

**COMPETITIVE  
AGILITY  
BOTTOM LINE ON  
TRUST**

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# True **competitiveness**

Trust must be a critical input  
and output to your strategy



# How we measure competitiveness

## Growth

**Year-over-year enterprise value growth**  
**Revenue growth**

## Profitability

**Multi-year views of return on invested capital, net debt, and EBITDA margin.**

## Sustainability and Trust

**Environmental, social, and governance factors; a proprietary measure of trust based on publicly available data.**

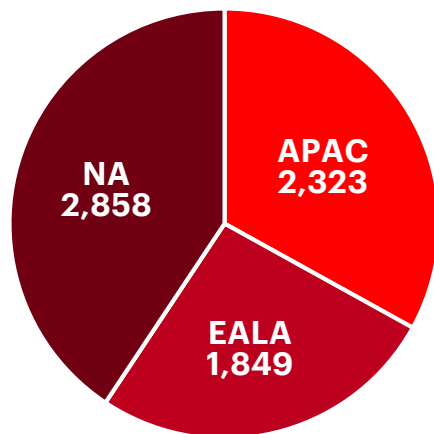
# Competitive Agility Index

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## About the research



### Companies by geography



### Companies by sector\*

Banking	<b>437</b>	Manufacturing	<b>545</b>
Communications	<b>160</b>	Media	<b>367</b>
Consumer goods & services	<b>367</b>	Retail	<b>339</b>
Electronics & high tech	<b>429</b>	Software, platforms & services	<b>339</b>
Energy	<b>279</b>	Travel & Transportation	<b>260</b>
Industrial services	<b>329</b>	Utilities	<b>261</b>
Insurance	<b>197</b>		

\*Includes other sectors not listed here

# The bottom line on trust

The first-of-its kind analysis reveals that 54% of companies on the Accenture Strategy Competitive Agility Index experienced a material drop in trust, conservatively losing out on **\$180B** in potential revenues

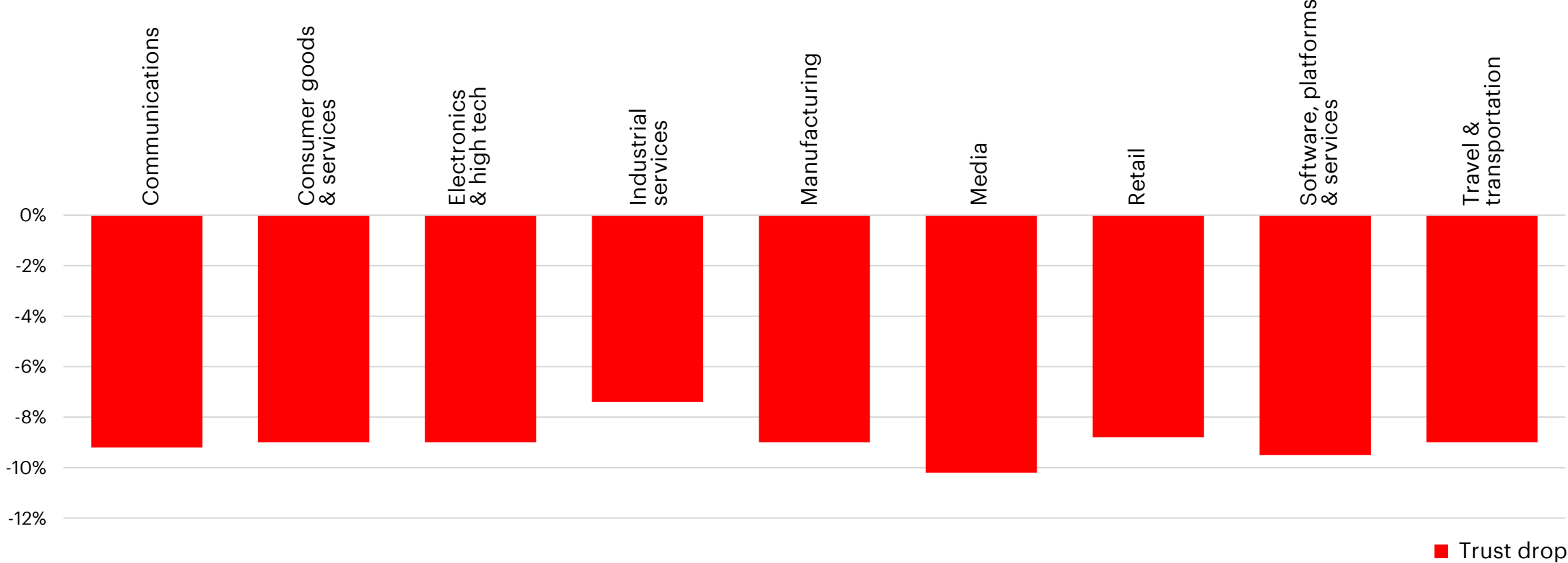


**\$180 billion at stake**

# Not if, but when

# 1 out of 2

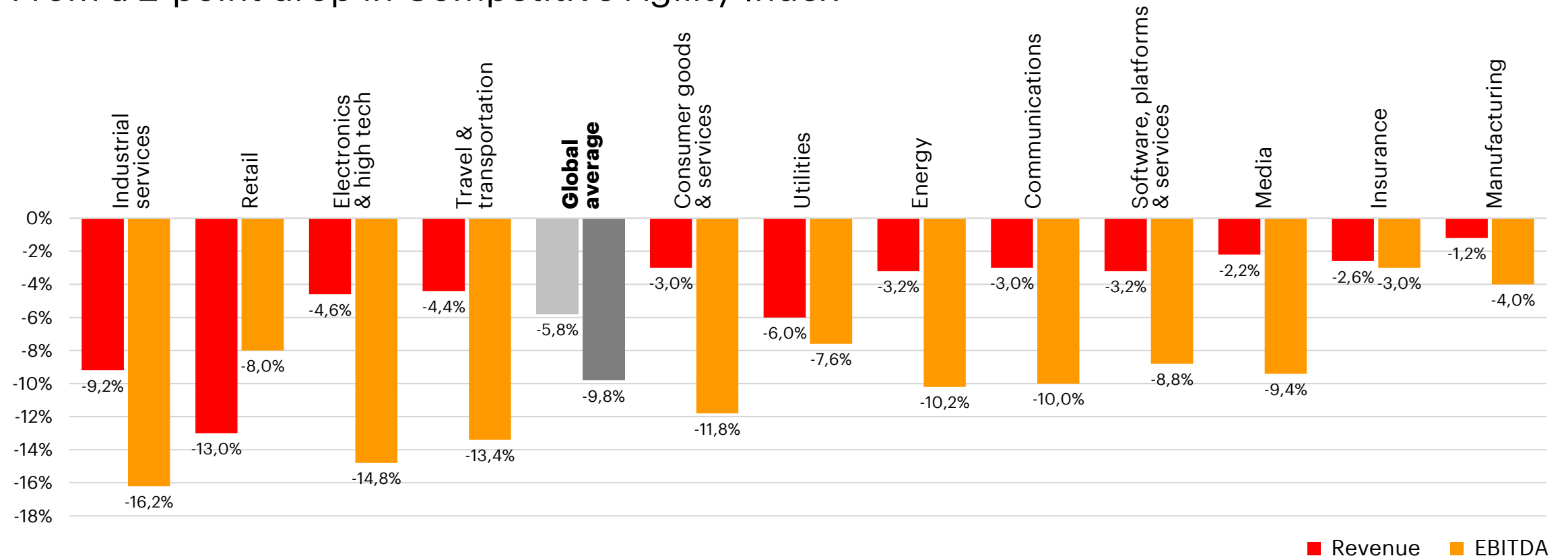
companies in our research experienced a material drop in trust of 5% or more



Note: this represents the largest quarter-over-quarter drops in trust scores for each company in our study that had a drop in trust, representing 54% of all companies. A meaningful drop in trust is defined by a drop of 5% or more in the CAI trust score. The average included sectors not represented in this chart.

# Potential impact on Revenue and EBITDA growth

From a 2-point drop in Competitive Agility Index



Note: Global Average includes other sectors not listed here.

# A US Retail Company



**A US\$30B**  
**retail company**

experiencing a material  
drop in trust stands to lose

**~US\$4B** in future  
revenues



# A US Consumer Company



**A US\$15B**  
**food company**

experiencing a material  
drop in trust lost

**~US\$400M** in  
revenues



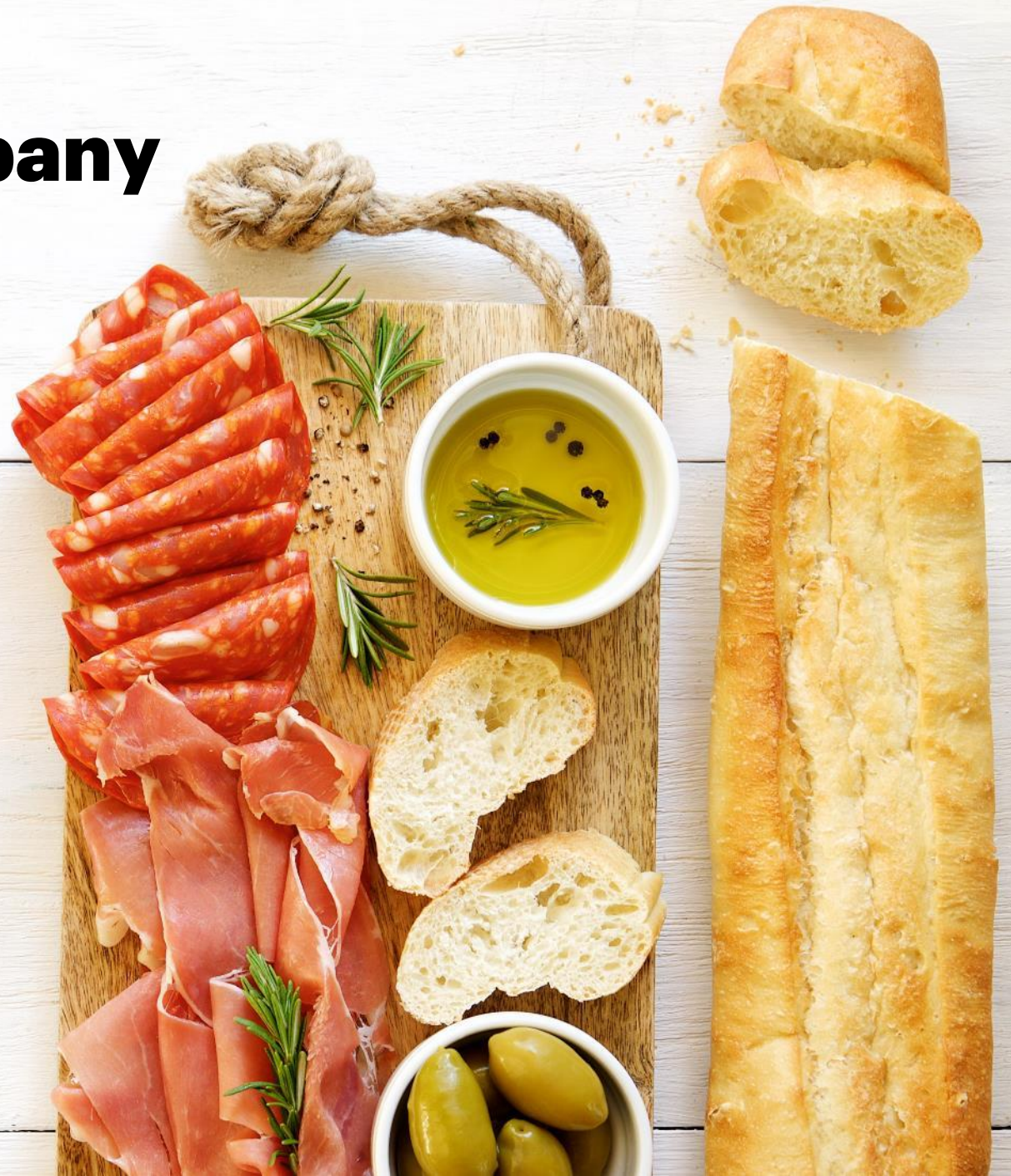
# A US Consumer Company



**A US\$7B**

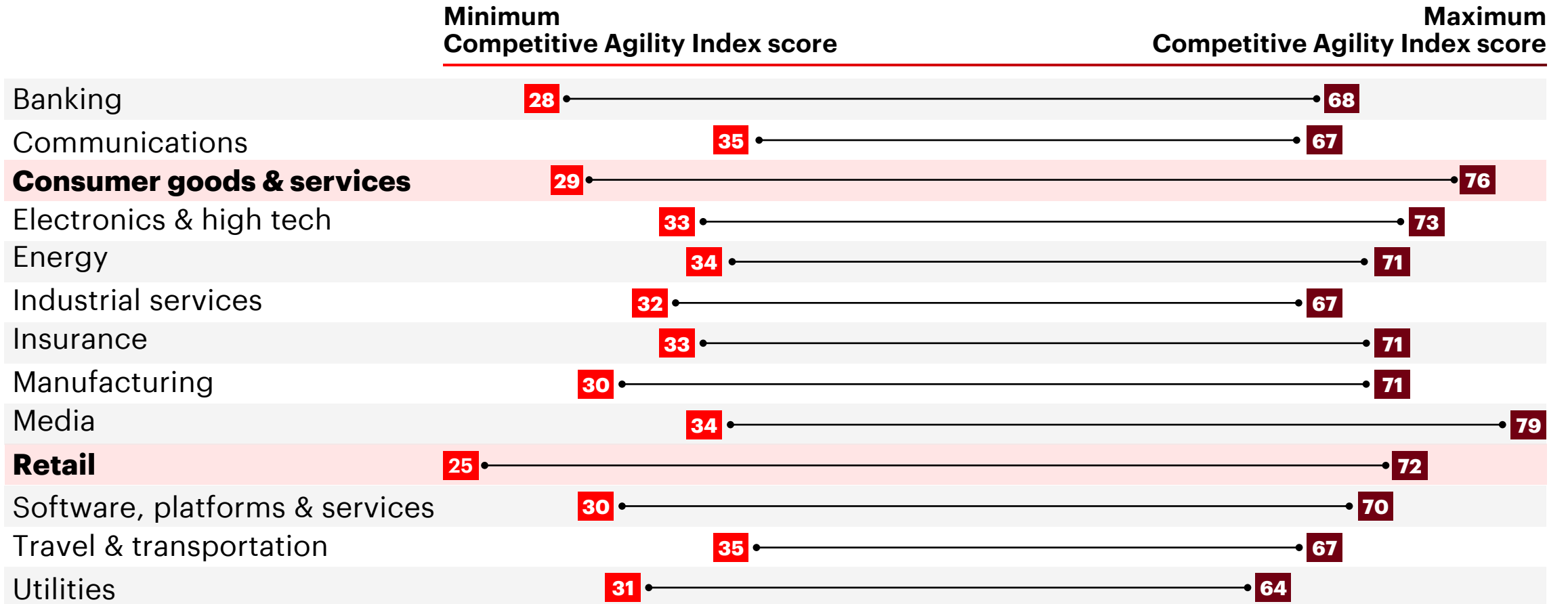
**food company**

experiencing a material  
drop in trust lost **3%** in  
revenues



# Competitive Agility Index

## Range across sectors



# From Me to We

**73%**

want companies to take a stand on **social, cultural, environmental** and **political issues**

**63%**

say their purchasing decisions are influenced by a **company's ethical values** and **authenticity**

**71%**

buy goods and services from companies that **reflect their** personal **values** and **beliefs**

**80%**

of institutional investors has integrated **ESG** criteria in their investment strategy, believing it **improves returns**

**76%**

say that **CEOs should take the lead on change rather than waiting for government** to impose it

**47%**

have **stopped doing business** with a company as a **result of its actions**

# Minding your bottom line

Know where you stand

Make **trust** part of your cultural bedrock and elevate trust's role in your overall strategy

Activate your **purpose**: be human, be clear and authentic, be creative



**THANK YOU**