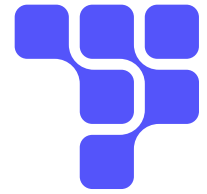


REGIONAL FOCUS | APAC

Cloudera Data Utilization And Optimization Across APAC



Introduction

Data is everywhere and has become increasingly important to improving business. The pandemic has created a surge of change and how organizations engage with it changes day by day.

Being able to adapt quickly is critical, with the research revealing three key elements:

- While most across APAC (Asia-Pacific) engage with a multitude of data sources, and analytical tools and methods, organizations need to reassess where their data and performance analytics needs to be housed in the near future.
- Due to the pandemic, organizations had to relearn best practices in handling and optimizing data to make business critical decisions.
- Organizations need to prepare accordingly with the anticipated shift toward hybrid multi-cloud, and the rate of hybrid working being on the rise since the pandemic.

Read on to find out the current state of data and analytics across APAC, and both the benefits and challenges currently faced...



The Explosive Growth of Data and How Organizations Are Coping With It

Organizations across APAC demonstrate a high level of engagement with data and analytics, with nearly all surveyed IT decision makers (ITDMs) (99%) and senior decision makers (SDMs) (99%) using data and analytics in at least a little capacity in their own department. In terms of the specific data sources, customer and prospect data is the most commonly used as reported by ITDMs (67%).

The research reveals that customer and prospect data is the most commonly used data source across Australia, Indonesia, India and Japan. Surveyed organizations in India (71%) and Australia (56%) are currently using data and analytics to drive revenue and profit, while organizations in Indonesia (67%) and Japan (51%) use data and analytics to improve the customer experience.

Further data sources used in APAC such as connected product data (62%), supply-chain data (60%), customer sentiment data (58%) and market data (58%) further support the fact that organizations across this region are keen to, and see the value in, understanding the customer.

The results show that organizations recognize the value in understanding the changing behavior and heightened expectations of the customer. Having access to such data allows them to make informed marketing approaches that are essential to gain a competitive advantage in the market. Furthermore, improving the customer experience and satisfaction is one of the main areas why data and analytics is used across APAC, with the majority (68%) of SDMs and more than half (57%) of ITDMs saying their organization is currently doing so.

Supply-chain data is also used across China (80%) and Singapore (64%), which is unsurprising given the extent to which products and goods are manufactured and transported across these markets.

South Korea uses customer sentiment data analysis (64%) to explore emotions and communications, and understand how customers feel about products, brands and services. The majority (84%) of surveyed organizations across South Korea have also either already completely or mostly achieved routinely evaluating and optimizing processes to refine new business models based on these insights.

While organizations across APAC demonstrate an impressive level of engagement with data and analytics, and strive to be ahead in terms of innovative ways to further enhance their use of data, further improvements can be made. For example, the increasing number of data sources and analytical tools and methods will result in a challenging volume of data that organizations are expected to manage.

Top Three Scoring/Most Used Data Source by APAC Country

























Total APAC [700]	Australia [100]	Singapore [100]	South Korea [100]	Indonesia [100]	India [100]	China [100]	Japan [100]
67%	63%	64%	64%	80%	83%	80%	66%
							
Customer and prospect data	Customer and prospect data	Supply-chain data	Customer sentiment data	Customer sentiment data	Customer and prospect data	Supply-chain data	Customer and prospect data
62%	57%	57%	59%	75%	73%	75%	51%
							
Connected product data (i.e., IoT)	Connected product data (i.e., IoT)	Connected product data (i.e., IoT)	Connected product data (i.e., IoT)	Connected product data (i.e., IoT)	Connected product data (i.e., IoT)	Market data	Customer sentiment data
60%	54%	55%	56%	69%	69%	71%	45%
							
Supply-chain data	Market data; Customer sentiment data	Customer and prospect data	Market data	Customer sentiment data	Supply-chain data	Connected product data (i.e., IoT); Economic data	Connected product data (i.e., IoT); Supply-chain data

Figure one: What data sources are currently used by your organization? [Base sizes in table], asked to ITDMs only, showing top scores by APAC region and country.

Interestingly, Those With More Mature Enterprise Data Strategies Are More Likely To Have Experienced Higher Profit Growth Recently, Despite The Pandemic

Most organizations that have adopted enterprise data strategies have reported achieving some benefits, which shows the value of such strategies. More than half of ITDMs (51%) report their current enterprise data strategies as being very effective, with clear benefits achieved through their current strategies. However, for a similar proportion (47%), there are improvements that could be made, despite recognition of the benefits that can be achieved. SDMs report similar findings, with nearly half (45%) having very effective strategies, and 52% having somewhat effective strategies, where clear benefits are achieved but some improvements could be made.

Of the enterprises with data strategies in place currently, the vast majority (95%) report that their strategies are key to their business resiliency. Perhaps it's too soon to see such benefits for those with newer strategies, or it could be said that this group would benefit from understanding how to best utilize them. Either way, organizations want and need to best optimize them, and that's key in terms of minimizing missed opportunities involving data.

95%

of **senior decision makers** agree that it's important to optimize data management within organizations.

85%

of **senior decision makers** across APAC agree that data management has been impacted as a result of the pandemic.

Organizations with more mature enterprise data strategies are also more likely to have weathered COVID-19 better than others, and noticeably so. Almost six in ten (57%) surveyed SDMs from organizations with enterprise data strategies in place for longer than a year have coped very well since the start of the pandemic, versus just a quarter (25%) of those with newer strategies.

APAC organizations report a total average profit growth of 4.62%, and those with enterprise data strategies in place for longer than a year report higher profit growth than those with newer strategies, and even those that do not have strategies in place at all. It's perhaps those with newer strategies that would benefit from further guidance in terms of how to best optimize these strategies in order to manage their data better.

SDMs are more likely to experience or anticipate experiencing challenges when implementing an enterprise data strategy, compared to ITDMs. This could be a result of senior decision makers having to be responsible for the outcomes of their enterprise data strategies, through areas such as business initiatives, marketing and communications.

Key differences between these parties within organizations center on the types of challenges faced — the biggest challenge for ITDMs relating to the high costs of data management solutions (41%). On the contrary, growing data volumes (54%) is a key challenge for SDMs.

Two fifths (40%) of ITDMs report their organization is coping extremely well with the volumes of data, with little to no issues in this area. However, the remaining surveyed organizations across APAC are not able to do so, which is telling. Given how many SDMs say data management has been impacted too, there's perhaps a gap between the perception of ITDMs on this across their organization, vs. the reality of the situation.

Similar trends are seen when considering the variety of data, the veracity, velocity and value. It's critical that improvements are made across these areas as by not doing so, organizations run the risk of not being able to best optimize their data in order to inform business critical decisions.

83%

of **senior decision makers** agree that their organization would experience more revenue-paying opportunities if it were able to manage its data more effectively.

\$805,441

Senior decision makers across APAC report annual losses of **\$805,441** as a result of missed opportunities involving their data, with organizations in the **Manufacturing industry** reporting annual losses of **\$2,524,460** on average.

97%

of **senior decision makers** report currently facing, or anticipate challenges when implementing enterprise data strategies.

94%

of **IT decision makers** report currently facing, or anticipate challenges when implementing enterprise data strategies.

Hybrid Multi-Cloud is The Way Forward

Organizations are planning to shift more than three times the amount of their current performance analytics to the hybrid multi-cloud in the near future. The need to adapt and change direction quickly is something that the hybrid multi-cloud will enable organizations to achieve.

Being able to access and manage data from multiple sources and locations is more important now more than ever, and would give organizations the agility that they desire. The fact that more than half (56%) of SDMs rank improving data management and analytics capabilities within the top three most prioritized areas over the next three years is further indication that organizations are making these progressive steps with that priority in mind.

Organizations are already preparing for such changes, with an average of more than two fifths (42%) of the IT department's time and resource in organizations being dedicated to cloud migration and strategy, and a similar average amount dedicated to managing data (39%). Furthermore, nearly half (47%) of ITDMs surveyed across APAC have reported an increase in spend across supporting changing work environments (e.g., hybrid working), to support their organizations' workforces. The same amount (47%) have also dedicated increased spend since the start of the pandemic in supporting digital transformation initiatives such as hybrid multi-cloud architecture, and data and analytics solutions.

Average Percentage of Staff Working Remotely

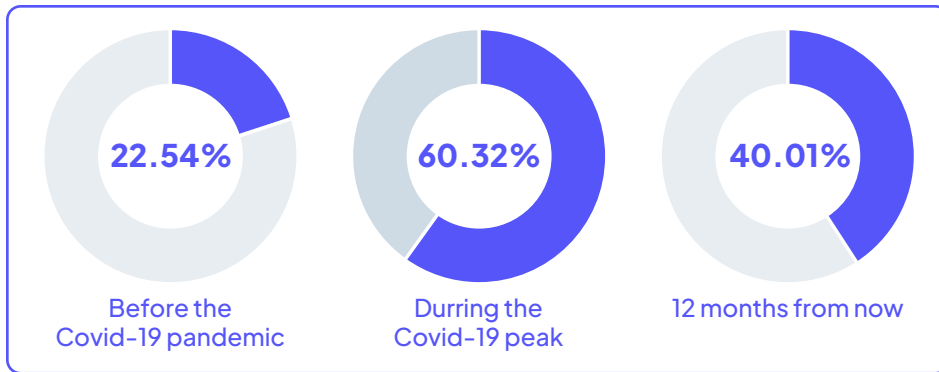


Figure two: Approximately what percentage of your organization's staff worked remotely before the global COVID-19 pandemic, what percentage did at the peak of COVID-19, and what percentage do you think will 12 months from now? [700], ITDMs showing average percentages in APAC.

95%

of **senior decision makers** believe that making sense of all data across hybrid, multi-cloud and on premises architectures is or would be valuable.

94%

of **IT decision makers** report that managing data with at least some cloud capacity is a priority for their organization.

94%

of **IT decision makers** agree that organizations that implement a hybrid architecture as part of its data strategy will gain a competitive advantage.

IoT and Edge device management are currently prioritized across APAC currently when it comes to the analytical tools and methods most used. Given the fact that IT decision makers across APAC report that those working remotely in their organization more than doubled since before the pandemic, this makes sense. COVID-19 has taught organizations of the importance to adapt and evolve to change, and fast. IoT and Edge device management allow organizations to support remote working and have greater flexibility across locations and devices.

With organizations demonstrating an impressive level of engagement with data and analytics, and the clear explosive growth of data, the hybrid cloud can certainly help to alleviate some of the challenges with data management. This, alongside the fact that nearly all (92%) ITDMs see the value in real-time business insights demonstrates the importance of fast data — something the hybrid cloud can help organizations to achieve.

Data is at the Center Of Business Initiatives and Organizational Success

Almost seven in ten (68%) ITDMs report that their organizations have not completely achieved the ability to leverage solutions optimized for speed and access across on premise and public/private cloud infrastructure. This can hinder organizational success, especially with more than two thirds (64%) of SDMs report needing data in real-time in order to do so and nearly all (92%) ITDMs see the value in delivering real-time business insights.

It's promising however, that all (100%) ITDMs, and almost all (99%) SDMs across APAC report digital transformation forming at least part of their business strategy. Almost three quarters (72%) of SDMs across APAC report digital transformation being a business driver that is currently prioritized. However, despite the extensive utilization of such initiatives, organizations' current capabilities can be further improved.

With the vast majority of ITDMs (97%) and SDMs (93%) across APAC believing that data and analytics is important to ensuring successful and effective DEI (Diversity, Equity and Inclusion) initiatives, it makes sense that almost all (99%) ITDMs and SDMs say their organization either currently have these in place or plan to in the future.

98%

of ITDMs agree that DEI initiatives contribute to an organization's success.

93%

of SDMs agree that DEI initiatives contribute to an organization's success.

Conclusion

Customer satisfaction is one of the top investment priorities for Asian brands and companies have invested heavily in tools and technologies to help them understand their customers more deeply,” said **Mark Micallef, Vice President of Asia Pacific and Japan, Cloudera**. “Yet research has shown that organizations continue to struggle with implementing effective enterprise data strategies in terms of high data management costs and growing data volumes. Businesses in Asia Pacific need a true hybrid platform that allows them to break through the burgeoning number of communication channels and more effectively meet the demands of the new wave of customer expectations as economies reopen.

APAC is recognizing the importance of data and analytics, as shown by the wide range of data sources, and the analytical methods and tools used. These practices suggests their proactivity in terms of where attention should be focused. Most have enterprise data strategies in place, which also proves an awareness of a need to manage the masses of available data in more effective ways.

However the effectiveness of enterprise data strategies is a pinchpoint for some and will surely be limiting potential. Organizations would benefit from further support and guidance, especially those with less mature enterprise data strategies in place. Doing so could really improve the agility of organizations, and their ability to cope with unprecedented events in the future.

The anticipated shift towards a hybrid multi-cloud, and investments spent on supporting hybrid working and infrastructure is promising — organizations are already putting practices in place ahead of plans to move where infrastructure is currently housed. Such changes can also further support the business initiatives organizations currently have in place and see value in. Engaging in such initiatives will give organizations an opportunity to gain traction in the market, and retain diverse employees that can help to fulfill business objectives and desired outcomes.

Data is now recognized as what it has always been, a strategic asset underpinning the success of organizations across the world. Organizations that recognize this and utilize available data in the best way will noticeably succeed in the competitive market.

Methodology

This report specifically focuses on the analysis of APAC which consisted of 700 ITDMs and 350 SDMs.

Respondents were from organizations with 1,000 or more employees across both public and private sectors.

ITDMs and SDMs were based in the following countries and regions:

- **APAC ITDMs (700)** — Singapore (100), Australia (100), South Korea (100), Indonesia (100), India (100), China (100), Japan (100)
- **APAC SDMs (350)** — Singapore (50), Australia (50), South Korea (50), Indonesia (50), India (50), China (50), Japan (50)

All interviews were conducted using a rigorous multi-level screening process to ensure that only suitable candidates were given the opportunity to participate.

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