

Insight Highlights

Digital transformation of enterprises and vertical sectors: a selection of survey insights

DATE

November 2024

GSMA

The GSMA is a global organisation unifying the mobile ecosystem to discover, develop and deliver innovation foundational to positive business environments and societal change. Our vision is to unlock the full power of connectivity so that people, industry, and society thrive. Representing mobile operators and organisations across the mobile ecosystem and adjacent industries, the GSMA delivers for its members across three broad pillars: Connectivity for Good, Industry Services and Solutions, and Outreach. This activity includes advancing policy, tackling today's biggest societal challenges, underpinning the technology and interoperability that make mobile work, and providing the world's largest platform to convene the mobile ecosystem at the MWC and M360 series of events.

We invite you to find out more at www.gsma.com

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GSMA Intelligence

GSMA Intelligence is the definitive source of global mobile operator data, analysis and forecasts, and publisher of authoritative industry reports and research. Our data covers every operator group, network and MVNO in every country worldwide – from Afghanistan to Zimbabwe. It is the most accurate and complete set of industry metrics available, comprising tens of millions of individual data points, updated daily.

GSMA Intelligence is relied on by leading operators, vendors, regulators, financial institutions and third-party industry players, to support strategic decision-making and long-term investment planning. The data is used as an industry reference point and is frequently cited by the media and by the industry itself.

Our team of analysts and experts produce regular thought-leading research reports across a range of industry topics.

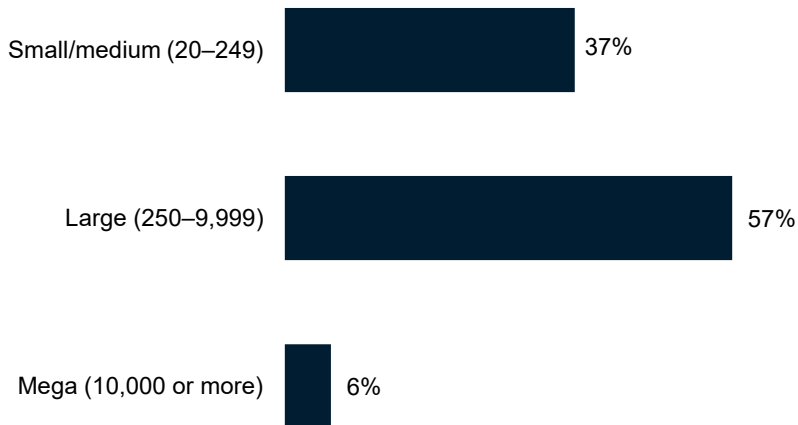
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GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2024

- Between June and August 2024, GSMA Intelligence surveyed nearly 4,200 enterprises across 21 countries and 10 vertical sectors to gain insight 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.
- The survey focused on:
 - different aspects of enterprise digital transformation such as strategic objectives, investment plans and priorities, deployment challenges and supplier decisions
 - a range of technologies enabling digital transformation, including 5G, private networks, AI, cloud, edge, IoT, eSIM, cybersecurity and network APIs.
- This report provides an overview of some of the relevant findings from our survey research across a selected range of topics. For full insights, see the main [report](#) and the accompanying [dashboard](#).

Survey breakdown by organisation size (number of employees)



Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2024

Global Digital Transformation Survey 2024

Vertical sectors and countries in focus

Vertical sectors
Manufacturing and industrial sectors
Transportation, logistics and warehousing
Automotive and mobility
Utilities and energy
Financial services
Healthcare
Retail
Media and entertainment
Agriculture, forestry and fishing
Public sector

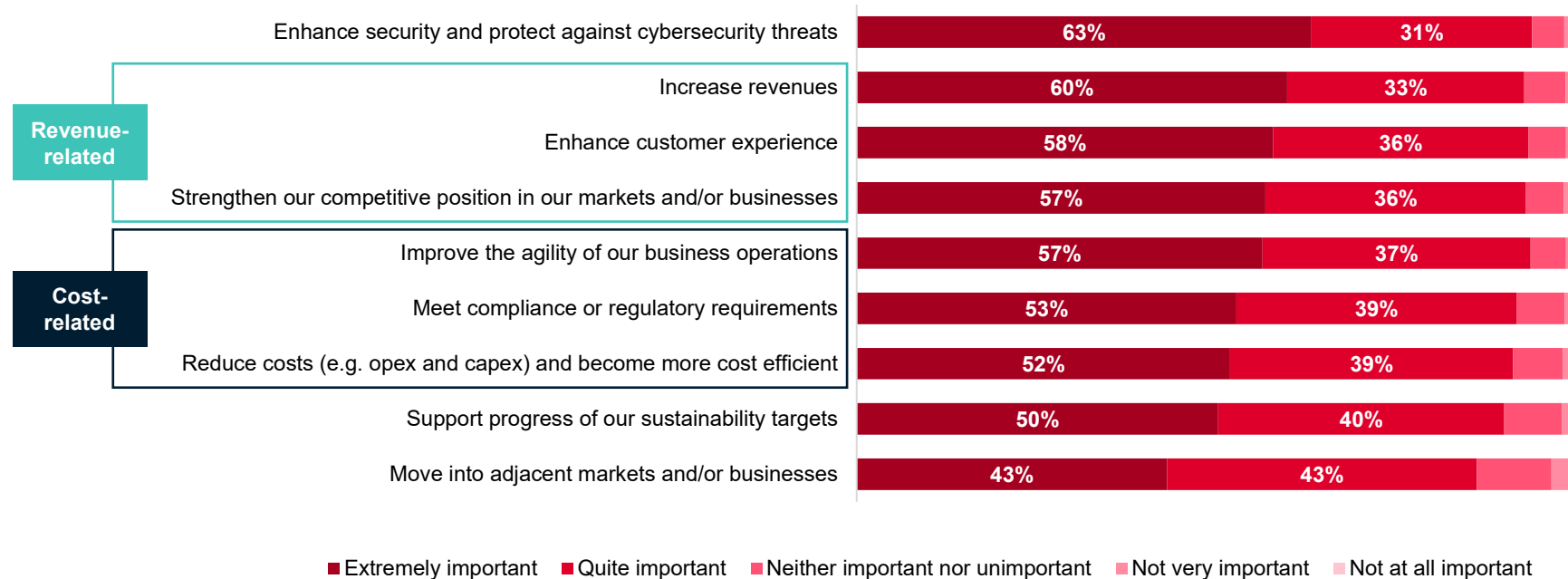
Countries			
Asia Pacific	Europe	Middle East and North Africa	Americas
Australia	France	Egypt	Argentina
China	Germany	Morocco	Brazil
India	Italy	Saudi Arabia	Mexico
Indonesia	Spain	South Africa	US
Japan	UK	Türkiye	
Kazakhstan			
South Korea			

Revenue generation bests cost savings as a digital transformation objective, but security comes out on top

Digital transformation objectives

How important are the following objectives to your company's digital transformation initiatives?

Aggregate figures across all countries and vertical sectors surveyed. Base is all enterprises undertaking digital transformation. Percentage of respondents. Percentages may not add up due to rounding.



Digital transformation: how vertical sectors compare across three key aspects

Across three key aspects of digital transformation (objectives, current use of technologies, and spend during 2024–2030), all vertical sectors are eager to accelerate their digital transformation. An indication of this is the difference in the overall digital transformation score between the 1st and 10th vertical sectors, at just 11%.

Sectors where enterprises tend to have more direct and frequent engagement with consumers (e.g. financial services and media and entertainment) lead on digital transformation, as engagement with consumers increasingly shifts to digital.

Digital transformation ranking: vertical sectors

	Overall ranking
Financial services	1 st
Media and entertainment	2 nd
Utilities and energy	3 rd
Manufacturing and industrial sectors	4 th
Transportation, logistics and warehousing	5 th
Healthcare	6 th
Automotive and mobility	7 th
Retail	8 th
Public sector	9 th
Agriculture, forestry and fishing	10 th

Digital transformation objectives	Use of technologies enabling digital transformation	Spend on digital transformation (percentage of revenues)
4 th	1 st	1 st
7 th	3 rd	2 nd
1 st	2 nd	7 th
2 nd	4 th	4 th
6 th	6 th	5 th
8 th	5 th	6 th
3 rd	7 th	8 th
5 th	8 th	9 th
10 th	9 th	3 rd
9 th	10 th	10 th

Methodology: For each vertical sector, GSMA Intelligence used data from the survey as an input to calculate a score for each of the three key aspects of digital transformation. The three individual scores then informed the overall score. All scores (individual and overall) have the same range.

Digital transformation of countries: top three by selected metrics

- The US is always in the top three (holistic approach to digital transformation)
- Europe is here and there
- Significant variation in developing countries

		Developed countries	Developing countries
Spend	Highest spend on digital transformation as a percentage of revenues during 2024–2030	1) US 2) South Korea 3) Australia	1) Brazil 2) South Africa 3) Egypt
GenAI	Highest advanced use of genAI technology	1) Germany 2) US 3) China	1) Indonesia 2) Saudi Arabia 3) India
Cloud	Highest advanced use of cloud technology	1) US 2) Spain 3) UK	1) Brazil 2) Mexico 3) Indonesia
Cybersecurity	Highest advanced use of cybersecurity technology	1) UK 2) US 3) Spain	1) Indonesia 2) South Africa 3) Türkiye
IoT	Highest use of 5G for IoT in the future	1) Australia 2) South Korea 3) US	1) India 2) Indonesia 3) Saudi Arabia
AI business impact	Highest expectation that AI will have a big impact on customer experience	1) China 2) US 3) Spain	1) Brazil 2) Türkiye 3) South Arabia

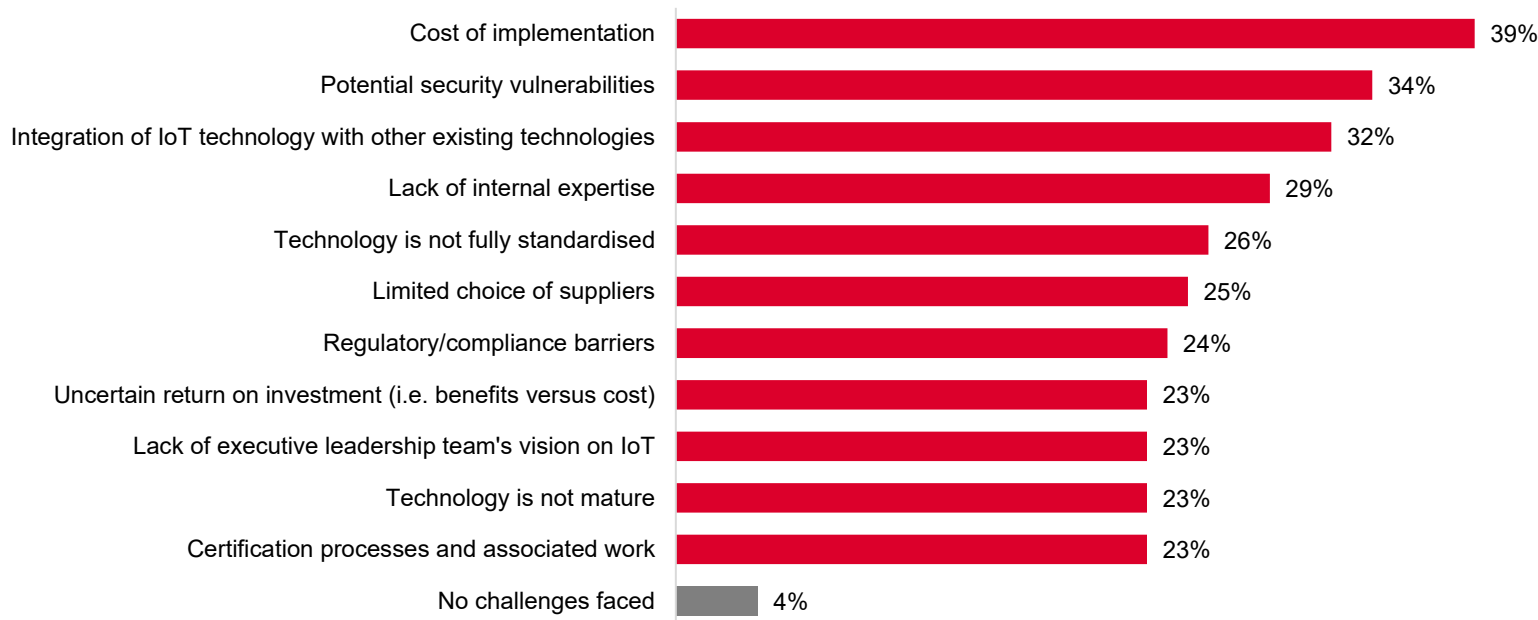
Cost of implementation, security vulnerabilities and complex tech integration are the top IoT deployment challenges

IoT deployment challenges

What are the challenges that your company has faced or currently faces when deploying IoT technology?

Aggregate figures across all countries and vertical sectors surveyed. Base is all enterprises that are already using or testing IoT technology.

Percentage of respondents. Respondents could select all that apply.



The top three 5G capabilities rated as important vary by sector, with enhanced security and connectivity leading

Importance of 5G capabilities or technologies to the success of digital transformation by vertical sector

How important are the following 5G capabilities or technologies to the success of your company's digital transformation?

Aggregate figures across all countries surveyed. Base is all enterprises that are already using or testing/planning to use public 5G networks.

	Manufacturing and industrial sectors	Transportation, logistics and warehousing	Automotive and mobility	Utilities and energy	Financial services	Healthcare	Retail	Media and entertainment	Agriculture, forestry and fishing	Public sector
Enhanced security	1	1	1	2	2	2	2	2	2	1
Enhanced connectivity	2	2	4	1	1	1	1	1	4	2
Greater cloud-network integration	3	3	5	3	3	4	3	4	3	3
Private wireless networks	5	5	3	6	4	5	4	5	9	4
5G FWA (fixed wireless access)	6	4	2	8	5	3	5	3	7	5
5G IoT (URLLC, mMTC, RedCap, sidelink)	4	6	6	5	6	6	9	6	1	6
Greater integration with satellite networks	9	7	7	7	8	10	6	7	6	10
Network API exposure	7	10	8	4	7	9	7	8	11	9
Edge computing	8	9	10	9	10	8	8	9	5	7
Network slicing	10	8	11	10	9	7	11	10	10	8
Open networks	11	11	9	11	11	11	10	11	8	11

Global Digital Transformation Survey 2024 Dashboard

The accompanying [dashboard](#) provides the full survey data – a valuable asset for companies looking to focus on specific vertical sectors, countries or customer size.

The dashboard includes filters for 10 vertical sectors, 21 countries, three sizes of organisation (SMEs, large enterprises and mega enterprises), state of digital transformation (full or partial), spend on digital transformation, and more.

Enterprise in Focus Global Digital Transformation Survey Dashboard

Survey conducted in June/August 2024

Instructions:

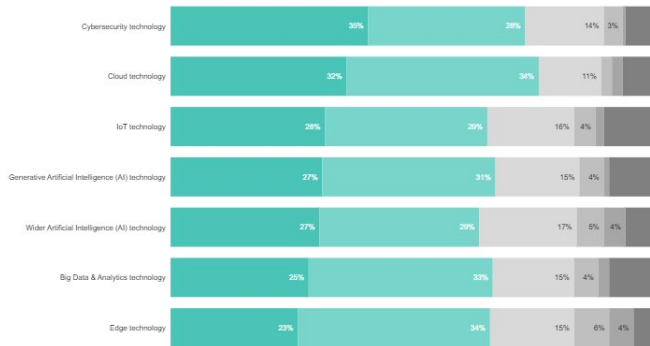
1. Select the dashboard that you wish to view from the list below, then apply filters to discover different views of the data.
2. To combine multiple filters in the same menu (e.g., a list of several countries), hold **Ctrl** while making the selection.
3. To reset a filter, hit the "Clear selections" at the top right of the filter field.

Percentages may not add up to 100%, due to rounding.

Contents

Enterprises undertaking Digital Transformation

- Digital Transformation overall
- IoT
- 5G and Private Networks
- AI
- Other Technologies



Filter selection:

- Vertical Sector**

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

Country

 - Argentina
 - Australia
 - Brazil
 - China
 - Egypt
 - France
 - Germany
 - India
 - Indonesia
 - Italy
 - Japan
 - Kazakhstan
 - Mexico
 - Morocco
 - Saudi Arabia
 - South Africa
 - South Korea
 - Spain
 - Türkiye
 - UK
 - USA

Enterprise size (number of employees)

 - Large (250-9,999 employees)
 - Mega (10,000 or more employees)
 - Small/Medium (20-249 employees)

Enterprise revenues (annual revenues in USD)

 - Less than \$100 million
 - Between \$100 million and \$1 billion
 - Between \$1 billion and \$5 billion
 - Between \$5 billion and \$10 billion
 - Over \$10 billion
 - Don't know / Not sure

Number of countries of operations

 - One
 - 2-10
 - 11-49
 - 50 or more
 - Don't know / Not sure

State of digital transformation (DT)

 - Working on DT initiatives AND have a full DT plan
 - Working on DT initiatives BUT have no full DT plan

Financial spending on digital transformation (DT) during 2024-2026 % of revenue

 - 1-3%
 - 4-6%
 - 7-9%
 - 10-12%
 - 13-14%
 - 15% or more
 - Don't know

Financial spending on digital transformation (DT) during 2027-2030 % of revenue

 - 1-3%
 - 4-6%
 - 7-9%
 - 10-12%
 - 13-14%
 - 15% or more
 - Don't know

GSMA Intelligence Global Digital Transformation Survey 2024: access the full insights

The Global Digital Transformation Survey research (report and dashboard) is part of the GSMA Intelligence IoT & Enterprise module. If you already subscribe to the module, you can [access the full insights here](#).

If you don't have a subscription, please contact our account managers to learn more: sales@gsmaintelligence.com

Out now

Global Digital Transformation Survey 2024

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

survey results from 4,200 enterprises

priorities, challenges, and investment

5G, private networks, AI, IoT, eSIM, cloud, security, and more

cloud and edge: same leading suppliers but different spend

The rise of digital industries: navigating enterprise needs, investments and supplier decisions

- 1 Highlights
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- 4 Enterprises considering undertaking digital transformation
- 5 Enterprises not planning for digital transformation at present

vertical sectors compare

5G technology

