2023 Voice of Our Clients
Findings from interviews with executives in Manufacturing

Top trends & priorities

<table>
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<tr>
<th>Macro trends</th>
<th>Industry trends</th>
<th>Business priorities</th>
<th>IT priorities</th>
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</thead>
<tbody>
<tr>
<td>Fight against climate change</td>
<td>Sustainability</td>
<td>Optimize operations</td>
<td>Protect through cybersecurity</td>
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<tr>
<td>Reconfiguration of supply chains</td>
<td>Protecting the enterprise through cybersecurity</td>
<td>Develop and deliver new services</td>
<td>Drive IT modernization of applications</td>
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<tr>
<td>Technology and digital acceleration</td>
<td>Becoming digital organizations</td>
<td>Protect the organization</td>
<td>Digitize processes and integrate systems</td>
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Executives we interviewed
Annually, CGI leaders meet with executives across industries and geographies to gather their perspectives on the trends affecting their enterprises:

1,764 across 21 industries
172 in Manufacturing

37% Business leaders
63% IT leaders
55% C-level
45% Operations

Digital strategy progress
Overall, achieving results from digital strategies is progressing slowly. However, the pace varies across sub-industries, with automotive leading the way.

Manufacturing globally
93% Producing expected results
20%

Producing results by sector

- Automotive: 34%
- Commercial & Industrial Goods: 21%
- Natural Resources: 16%
Key findings in Manufacturing

Macro trends impact felt acutely ≥ 25pp increase in manufacturers citing high impact of shift in world economic order, climate and supply chain vs. other industries

Sustainability grows in importance 82% feel strongly that sustainability is core to creating future value, up from 73% in 2022

Tighter IT-business alignment could drive better strategy results 39% say IT and business are highly aligned to drive strategy execution

Business model transformation is needed 22% say their business models are highly agile to address digitization, including integration of new technologies

Data is an untapped opportunity 36% rate their data strategy as mature enough to achieve business model resiliency
Digital leaders in Manufacturing

When comparing insights from the 20% producing results from digital strategies (digital leaders) to those building or launching digital strategies (digital aspirants), common attributes emerge.

Digital leaders in manufacturing are focused on optimized and protected operations underpinned by data-driven decisions. Notably, this year, the gap between digital leaders and digital aspirants has reduced.

### Key Attributes

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Digital leaders</th>
<th>Digital aspirants</th>
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<tbody>
<tr>
<td>Have highly aligned business and IT operations to support their strategy</td>
<td>59%</td>
<td>19%</td>
</tr>
<tr>
<td>Have highly agile business models to adapt to digitization</td>
<td>34%</td>
<td>13%</td>
</tr>
<tr>
<td>Cite fewer challenges from legacy systems to digital implementation</td>
<td>71%</td>
<td>41%</td>
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<tr>
<td>Feel the impact of technology and digital acceleration more keenly</td>
<td>73%</td>
<td>57%</td>
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<tr>
<td>Are seeing results from cybersecurity strategies</td>
<td>89%</td>
<td>79%</td>
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5 recommendations for navigating new market realities with resilience

1. **Assess your IT and shopfloor landscape**
   - for agility, speed to market and cost efficiencies.

2. **Get your data ready**
   - to inform plans with real-time information and become data driven.

3. **Build flexible supply chains**
   - to respond to changing production demand and maximize value creation.

4. **Collaborate using platforms**
   - to thrive in industry convergence and new ways of working.

5. **Stay focused on IT and OT security**
   - ensuring it allows for data sharing and protection.

At CGI, we help manufacturing organizations address new market realities and drive smart, sustainable and resilient operations.

Learn more →

Meet with our experts about these insights.

Schedule a discussion →

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