



Ecosystem partnerships: Research summary

Advisory Insights

December 2024



GenAI was utilized in the creation of this image

Overview of partner ecosystem primary research

Research objectives

Understand what organizations must do to evolve their ecosystem partnerships to support the strategy and business of the future.

Specifically, this survey assessed:

- What organizations are challenged with today in managing their ecosystems
- How ecosystems are changing for the future
- How organizations should design, architect, and manage their partner ecosystem to drive growth and deliver value

Methodology

- Defined partner ecosystem as “Any third party an organization uses to enable and progress strategic and operational objectives, initiatives, and / or programs”
- Respondent criteria for participation included:



Geography:
US-based



Industry:
Any (except public sector)



Level:
Approx 50% Director/Sr. Director and 50% VP+



Company Revenue:
\$1B+ annually



Function:
Back, middle, and front-office roles



Role:
Decision-maker, leader, influencer in the ecosystem partnerships where the company participates, with a plurality (37%) responsible for establishing and managing partnerships

Note: Fielded a quantitative survey to 258 respondents in partnership with GLG

Our research provides insight into the plans and challenges of organizations to grow their partner ecosystems and drive future value

Key Takeaways



Partner ecosystems are growing, with almost **50%** exploring new types of partnerships to expand capabilities



Organizations see ecosystems having a significant role in advancing growth strategies



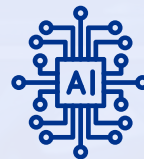
Tech advancements (i.e., AI) and evolving market demands are top drivers of partner ecosystem changes



A top challenge organizations face is aligning goals and expectations among partners



Technology and strategic/business partners both play a significant role in organizations' ecosystems

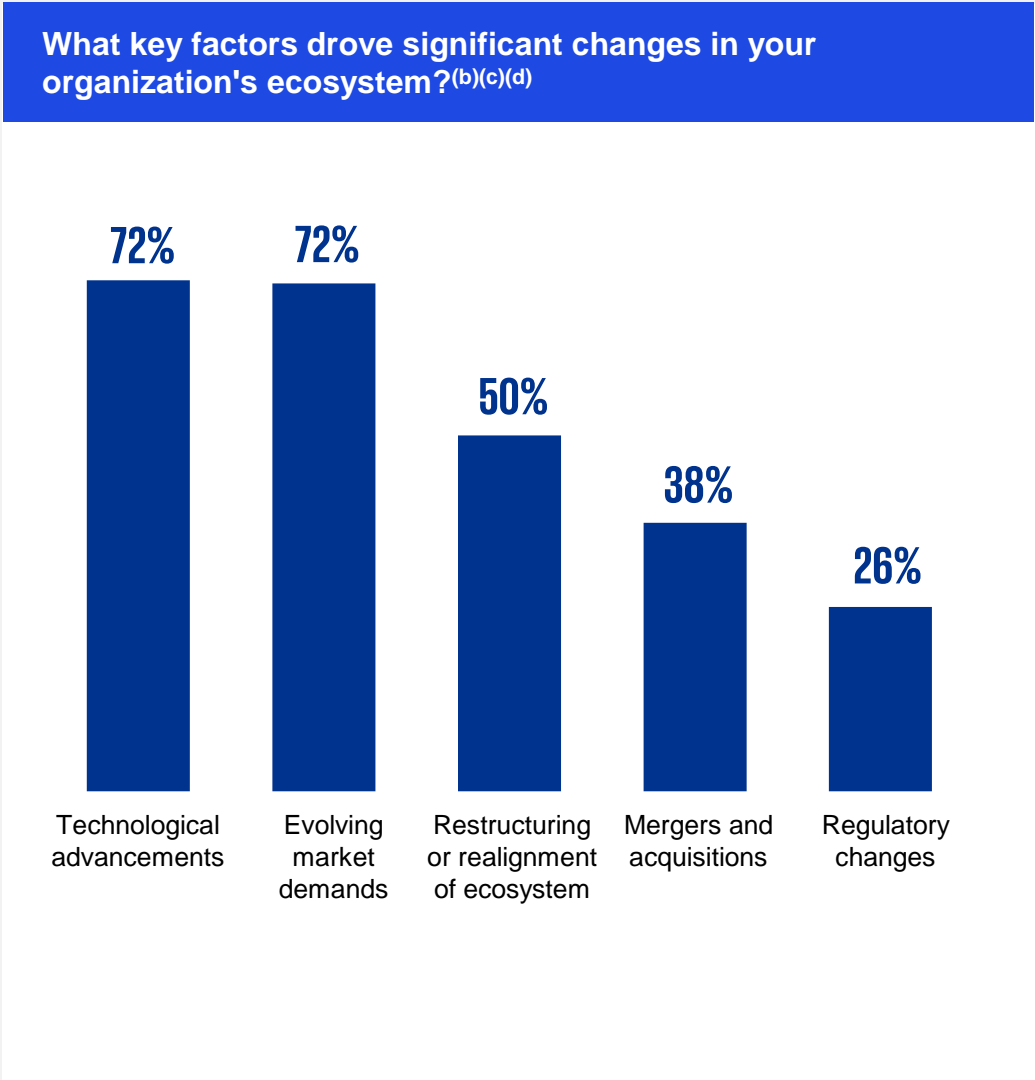
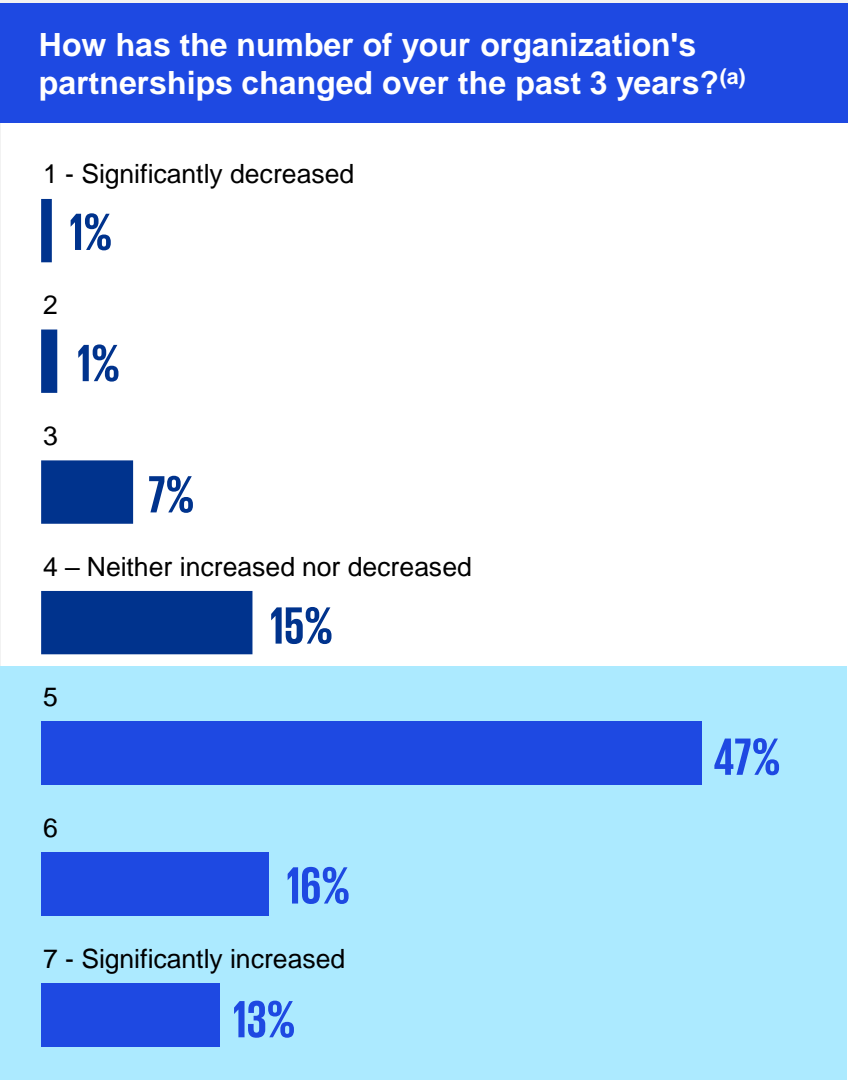


Nearly **50%** of organizations feel that Gen AI has influenced their ecosystem strategy and planning



Only **36%** of respondents consistently measure ecosystem performance

Partnerships have surged in the last 3 years, with a majority of respondents experiencing an increase driven by tech advancements and market demands



Note(s): (a) Sum of percentages may not add up to 100% due to rounding off; (b) For respondents who selected 'Neither increased nor decreased' in Q "How has the number of your organization's partnerships changed over the past 3 years", didn't answer this question; (c) Sum of percentages may not add up to 100% as it is a multi-select question; (d) Other, please specify" option is not included in the graphical representation, due to low number of respondents

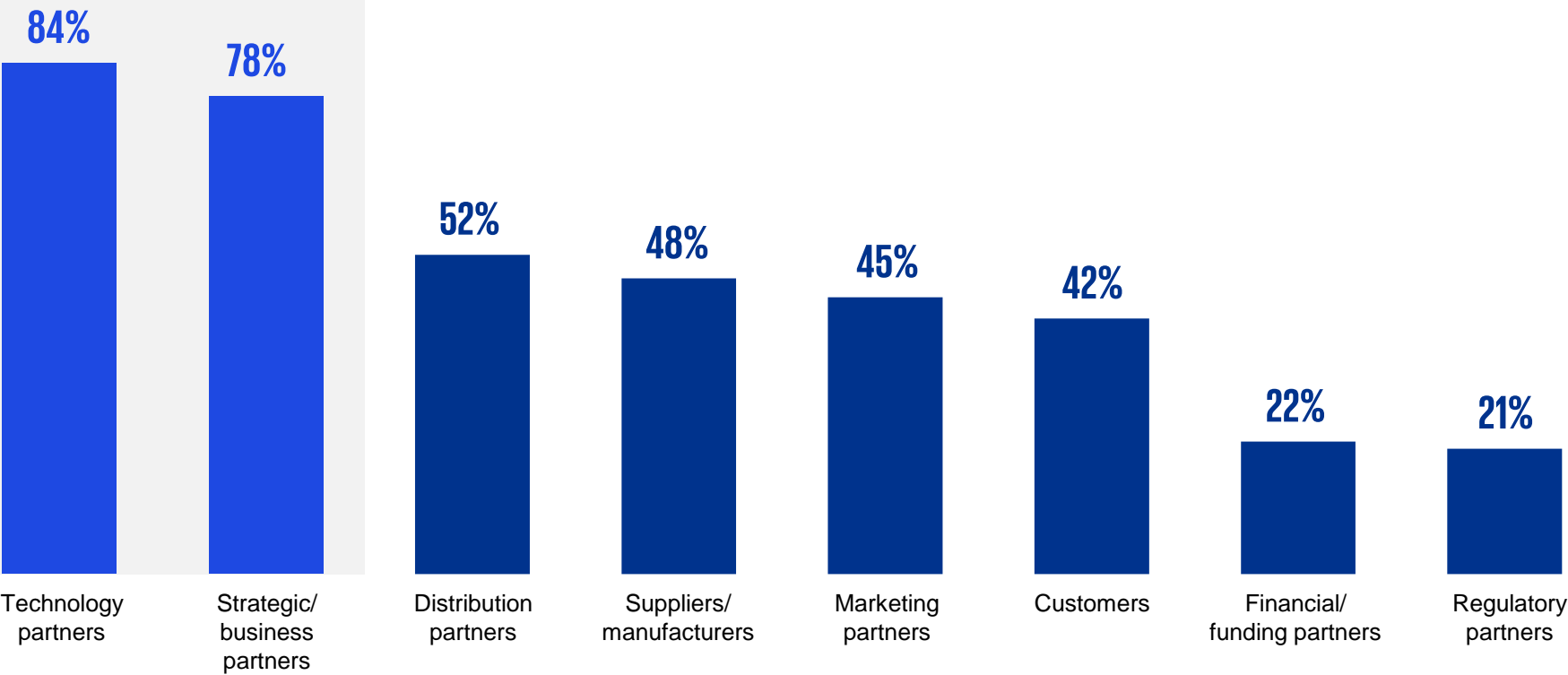
Source(s): Partner ecosystem survey, Sep 24

Technology partners dominate firm ecosystems; yet strategic / business partners play a significant role

What type of partners are currently part of your ecosystem?(a)(b)



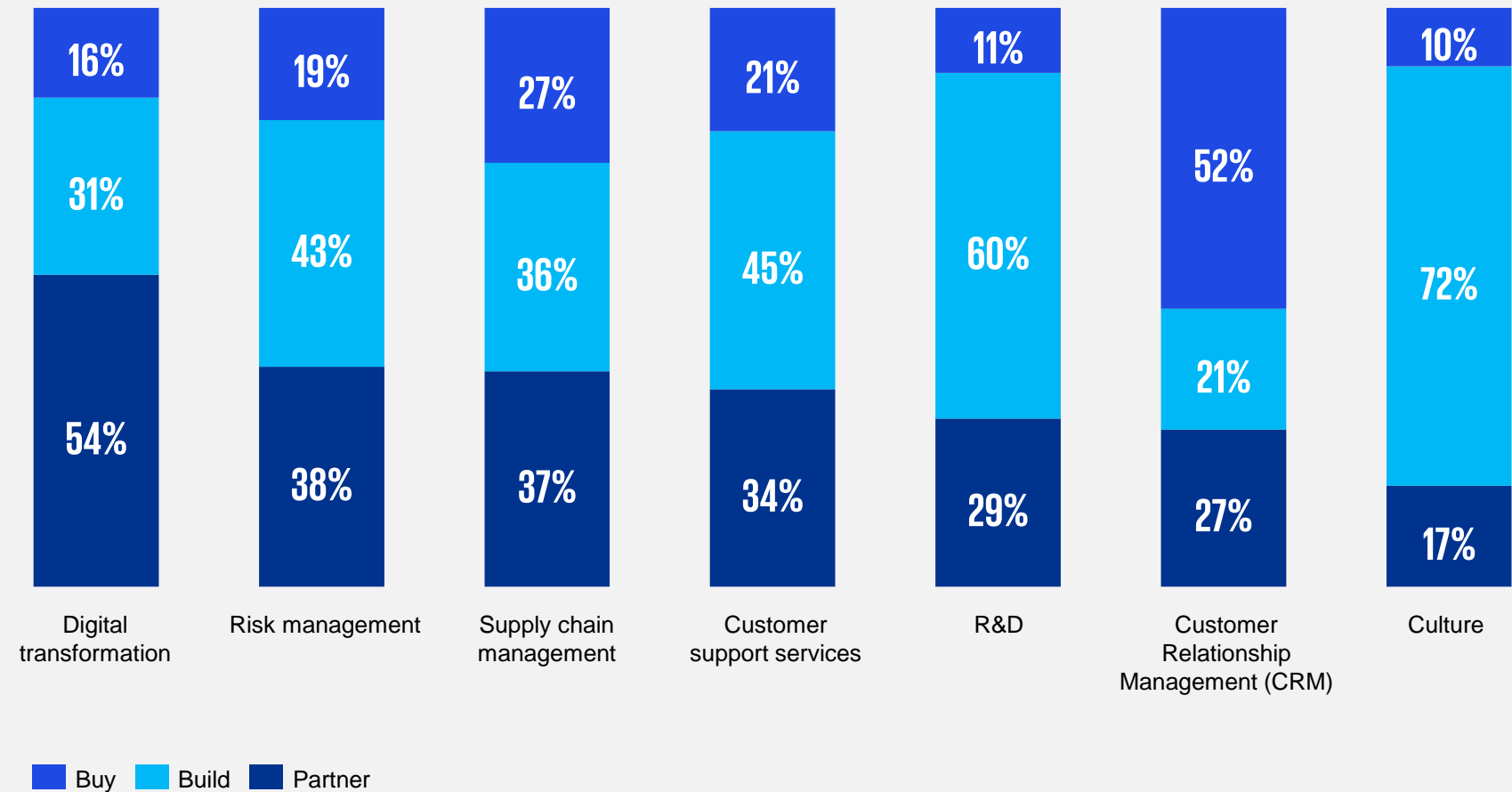
Currently, firms' ecosystems are **dominated by technology partners**, emphasizing the importance of collaborating for technological expertise, **with strategic/business partners also playing a significant role**



Note(s): (a) Sum of percentages may not add up to 100% as it is a multi-select question; (b) Other, please specify" option is not included in the graphical representation, due to low number of respondents
Source(s): Partner ecosystem survey Sep 24

Digital transformation is a top capability for partnership, but culture and R&D are leading capabilities that respondents aim to build themselves

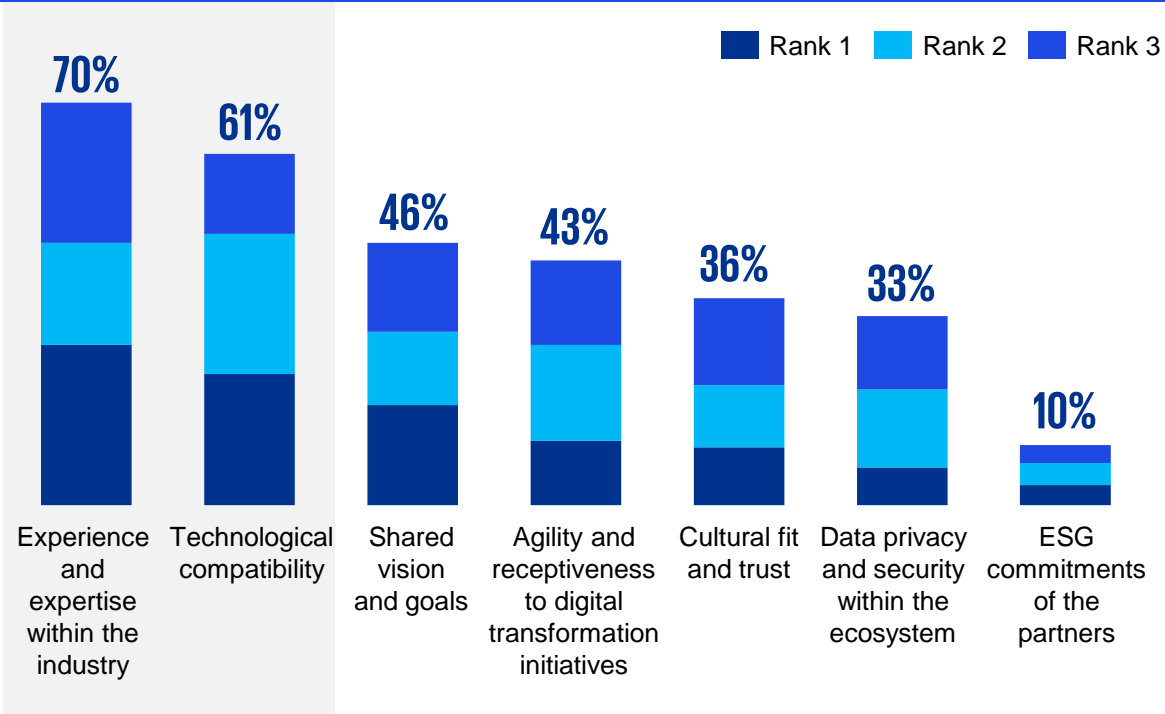
Thinking of the ecosystem you would like to build to achieve objectives for the future, what capabilities need to be...^{(a)(b)}



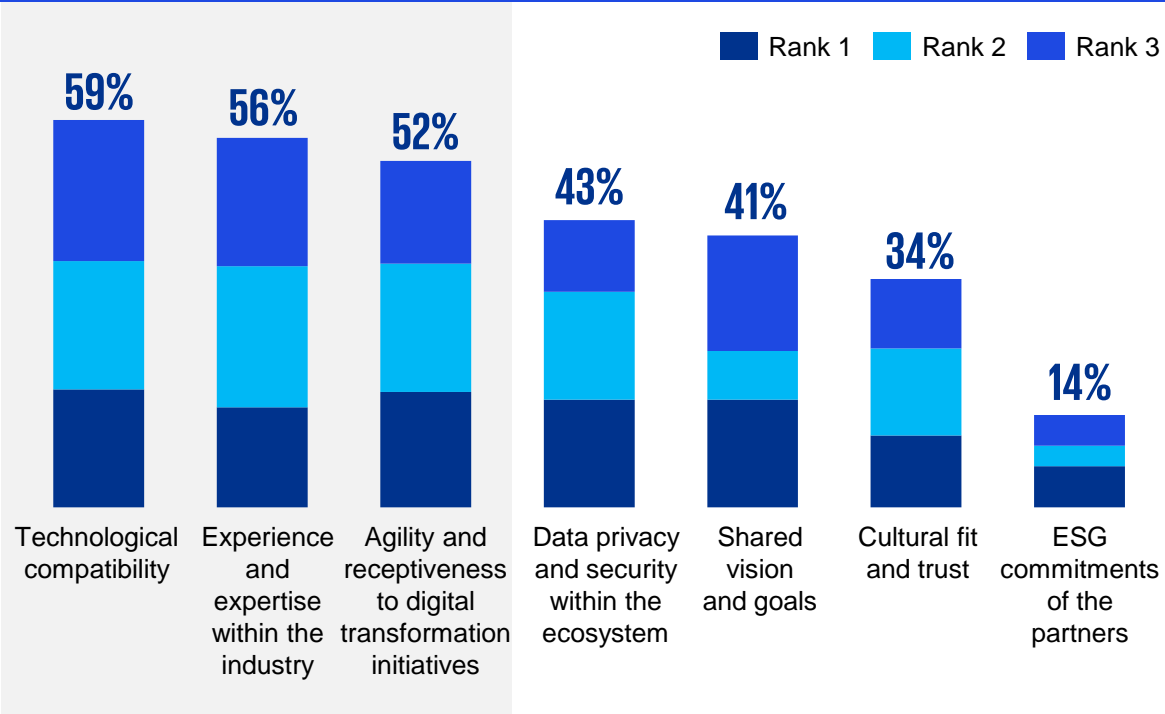
Note(s): (a) Sum of percentages may not add up to 100% due to rounding off; (b) Other, please specify" option is not included in the graphical representation, due to low number of respondents
Source(s): Partner ecosystem survey, Sep 24

Current priorities in ecosystem building focus on experience and expertise, but the next 1-3 years will emphasize technology compatibility

Which partner attributes are currently most important in your ecosystem?^(a,b)



Which partner attributes do you anticipate will become more important for your ecosystem in the next 1-3 years?^(a, b)



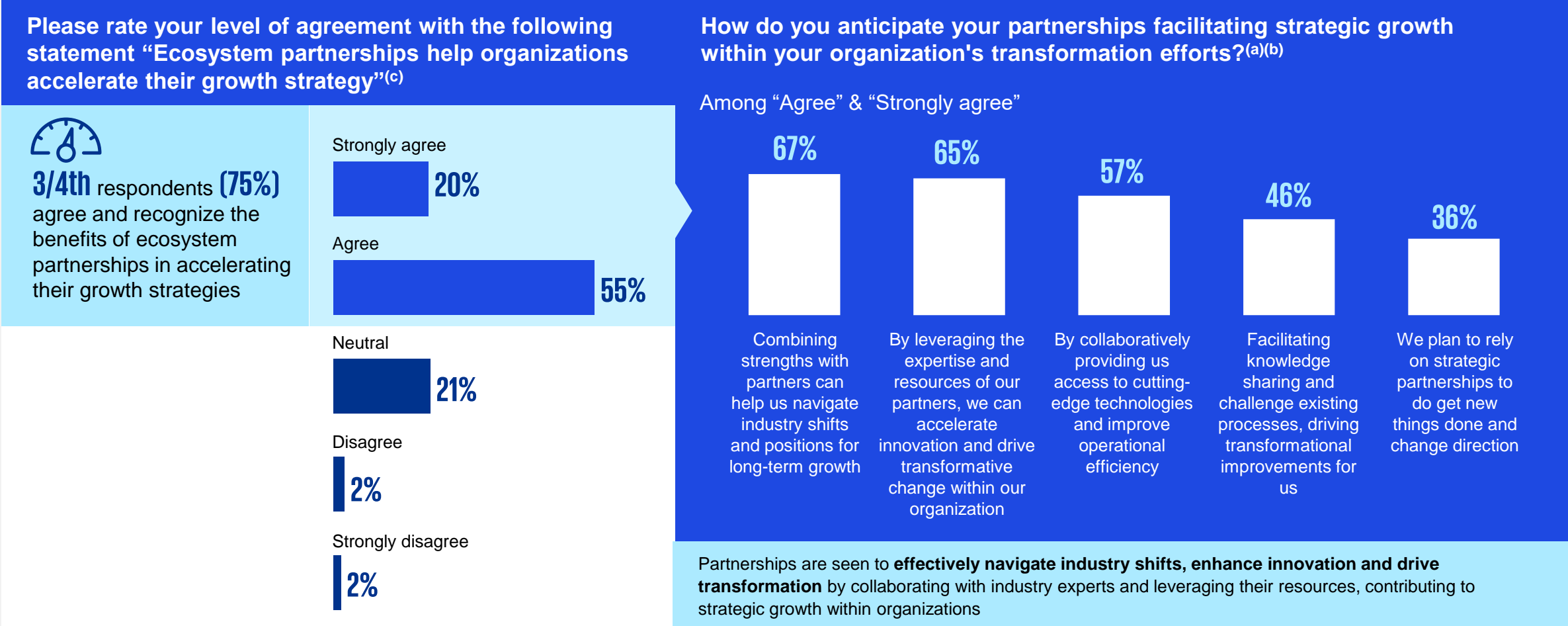
Currently, **experience, industry expertise, and technological compatibility** are prioritized by respondents when building their ecosystem



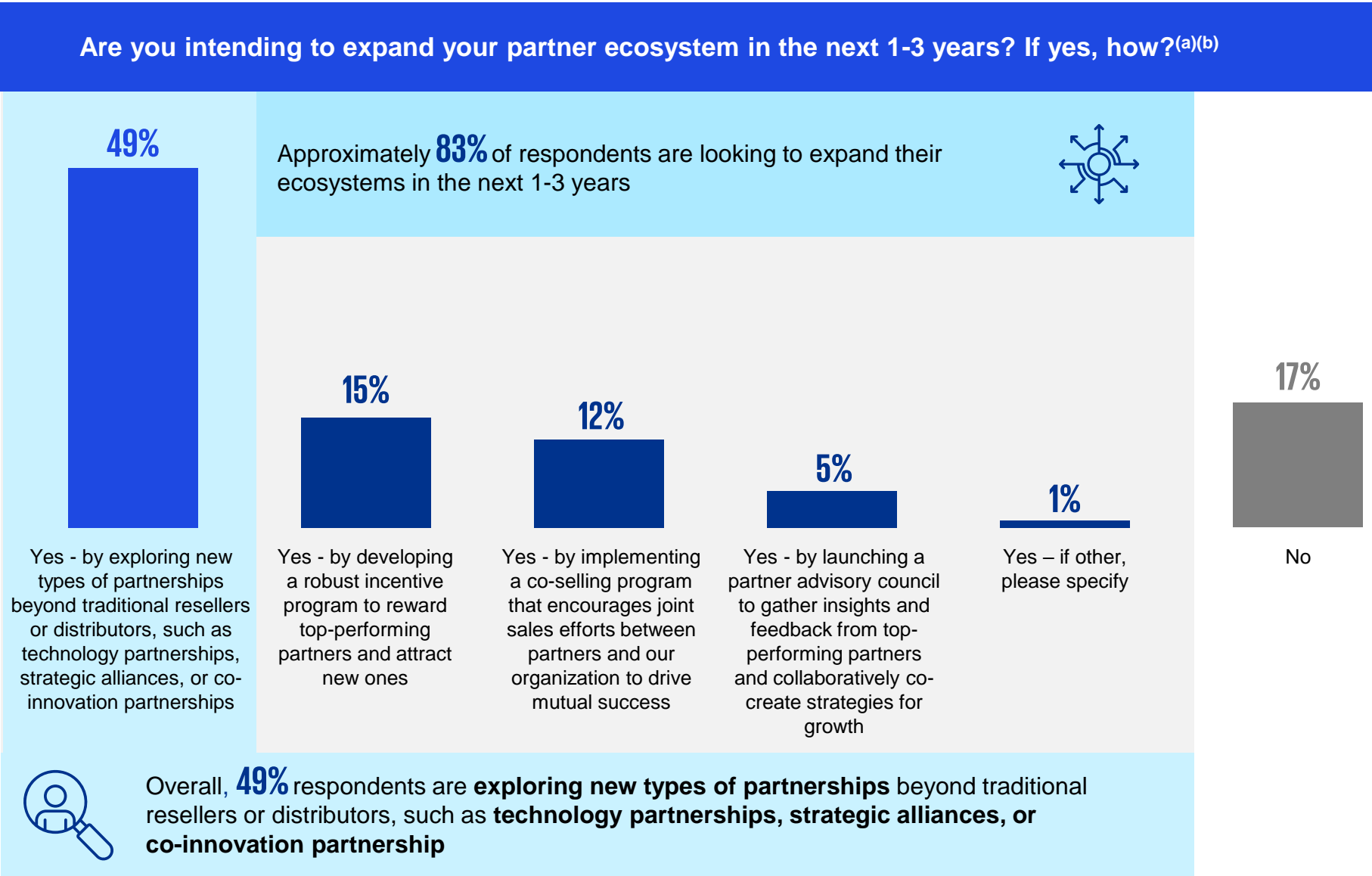
However, in the next 1-3 years, **technological compatibility, industry expertise, agility, and receptiveness to digital transformation** will prove to be more important for ecosystems

Note(s): (a) Other, please specify" option is not included in the graphical representation, due to low number of respondents (b) Sum of percentages were based on respondents ranking top 3 attributes
Source(s): Partner ecosystem survey, Sep 24

Organizations see ecosystems having a significant role in advancing growth strategies



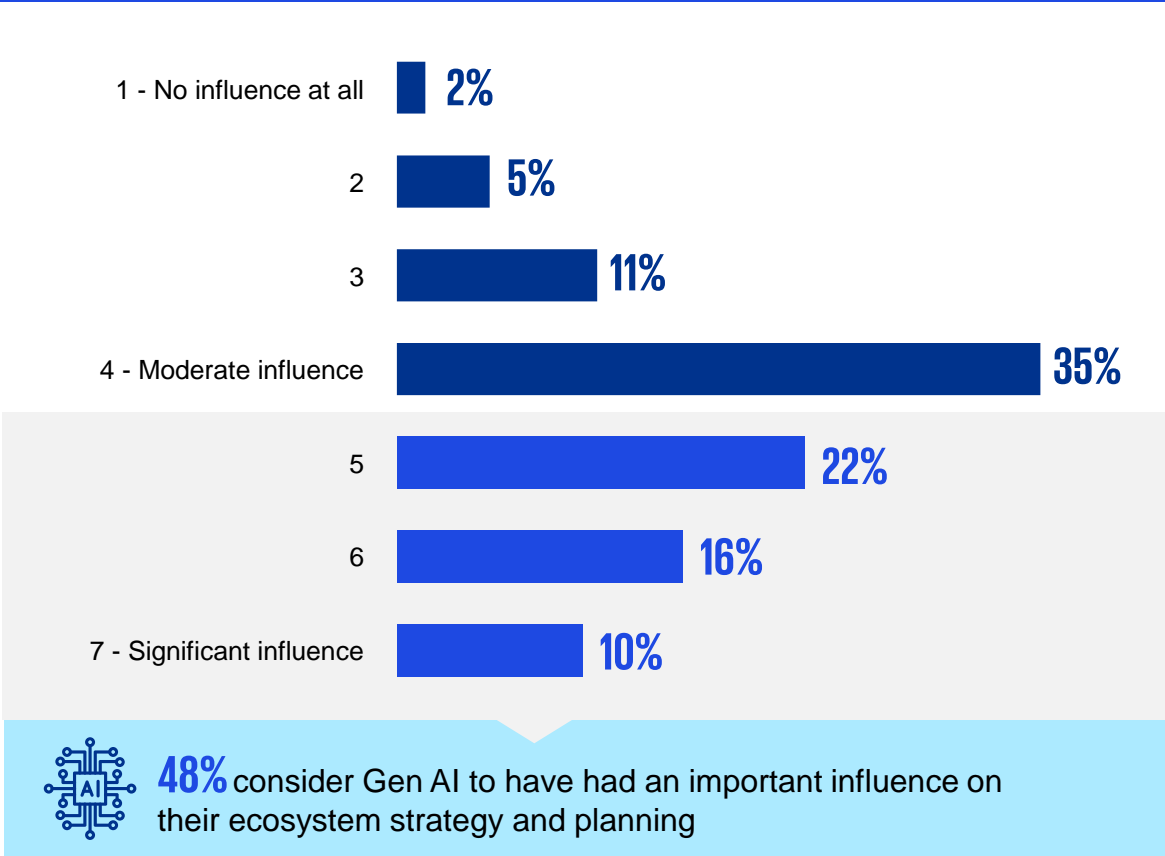
Organizations are exploring new types of partnerships beyond traditional resellers or distributors to expand their ecosystems in the future



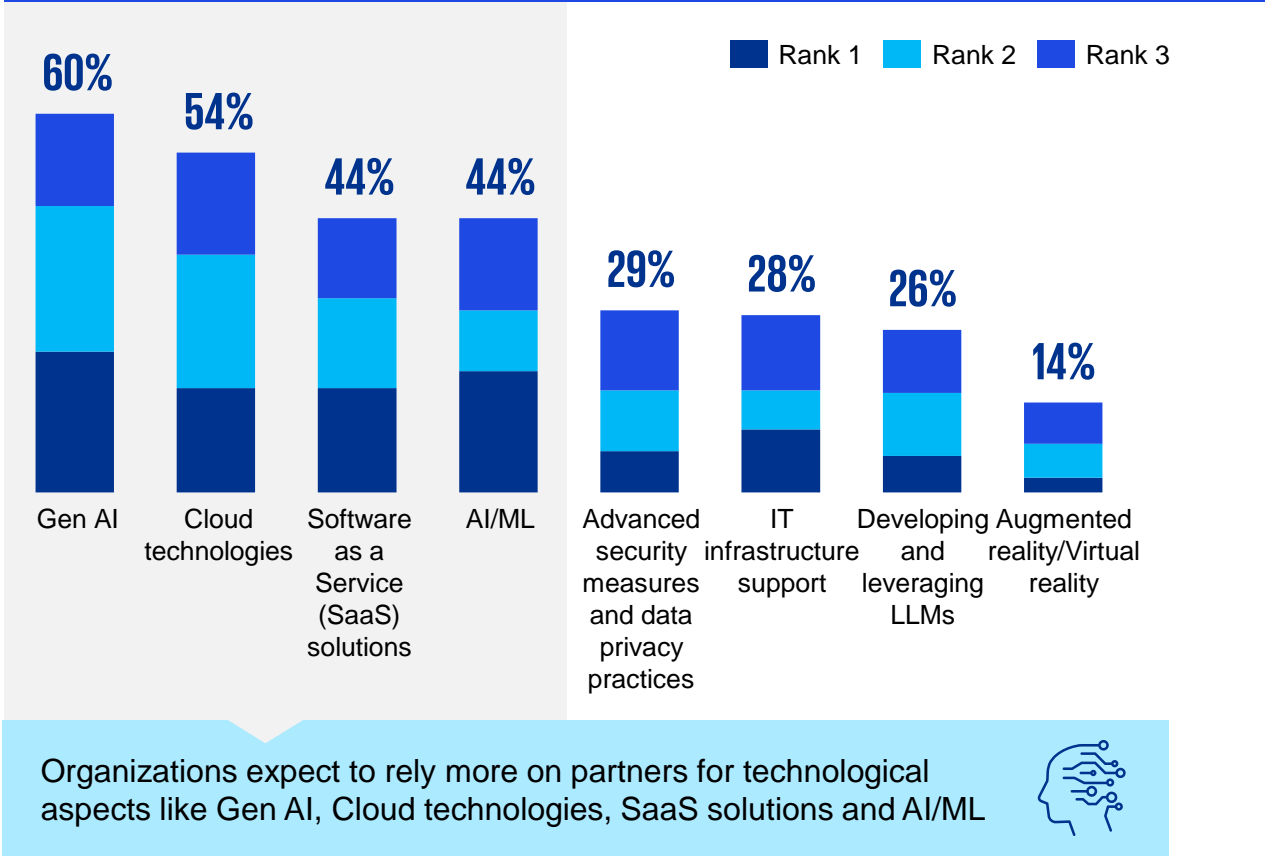
Note(s): (a) Sum of percentages may not add up to 100% due to rounding off; (b) "Yes - if other, please specify" option is not included in the graphical representation, due to low number of respondents
Source(s): Partner ecosystem survey, Sep 24

Gen AI has significantly impacted ecosystem strategy and planning, prompting organizations to increasingly depend on partners for Gen AI solutions in the future

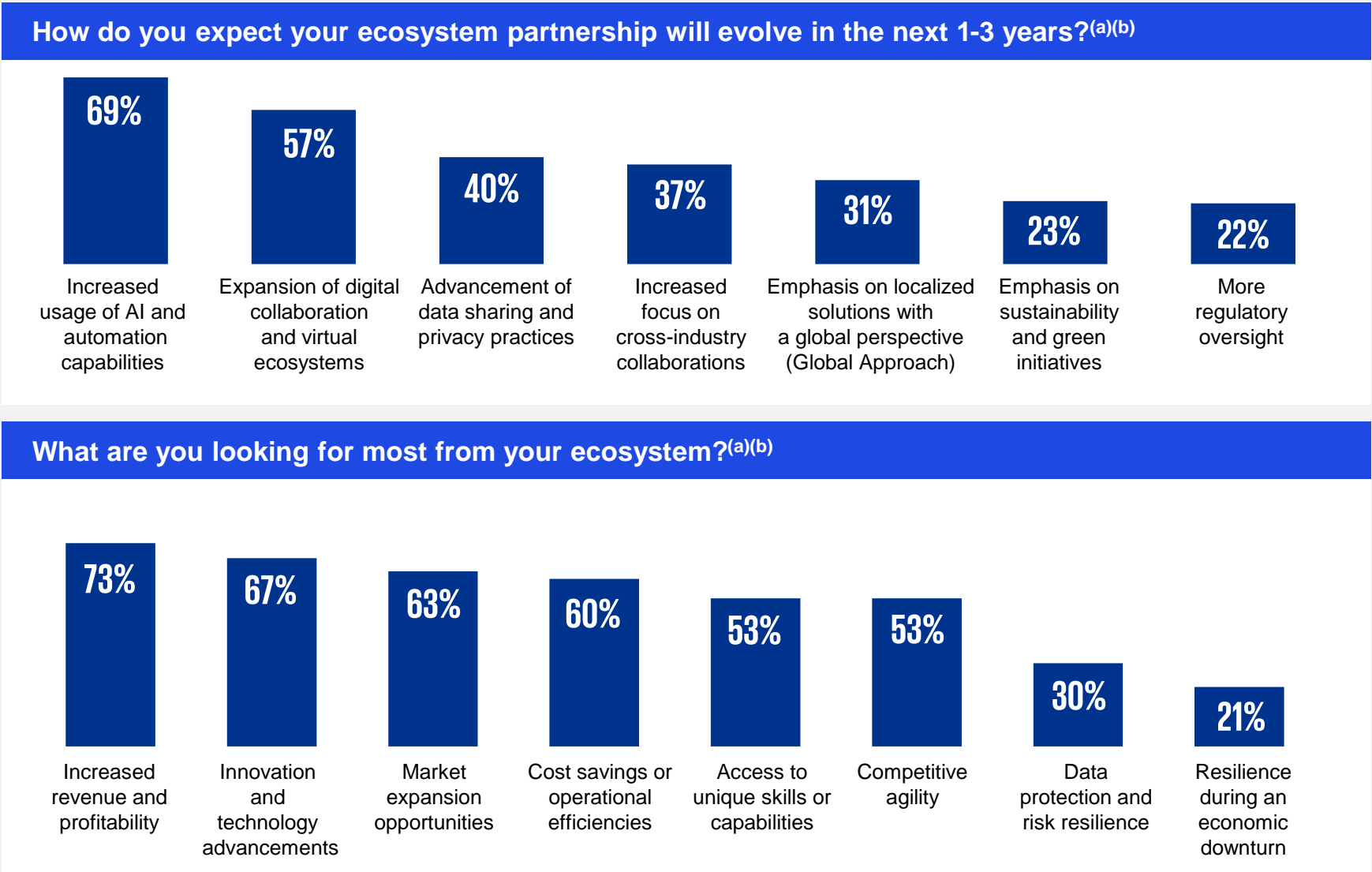
To what extent has Generative AI influenced your ecosystem strategy/planning in any manner?^(a)



In the future, for which technological aspects do you anticipate your organization will increasingly rely on partners?^(b, c)



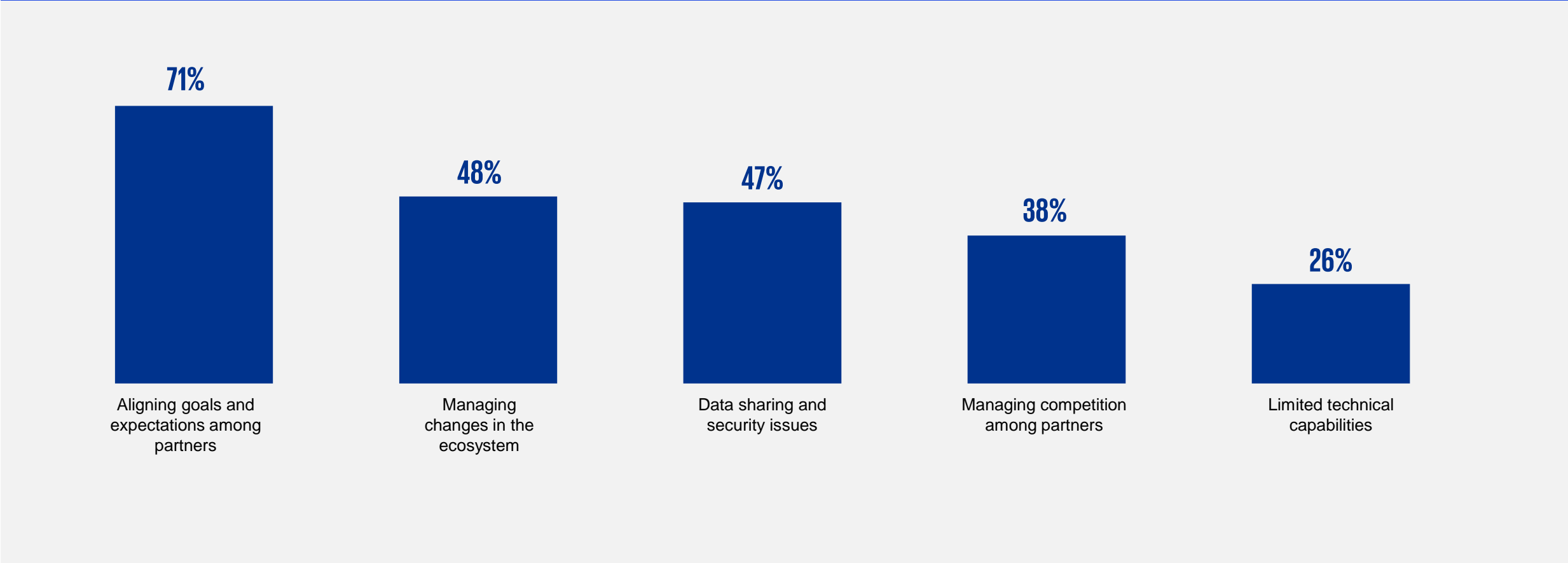
Organizations foresee a shift to digital collaboration, AI, and automation in ecosystems, stressing the need for technology, data analysis, and agile decision-making



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Source(s): Partner ecosystem survey, Sep 24

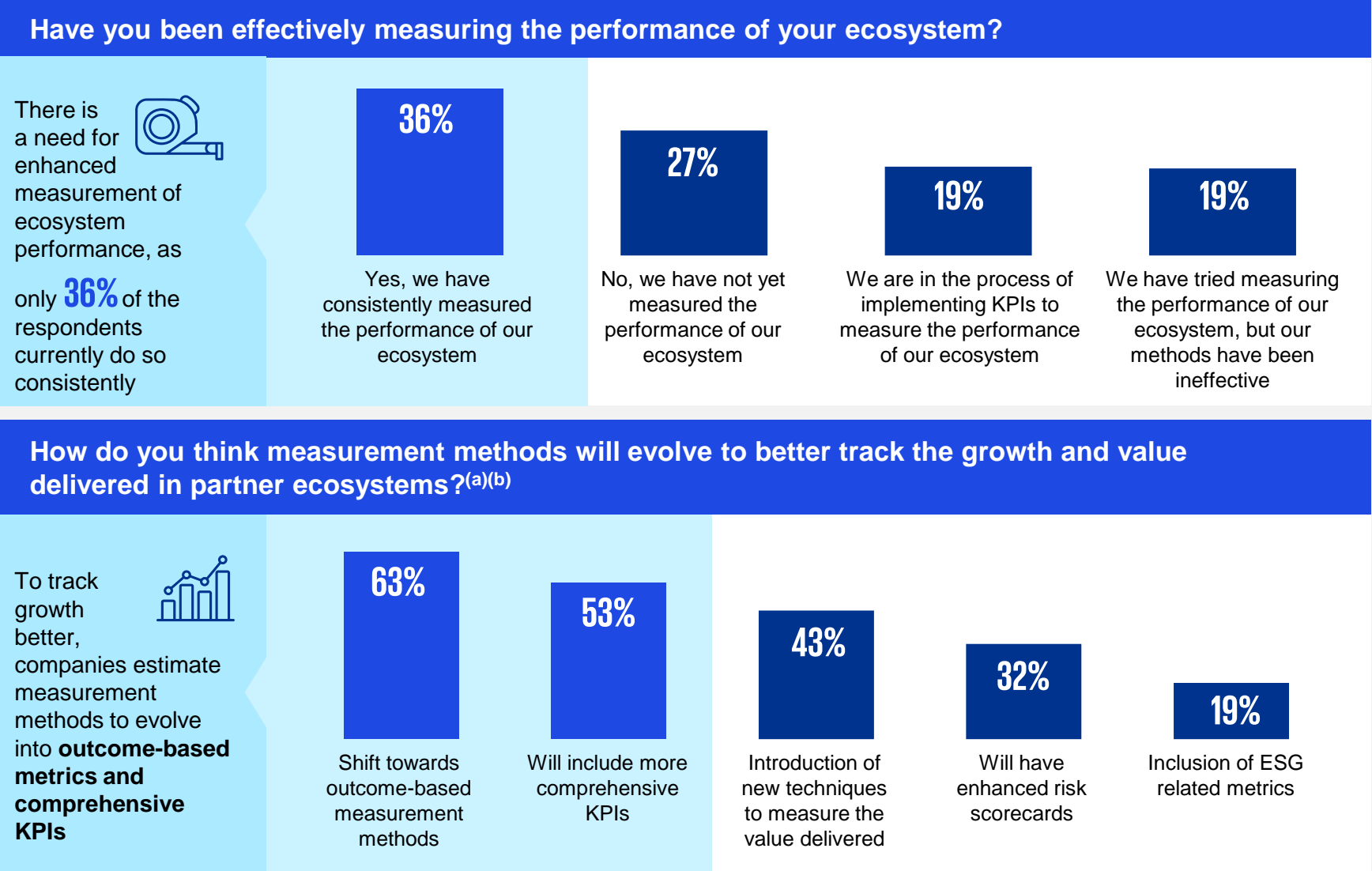
Organizations are challenged with aligning goals and expectations within their ecosystem partnerships

What challenges do you face with your partner ecosystem?^(a)



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Source(s): Partner ecosystem survey, Sep 24

Only a third of respondents currently measure their ecosystems effectively, highlighting the need for evolved, outcome-based metrics and KPIs for growth tracking



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