

Total Decision-Making Ability Score Ranked by Industry

- 1  Mining
- 2  Professional, Scientific & Technical Services
- 3  Transportation, Postal & Warehousing
- 4  Construction
- 5  Financial Services or Insurance
- 6  Manufacturing
- 7  Accommodation, Hospitality & Food Service
- 8  Electricity, Gas, Water & Waste Services
- 9  Wholesale Trade
- 10  Healthcare & Pharmaceuticals
- 11  Retail Trade
- 12  **Government, Education & Non-Profit**

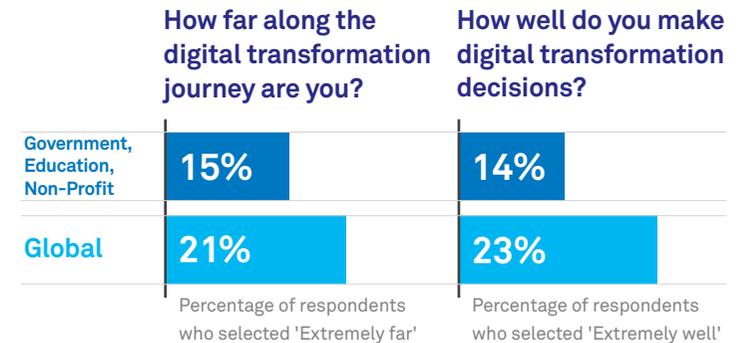
Digital Transformation Decision-Making in Government, Education and Non-Profit



How does decision-making shape digital transformation outcomes in government, education, and non-profit institutions? To find out, Telstra surveyed 3,810 executives in 14 markets and 12 industries worldwide.

How do government, education and non-profit compare with other industries?

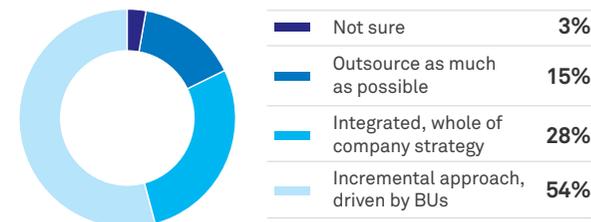
Government, education and non-profit institutions lag behind other industries in digital transformation decision-making, ranking in last place.



How can government, education and non-profit make better digital decisions?

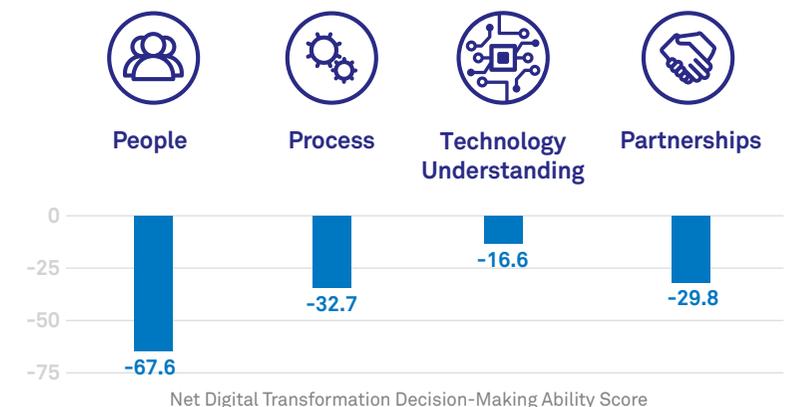
Move beyond an incremental approach to digital transformation.

Government, education and non-profit digital transformation projects are driven mainly by individual business units.



Focus on more than just technology and processes for digital decisions.

Government, education and non-profit institutions pick their understanding of technology over other decision-making factors when evaluating their digital transformation process.



Closing the digital priorities performance gap

Government, education and non-profit institutions struggle to meet their top digital transformation priorities – in fact their top priority, ‘Protecting digital assets from cyber threats’, ranks 16th out of 17 in terms of performance.

Top three digital transformation priorities



#1

Protect our digital assets from cyber threats

Rank in performance
16th



#2

Optimise our technology to move faster and adapt to change

Rank in performance
15th



#3

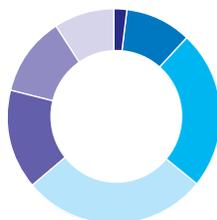
Increase connectivity to improve employee effectiveness

Rank in performance
14th

Government, education and non-profit IT spend (USD) expected to rise

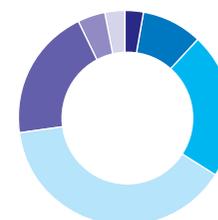
Two thirds of government, education and non-profit institutions say they will increase their IT spend in the next three years. More than a third spent more than \$500,000 in the previous year.

Previous year IT spend



Less than \$1,000	2%
\$1,000 to \$9,999	10%
\$10k to \$99k	24%
\$100k to \$499k	28%
\$500k to \$999k	15%
\$1m to \$4.9m	12%
More than \$5m	9%

Expected change in IT spend for next three years



More than -10%	3%
-1% to -10%	9%
No change	22%
+1% to +10%	39%
+11% to +20%	20%
+21% to +30%	4%
More than +30%	3%

Top government, education and non-profit partner attributes

Government, education and non-profit institutions seek digital transformation partners that have insight into their challenges and understand their technical requirements.



Ability to determine which IT model best fits my company and my needs



Deep knowledge of our business challenges and how IT can help



Ability to understand my company's technical requirements



For more insights, visit telstraglobal.com/disruptive-decision to download the Disruptive Decision-Making white paper.