

Enterprise in Focus

Global Digital Transformation Survey 2024

Navigating enterprise needs, priorities,
investments and supplier decisions across
vertical sectors

What's in scope?



The survey

Between June and August 2024, GSMA Intelligence surveyed nearly 4,200 enterprises across 21 countries and 10 vertical sectors to gain relevant insights into their digital transformation. For each enterprise, GSMA Intelligence targeted respondents who are either decision makers for digital transformation plans/projects or provide recommendations to decision makers.

Survey content

The survey focused on different aspects of digital transformation (strategic objectives, investment plans and priorities, deployment challenges, supplier decisions) as well as on a range of technologies enabling digital transformation, including:

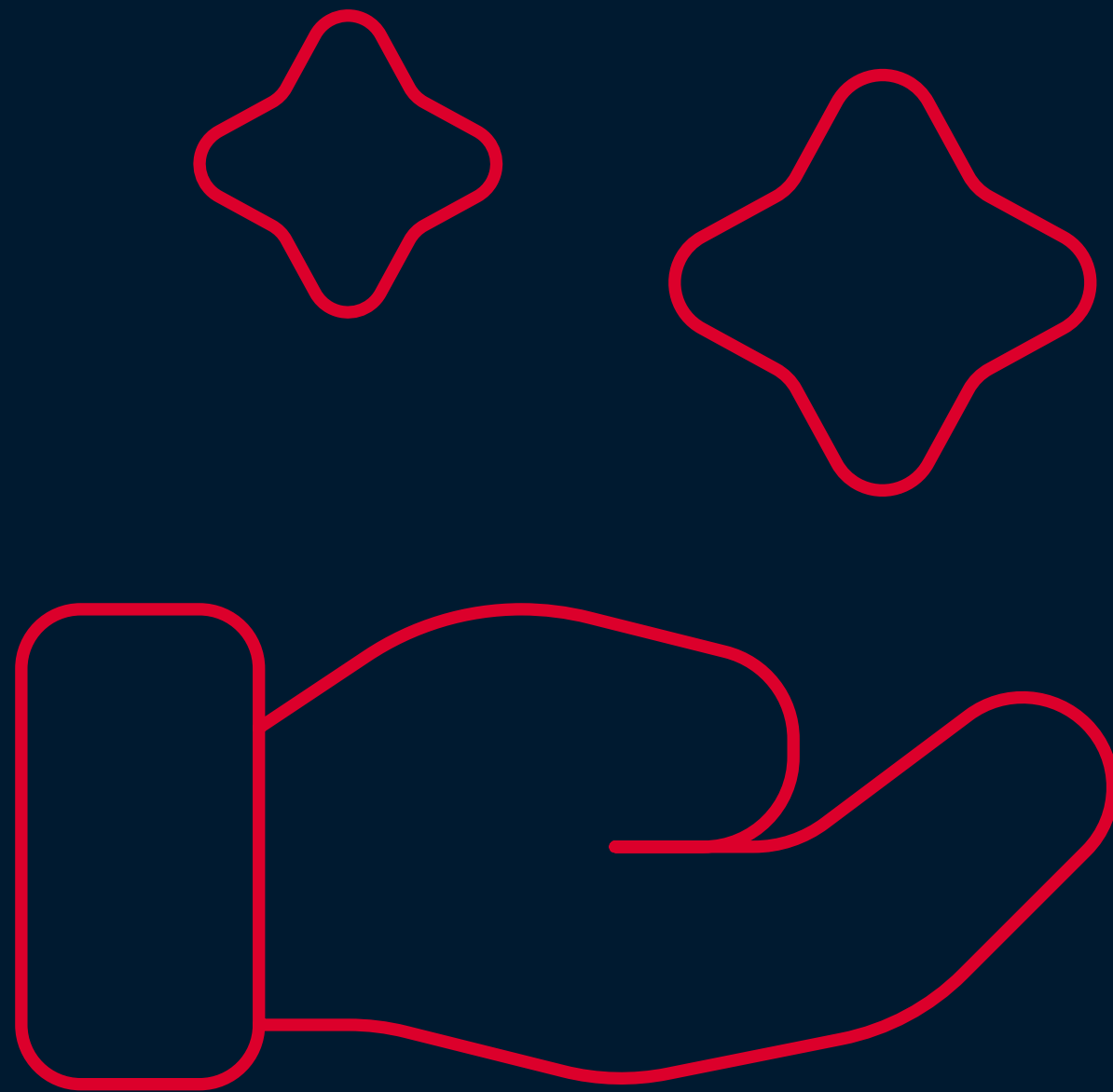
- 5G
- Private networks
- AI
- Cloud
- Edge
- IoT
- eSIM
- Cybersecurity
- Network APIs, and more.

How customers will benefit

Access to insights











Customers will be able to

- Access a major report that analyses the key findings and implications.
- Access an accompanying dashboard that provides full survey data in a consistent and structured way, with filters for vertical sectors, countries, organisation sizes (SME, large, mega), state of digital transformation, and more.
- Engage with our analysts driving the digital transformation research for further queries and analyses.




10 Vertical Sectors and 21 Countries in Focus *~4,200 enterprises in total*

Vertical sectors

-  Manufacturing and Industrial Sectors
-  Transportation, Logistics & Warehousing
-  Automotive and Mobility
-  Utilities and Energy
-  Financial Services
-  Healthcare
-  Retail
-  Media and Entertainment
-  Agriculture, Forestry & Fishing
-  Public Sector

Countries






Asia

-  Australia
-  China
-  India
-  Indonesia
-  Japan
-  Kazakhstan
-  South Korea





Europe

-  France
-  Germany
-  Italy
-  Spain
-  UK

Middle East and Africa





-  Egypt
-  Morocco
-  South Africa
-  Saudi Arabia
-  Türkiye

Americas

-  Argentina
-  Brazil
-  Mexico
-  US

Content: What will you learn from the survey?













Insights available for vertical sectors, countries, organisation sizes (SME, large, mega), state of digital transformation, and more.

 Digital transformation	What's the state of digital transformation?	What are the primary objectives driving digital transformation?	Which vertical sectors are leading on digital transformation?	Which countries are leading on digital transformation?
 Financial spending	How much will enterprises spend on digital transformation?	Which technologies will have the greatest financial spending?	Which vertical sectors will spend the most on digital transformation?	Which vertical sectors will spend the most on each technology?
 Enabling technologies	What's the state of adoption?	What technologies are most important to the success of digital transformation?	What are the main benefits of using each technology?	What are the main deployment challenges for each technology?
 Suppliers	Who are the preferred suppliers for each digital transformation technology?	Who are the preferred suppliers for digital transformation overall?	How do MNOs compare with other suppliers?	What do companies expect from MNOs?

Benefits: How GSMA Intelligence's Global Digital Transformation Survey can help your business

Are you a **Supplier** of Digital Transformation Technologies? [Page 7](#)

A provider of services and solutions enabling digital transformation such as:

-  Networks
-  Equipment
-  Connectivity
-  Private networks
-  Cloud
-  Edge
-  AI
-  IoT
-  eSIM
-  Cybersecurity
-  Network APIs
-  Other

Are you an **End-User** of Digital Transformation Technologies? [Page 8](#)

An organisation purchasing and using technologies to advance its digital transformation

-  Manufacturing and Industrial Sectors
-  Transportation, Logistics & Warehousing
-  Automotive and Mobility
-  Utilities and Energy
-  Financial Services
-  Healthcare
-  Retail
-  Media & Entertainment
-  Agriculture, Forestry & Fishing
-  Public Sector

Benefits: How GSMA Intelligence's Global Digital Transformation Survey can help your business

Enhancing your B2B strategies

- Are your B2B strategies aligned to enterprises' digital transformation plans?
- Are your B2B priorities aligned to enterprises' needs and priorities?
- Does your B2B roadmap align to the future evolution of enterprises' digital transformation plans?

Enhancing your competition and partnership strategies

- Do enterprises see you as a key supplier of digital transformation technologies?
- Who are your main competitors for your main business areas (e.g. services, products, technologies)?
- Who should you partner with when deploying/offering digital transformation solutions for your areas of focus?

Targeting new services and markets

- What services and technologies will see the highest demand from enterprises?
- Are there any adjacent services or technologies that you should explore offering?
- Are there any new markets (e.g. countries) that you should explore targeting?

Redefining your budget and resources allocation

- How much will enterprises spend on digital transformation?
- Do your internal estimates align to enterprises' investment plans?
- Are you allocating the right amount of resources/efforts to the services or markets that present the biggest opportunities?

Enhancing your B2B messaging (e.g. marketing, sales)

- Is your B2B messaging aligned to what enterprises seek from digital transformation?
- Does your B2B messaging speak to the main challenges that enterprises face when deploying digital transformation?
- When approaching new customers, which services and technologies should you lead the discussion with?

Benefits: How GSMA Intelligence's Global Digital Transformation Survey can help your business

Enhancing your benchmarking activities

- How does your organisation compare with your peers (same sector, same country) on state of digital transformation?
- Does your digital transformation roadmap align to the overall direction of the sectors/countries you operate in?
- How do your digital transformation objectives compare with those of your peers?

Enhancing your supplier decisions

- Which suppliers of digital transformation technologies do your peers use the most?
- Who should you partner with when deploying digital transformation solutions for your areas of focus?
- When using MNO services, are you fully leveraging MNO expertise and capabilities?

Enhancing your services and products

- Are there any adjacent technologies that you should explore implementing as part of your digital transformation?
- Are there any new markets (countries) or services that you should explore targeting?
- Do you have the right plan for overcoming some of the digital transformation deployment challenges?

Redefining your budget and resources allocation

- How much are your peers spending on digital transformation?
Is your investment higher or lower?
- How do your investment priorities compare with those of your peers?
- Are you allocating the right amount of resources/efforts to accelerate digital transformation?

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