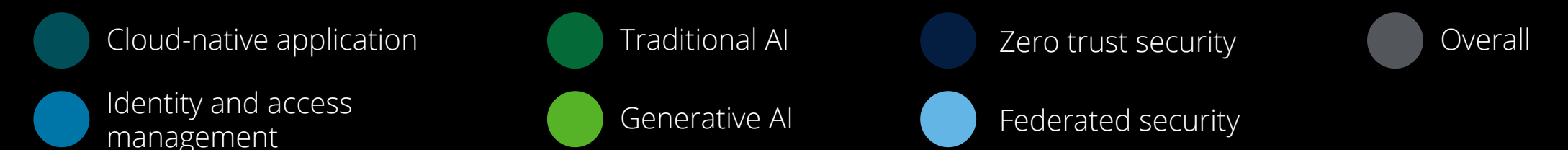
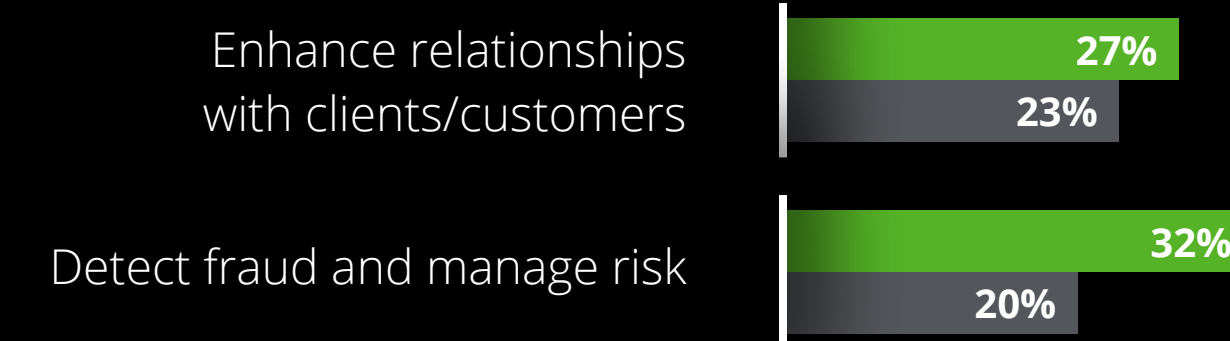
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KPI utilization



Expected benefits





Financial services

(cont.)

Tech value signal

In general, financial services industry respondents measure technology value more holistically than other industries in the Deloitte . Their tech investments are more focused on federated security, and they're using customer lifetime value as a key value metric to assess the tech's impact. When investing in zero trust security capabilities, they're more likely than other industries' respondents to assess the tech's impact on organizational trust, employee innovation, and intangible assets as a percentage of long-term assets. For cloud-native investments, as well as investments in traditional AI and identity and access management, financial services respondents report a heavier focus on automation KPIs than others.



Industry example

[Deloitte's Financial Services Outlook 2024](#) finds that the lines across industries are blurring. This convergence makes strong financial capabilities critical for businesses to thrive.¹⁰ That requires banks to invest in technologies that enable them to build and maintain trust and security—like zero trust capabilities—across an ever-growing ecosystem to drive returns. For instance, one leading financial institution in Germany, implemented a zero trust security strategy to enable digital transformation and organizational trust.¹¹



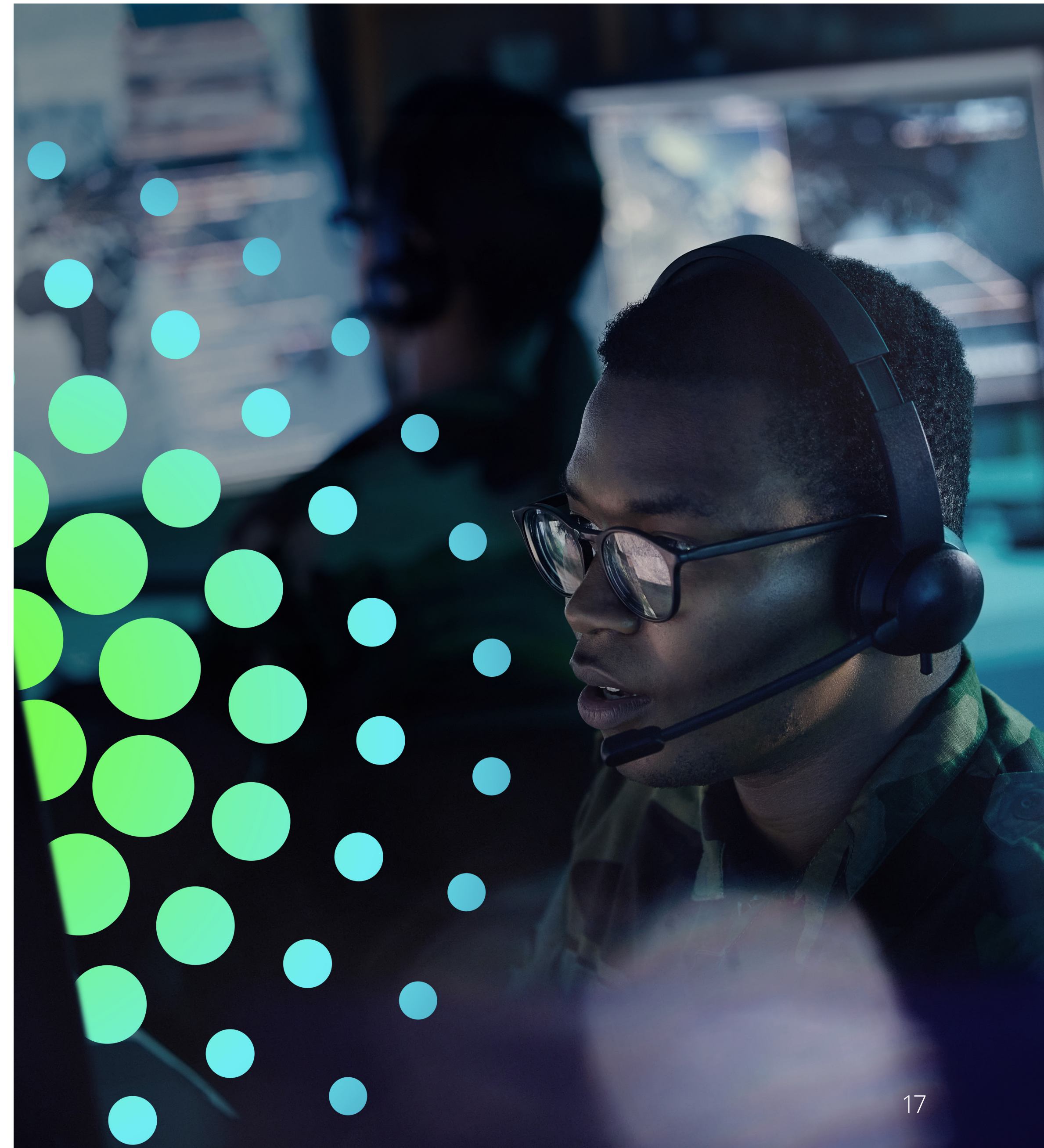
Government and public services

respondents who are investing in zero trust security use organizational trust, sustainability, and workforce inclusion KPIs—but AI measures differ

Trust has long been embedded on governments' strategic agendas, but the issue has come to the fore again as government service delivery is being transformed by technology, including the latest waves of transformation introduced by Generative AI.

"Government should remain steady in its mission: Deliver improved services, enhance citizen engagement, protect our people and assets, and improve our human experience," says Vineet Gupta, principal, Deloitte Consulting LLP leader for [Deloitte US focused on government and public services](#). "This role in holding up the social and security fabric should stay intact as Generative AI creates and continuously accelerates the disruption to labor markets, warfare, information, and beyond. This level of disruption will likely require government agencies to deliver with more agility, creativity, and innovation." There should also be a tech-specific focus on trust, he says.

“ Without trustworthy AI, Generative AI technologies may deteriorate trust and create adverse results like the incorrect distribution of government funds. Trustworthy AI can help mitigate these risks, increase public trust in AI, and encourage economic growth and global competitiveness.”



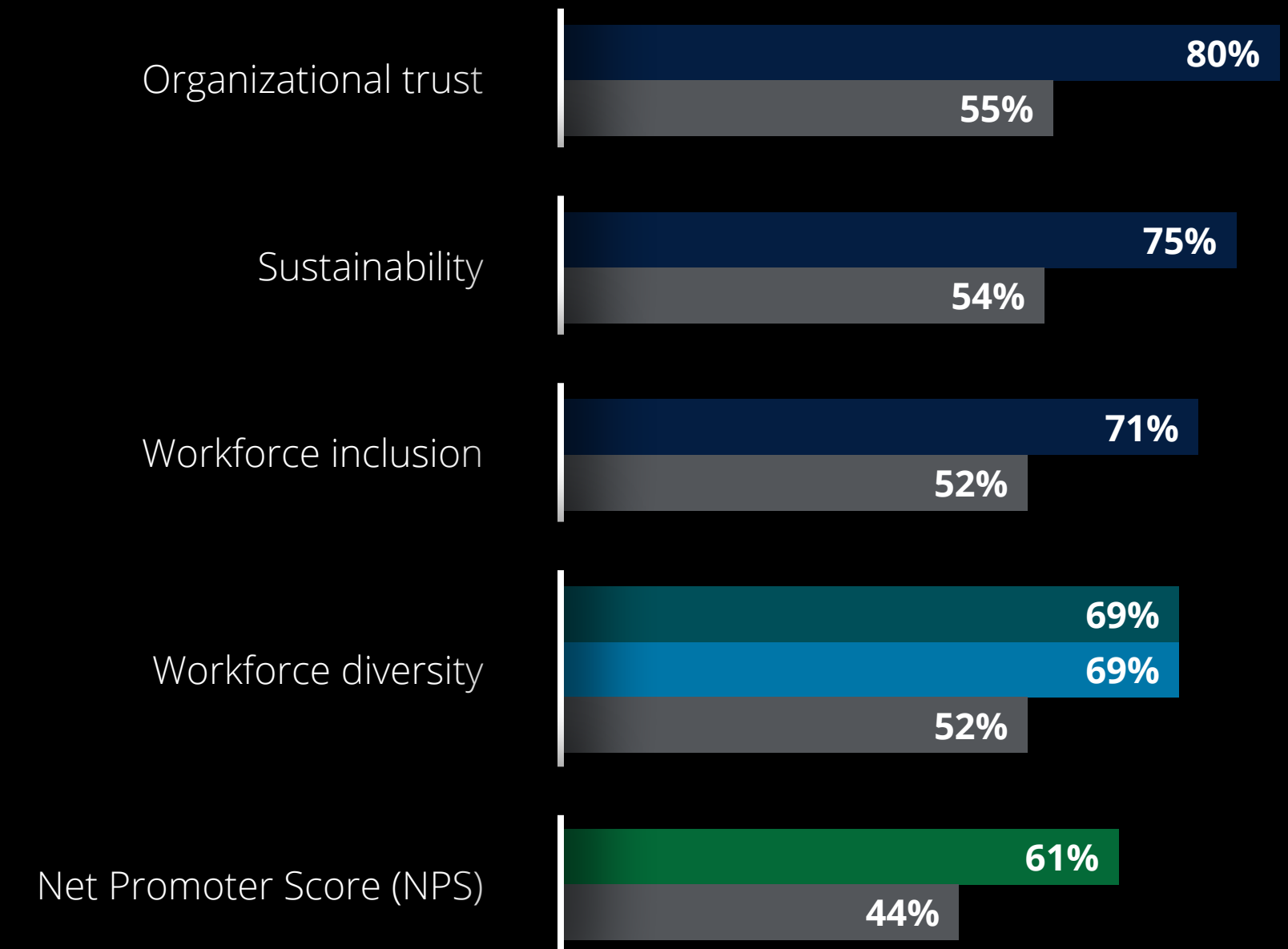


Government and public services tech value signals

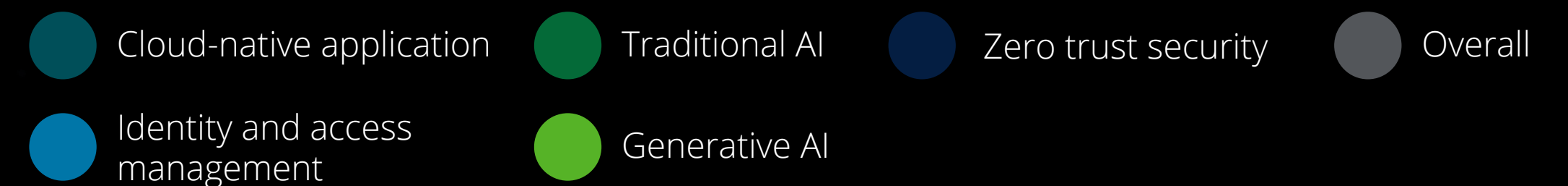
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KPI utilization



Expected benefits



Source: Deloitte Center for Integrated Research analysis



Government and public services (cont.)

Tech value signal

Government and public services organizations that were represented in our survey are heavily focused on purpose KPIs to assess the impact of their tech investments. For example, when these value survey respondents are investing in zero trust security, they use organizational trust (80%), sustainability (75%), and workforce inclusion (71%) metrics, compared to the 52% to 55% sample average. This could indicate that respondents are using zero trust security—a critical cyber investment—to enable organizational trust and drive industry advantage.

Sixty-one percent of government and public services respondents investing in AI use Net Promoter Score (indicative of citizen satisfaction) more than others, while GenAI expectations are more focused on improving efficiency and productivity according to our data.

Industry example

Deloitte's 2024 Government Trends research shows that customer experience is a strong predictor of citizen's trust in government. Therefore, it makes sense that these two KPIs (NPS and organizational trust) are a higher priority when investing in zero trust capabilities. The zero trust security investment provides an important opportunity to help enable trusted outcomes while the AI investments and focus on NPS can positively affect customer experience—a citizen trust predictor.

For example, in September 2023, the Office of the Federal Chief Information Officer issued a memorandum calling for all federal agencies to deliver a digital-first public experience. This builds on the earlier memo regarding moving government toward zero trust cybersecurity principles. The initiative aims to support better customer experiences with government websites and improve customer trust in federal agencies.¹² Deloitte research refers to this relationship as the “virtuous cycle” between digital customer experience and trust in government, whereby one enables the other.¹³



Life sciences and health care

respondents who are investing in cyber and GenAI are looking for impact on R&D spending and organizational trust

Life sciences and health care companies that participated in our value survey are investing in cyber—both federated security and zero trust security capabilities—likely to help better enable trusted data solutions across research, clinical trials, and drug development and delivery, thus fostering greater innovation and problem-solving.

Generative AI is also expected to extend the value they're seeing from data and AI investments, says Bill Fera, principal, Deloitte Consulting LLP and Deloitte US GenAI leader for life sciences and health care.

“*GenAI has the potential to transform the way life sciences and health care organizations fight disease, engage in clinical trials, and research and deliver life-enhancing therapies and life-saving cures,” he says.*

“Deloitte has estimated that investments in GenAI capabilities at scale could save a large biopharma company between US\$5 billion and US\$7 billion over five years.¹⁴ R&D strategies make up as much as 40% of that number, with other value adds expected across manufacturing, supply chain, and traditional business functions. This can help improve life sciences organizations' ability to bring medicines to market faster and health care organizations' ability to deliver high-quality care.”



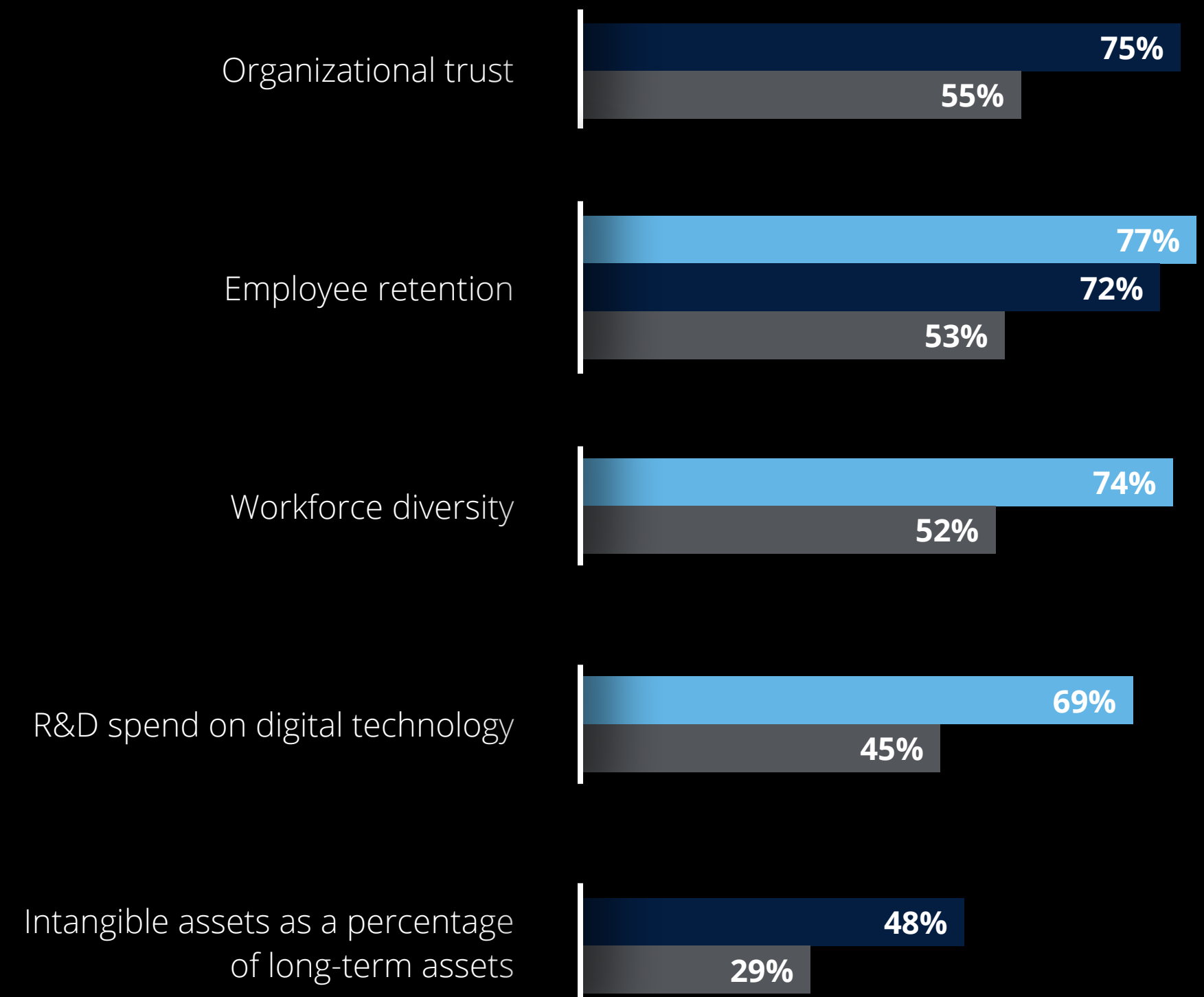


Life sciences and health care tech value signals

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KPI utilization



Expected benefits



● Zero trust security ● Federated security ● Generative AI ● Overall



Life sciences and health care (cont.)

Tech value signal

Life sciences and health care leaders who participated in our value survey prioritize innovation metrics to gain value from cyber investments, with 69% gauging the value of federated security capabilities by looking at the impact on R&D spend on digital technology, and 48% measuring zero trust security capabilities' value with the "intangible assets as a percentage of long-term assets" KPI.

Like other highly regulated industries surveyed, most life sciences and health care respondents use measures like organizational trust (75%) when investing in zero trust security. Unlike other industries, that same group also tends to focus more on employee retention as a path to greater industry advantage. Similarly, looking ahead, life sciences and health care leaders surveyed in the GenAI study expect to benefit from how it helps with shifting workers from lower- to higher-value tasks.



Industry example

According to [Deloitte's 2023 Global Life Sciences Outlook](#), attacks on biopharma and medtech companies have disrupted manufacturing processes calling for improved cybersecurity measures.¹⁵ Takeda, a global R&D pharmaceutical company, implemented a zero trust security architecture to securely manage the information flow across its massive ecosystem of physicians, patients, researchers, logistic partners, and other health care providers—an example of security investments enabling both organizational trust and R&D outcomes.¹⁶



Technology, media, and telecommunications industry respondents gauge the value of several tech capabilities based on how they affect sales of new digital products

“*Technology, media, and telecommunications (TMT) leaders are on the front lines of today’s technology revolution,” says Gopal Srinivasan, principal, Deloitte Consulting LLP.*

“They are steadfast in spotting opportunities for business model disruption and bringing new products to market that help enable the market at large to adopt new technologies and services. This is often true of technology companies bringing products for AI, cloud, cybersecurity, and so on. It can also be true of media companies bringing digital services, such as social video and shoppable media, and enabling creator monetization. That’s a large area of investment as well as sources of value creation for them.”





Technology, media, and telecommunications

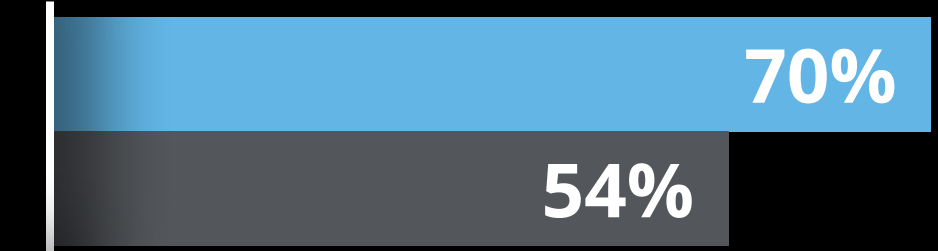
tech value signals

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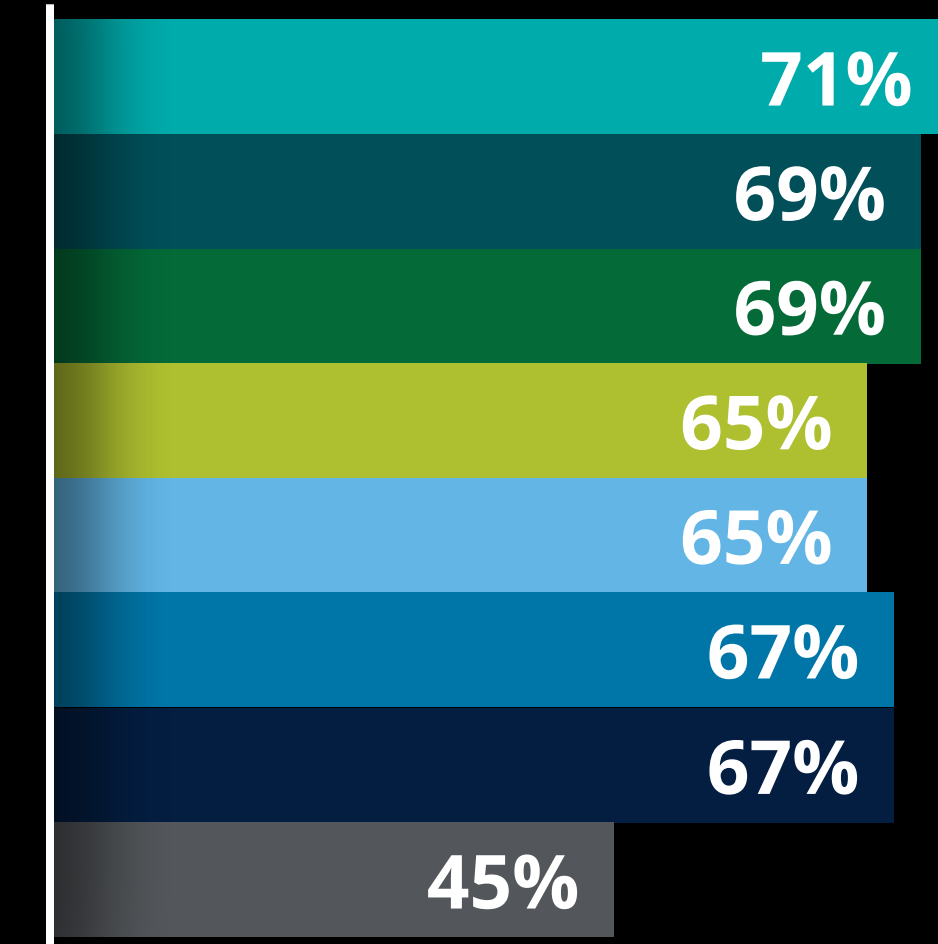
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KPI utilization

Sales through new digital platforms

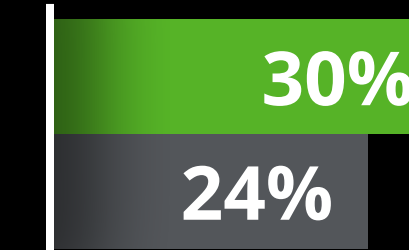


Sales of new digital products



Expected benefits

Increase revenue



- Cloud-native application
- Cloud platform
- Identity and access management
- Traditional AI
- Generative AI
- Data analytics
- Zero trust security
- Federated security
- Overall



Technology, media, and telecommunications (cont.)

Tech value signal

TMT respondents in the value survey are more likely to measure the digital value gained from their cloud-native apps and platforms, traditional AI, data analytics, federated security, zero trust security, and identity and access management investments by looking at their impact on the organizations' sales of new digital products. TMT organizations in our value survey use this KPI for all seven of these tech investments significantly more than the survey average.

TMT organizations are also focused on innovating with new technologies, like Generative AI. One focus: building future digital product pipelines and generating net new revenue. For example, when investing in GenAI, TMT respondents in the GenAI survey are more likely than other industries to expect revenue increases (30%) as a top three benefit.



Industry example

[Deloitte's TMT Predictions 2024](#) expects enterprise GenAI spending to grow by 30%, GenAI chip revenue likely to reach US\$50 billion, and green tech¹⁷ likely to surpass US\$1 billion, by the end of 2024.¹⁸ A large portion of that growth could be from sales through new digital products or platforms—at least that is where our survey data shows. For example, Adobe launched Adobe Product Analytics, which, according to the company, “combines customer journey insights with product analytics to drive a new level of product-led growth.”¹⁹ This is an example of how one organization is using data analytics and personalized customer insights to advance digital sales of its product.

What's your advantage?

Creating an industry advantage starts by understanding what's shaping the future of an industry and how an organization plans to transform using strategy, technology, engineering, and innovative talent to create opportunities and value. That value can come in many forms, so financial, customer, process, workforce, and purpose-related indicators should be considered as leaders think about how they'll use their technology investments and the power of their wider digital ecosystem to help drive an industry advantage.



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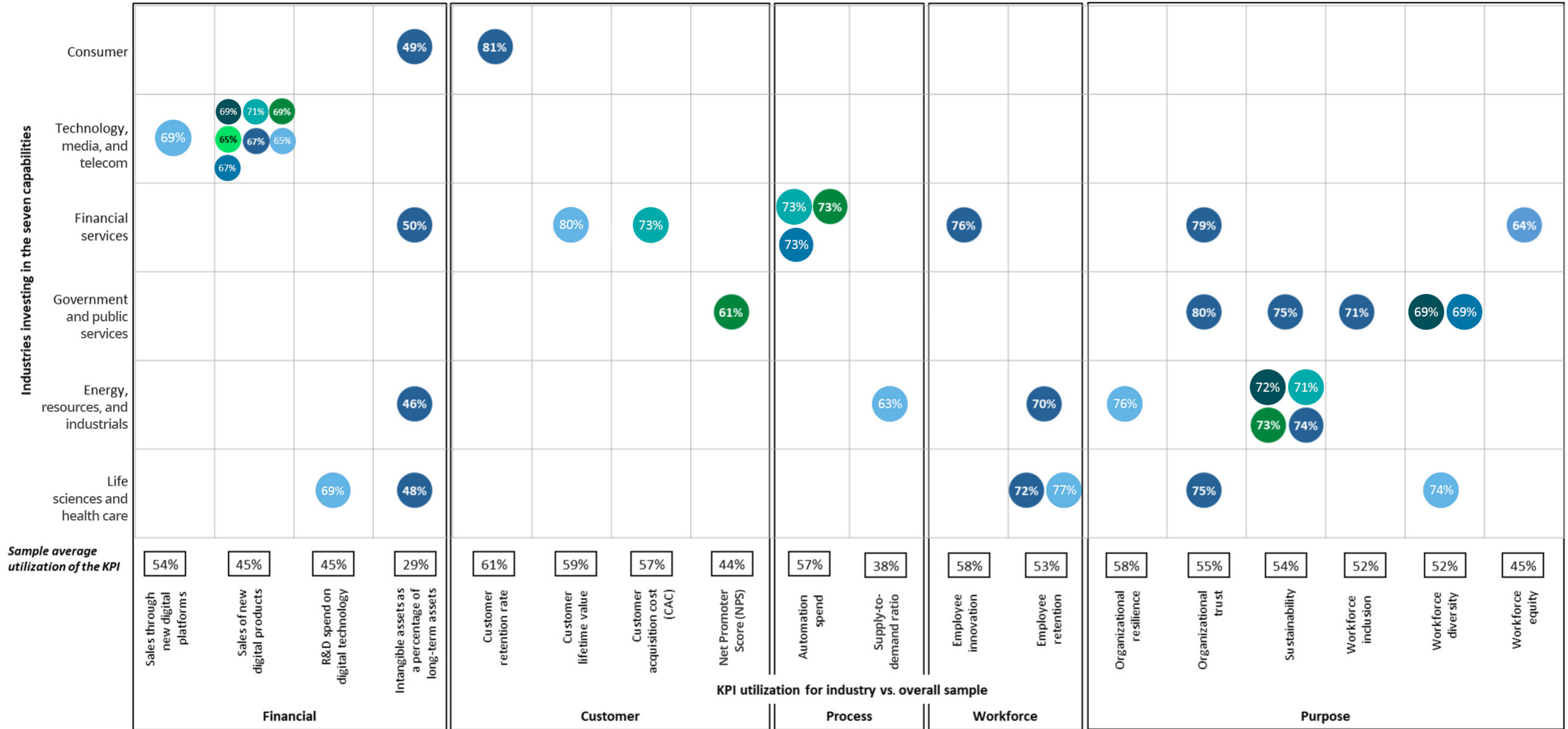
A woman with curly hair is looking at a hand holding a small, black, cylindrical robot. The robot is surrounded by a field of glowing green and blue dots, suggesting a digital or data environment. The woman is wearing a dark blue turtleneck. The background is a blurred indoor setting.

Appendix

Figure 1:

Top KPIs with the highest industry variance in value measurement, across seven capabilities

- Cloud-native application
- Traditional AI
- Zero trust security
- Identity and access management
- Cloud platform
- Data analytics
- Federated security



N = 1,600

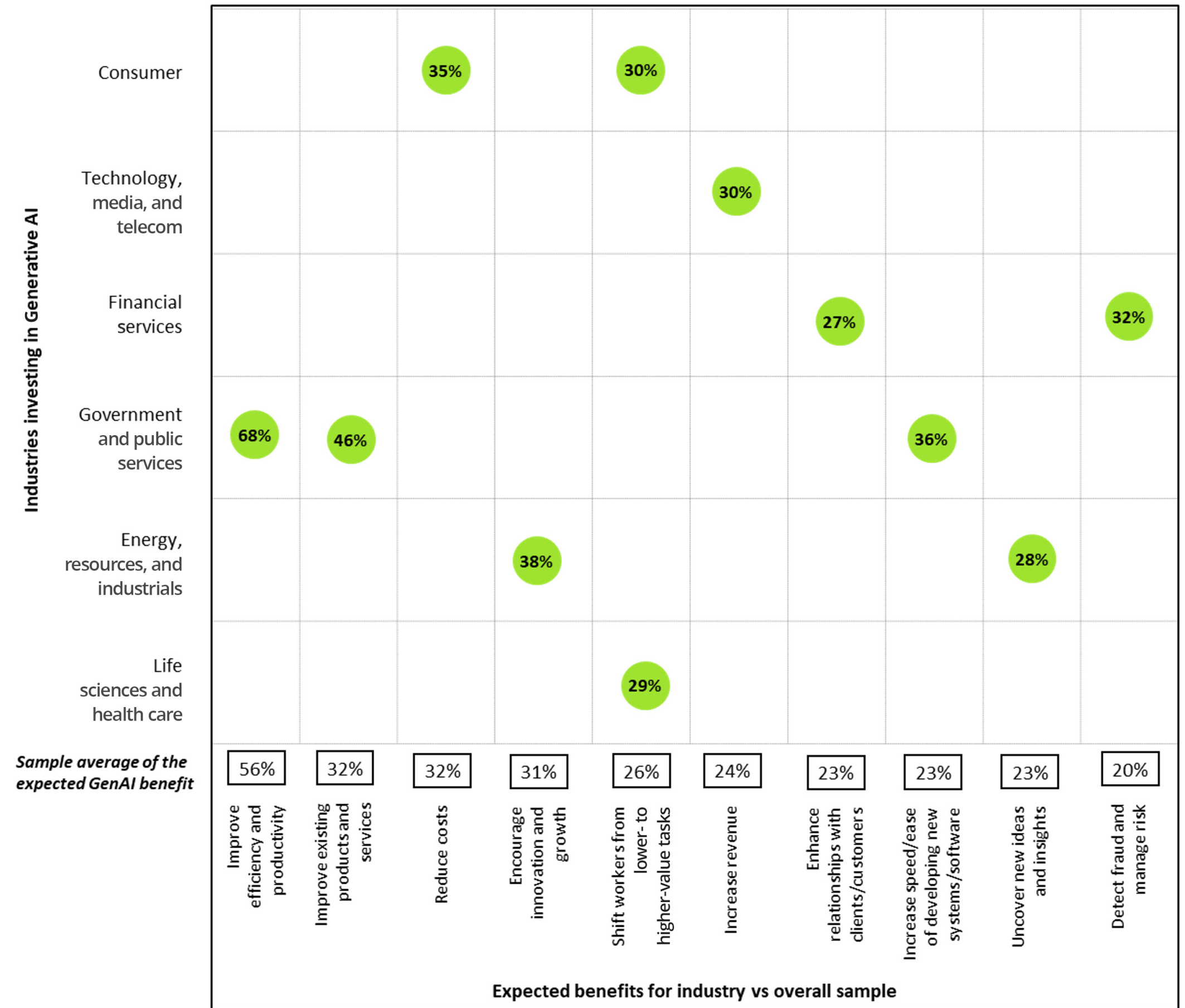
Note: Out of the 46 KPIs asked about in the survey, we limited our analysis to the top three KPIs used by each industry and each technology that had a utilization difference of more than 15 percentage points vs. the overall sample.

Source: Deloitte Center for Integrated Research survey of global tech value leaders, conducted in February 2023



Figure 2:

Expected benefits from Generative AI depicting the highest industry variance in value measurement



Generative AI

N = 1,982

Note: We limited our analysis to the top three benefits expected by each industry that had the highest percentage point difference vs. the overall sample.

Source: Deloitte State of Generative AI survey, conducted January through February 2024

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