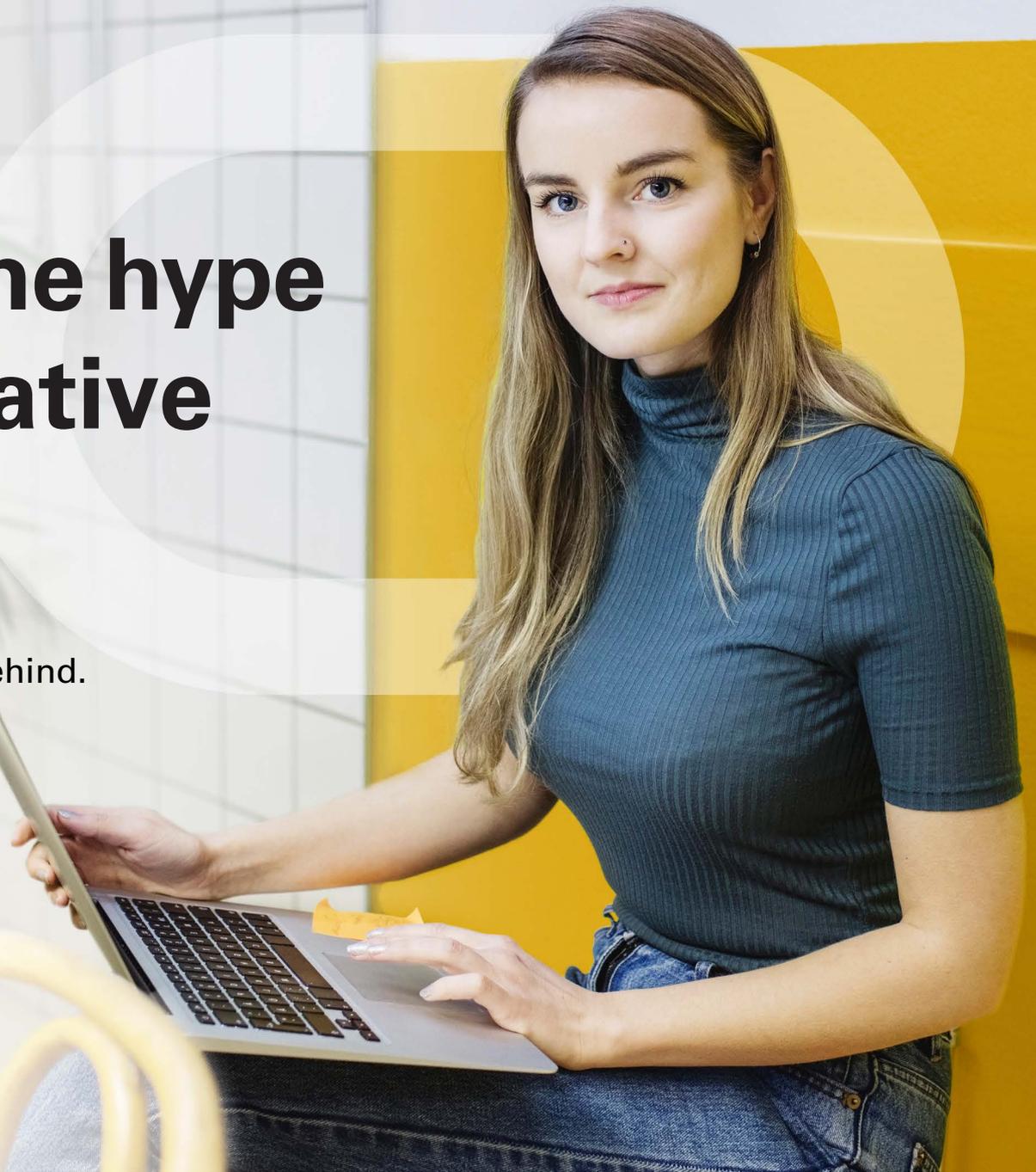


Uncovering the hype around innovative technology

The **IT community's** view on which
technologies are leaving the others behind.



Your Tomorrow, **Today**

ORACLE[®]
Cloud

Our new study reveals that platform technologies such as cloud security and autonomous databases are widely valued and implemented.

Artificial intelligence (AI) is the next in focus, whereas other transformation technologies appear less understood and adopted.

Technology steers every industry, company and person. It has the power to change how we work, communicate and innovate. It can reveal new markets, unlock new services, relieve workloads and improve our decision making.

But technology adoption is varied. Different sectors and markets see value in different technologies, and some move faster to adopt than others.

Did you know that the perception of value and rate of adoption across different technology varies across markets and sectors. Even within the same company, teams' attitudes towards tech can vary hugely and, with innovation, often can happen in small, isolated pockets.

So how did people really feel about tech? In August 2018 we asked over 4,000 senior decision makers, across 21 markets, to tell us.

We wanted to find out what they thought was just 'noise' and what they needed to hear about. And we were keen to know which technologies held the most potential for innovation within their business, as well as what they were already using. We even asked which technologies they loved, the ones that annoyed them, and those that actually delivered.

We were fascinated by the results, and we hope you find our research as valuable as we did.

Key highlights

Technologies

Cloud security is recognised as the most promising technology to revolutionise industries – and actually deliver – reflecting a continued focus on data protection.

Autonomous databases are the second most-valued technology across countries and business teams, likely due to people working to keep on top of surging data volumes now and well into the future. It's also the tech making the most noise in the press, and people want to hear more.

Every business team wants to hear less about **Chatbots**, even though they make the least noise in the press. And while they're considered the least important technology, more than half of organisations have implemented them. The only area where this isn't true is within the marketing function, where only 45% use chatbots – perhaps due to a greater focus on gaining deep insight into customers.

Globally, **AI** is highly valued but is also the technology with the biggest gap between recognised value – we can expect to see this as a focus for investment in the near term.

Countries

Russia and **Poland** may have the greatest potential for growth in innovation: they currently have the largest average gaps between recognising the importance of technologies and implementing them within the business.

India, Thailand and the **United Arab Emirates** had the lowest average gaps, suggesting that they've moved fastest to take advantage of new, innovative technologies – or have perhaps been more experimental in how they approach innovation.

Some countries, for selected technologies, appear to have implemented ahead of expectations: **India** and **Malaysia** for Artificial intelligence (AI), and **Malaysia** and **New Zealand** for the Internet of things (IoT)... will these technologies deliver on their promise?

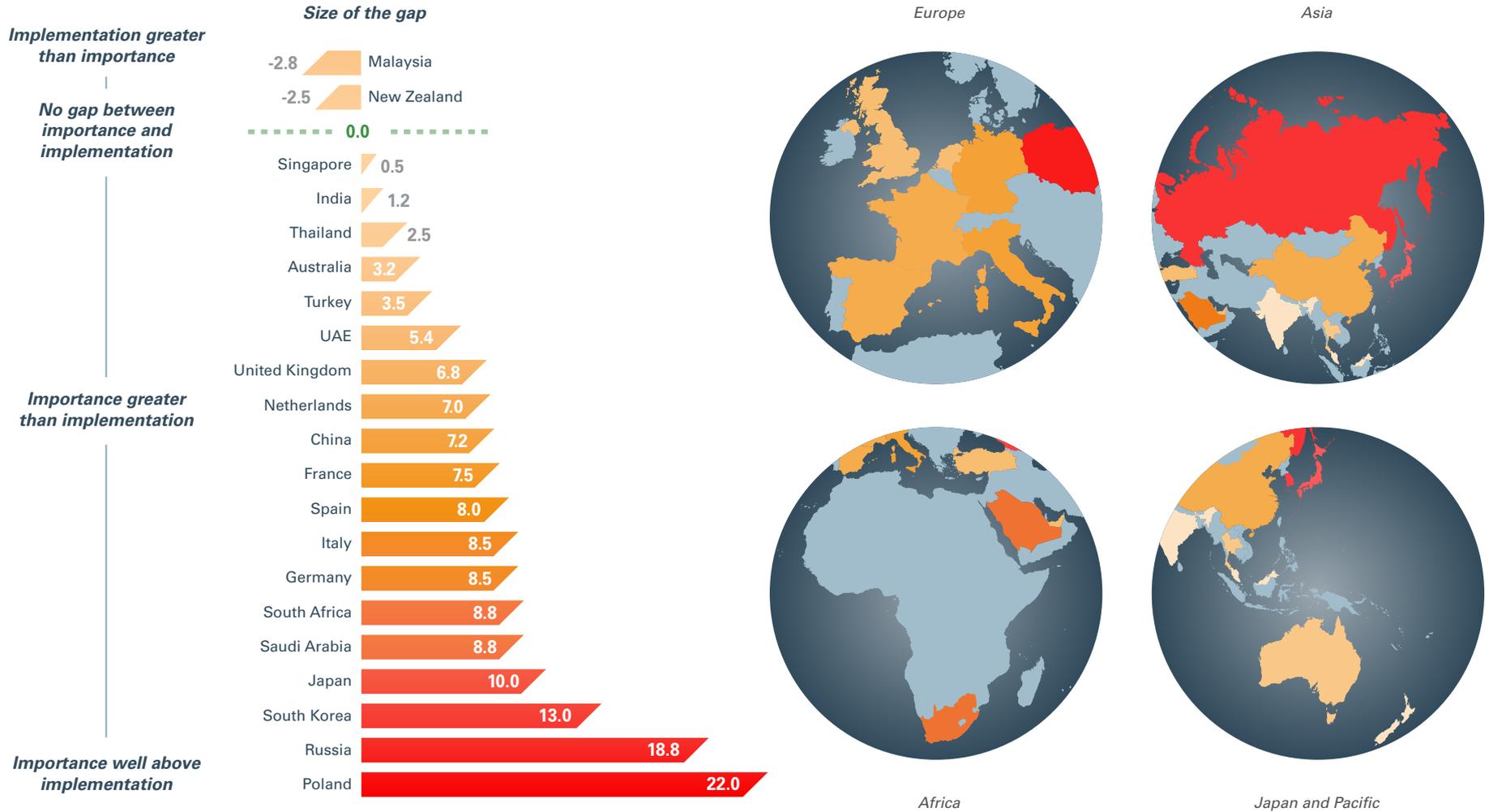
All audiences

- Importance v implementation – Heat maps
 - Internet of things (IoT)
 - Chatbots
 - Blockchain
 - Cloud security
 - Autonomous databases
 - Artificial intelligence (AI)
 - Summary – All tech
- Press noise – All tech
- Want to hear more v less – All tech
- Feelings – All tech

All audiences – Importance v implementation – IoT

We asked businesses how important a technology was to their success, and whether they had adopted it. **The difference between the importance and actual implementation is the gap.**

Organisations in India have the smallest gap for IoT. Whereas Poland and Russia have the greatest gap. However in New Zealand and Malaysia, there is greater implementation of IoT than agreement on its importance, suggesting either an experimental approach to adoption, or a reflection of frustration with current deployments.

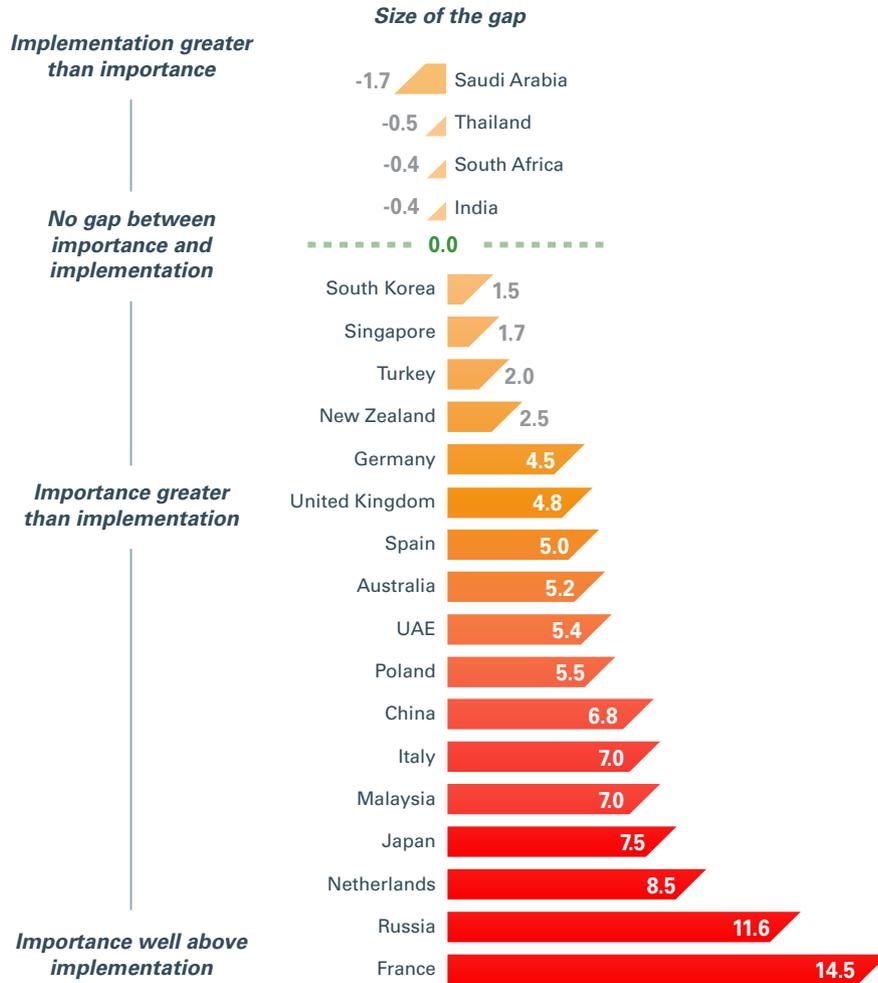


All audiences – Importance v implementation – Chatbots

Chatbots are considered the **least important** – on average only ~57% of respondents across countries find the tech important and adoption levels are low.

India, Saudi Arabia, South Africa and Thailand have the smallest gaps between importance and implementation, while France and Russia have the farthest to go with the tech. India stands with

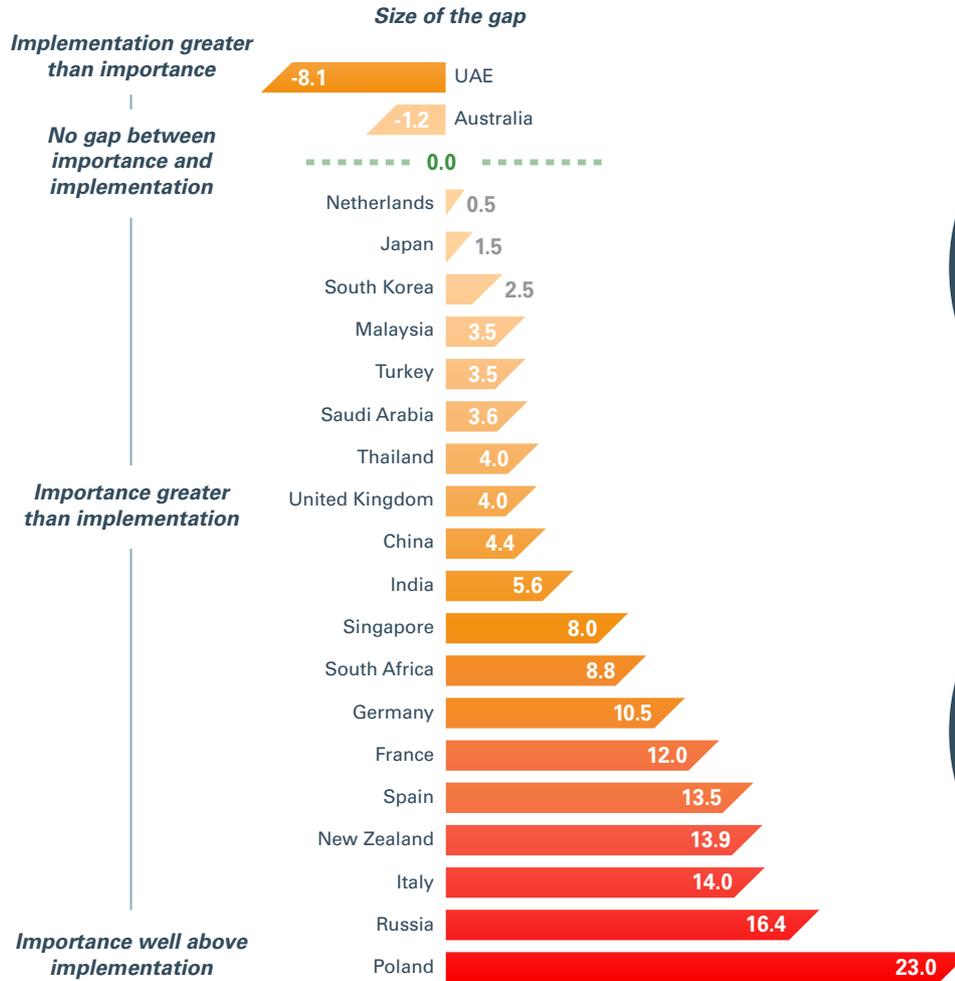
much more recognition of chatbots' value (68%) and almost exactly the same level of implementation, suggesting a greater appreciation of their potential, and have therefore prioritised their adoption.



All audiences – Importance v implementation – Blockchain

Australia and **Netherlands** have the smallest gaps between importance and implementation for **blockchain** technology, indicating they have **implemented the tech successfully**.

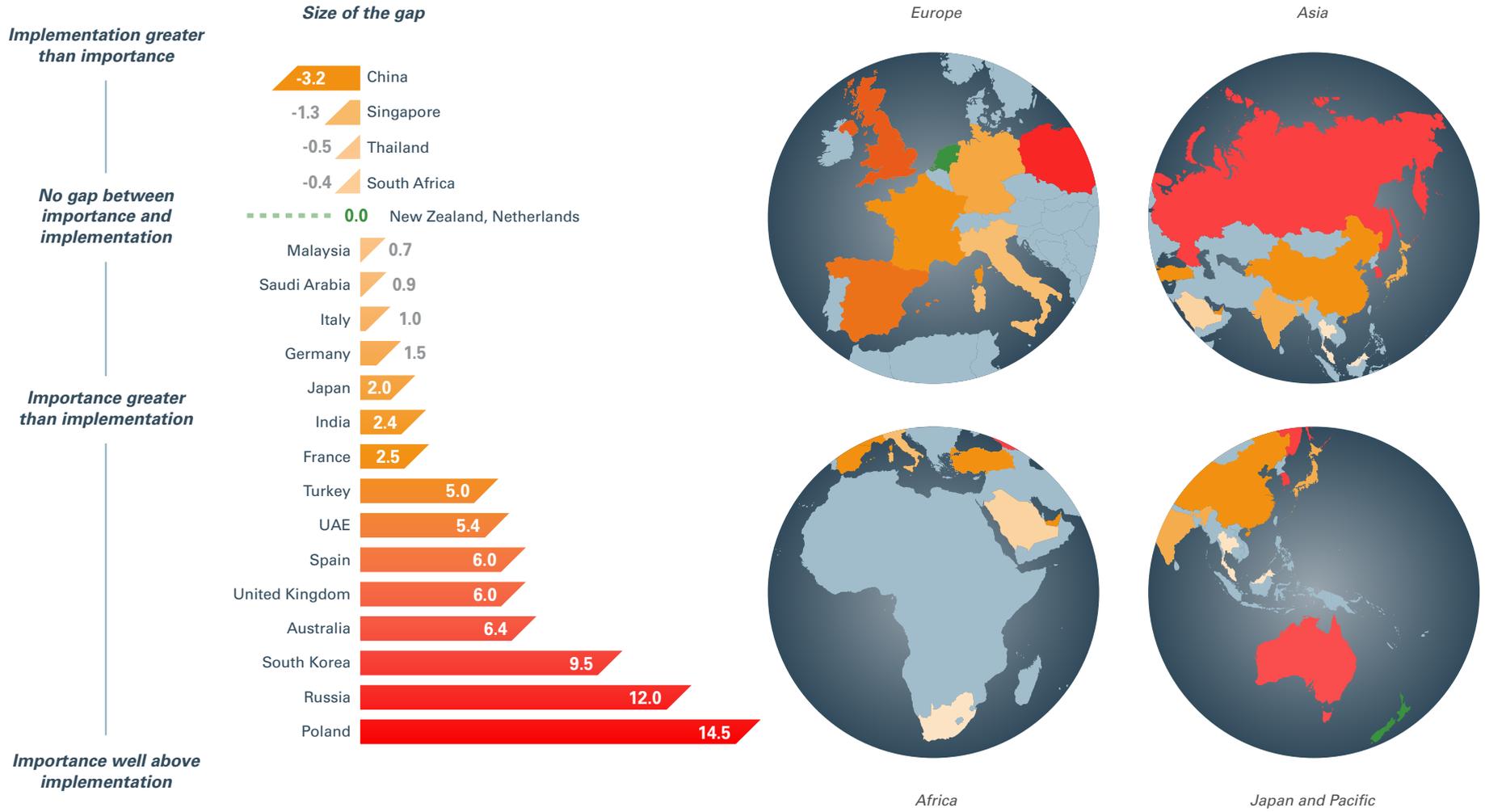
European countries, by contrast, seem to be more cautious, with France, Germany, Italy, Spain, Poland and Russia all showing at least a 10% lag in implementation. Companies in Poland and Russia have the greatest room for growth with blockchain technology.



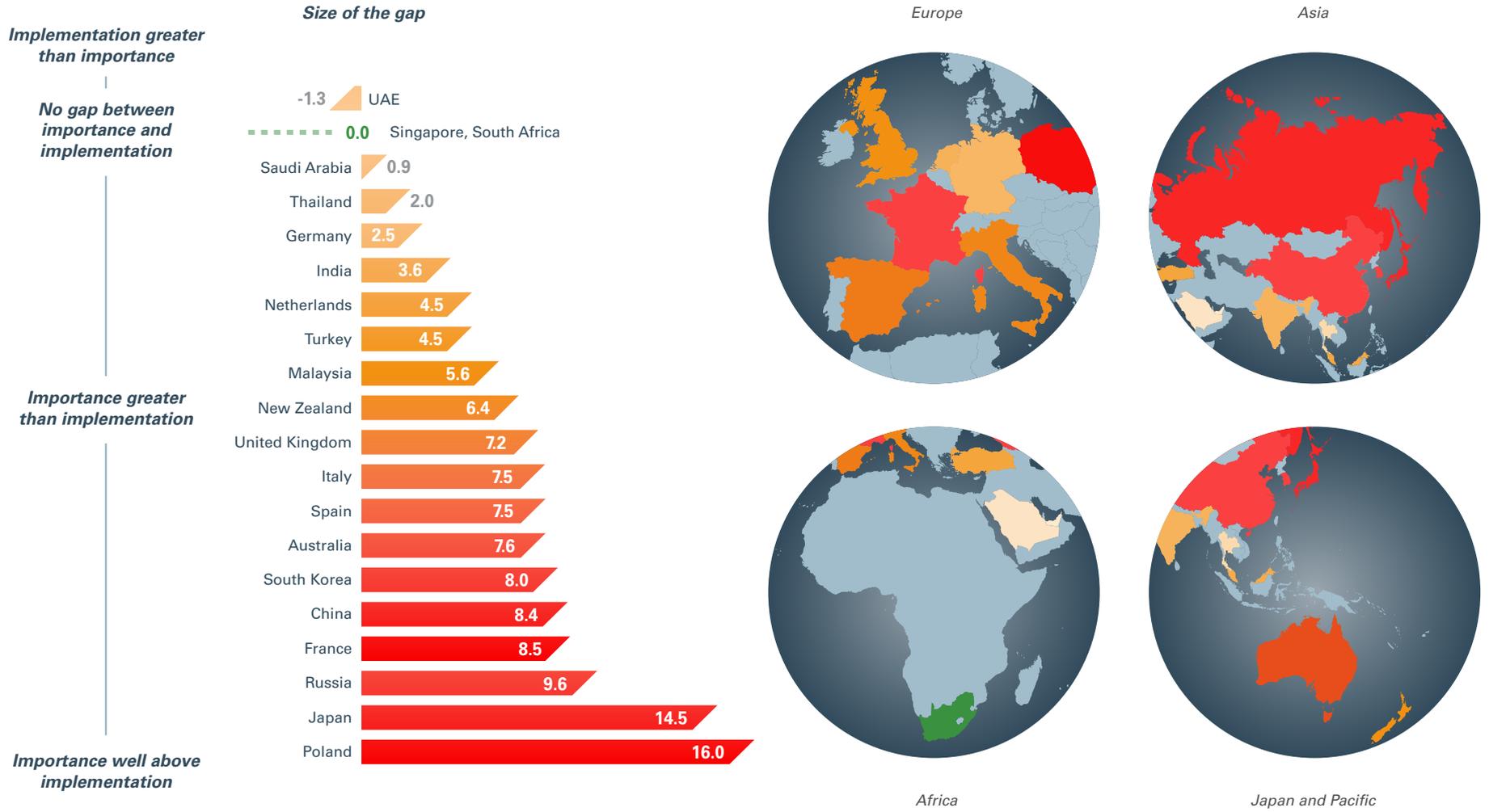
All audiences – Importance v implementation – Cloud security

Cloud security is the most valued of all the technologies surveyed. It has the lowest average gap sizes, and the highest average importance – it is **considered valuable and easy to implement**.

New Zealand and Netherlands have the ideal balance of perceived importance and implementation with no gap, while Russia and Poland have room to grow with gaps of over 10%.



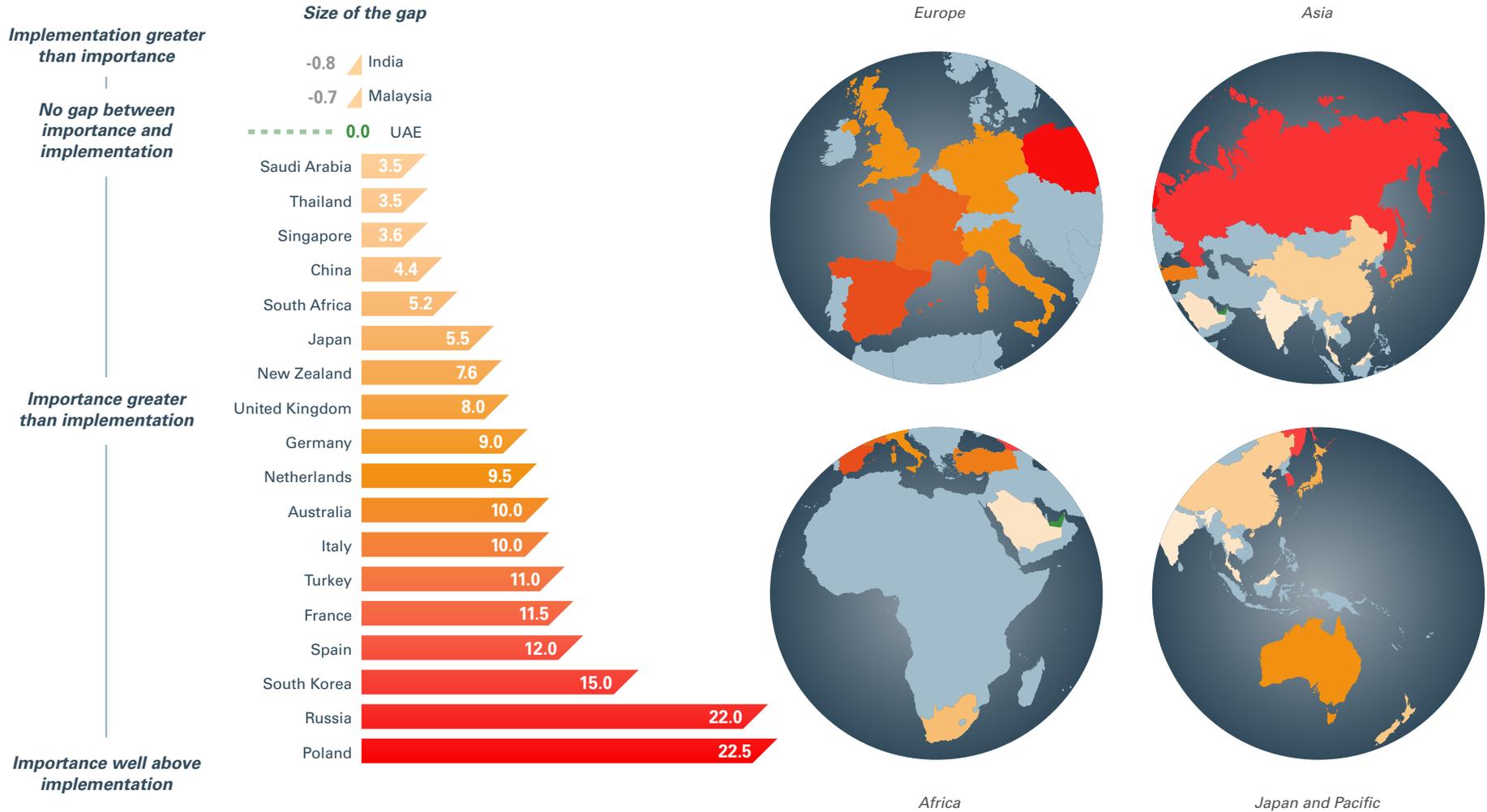
Autonomous database technology is the second most-valued tech across countries. Singapore and South Africa have no gap between perceived importance and implementation, while Japan and Poland have the largest gaps.



All audiences – Importance v implementation – AI

Globally **AI** is **highly valued** but it's also the technology with the **biggest gap between recognised value and actual use**. This tech still has room to realise potential.

UAE is balancing perceived importance and implementation with no gap. Although India has one of the highest levels of implementation, the rate of delivery is not matched by its perceived importance. This suggests trials have yet to prove their value.



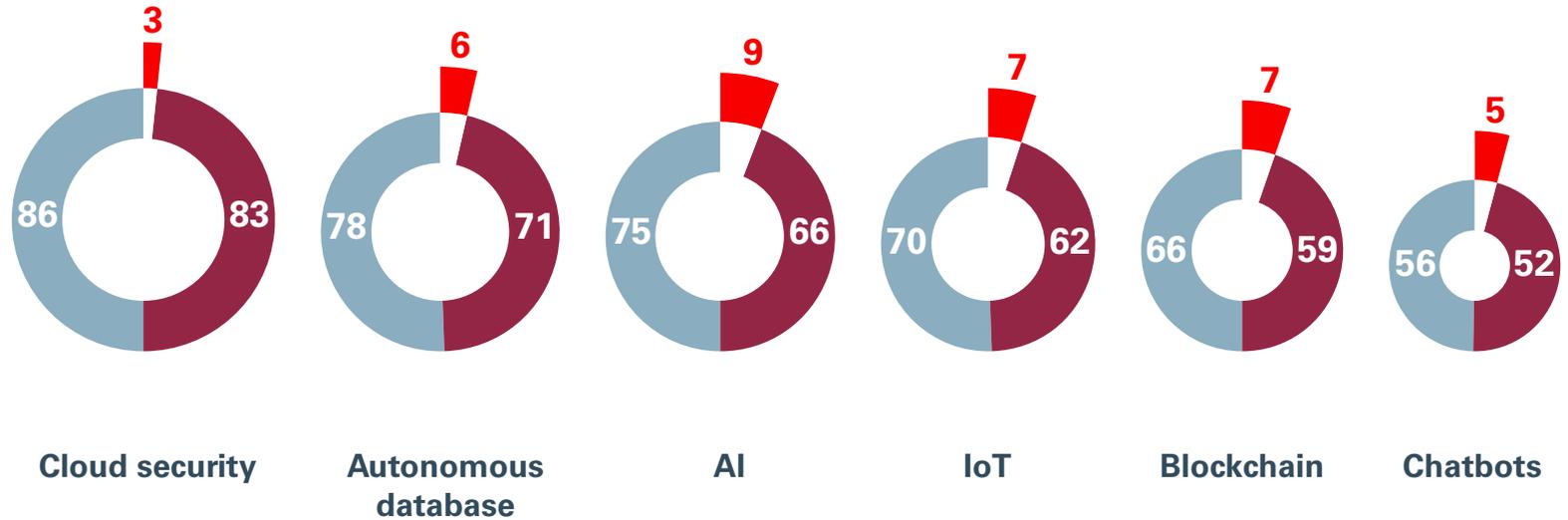
All audiences – Summary – All tech

Taking a global look, **cloud security is considered the most important technology for enabling innovation.** This thought has been backed up by action, with almost the same levels of implementation and only a 3% gap.

It's not surprising that cloud security comes out on top given the high profile data protection and GDPR. More surprising is the lower performance of other technologies such as chatbots, with their use cases in development.

Gap analysis – All countries

- Importance %
- Implementation %
- Gap %



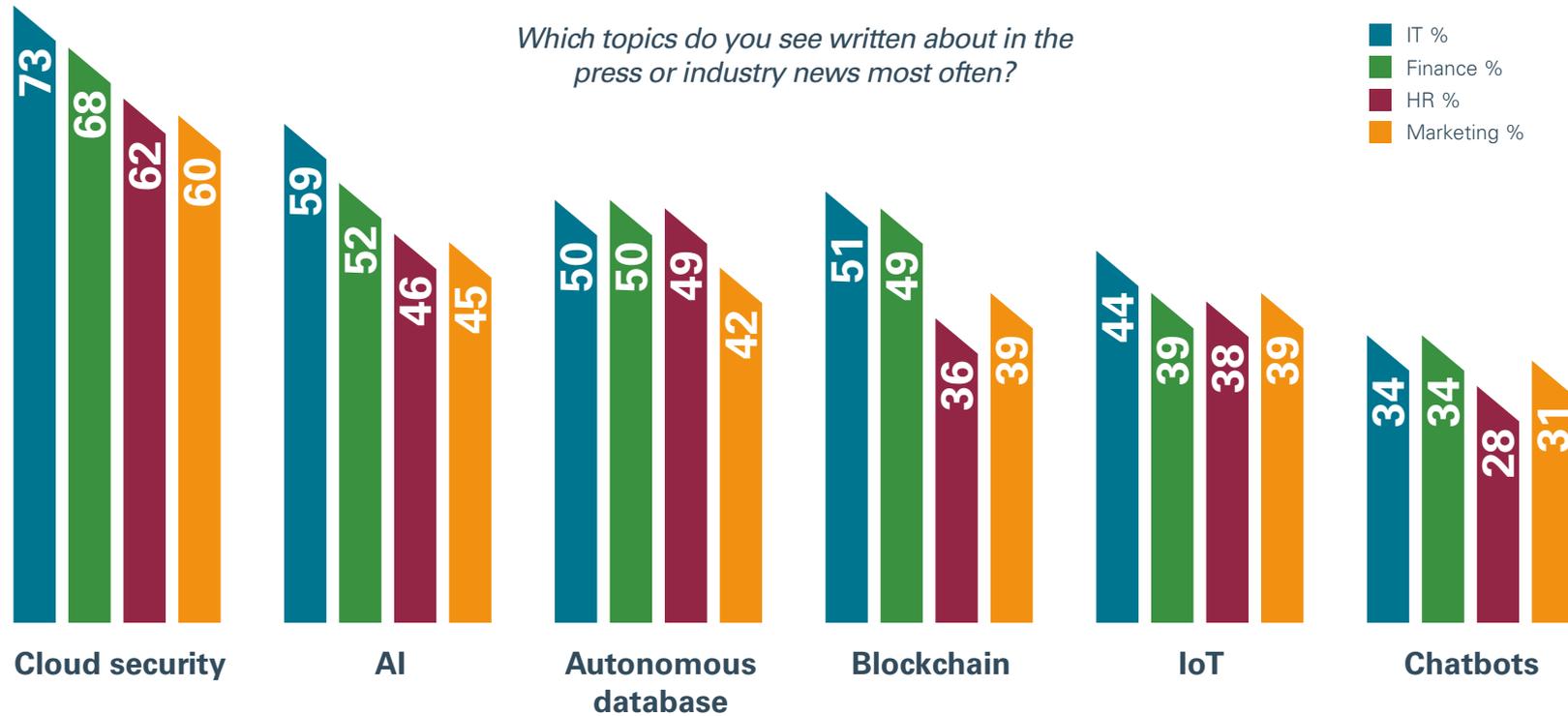
Importance



All audiences – Press noise – All tech

Audiences tell us **cloud security is making the most noise** across industries. IT and finance audiences hear more about cloud security, AI, and autonomous database.

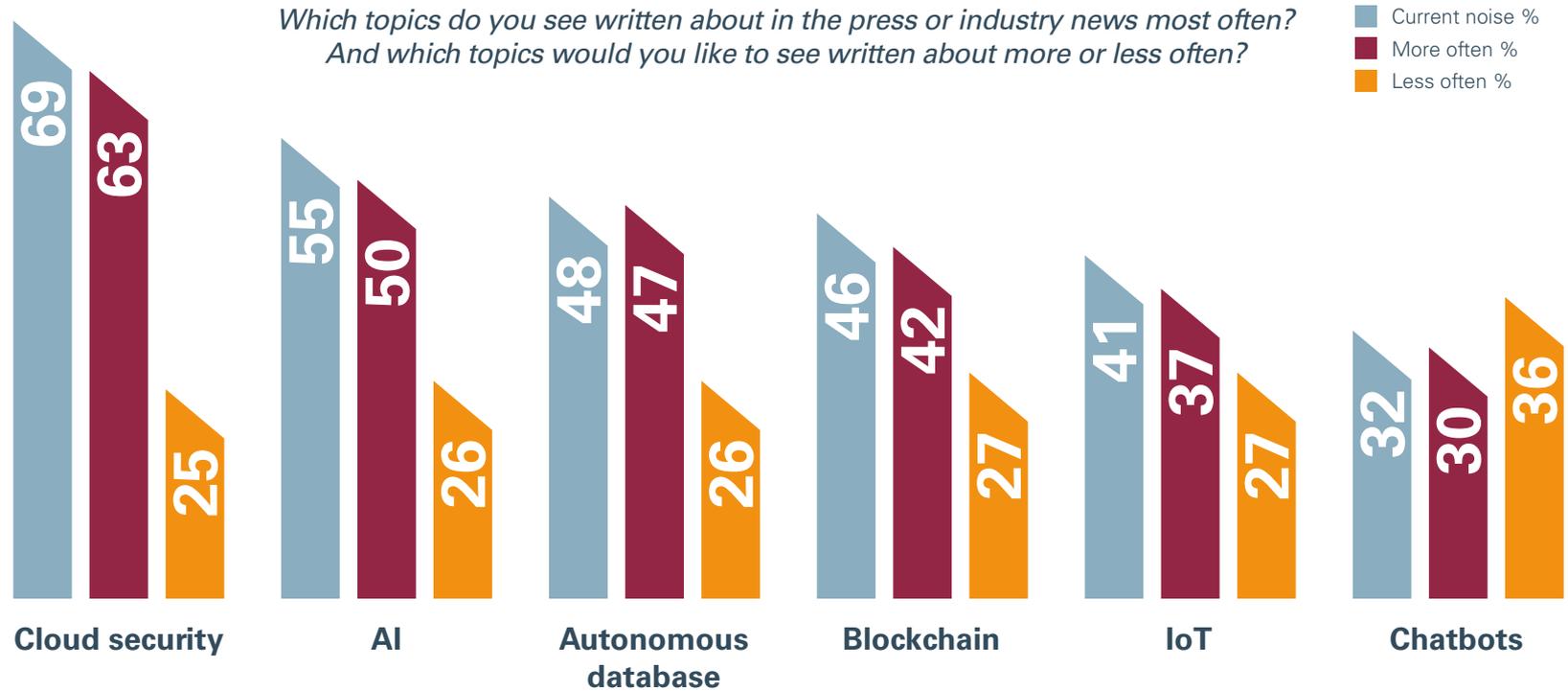
The tech with the biggest difference between departments is blockchain: IT and finance teams feel it's covered far more frequently than their HR and marketing colleagues do. This is likely due to the debates these teams see around data storage, cryptocurrencies and the effect on banking, and the lack of clearly defined applications relevant to HR and marketing audiences.



All audiences – Want to hear more v less – All tech

Overall, people see **cloud security covered the most in the press**, and they want to see even more. AI is the second most frequently covered topic according to our respondents, and half would still like to see more coverage.

In line with our other findings, people want to hear less about chatbots, even though they say it's the tech they already hear the least about.

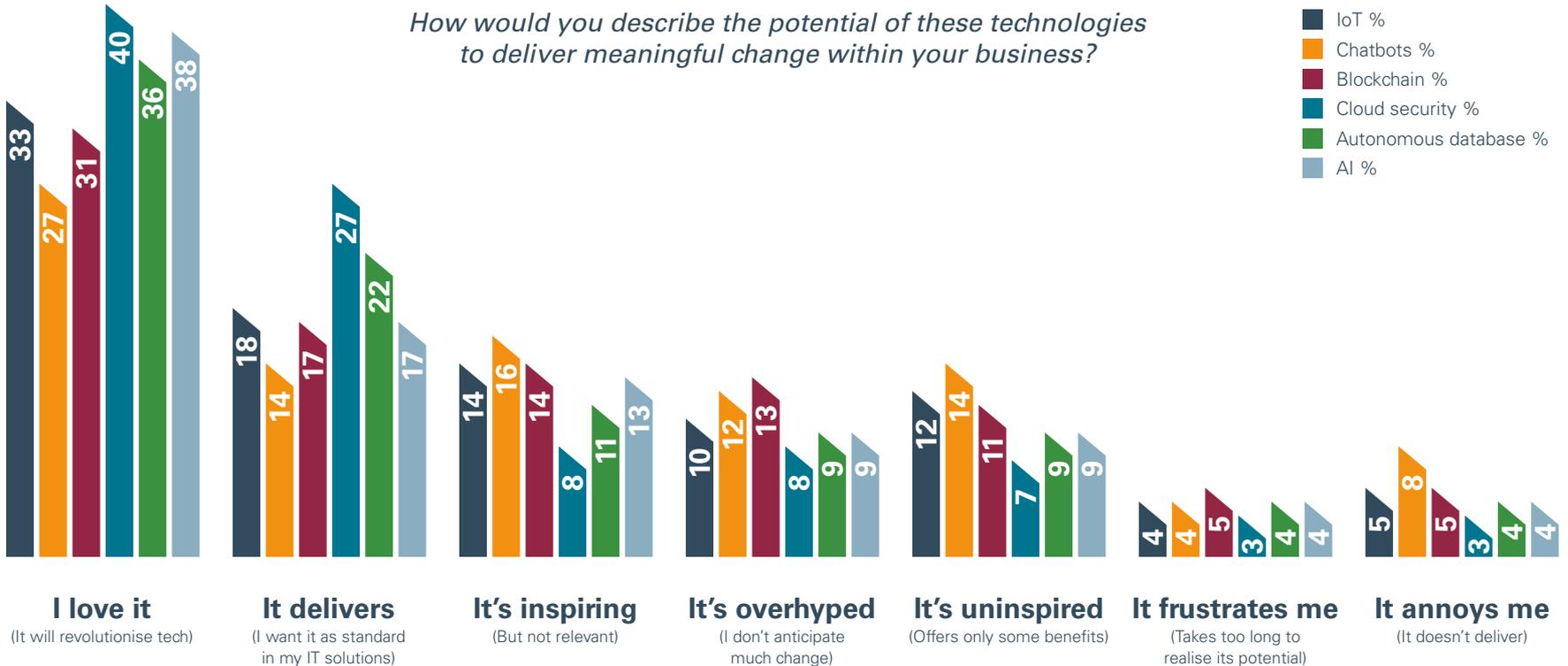


All audiences – Feelings – All tech

Overall, **cloud security** is identified as the most promising tech that **delivers** and will revolutionise tech.

AI isn't far behind in its potential to revolutionise, though it isn't delivering as well as cloud security, autonomous databases or IoT at the moment.

Chatbots were highest in three of the feelings – most inspiring (but not relevant), uninspired, and the most annoying – with much to prove.



IT audience

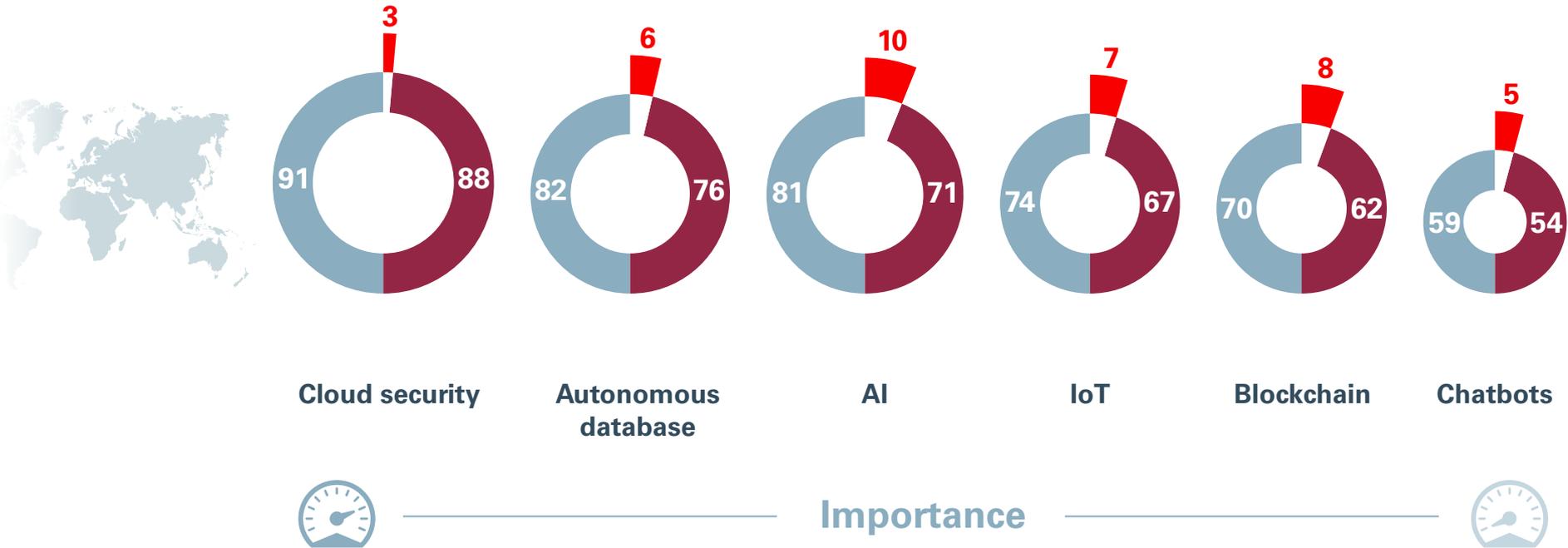
- Importance v implementation – All tech
- Press noise – All tech
- Feelings – All tech

IT audience – Importance v implementation – All tech

As you'd expect, most **IT professionals rank cloud security as important** and are already using it. Interestingly, autonomous databases are seen as the second most important tech and the second most widely implemented.

The greatest opportunity for development appears to be in AI, which is valued and adopted a little less than autonomous databases. With a 10% gap between current implementation and how important IT professionals feel it is, AI could be the focus for investment.

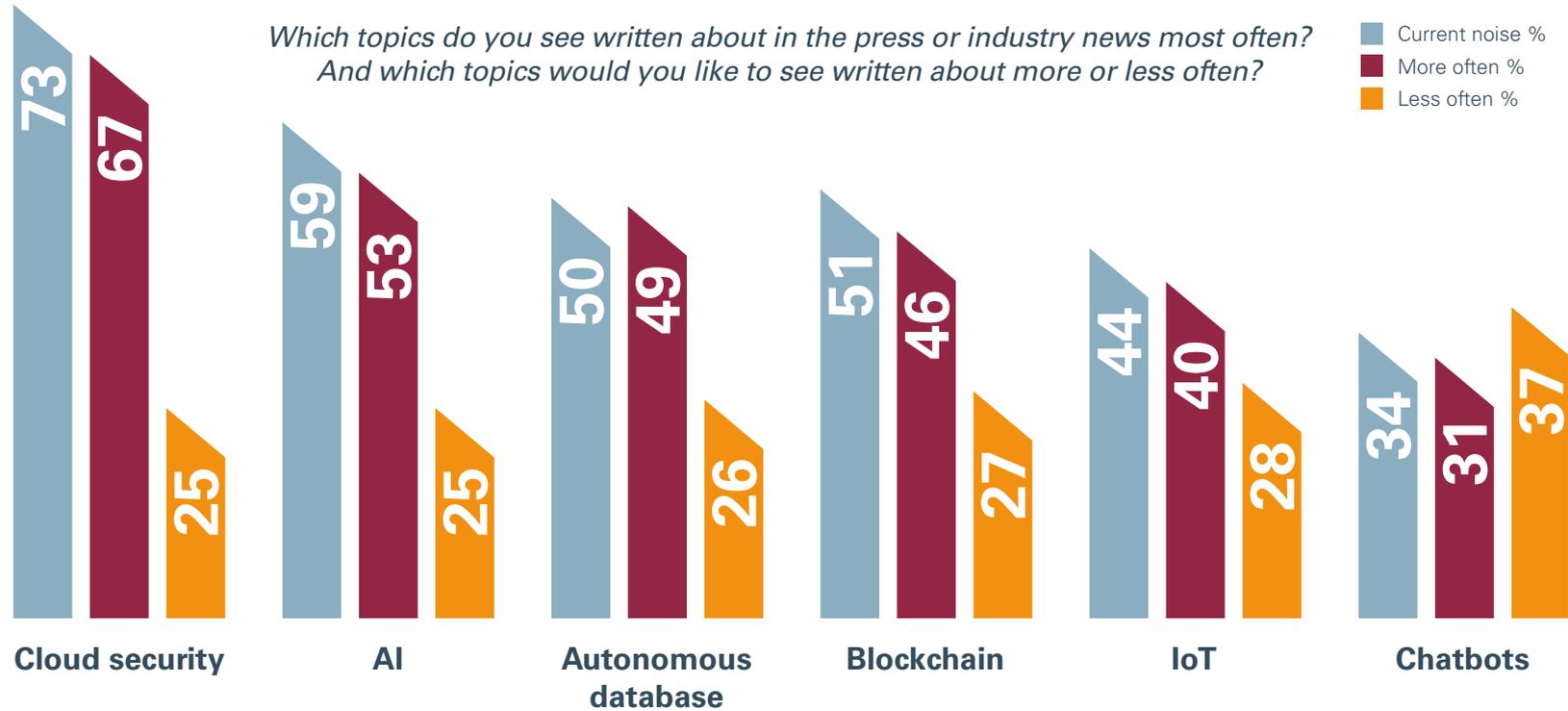
Gap analysis – All tech



IT audience – Press noise – All tech

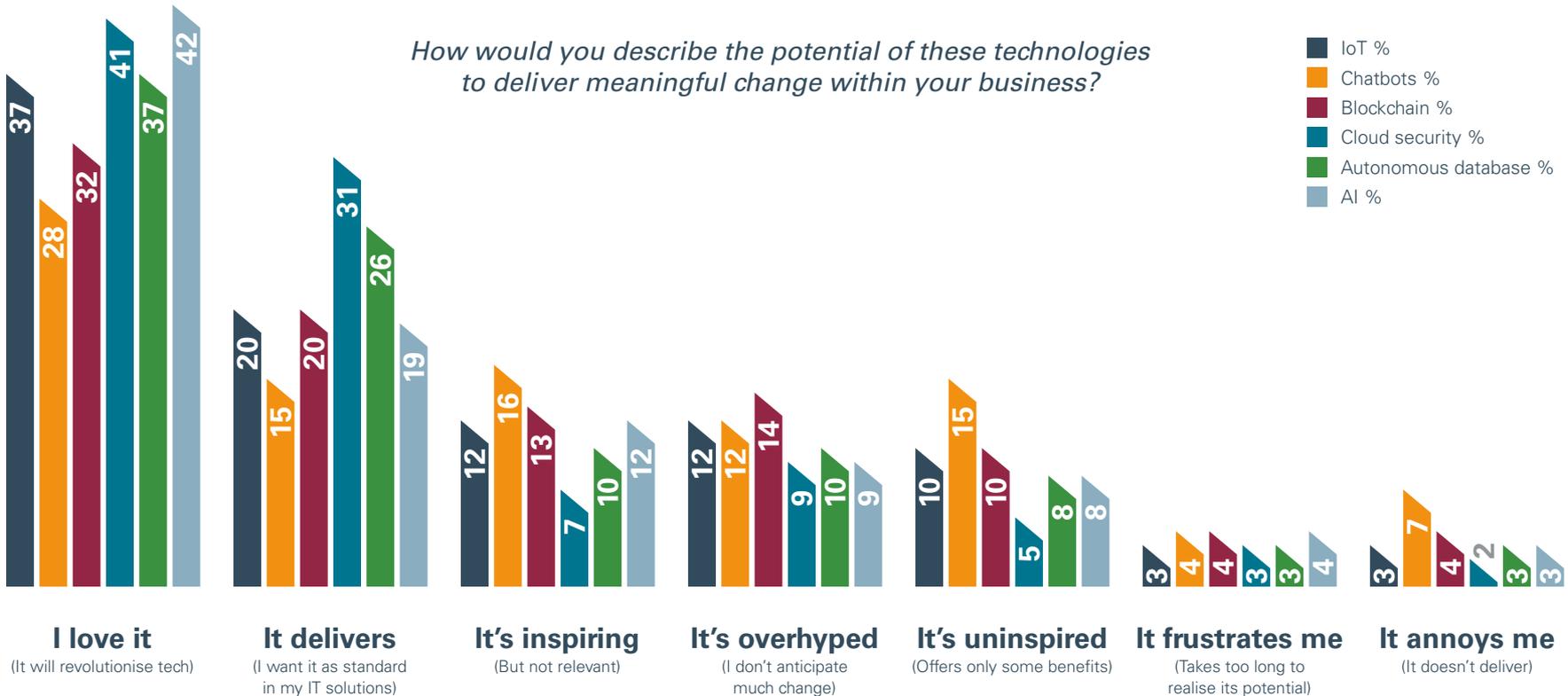
Even though IT teams hear about cloud security far more than any other technology, **two thirds want to see it covered in the press more often** – due to the need to continually review and improve data security.

The same goes for AI, though on a smaller scale, with the second largest share of media coverage, and the second biggest appetite to hear more. Even though chatbots aren't making as much noise as the other technologies, over a third of IT professionals would like to hear less about them.



While IT professionals see **cloud security as the top technology that delivers**, they're slightly more excited by AI's potential with IoT and autonomous databases close behind.

Although chatbots are the most annoying tech for IT professionals, they feel blockchain is the most overhyped. This could be down to the fact that many organisations aren't yet using blockchain widely, so even IT professionals haven't seen enough of its benefits.



To learn how these transformational technologies can help innovate your IT department, **why not try Oracle Cloud today?**

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