ASUG

ASUG 2024 Pulse of the SAP Customer Research

ASUG's 7th annual Pulse of the SAP Customer Research gauges the attitudes, preferences, and plans of ASUG Members as they relate to SAP technology. This year's research highlights that SAP S/4HANA is on the minds and budgets of ASUG Members, as is the cloud. Pandemic-related business disruptions are in the rearview, and organizations are moving forward with technology initiatives. With workforce needs shifting, organizations will need to focus on upskilling and reorganizing their teams to address innovation needs and emerging technologies.

Technology in Focus

Top Focus Areas for ASUG Members in 2024

- Moving to SAP S/4HANA
- Integration between SAP and non-SAP systems
- Automation
- Standardizing business processes
- Integration within SAP systems

Top Digital Transformation Technologies

Data analytics/ dashboards	Cloud
62% (vs. 63% in 2023)	57% (vs. 59% in 2023)
Automation	**AI/ML**
43% (vs. 44% in 2023)	38% (vs. 23% in 2023)

Organizational Technology Barriers

Top Issues and Challenge Drivers at Organizations

1 Budget Challenges
- 35% Inability for Technology Implementations and Upgrades
- 29% Lack of Funding for Projects/Initiatives
- 16% Market/Economic Factors

2 Integration
- 27% Acquisition and Consolidation
- 24% System Migration and Knowledge Gap
- 11% Data Disparities and Reconciliation

3 Master Data Maintenance
- 22% Data Quality and Standardization
- 16% Analytics and Insights
- 13% System Updates/Upgrades

> We are growing as an organization both organically and through acquisitions. We need to spend money on technology to support the growth.

Top Skills Missing at Organizations

- SAP S/4HANA expertise
- AI
- Optimizing emerging technologies
- Business process management
- Integration and APIs

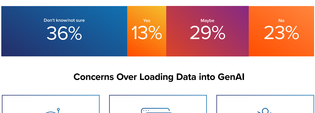
SAP Investment and Initiative Status

Investment in SAP

Making more investments into SAP	Keeping the same level of SAP investment as before	Making fewer investments in SAP
52% (vs. 46% in 2023)	42% (vs. 42% in 2023)	5% (vs. 11% in 2023)

> We are migrating to SAP S/4HANA (so) a lot of investments are being made in consulting, software/services acquisition, migration, integration, and education.

Status Update on Planned Initiatives



Top SAP Products in Future Consideration

- SAP S/4HANA Cloud
- SAP Signavio
- RISE with SAP
- SAP Analytics Cloud
- SAP HANA Enterprise Cloud
- SAP Business Technology Platform

The Move to SAP S/4HANA

SAP S/4HANA Implementation Plans

SAP S/4HANA Cloud Environments

Cloud (Private, Managed Cloud, Public Cloud)	Hybrid Cloud	On-premise bare metal or basic virtualized systems
62%	18%	21%

Spotlight on AI

AI Usage

28% of ASUG Members regularly use AI

Willingness to Enter Data in AI Model

Don't know/not sure	Yes	Maybe	No
36%	13%	29%	23%

Concerns Over Loading Data into GenAI

- Security/Privacy of Data
- Data Quality/Accuracy
- Use-case and Sharing Concerns

ASUG Talks

Listen to ASUG CEO Geoff Scott and Research Director Marissa Gilbert

break down the key results of the 2024 ASUG Pulse of the SAP Customer study in a special episode of ASUG Talks.

Listen Now

About the Research

Americas' SAP Users' Group (ASUG) conducted its annual Pulse of the SAP Customer study in October/November 2023. The results are based on responses from 766 participants who are members of ASUG, the world's largest independent SAP user group.

Throughout 2024, be on the lookout for our new ASUG Research Reports covering important topics including Sustainability, SAP S/4HANA, SAP Signavio, and SAP Business Technology Platform.

Update your communication preferences to ensure you receive these vital research updates.

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