IT Enterprise Insights
Global - 2022

Technology and communications buyer intelligence by line of business
Why buy IT Enterprise Insights?

- Reliable buyer insight that is comparable across multiple market segments

The challenge for vendors is gaining a deep understanding of enterprise ICT adoption by industry, country, and company size, and then successfully applying this insight on their route to market.

- What are the key business investment priorities for my vertical?
- How should we plan our product evolution?
- How should we refine our marketing message?
- What is the most appropriate deployment for our sales force?
- How should we differentiate our proposition?
- Does our product strategy match customer demand?
IT Enterprise Insights – providing breadth, depth and detail on IT buyer investment priorities

6,250+ ICT decision makers

IT budgets
- COVID-19
- Industry priorities
- Digital

IT investment
- Artificial intelligence
- SaaS & cloud
- 5G

62 COUNTRIES
- Americas – Asia Pacific – Europe – Middle East / Africa

14 LINES OF BUSINESS
- Including: Banking – Payments – Healthcare – Education

80+ TECHNOLOGIES
- Including: Data & analytics – Mobility – Security – Cloud – IoT – Customer engagement –
- Customer Communication – Ent. apps

8 COMPANY SIZE BANDS
- From revenues of <$10 million to >$20 billion
IT Enterprise Insights is a premium research program built to provide a robust & high integrity data platform for decision making

Design and validation led by leading industry and technology analysts to drive highest quality insight in the industry

**SURVEY DESIGN**
- Domain-led topic selection
- Questionnaire design
- Sample size selection
- Survey method selection
- Built-in quality control framework

**SURVEY EXECUTION**
- Rigorous survey testing
- Adapting for regional & cultural differences
- Detecting & managing data integrity issues

**DATA DELIVERY**
- Data validation
- Optimisation for granularity and comparability
- Expert data interpretation for dashboard creation

The most effective way for vendors to discover, understand, and act on evolving IT decision-maker attitudes to technology investment.

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IT Enterprise Insights is delivered via easy-to-use data dashboards, with multi-dimensional filters to target segments that matter to you.

<table>
<thead>
<tr>
<th>Filter by:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicator by IT spending theme</td>
</tr>
<tr>
<td>Line of business and sub-industry</td>
</tr>
<tr>
<td>Region and country</td>
</tr>
<tr>
<td>Size by revenue or employees</td>
</tr>
</tbody>
</table>

**IT budget changes**

- **Increase 6% or more**
- **Increase 1% to 5%**
- **No change**
- **Decrease 1% to 5%**
- **Decrease 6% or more**

<table>
<thead>
<tr>
<th>Year</th>
<th>Increase 6% or more</th>
<th>Increase 1% to 5%</th>
<th>No change</th>
<th>Decrease 1% to 5%</th>
<th>Decrease 6% or more</th>
<th>Proportion of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019-2020</td>
<td>10%</td>
<td>20%</td>
<td>40%</td>
<td>20%</td>
<td>10%</td>
<td>30%</td>
</tr>
<tr>
<td>2020-2021</td>
<td>15%</td>
<td>25%</td>
<td>45%</td>
<td>15%</td>
<td>5%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Sample size: 6,628

Question: Did your organization’s IT budget increase or decrease from 2019 to 2020 and what is your expectation for 2020 to 2021? Vertical: All; Subvertical: All; Country: All; Enterprise size: All.

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Insight across industry and technology investment themes provides a complete view on IT priorities

- **New focus areas for 2022**
  - Investment in technologies & solutions for sustainability
  - Detailed analysis of industrial & manufacturing verticals
  - Plans for "Return to Work" in post-pandemic world

- **IT budget composition & trends**
  - IT budget growth by area
  - Detailed IT budget allocation breakdowns

- **Business & technology drivers**
  - Key drivers for IT expenditure
  - Progress in digital transformation

- **Industry investment priorities**
  - Investment prioritization across industry function areas
  - Growth plans and top industry projects

- **Industry hot topic drill-down**
  - Drivers & detailed investment plans in hot solution areas
  - Line of business specific insight

- **Investment approach by technology**
  - Which technologies enterprises plan to maintain, modify or replace
  - 80+ technologies

- **COVID-19 Impact**
  - Transformation of customer experience
  - Modernization of legacy system
  - Creation of digital capability

- **AI, Cloud, IoT, 5G**
  - Shift in workloads to cloud for SaaS and IaaS/PaaS
  - Drivers for IoT
  - Awareness of 5G
  - Investment in AI technologies

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IT Enterprise Insights provides detailed industry-specific analysis, as well as cross-industry comparison.
Each vertical can be analysed by line of business, IT strategies explored by business function, with drill-down into industry hot topics.

<table>
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<tr>
<th>Line of business</th>
<th>Business functions</th>
<th>Industry hot topics</th>
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</thead>
<tbody>
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<td>Community amenities &amp; housing</td>
<td>Citizen self-service</td>
<td>Investment drivers</td>
</tr>
<tr>
<td>Environmental protection</td>
<td>Citizen/customer relationship management</td>
<td>Cloud computing challenges</td>
</tr>
<tr>
<td>Public order &amp; safety</td>
<td>ERP Finance/ HR</td>
<td>Workloads using IaaS</td>
</tr>
<tr>
<td>Transportation/public works/infrastructure</td>
<td>Business analytics</td>
<td>Analytics</td>
</tr>
<tr>
<td>General public services</td>
<td>Employee mobile applications</td>
<td>Challenges in using analytics</td>
</tr>
<tr>
<td>Defense</td>
<td>Compliance management</td>
<td>Big Data</td>
</tr>
<tr>
<td>Social protection</td>
<td>Payments</td>
<td>Digital disruption impact</td>
</tr>
<tr>
<td>Education &amp; training agencies</td>
<td>Case management</td>
<td>Digital program maturity</td>
</tr>
<tr>
<td>Immigration &amp; customs</td>
<td>Cross-department collaboration</td>
<td>Digital program challenges</td>
</tr>
<tr>
<td>Tax &amp; economic affairs</td>
<td>Bring your own device</td>
<td>Drivers for digital transformation</td>
</tr>
</tbody>
</table>

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Essential intelligence to support your decision making from strategic planning through to client engagement

Your challenges

- Validate your product strategy
- Segment the market
- Identify new opportunities
- Assess your competitors
- Refine your marketing message
- Target an industry
- Increase the effectiveness of your sales force
Target your industry segment by segment

- Identify the top 3 IT projects in each industry by segment
- Determine the most important industry specific business challenges and drivers for investment
- Understand spending plans by enterprise business area in each industry

Apply industry specific insight to gain a detailed understanding of the unique spending plans in each industry
Target your industry segment by segment

- Understand the most important business and IT drivers for each geography and industry
- Determine the hot industry topics driving IT investment in 2022
- Hone your message to match the demand, approach and maturity for each segment

Gain insight into the technology requirements, drivers and investment priorities in each industry and country segment to ensure your messaging resonates
Develop your product strategy

- Discover the current and planned levels of investment by technology area
- Understand the scale of new IT investments to determine future shifts in market share
- Understand market driver, pain points, and adoption timescales

Understand the principal IT and business drivers and planned changes in IT spending over time, to ensure that your product portfolio continues to meet market demand.
Enhance your sales pitching and planning

- Align your sales force to the geographies and vertical markets with the highest spending growth
- Educate your sales team on the most important business drivers and investment priorities
- Understand institution maturity levels by industry, country, and size

IT Enterprise Insights delivers actionable sales intelligence to enable you to plan effectively, educate your team, and accelerate your sales process

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Appendix
IT Enterprise Insights: Geographic segmentation

**AMERICAS**
- Canada
- United States
- Argentina
- Brazil
- Chile
- Mexico
- Colombia
- Venezuela
- Rest of Latin America

**EUROPE**
- Austria
- Belgium
- Denmark
- Finland
- France
- Germany
- Greece
- Ireland
- Italy
- Netherlands
- Norway
- Luxembourg

**ASIA PACIFIC**
- Australia
- New Zealand
- China
- Hong Kong
- Japan
- South Korea
- Singapore
- Taiwan
- India
- Indonesia
- Malaysia
- Philippines
- Thailand
- Vietnam
- Rest of South of Asia / South East Asia

**MIDDLE EAST / AFRICA**
- Israel
- Oman
- Saudi Arabia
- Turkey
- United Arab Emirates
- Bahrain
- Kuwait
- Qatar

- Algeria
- Egypt
- South Africa
- Kenya
- Nigeria
- Rest of Middle East
- Rest of Africa
## Financial services line of business and business function coverage

### Retail banking
- Consumer banking
- Wealth management

### Insurance
- Life insurance
- Non-life insurance

### Corporate banking
- Corporate banking

### Financial markets
- Buy side
- Sell side

### Business function coverage

#### Retail banking
- Online banking
- Mobile banking
- Product development
- Operations
- Branches
- Contact center
- Marketing
- Compliance
- Risk management
- Product/ account administration
- ATMs
- Business support
- Payments
- Portfolio management / financial planning

#### Insurance
- Online banking
- Claims processing systems
- Marketing/ CRM systems
- Contact center
- Underwriting/ pricing systems
- Digital intermediary channels
- Regulatory/ compliance systems
- Fraud management systems
- Back-office support Billing systems
- Intermediary/ broker management systems

#### Corporate banking
- Online banking
- Mobile banking
- Sales/relationship management
- Marketing
- Risk management
- Liquidity risk management
- Regulatory compliance
- Cyber-security
- Real-time Payments
- Trade finance services
- Cash management services
- Back-office operations

#### Financial markets
- Asset/portfolio management
- Order management
- Client servicing
- Marketing/ asset gathering
- Performance management
- Risk management
- Compliance
- Product administration
- Settlement
- Back-office operations
- Back office support (e.g. HR/ finance)

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Information Classification: General
Payments & retail line of business and business function coverage

**Payment issuers/ acquirers**
- Issuers
- Acquirers

**Merchants**
- Nine merchant categories
  - Sales and marketing
  - Payment gateways
  - CRM/ customer engagement
  - Creating APIs/SDK for 3rd-party developers
  - Security/anti-fraud
  - Payment architecture
  - Card management
  - Risk management/ compliance
  - Product development

**Retail**
- Exploration/ production
- Field services

**Business function coverage**
- **Payment issuers/ acquirers**
  - Payment processing
  - Analytics/loyalty
  - Cross-channel customer experience and fulfillment

- **Merchants**
  - Transport/logistics/stock management
  - Anti-theft/fraud solutions (in-store and online)
  - POS software
  - Marketing/CRM
  - Driving sales via digital channels (online/mobile)
  - Payment processing

- **Retail**
  - Supply chain and logistics management
  - Fulfillment/logistics for digital commerce
  - Merchandising & inventory management
  - Sales & marketing
  - Customer support/services
  - Channel integration
  - Customer analytics
  - Self-checkout or in-store kiosks
  - New/enhanced payment solutions in online/mobile commerce
  - New/enhanced payments solutions for in-store
  - Fraud prevention/detection Dedicated loyalty program
  - Management/development of mobile app & online/mobile browser portal
  - Management/development of store network
Public services line of business and business function coverage

**Education**
- Undergraduate
- Graduate

**Healthcare**
- General hospital
- Integrated provider

**Government**
- Ten agencies, including
- Public order & safety
- Transportation
- General public

**Utilities**
- Electric
- Gas
- Water

**Business function coverage**

- Analytics
- Constituent relationship management
- ERP finance
- ERP HR
- Lecture capture
- Learning management systems
- Student information systems

- Medical records (EHR/PR/EMR)
- Care-coordination (including health information exchange)
- Digital imaging (including picture archiving and communication systems)
- E-prescribing and pharmacy
- Patient relationship management
- Business intelligence & analytics
- Financial/revenue cycle management

- Citizen self-service
- Citizen/customer relationship management
- ERP Finance/ HR
- Business analytics
- Employee mobile applications
- Compliance management
- Payments
- Case management
- Cross-department collaboration
- Bring your own device
- Citizen identity management

- Call center/ customer relationship management
- Customer billing
- Credit control
- Sales and marketing
- SCADA and distribution management
- Asset and work management
- Workforce mobility
- Smart grid projects
- Data management
- Energy trading and risk management
- Compliance management
Media and telecoms line of business and business function coverage

**Media**
- Nine media group types, including
  - Film studio
  - Internet TV/streaming
  - Music

**Telecoms**
- Broadband
- Fixed-line
- Cable TV and Satellite
- Mobile

**Business function coverage**
- Production systems
- Rights and royalties management systems
- Media asset management
- Second screen/companion apps
- Traffic and scheduling systems
- Airtime sales systems
- Online video delivery platforms
- Customer data management, marketing, and e-commerce
- Play-out and transmission systems
- Resource scheduling systems
- Content delivery networks
- Social analytics
- Video transcoding and rendering
- Digital rights management
- Network performance management
- Service assurance
- Fraud management
- Social CRM platform
- Omni-channel CRM
- Service orchestration for a hybrid environment
- Digital customer self-service
- Real-time conversed charging and billing
- Third-party payment settlement
- Virtualization of B/OSS systems
- Order-to-activation systems
2022 IT Enterprise Insights

_Comprehensive and reliable insight into the purchasing priorities of global enterprises_

- Drawing from surveys of 6,200+ senior IT executives in over 60 countries, focusing on 80 technologies and 15 industries
- Robust and high-integrity data platform lets you confidently compare IT enterprise investment data across multiple countries, lines of business, technologies, and company size
- Easy-to-use dashboards enable you to quickly focus on the segments that matter the most to you
- Essential intelligence to support your decision making from strategic planning through to client engagement
- Released October 2021

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