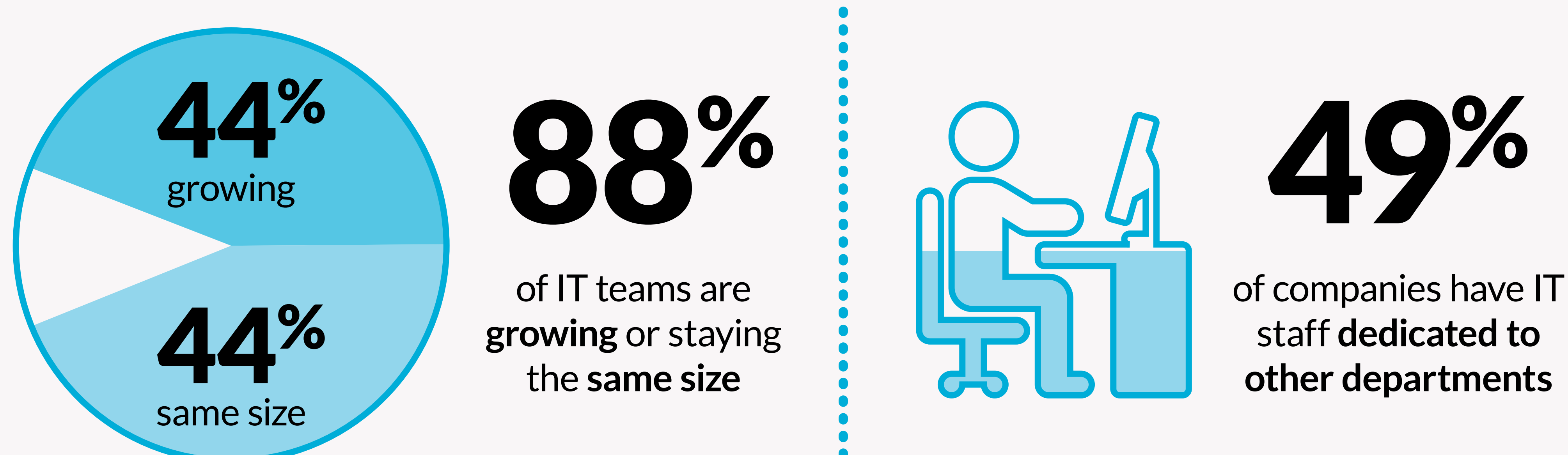


The State of the Community 2019

PERSPECTIVES FROM SAP USERS

The Evolution of Technology Teams



How This Affects Tech Purchasing

Who's Buying Technology



42%
C-levels lead



25%
IT teams lead

-12% decrease in influence vs. 2018

A Shift in Decision-Making



20%
Buying committees lead



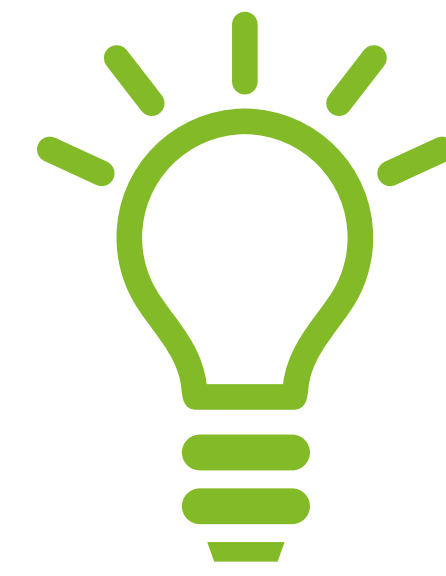
13%
Line-of-business departments lead

+2% increase in influence vs. 2018

What Customers Desire From Vendors



What Motivates Customer Preferences



Business Today Demands Innovation



Innovation Matters to Employees



51% say it affects job satisfaction



44% say it affects how long they'll stay

SAP Plays a Major Role

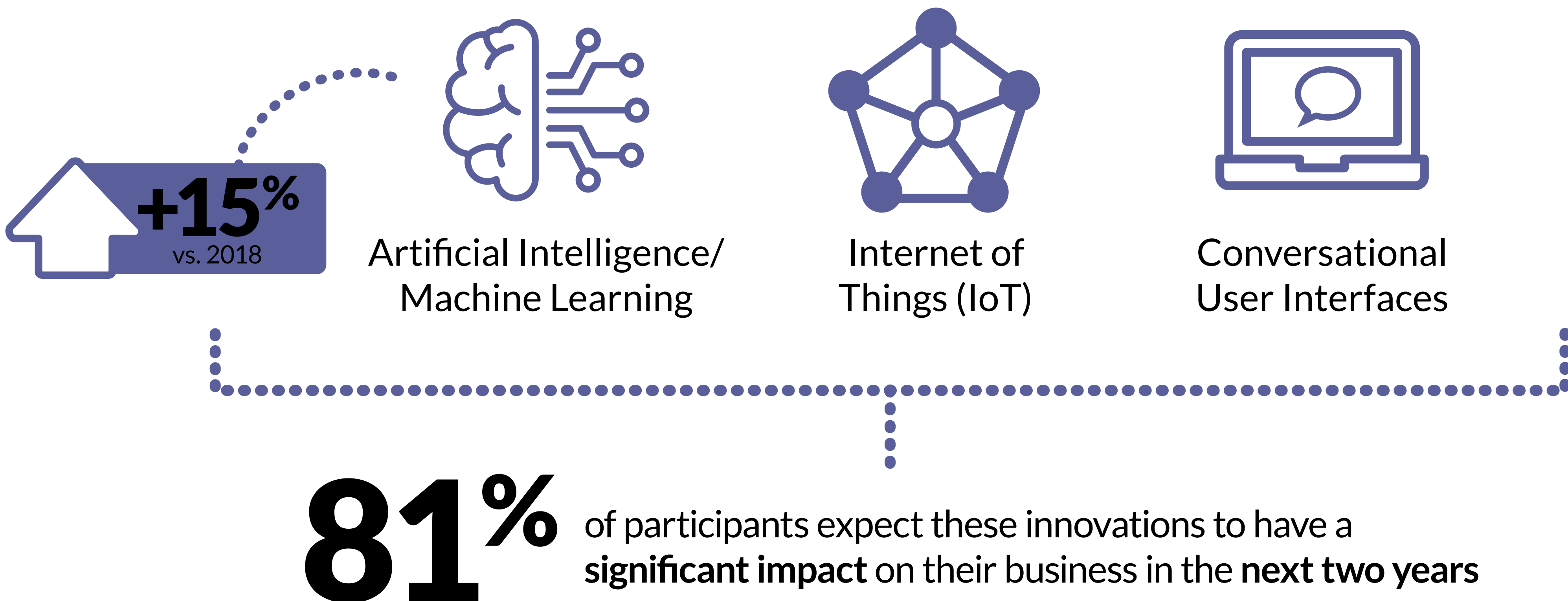


66% of growing IT teams are investing more in their SAP systems

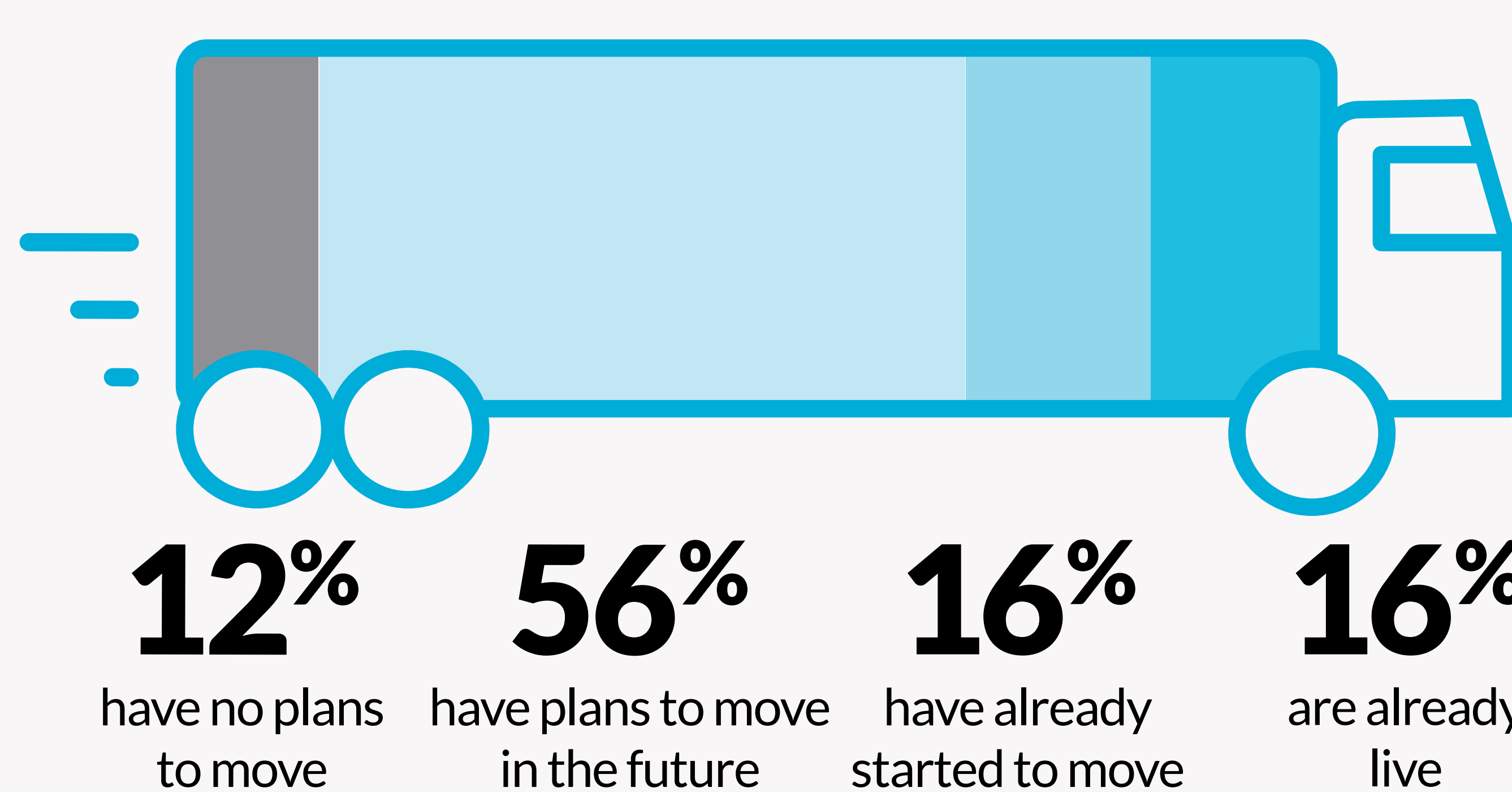


83% say SAP is a valuable partner in their innovation projects

Technologies that Are Truly Emerging



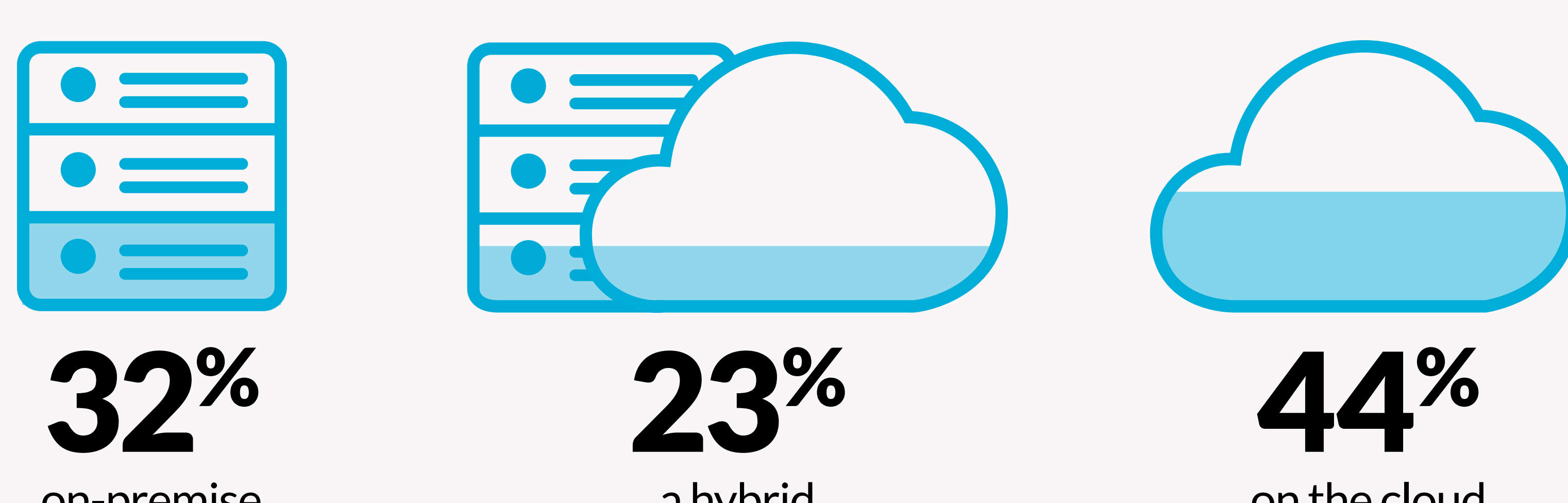
The Move to SAP S/4HANA



Top Reasons Customers Are Waiting 24+ Months



Where They're Planning to Implement



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