



Big Data & Analytics

The customer-activated enterprise

Insights from the IBM C-Suite Study

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What is changing in the realm of Business?



Data is emerging as the world's best resource for competitive advantage

Over 2 billion people (25% of the world's population) are online

Gartner

Decision-making is moving from the elite few to the empowered many

Every driver generates 900 rows of data per 15 minute commute

Directline Insurance 2013

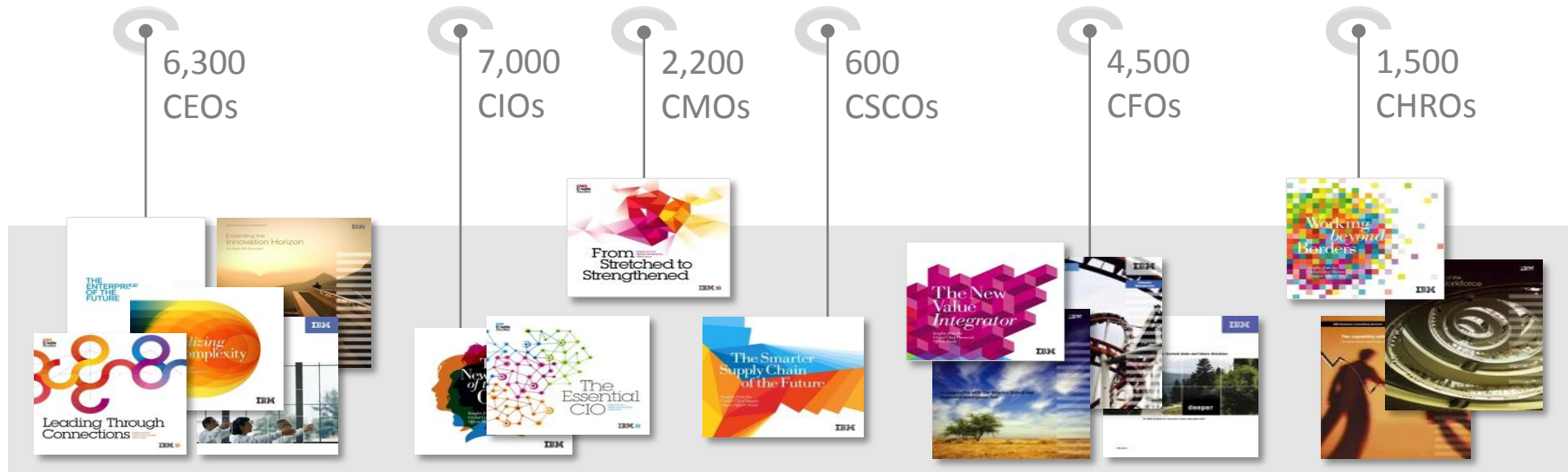
As the value of data continues to grow, current systems can't keep pace

Global data center traffic will grow at an annual rate of 25% reaching 7.7 zettabytes

Cisco Global Cloud Index: 2012 - 2017



The IBM global C-Suite Study draws on a decade of research:



Much has changed since the first study: digitisation has given customers more clout and transformed their expectations

2004



Focus on cost reduction to deal with increasingly global competition

2008



Business models evolve to enable external partnerships and collaboration

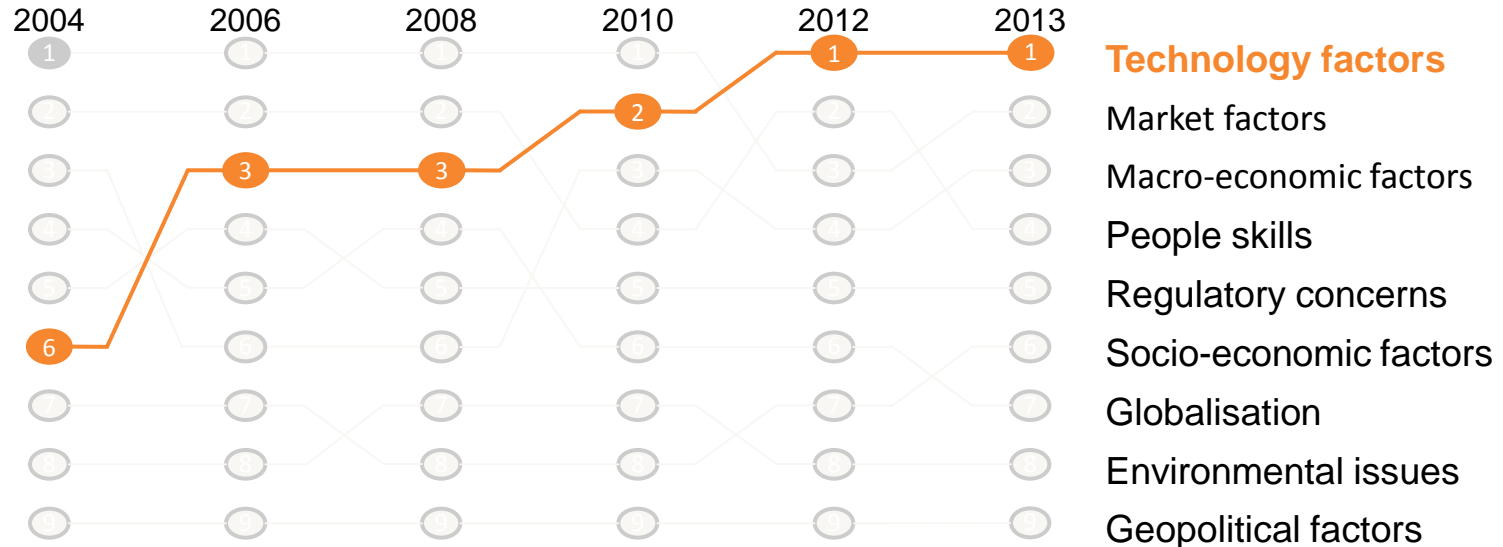
2014



The *digitally-activated* customer moves to the top of the C-suite agenda

CEOs think technology will be the most important external force shaping the future

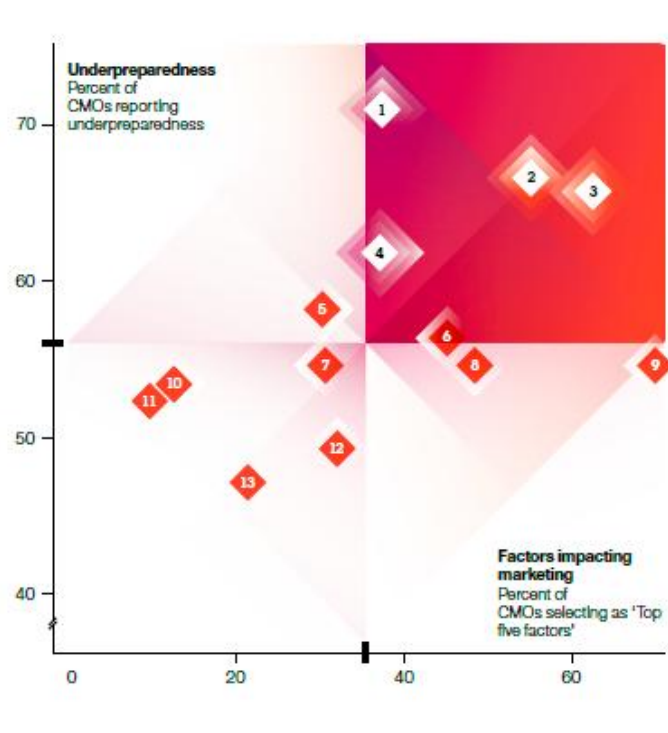
CEO Studies 2004–2013



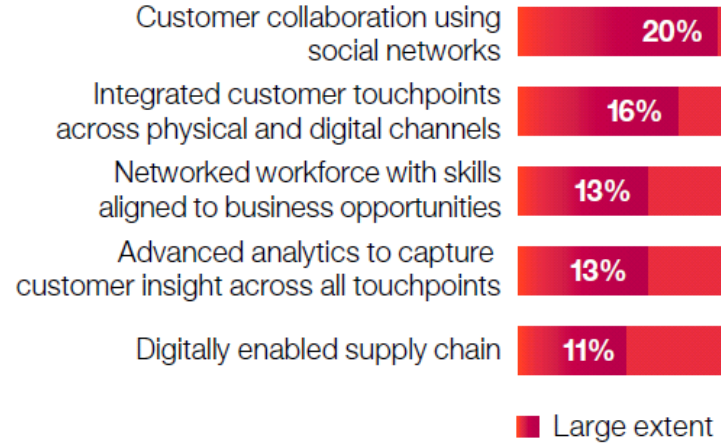
Source: Question E8–What are the most important external forces that will impact the enterprise over the next 3 to 5 years?; Global n=884 [CEO only]



Big Data is now considered the biggest headache for a CxO



- 1 Data explosion
 - 2 Social media
 - 3 Growth of channel and device ch
 - 4 Shifting consumer demographics
 - 5 Financial constraints
 - 6 Decreasing brand loyalty
 - 7 Growth market opportunities
 - 8 ROI accountability
 - 9 Customer collaboration and influe
 - 10 Privacy considerations
 - 11 Global outsourcing
 - 12 Regulatory considerations
 - 13 Corporate transparency
- Mean



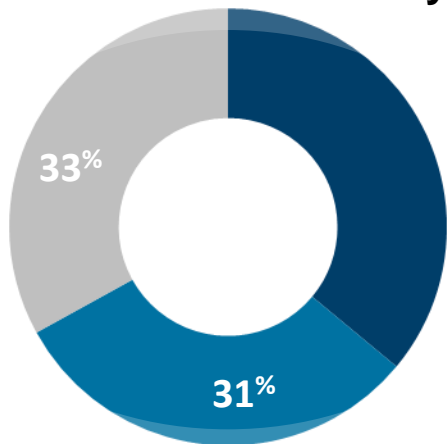
Taken from IBM CMO insights from global C-suite studies:

- *Stepping up to the Challenge - 2014*
- *The Customer Activated Enterprise - 2013*
- *From Stretched to Strengthened - 2011*



Like their global counterparts, Australian enterprises see a need for a digital strategy

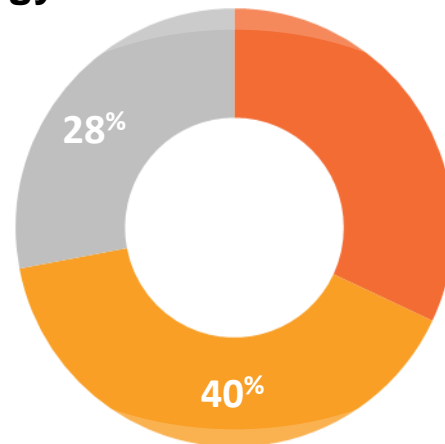
Types of digital strategy



Global

36%

have an integrated digital-physical strategy



Australia

32%

have an integrated digital-physical strategy

- Integrated digital-physical strategy
- Limited digital strategy
- No digital strategy

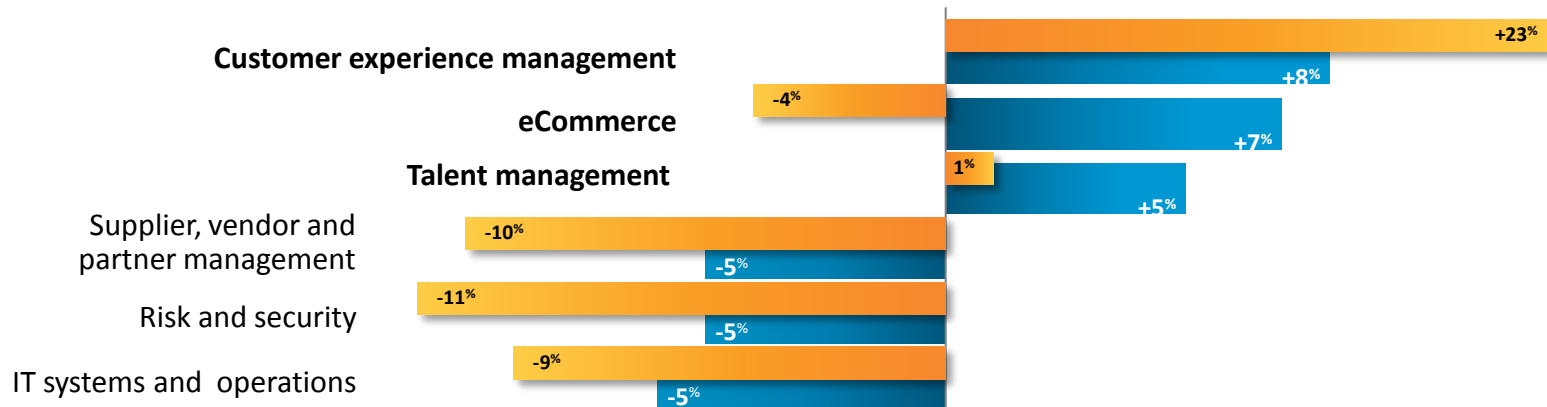
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Source: Question B4—What kind of digital strategy does your enterprise have?; Global n=2,869; Australia n=96



Australian CxOs plan to shift their attention towards the customer experience, more than their global counterparts

Areas of personal involvement

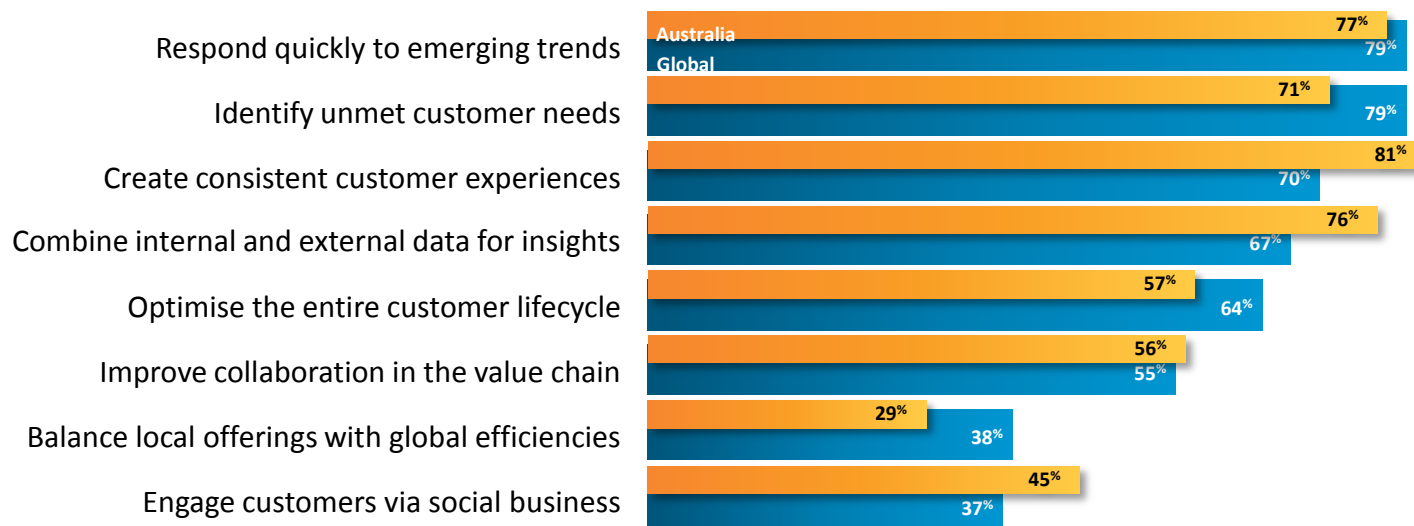


Source: Question B3—What are the top five areas you are personally involved in at an enterprise level?; Global n=2,940 to 2,954 Australia n=96



CxOs in Australia are more focused on obtaining insight from data to create consistent customer experiences

Initiatives to improve the customer experience



Source: Question C5—To what extent is your enterprise focused on the following initiatives to improve the customer experience?; Global n=2,994 to 2,995; Australia n=96



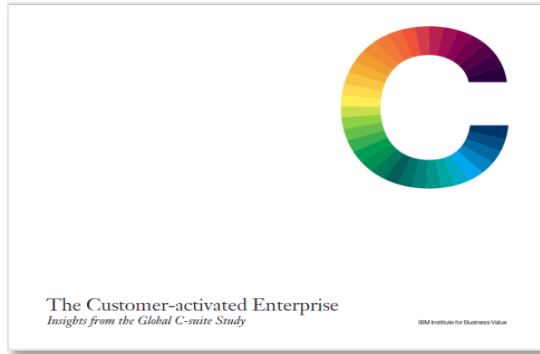
The common theme:

- Open up to Customer influence
- Pioneer digital innovation
- Craft engaging customer experiences



We invite you to continue the conversation

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For more information about this study and to get the full version of this report, see www.ibm.com/csuitestudy



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