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DSAG-ASUG-JSUG Survey 2022

Cloud is essential, staff shortages a problem, sustainability not a top priority

- More than 50 percent of the companies surveyed rate the cloud as a key technology for their IT landscapes.
- For DSAG members, self-services and composable/modular applications and processes are also key technologies
- Top 3 challenges of DSAG members surveyed in terms of innovation projects are internal skills/lack of staff, lack of company-wide commitment, and lack of vision/strategy

Walldorf, October 25, 2022 – According to a joint survey conducted by the German-speaking SAP Users' Group e. V. (DSAG), the Americas' SAP Users' Group and the Japan SAP Users' Group (JSUG) in June 2022, the vast majority of companies are able to keep up with the changes brought about by digitization, transformation and the political turn of the times well and reasonably well. This statement is supported by 71 percent of the DSAG member companies surveyed (ASUG 69 percent/JSUG 57 percent). When it comes to the relevant technologies required for change, the answers vary widely: DSAG members mention self-services with 59 percent, whereas ASUG members with 59 percent declare the cloud and JSUG user companies with 60 percent Artificial Intelligence (AI) and Machine Learning (ML) as number one. However, there is unanimity on the issue of internal capabilities and staff shortages, which all user companies are struggling with. Despite the current situation, sustainability is not a priority for companies.



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In a recent joint survey by the German-speaking SAP Users' Group (DSAG), the Americas' SAP Users' Group (ASUG) and the Japan Users' Group (JSUG), more than half of the members (DSAG 51 percent/ASUG 59 percent/JSUG 54 percent) said that the cloud was essential for their future IT landscapes. Self-services are also relevant for 59 percent of DSAG members (ASUG 41 percent/JSUG 19 percent), closely followed by 55 percent of users in the DACH region, for whom composable/modular applications and processes are decisive (ASUG 16 percent/JSUG 17 percent). Intelligent dashboards and analytics (55 percent) and automation/robotic process automation (RPA) (51 percent) are also important to ASUG members. Among JSUG users, Artificial Intelligence (AI) and Machine Learning (60 percent) and Automation/RPA (50 percent) are cited. "Not surprisingly, cloud was cited in all three user groups as a key technology for future IT landscapes. Cloud technologies have the potential to help companies or organizations better keep pace with change," says Jens Hungershausen, DSAG board chairman.

Challenges for people and systems

When asked about the greatest challenges to innovation projects, internal skills and a lack of personnel were the undisputed top priorities for all three user groups (DSAG 63 percent/ASUG 50 percent/JSUG 70 percent). In second and third place among DSAG members are a lack of company-wide commitment (33 percent/ ASUG 26 percent/JSUG 35 percent) and a lack of vision/strategy (31 percent/ASUG 24 percent/JSUG 27 percent). For ASUG members, funding issues/problems (38 percent) and lack of management support (26 percent) are the next biggest hurdles. JSUG respondents, on the other hand, cite an inability to keep pace with technological change (37 percent) and also a lack of company-wide commitment (35 percent).



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Companies also have non-priority issues

Surprisingly, sustainability or solutions for sustainability management do not play the main role in all three of the user associations surveyed: This is indicated by the feedback from DSAG with 39 percent, ASUG with 24 percent and JSUG with 16 percent. The optimization of new technologies (e.g., IoT, RPA, AI/ML) also receives little attention from DSAG (26 percent) and ASUG (24 percent). JSUG respondents have little interest in the topic of integration & APIs at 16 percent (DSAG 7 percent/ASUG 7 percent). Third place among the unpopular technology topics is taken by cloud extensibility among DSAG (23 percent) and ASUG (18 percent). Jens Hungershausen explains this position as follows: "Companies and organizations are currently confronted with multiple crises that they have to deal with acutely. Challenges such as the Ukraine war, skyrocketing energy prices and disrupted supply chains are just a few examples of why sustainability may have taken a back seat."

Large software vendors help keep pace with change

Respondents from all three user organizations were positive or very positive when asked whether SAP solutions help their companies keep pace with change: 86 percent of DSAG respondents, 80 percent of ASUG respondents, and 65 percent of JSUG respondents.

On average, users leave a lot of money with SAP

On average, members of the three user associations invest 36 percent (DSAG), 41 percent (ASUG), and 34 percent (JSUG) of their IT spending on SAP solutions and services, respectively. However, only 18 percent of DSAG members, 30 percent of ASUG members and 27 percent of JSUG members leave more than half of their total budget with SAP.



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Perception of SAP investments mostly positive

Fortunately, more than half of the respondents have a positive perception of their SAP investments (DSAG 61 percent/ASUG 74 percent/JSUG 52 percent). A negative reaction among respondents (DSAG 8 percent/ASUG 4 percent/JSUG 9 percent) was mainly due to the following two reasons: For DSAG and ASUG members, primarily that the investments made, and their costs were too high in terms of the benefits achieved; for JSUG, the lack of cost efficiency was criticized.

Survey basis:

492 survey participants were registered in North America, 434 in the DACH region and 213 in Japan. Of the ASUG participants, eleven percent were from the Consumer Products sector, followed by seven percent each from the High-Tech, Education & Research and Industrial Manufacturing, Machinery & Components (IM&C) sectors. Twelve percent of DSAG members were from Industrial Manufacturing, Machinery & Components (IM&C), six percent were from the Utilities sector, followed by five percent each from High-Tech and Wholesale Distribution. The JSUG respondents are 22 percent each from the Industrial Manufacturing, Machinery & Components (IM&C) and Wholesale Distribution sectors, followed by nine percent from the Chemicals sector and six percent from the High-Tech sector. The survey was conducted in June 2022.

Webinar on survey results

The results will be explained in a webinar on October 27, 2022, from 4:00 to 5:00 p.m. CEST. Registration is available at the following link: <https://event.on24.com/wcc/r/3981047/0411FD6681EA659241B5B0B20803A7B2?partnerref=asug.com>

The results will be commented by:

- Jens Hungershausen, DSAG board chairman
- Geoff Scott, CEO, ASUG



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About DSAG

The German-speaking SAP User Group e. V. (DSAG) is one of the most influential user associations in the world. More than 3,800 companies form a strong network that extends from SMEs to DAX corporations and across all economic sectors in Germany, Austria and Switzerland (DACH). Based on this reach, the industry association gains sound insights into the digital challenges in the DACH market. DSAG uses this knowledge advantage to represent the interests of SAP users and pave the way for digitalization for its members. For more information, visit:

www.dsag.de, www.dsag.at, www.dsag-ev.ch

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