



THE FUTURE OF THE  
DIGITAL ENTERPRISE

# Australia & New Zealand

Key Findings of the Ecosystem  
Digital Enterprise Study, 2022

AUGUST 2022





# Innovation Becoming a Leading Business Priority in ANZ

Organisations in Australia and New Zealand (ANZ) are focusing their digital transformation efforts on continued innovation in the experiences they deliver to their customers and employees.

**Innovation has been at the core of organisations' survival strategies – now it will be the means to gain competitive advantage and is getting prioritised over resiliency, business continuity and compliance.**

## TOP BUSINESS PRIORITIES, 2022-2023

45%

Digital Transformation

32%

Improving Employee Experience

32%

Improving Customer Experience

29%

Innovation of Products/ Services

## TOP BUSINESS PRIORITIES, 2020-2021

44%

Improving Customer Experience

40%

Digital Transformation

35%

Compliance with Regulations

31%

Improving Business Agility



# Tech Teams are Restructuring

Technology teams have struggled to deliver business outcomes for the last two years – there has also been a re-emergence of ‘shadow IT’.

Organisations in ANZ are looking to transform their internal tech teams in view of the changes in their IT environment. Tech skills shortage is also a reality in ANZ, which will lead to staff rationalisation and an increase in engagements with 3<sup>rd</sup> party providers.

However, given that they are committing themselves to delivering better experiences, there needs to be a greater emphasis on application modernisation.

## FOCUS OF TECH MODERNISATION STRATEGY, 2022-23

55%



IT Operations

46%



IT Organisation Design

34%



Infrastructure Modernisation



# Tech Investments are Focusing on Experience

3 of the top 4 areas where organisations will increase spend in 2022-23 are focused on delivering better employee or customer experiences.

Digital workplace and customer experience technologies are seeing continued growth – while process automation is increasingly being looked at as a means to improve experiences and not only for cost benefits. Organisations are also evolving their cyber resiliency, with a firm technology lens, so that they are prepared for future exigencies.

## TECH AREAS SEEING THE MOST INCREASE IN SPEND IN 2022-23



**46%**

Digital Workplace



**40%**

Customer Experience



**40%**

Cyber Resiliency



**37%**

Process Automation



# Hybrid Cloud Augmenting Existing Infrastructure

Organisations are building a hybrid cloud environment – irrespective of where their infrastructure is hosted now.

Organisations with on-prem infrastructure are extending to public cloud; while those that have gone public cloud are looking to integrate it better with on-prem infrastructure. Either way, hybrid cloud is the option that nearly all organisations will choose, as they want the flexibility to host individual workloads where it makes most business sense.

## LEADING REASONS FOR HYBRID CLOUD ADOPTION



**22%**

Extending data centre to public cloud

**22%**

Integrating public cloud with on-prem

**17%**

API-consistent public & private infra

*Source: Ecosystem Digital Enterprise Study, 2022*



# Customer Focus Driving Data Initiatives

Sales & Marketing teams are leveraging data the most in ANZ organisations.

This is followed by Product, Customer Experience and Strategy. Use of automation for IT Ops and SecOps is still nascent in ANZ but likely to see a sharp uptick as we get into 2023. Organisations will also explore ways of deepening customer engagements in a world of hyper-personalisation.

## USE OF DATA & AI NOW

**58%**

Lead Generation

**48%**

Location Based  
Marketing

**46%**

Product Fraud Detection

**45%**

Conversational AI for  
Customers

## FOCUS OF DATA & AI IN 2023

**62%**

IT Ops

**55%**

SecOps

**55%**

Employee Experience

**52%**

Personalised Customer  
Experience





# Cybersecurity Practices Not Evolving Fast Enough

While 60% of technology leaders in ANZ think that a data breach is inevitable, they continue to focus most on network security.

Only 9% of organisations in ANZ have implemented Zero Trust. The cyber focus needs to shift away from peripheral security to protecting the data whether it resides within or outside the corporate network. Organisations need to prioritise data privacy and governance, as risks evolve.

## TOP CYBERSECURITY MEASURES IN 2022-23



**40%**

Network security



**35%**

Data security



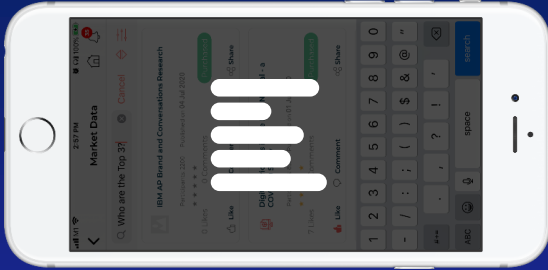
**34%**

Risk and compliance management



**26%**

Application security



# Engage our Analysts



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