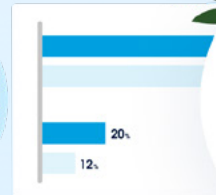


MULESOFT RESEARCH

2023 Connectivity Benchmark Report

In collaboration with **Deloitte.**
Digital



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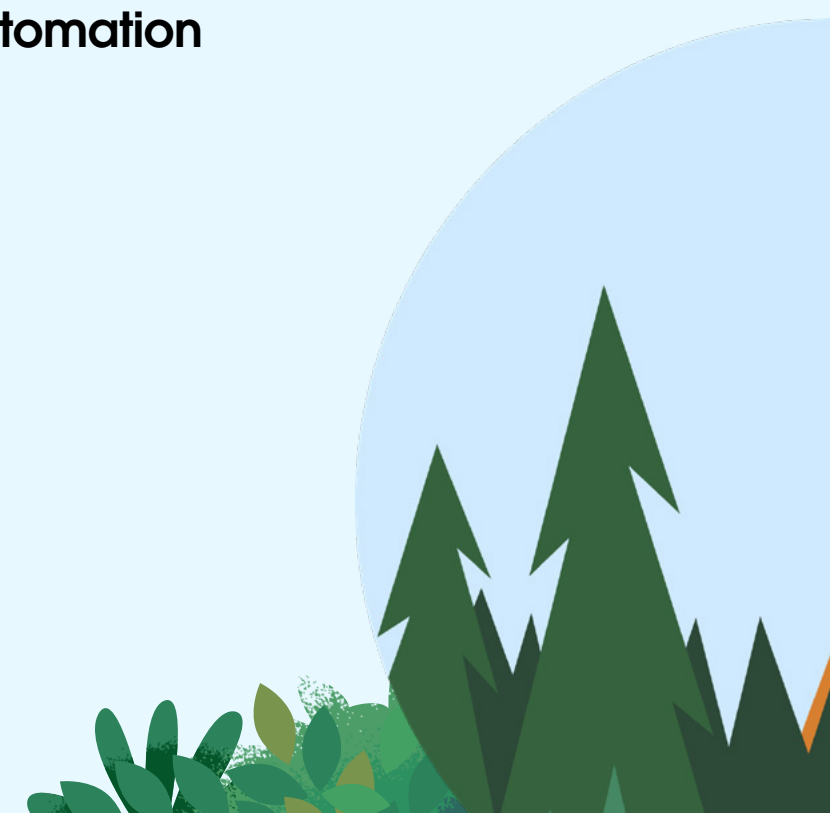
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Executive Summary

IT Delivers More as Leaders Invest in Efficiency

Leaders today want more out of IT and have increased their IT investment to \$11.7 million on average. IT is better able to meet business demands as more teams successfully completed all projects asked of them last year.



See chapter **2**



The Cost of Failing to Digitally Transform is Higher Than Ever

While most organizations are ahead of progress, the stakes for digital transformation have never been higher. The average organization could lose \$9.5 million should they fail to complete their transformation initiatives.

See chapter **3**

Integration Challenges Remain as App Volume Surges

Integration challenges block digital transformation as enterprises add even more applications to their ecosystem (1,061 on average vs. 976 in 2022). Those that turn to custom integration labor to solve these issues pay a high price (\$4.7 million per year).

See chapter **4**



Executive Summary

Customers Now Expect Connected Experiences

More than a third (36%) of organizations provide a completely connected user experience across all channels, an increase from 30% in 2022. However integrating user experiences remain a challenge for many organizations.



See chapter **5**



Teams Across the Business Demand Automation

Automation adoption is on the rise. Most IT organizations centrally manage (67%) and track (59%) automation work, but as more non-IT roles request automation organizations are turning to no-code tools and approaches to meet demand.



See chapter **6**

APIs Help Maximize Cost Saving and Revenue

APIs are the key to digital transformation. They streamline development and generate 38% of the average organizations' revenue. Of enterprises ahead of their anticipated digital transformation progress, 93% have a clear API integration strategy.



See chapter **7**





Foreword



Deloitte.
Digital

Following rapid post-pandemic expansion, leading organizations are shifting once again. Now more than ever, **businesses must rely on their IT teams** to drive digital transformation – and macroeconomic pressures are pushing business leaders to prioritize efficient growth and cost savings.

With these new values at the forefront, **organizations are investing in IT** to deliver results, streamline workflows and productivity, overcome connectivity challenges, and empower the business to thrive in this new normal.

Leaders are making strategic decisions to meet their goals. Nearly every company is using some type of API to integrate and connect systems and data. Many organizations are implementing approaches that **empower non-IT employees with automation capabilities**. And there's a rise in connected user experiences that ensure customers have a positive experience. These advancements in IT operations show that **efficient growth is possible when IT sets the business up for success**.



Kurt Anderson
Managing Director and API Transformation Leader,
Deloitte Consulting LLP

2

IT Delivers More as Leaders **Invest** in **Efficiency**



Key Trends

01

IT infrastructure is becoming more streamlined. Half say it's difficult to make changes (54%) or introduce new technology (54%), compared to 74% and 70% last year respectively.

02

IT teams are able to deliver more projects on time. Nearly half (48%) say they completed every project asked of them, up from 44% the prior year.

03

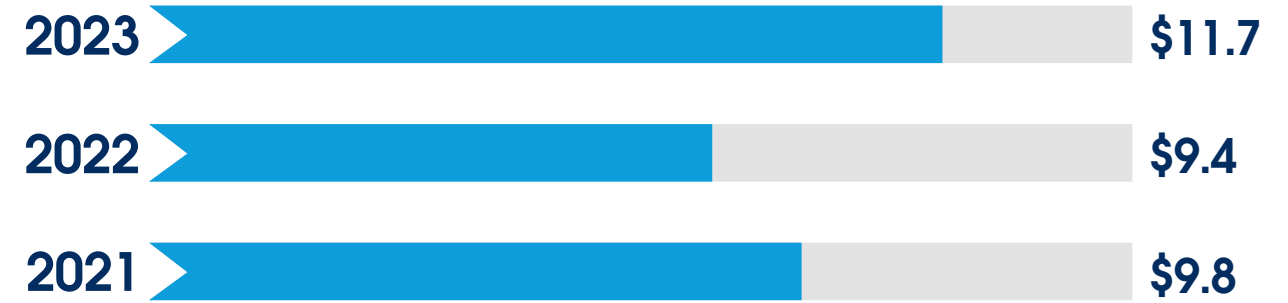
Organizations spent an average of \$11.7 million on IT staff in the past 12 months. Most (78%) say IT budgets will continue to increase over the coming year.



Spending on IT Teams Skyrockets

With rising economic uncertainties and growing customer expectations, business leaders are prioritizing efficiency, results, and lowering organizational costs. And they're investing in IT to get there.

On average, global organizations spent \$11.7 million on IT staff in the past 12 months, and most (78%) expect budgets and headcount to increase over the coming year.

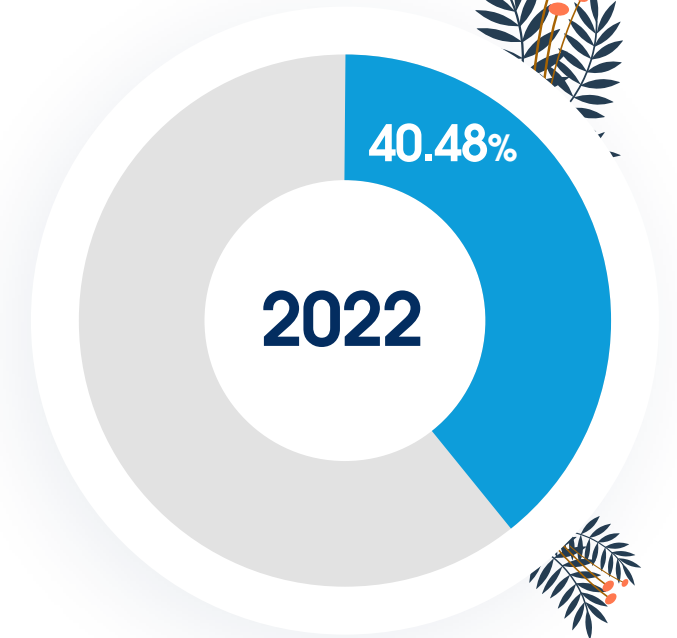
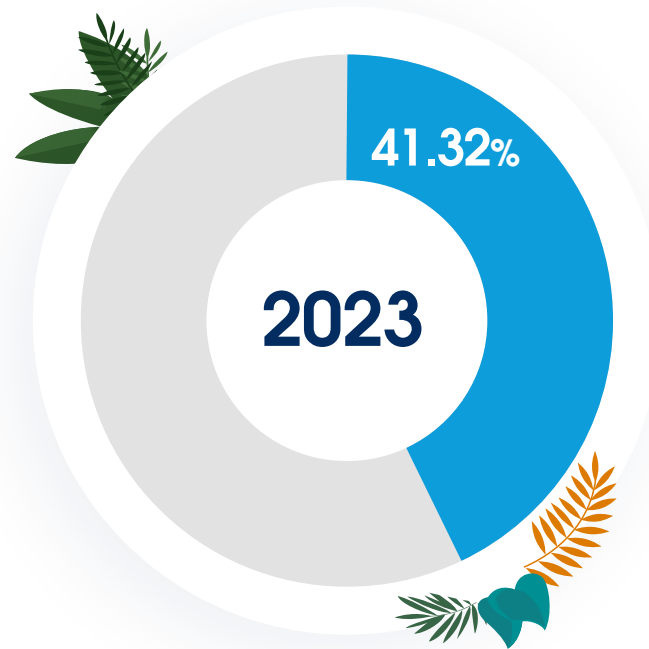


of enterprises expect IT budgets and headcount to increase over the next year.

IT Project Volumes Continue to Rise

With this increased investment, business leaders are expecting more from their IT teams. As a result, the number of projects IT was asked to deliver has increased 41% year-over-year, roughly the same increase as the previous year (40%).

Average increase in IT projects year-over-year:

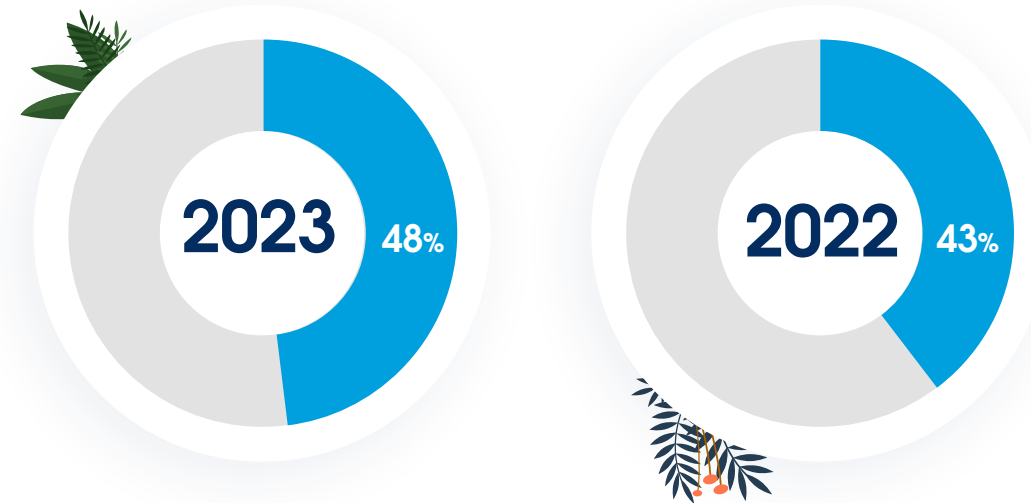


IT Delivery Improves Despite Growing Demand

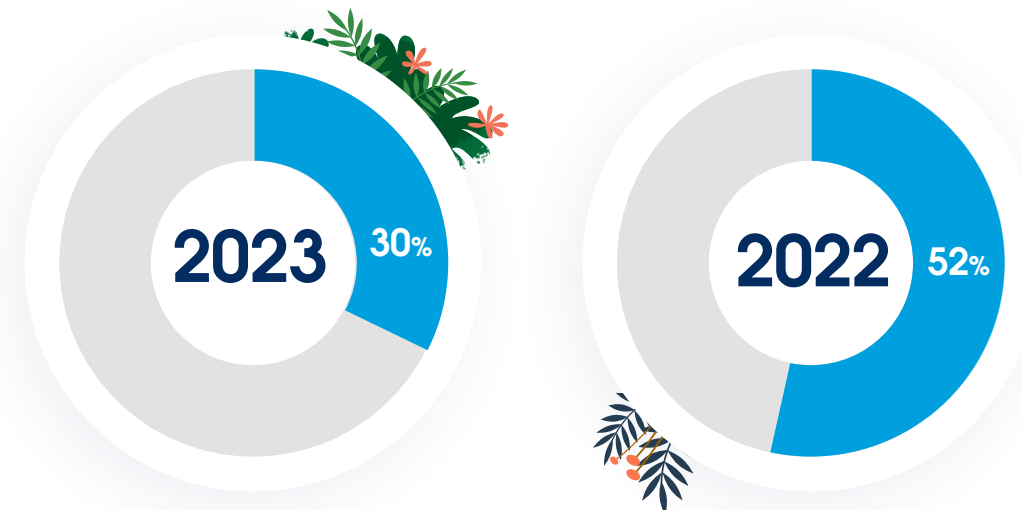
Even in the face of increased business demands, IT teams are getting better at delivering. Nearly half (48%) say they delivered all IT projects asked of them last year, compared to 44% in last year's report.

There was also a decrease in the average number of projects that were delivered late – 30% this year vs. 52% last year.

Organizations able to delivered all IT projects asked of them:

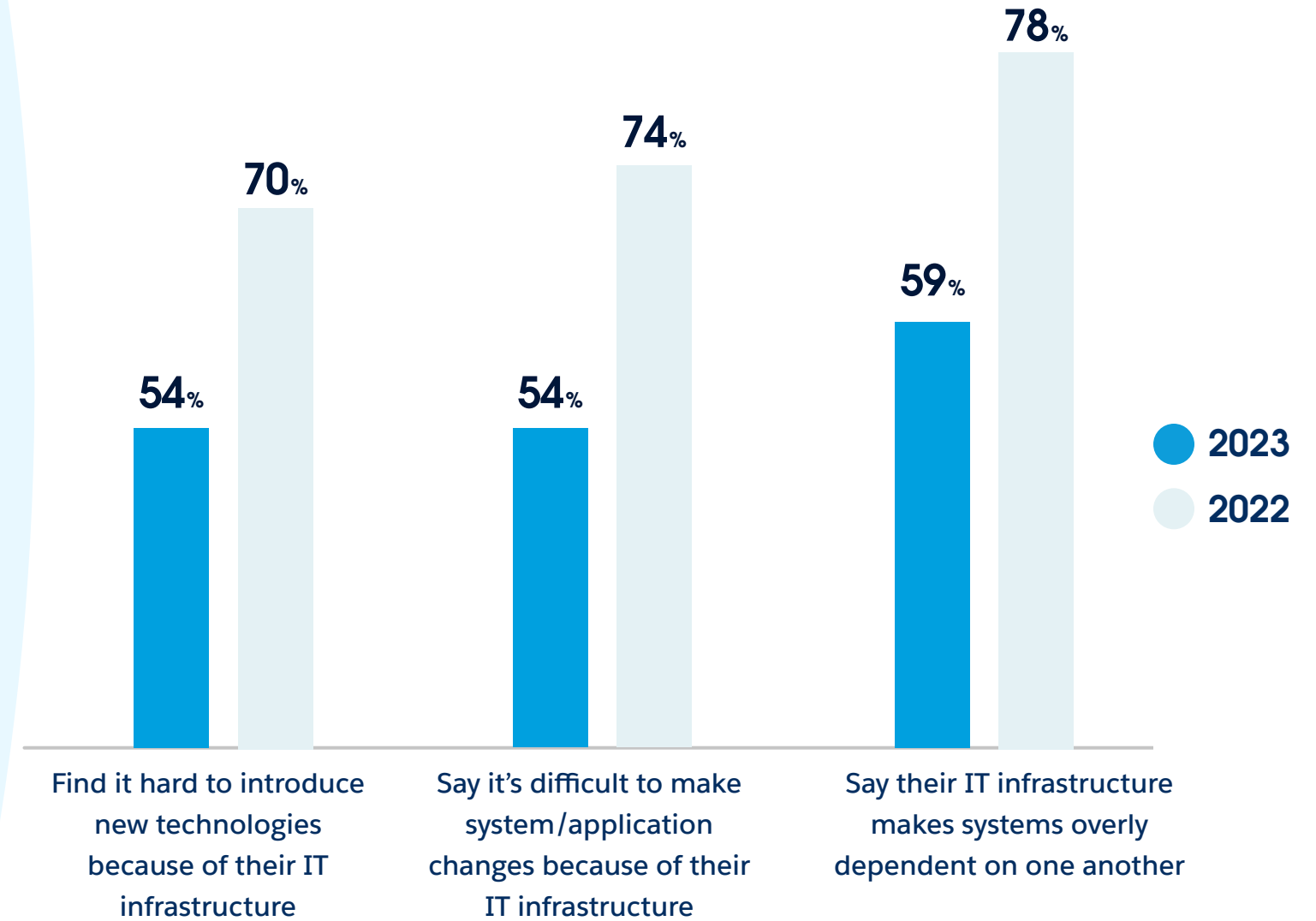


Percentage of IT projects not delivered on time:



Existing Infrastructure Is Less of a Challenge

Additionally, infrastructure issues are becoming less of a barrier to transformation. Organizations are using composable approaches to streamline their systems, support digital projects, and increase efficiency.



3

The Cost of Failing to Digitally Transform Is Higher Than Ever



Key Trends

01

With the customer experience being a critical indicator of organizational success, nearly three-quarters (72%) of customer interactions are now digital.

02

Most (69%) organizations say they're ahead of anticipated digital transformation progress. Only 10% report being behind where they expected to be.

03

The cost of failure has increased significantly. Organizations could lose \$9.5 million on average if they fail to complete digital transformation initiatives, compared to \$6.8 million in 2022.



Most Customer Interactions Are Digital

Customers today are loyal to brands that give them the best experience. Digital access to a company is what consumers have come to expect – which is why 72% of customer interactions today are digital.



of customer interactions are now digital.



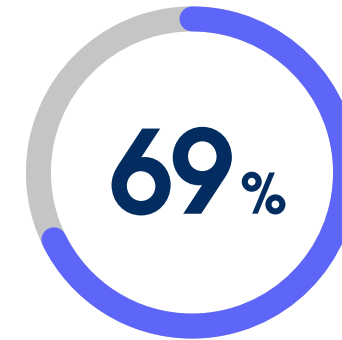
Many Are Ahead of Digital Transformation Progress

More than two-thirds (69%) of organizations say they're ahead of anticipated progress on their digital transformation projects. Only 10% say they are behind progress.

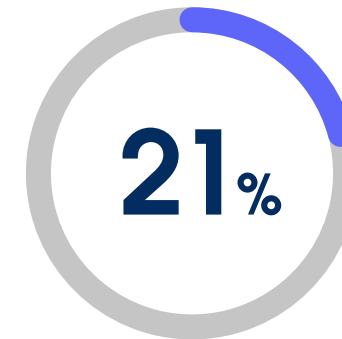


How organizations are tracking against expected digital transformation:

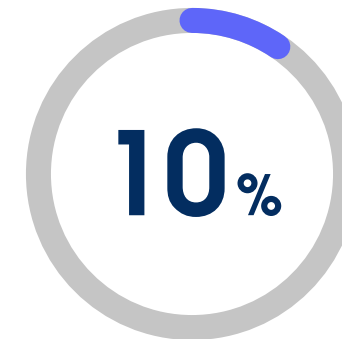
Ahead of anticipated progress:



On par with anticipated progress:

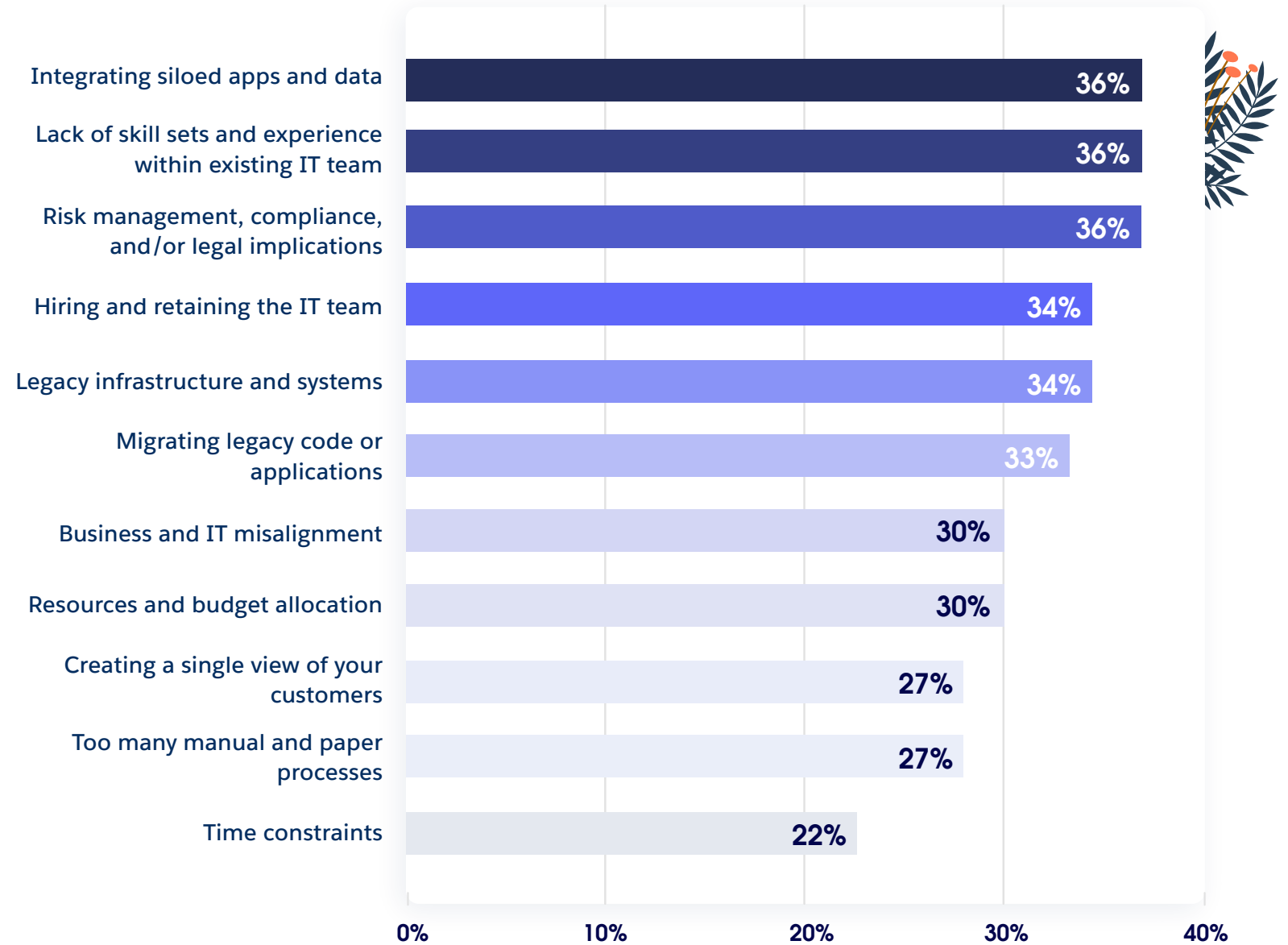


Behind anticipated progress:



Major Transformation Blocks Still in the Way

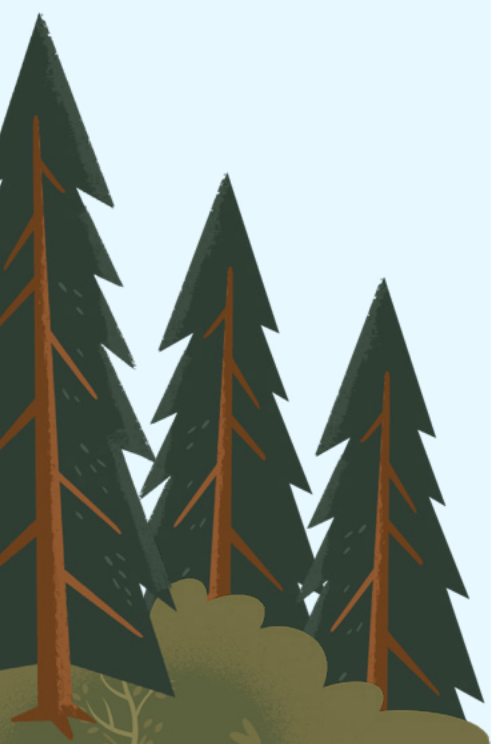
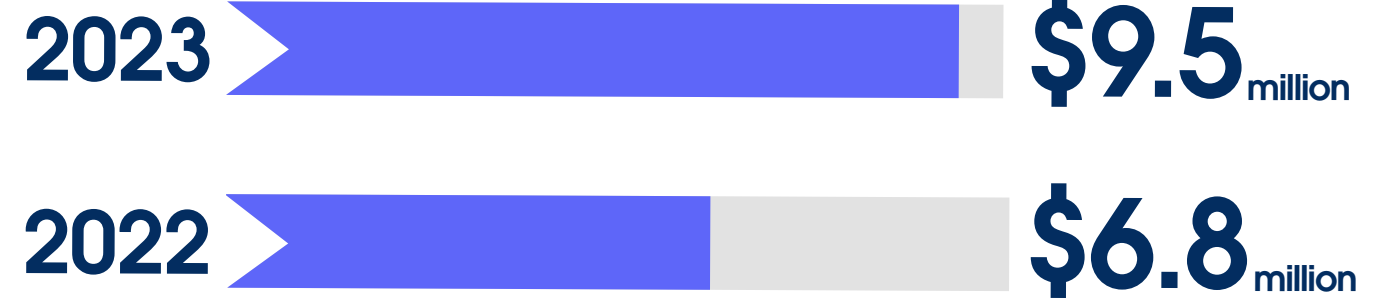
Despite this progress, IT teams continue to face a number of technology and process challenges that get in the way of their digital transformation. Integrating siloed apps and data (36%), lack of skills and experience (36%), risk and compliance (36%), hiring/retaining talent (34%), and legacy infrastructure (34%) all sit at the top of the list.



Failure to Transform Could Cost Millions

The average cost of failing to complete digital transformation initiatives now sits at \$9.5 million, up significantly from last year's estimate of \$6.8 million.

Organizations must address the challenges in the way of their transformation by adopting a composable IT approach underpinned by low/no-code tools.



4

Integration Challenges Remain as App Volume Surges



Key Trends

01

Application growth continues with organizations using an average of 1,061 different applications. Just 29% of these applications are integrated.

02

Organizations spent an average of \$4.7 million on custom integration labor in the past 12 months, up from \$3.6 million in 2022.

03

Integration hinders digital transformation for 80% of organizations. This figure rises to 90% for organizations behind on their anticipated digital transformation progress.



Number of Enterprise Applications Are Growing

Driven by the rise in hybrid working and the need for employees to work more efficiently, organizations are using more applications than ever. On average, organizations are using 1,061 different applications, up from 976 in 2022.



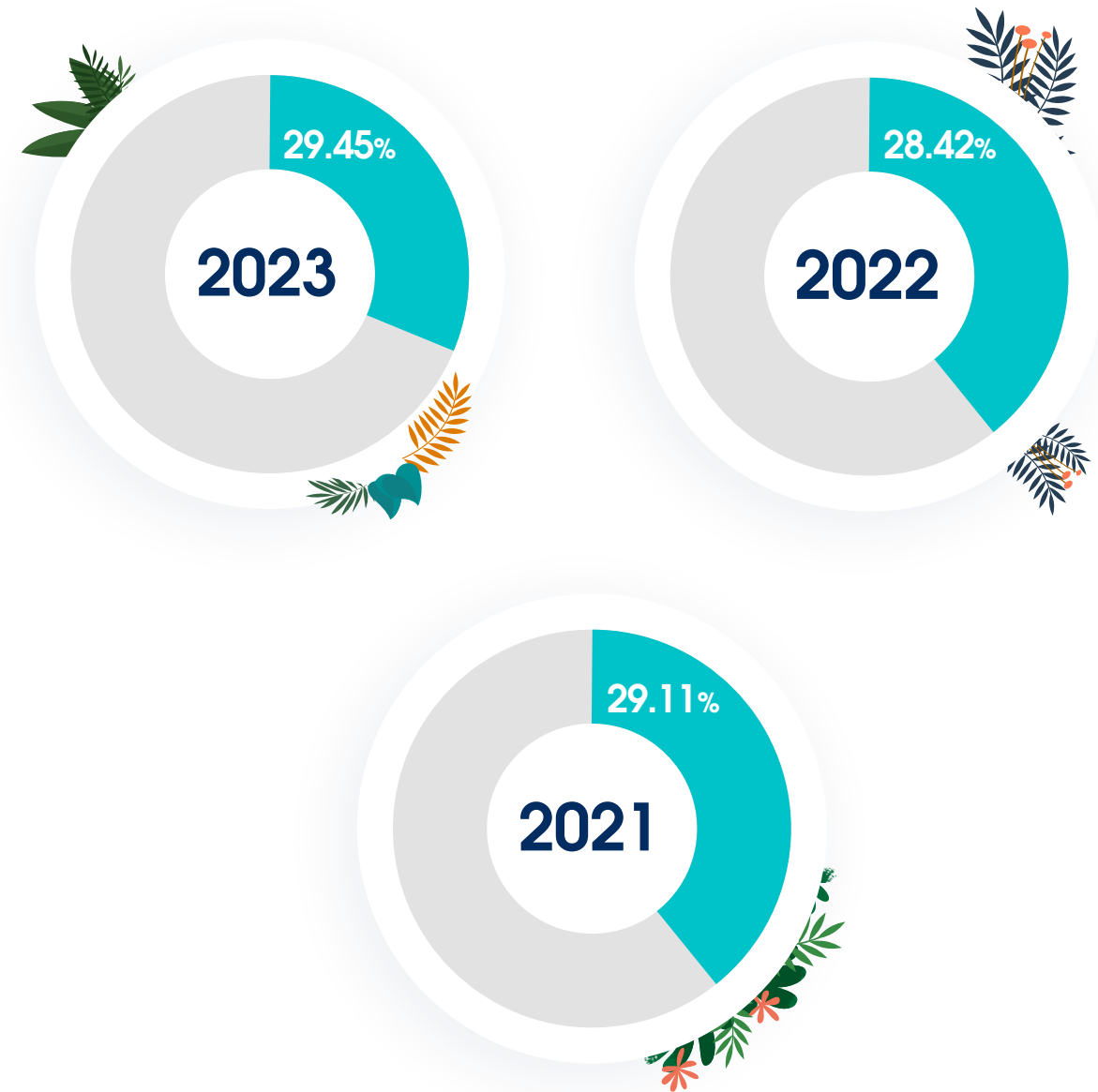
Average number of applications across the organization:



But Organizations Struggle with Integration

On average, 29% of these enterprise applications are integrated. Organizations that fail to prioritize integration miss out on cost-savings, growth, and efficiency opportunities. The customer experience also suffers.

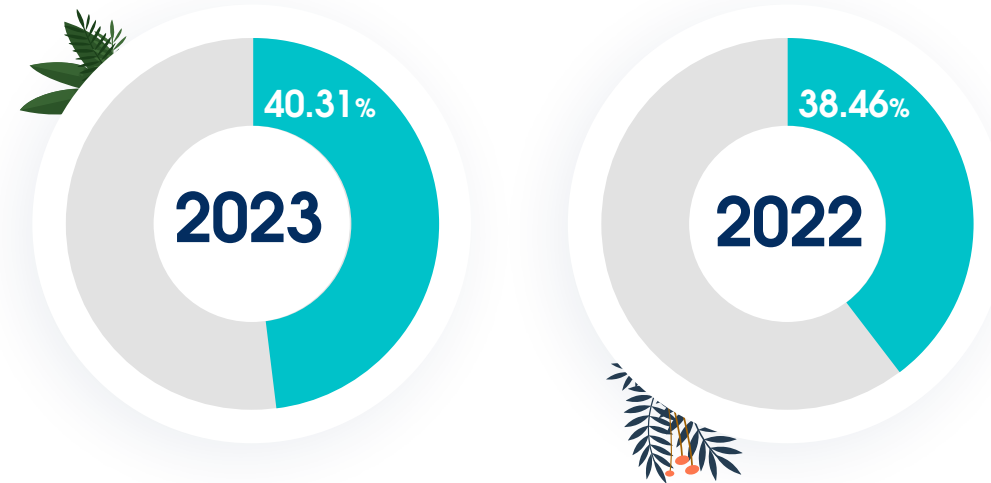
Average percentage of integrated applications:



Custom Integration Work Is Costly

Organizations spent \$4.7 million on custom integration labor in the past 12 months on average – up from \$3.6 million the prior year. At a time when IT budgets are under increased scrutiny, this approach is unsustainable. Reusable integrations built using APIs offer a more efficient, cost-effective approach.

Estimated IT time spent designing, building, and testing custom integrations:



Average spent on custom integration labor in the past 12 months:

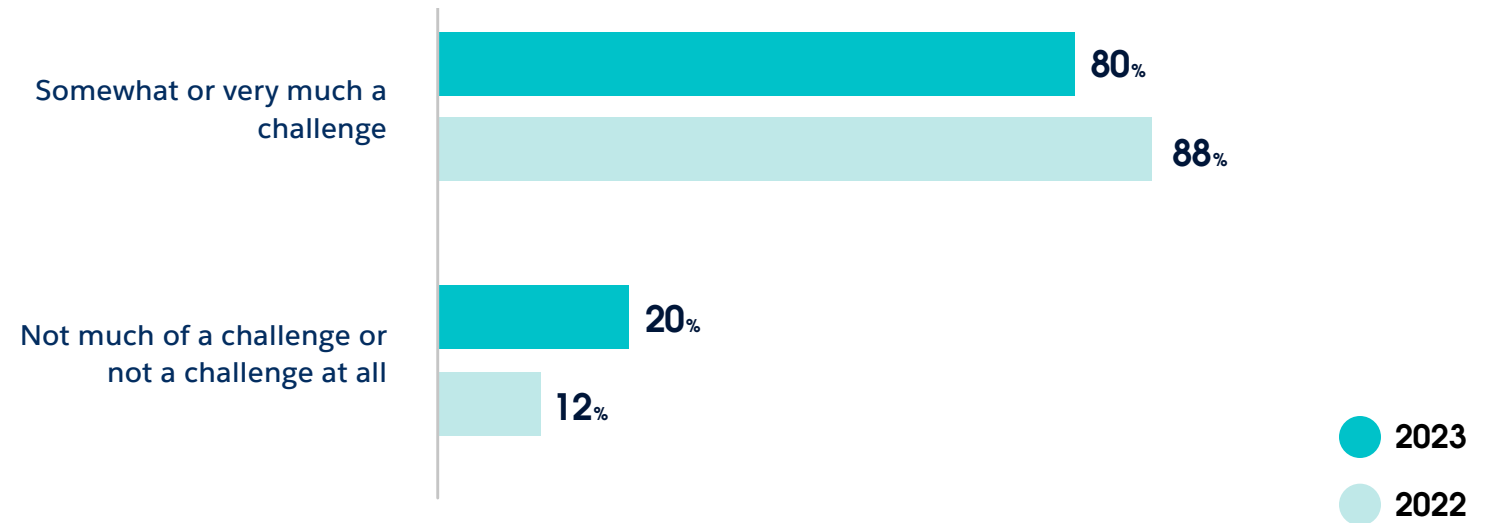


Integration Remains a Blocker to Digital Transformation

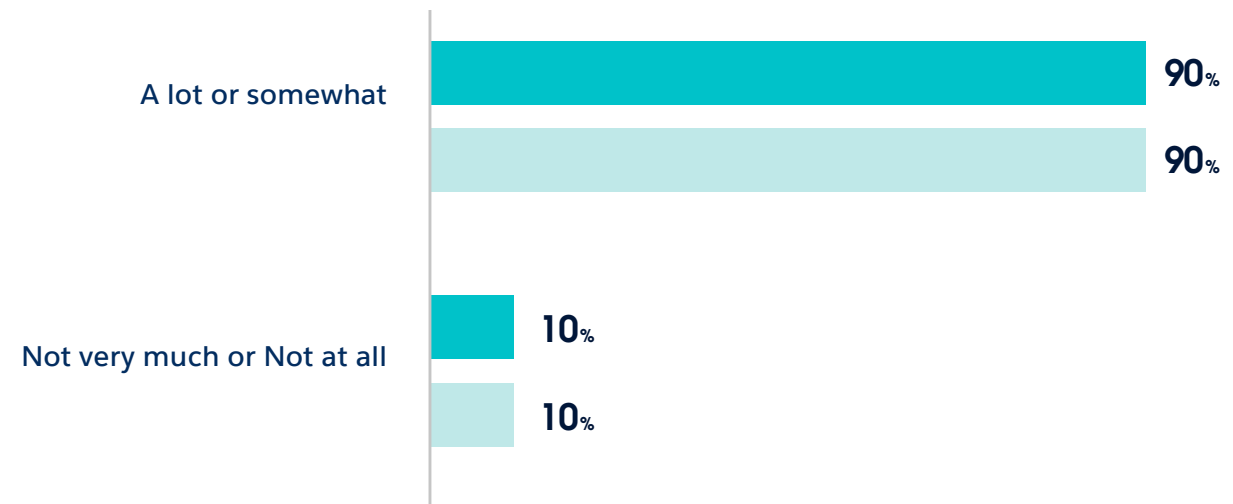
While there's been some progress over the past 12 months, integration is still a persistent barrier for 80% of organizations. Some 90% say that data silos create a challenge for their organization – unchanged from last year.



To what extent are integration challenges slowing or hindering digital transformation?



To what extent are data silos creating business challenges?

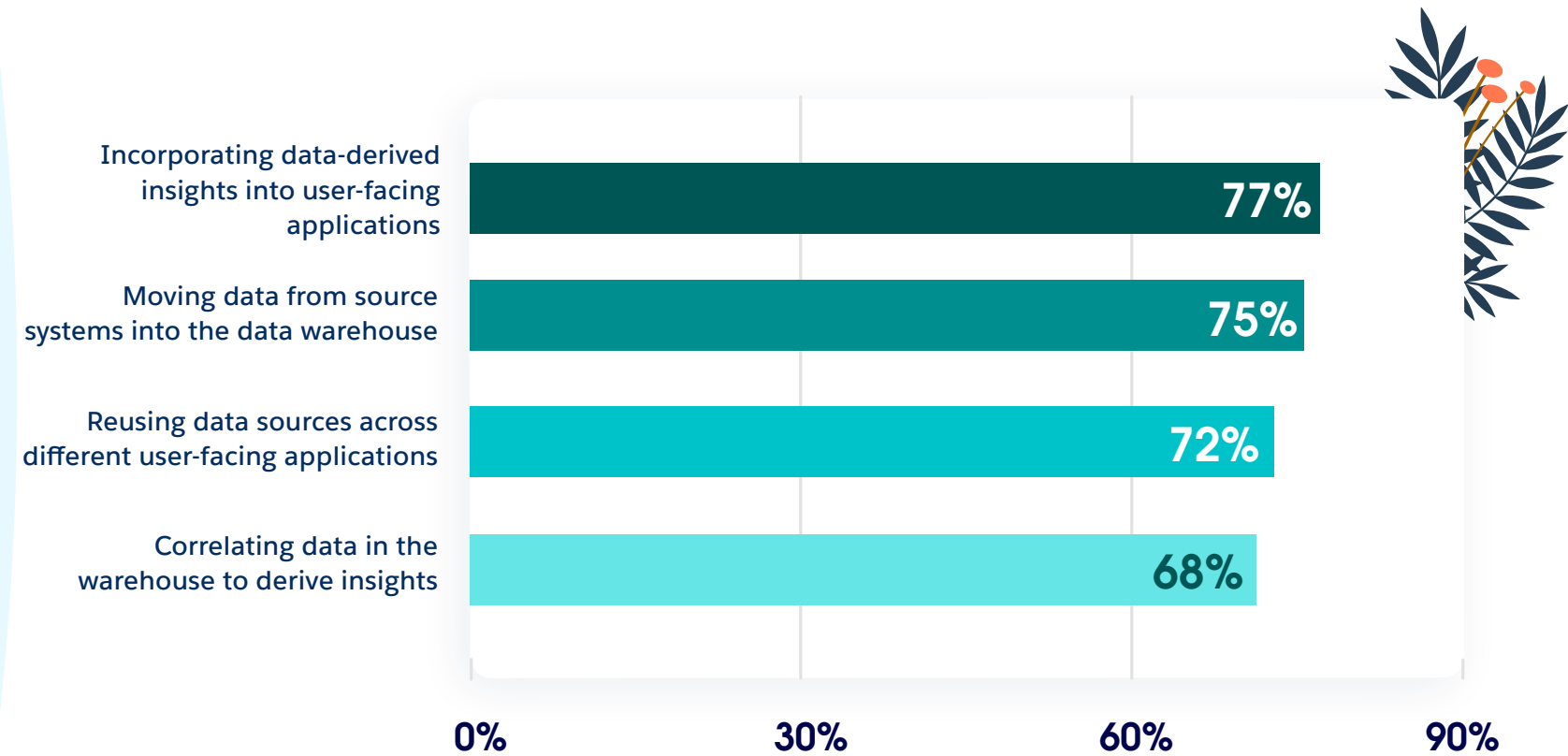


Multiple Causes for Data Integration Failure

There are a number of different data integration challenges facing organizations today. These include incorporating data-derived insights into user-facing applications (77%), moving data from source systems into the data warehouse (75%), and reusing data sources across different user-facing applications (72%).

Unlocking the power of enterprise data is a complex initiative that requires a future-proofed strategy supported by the right integration platform.

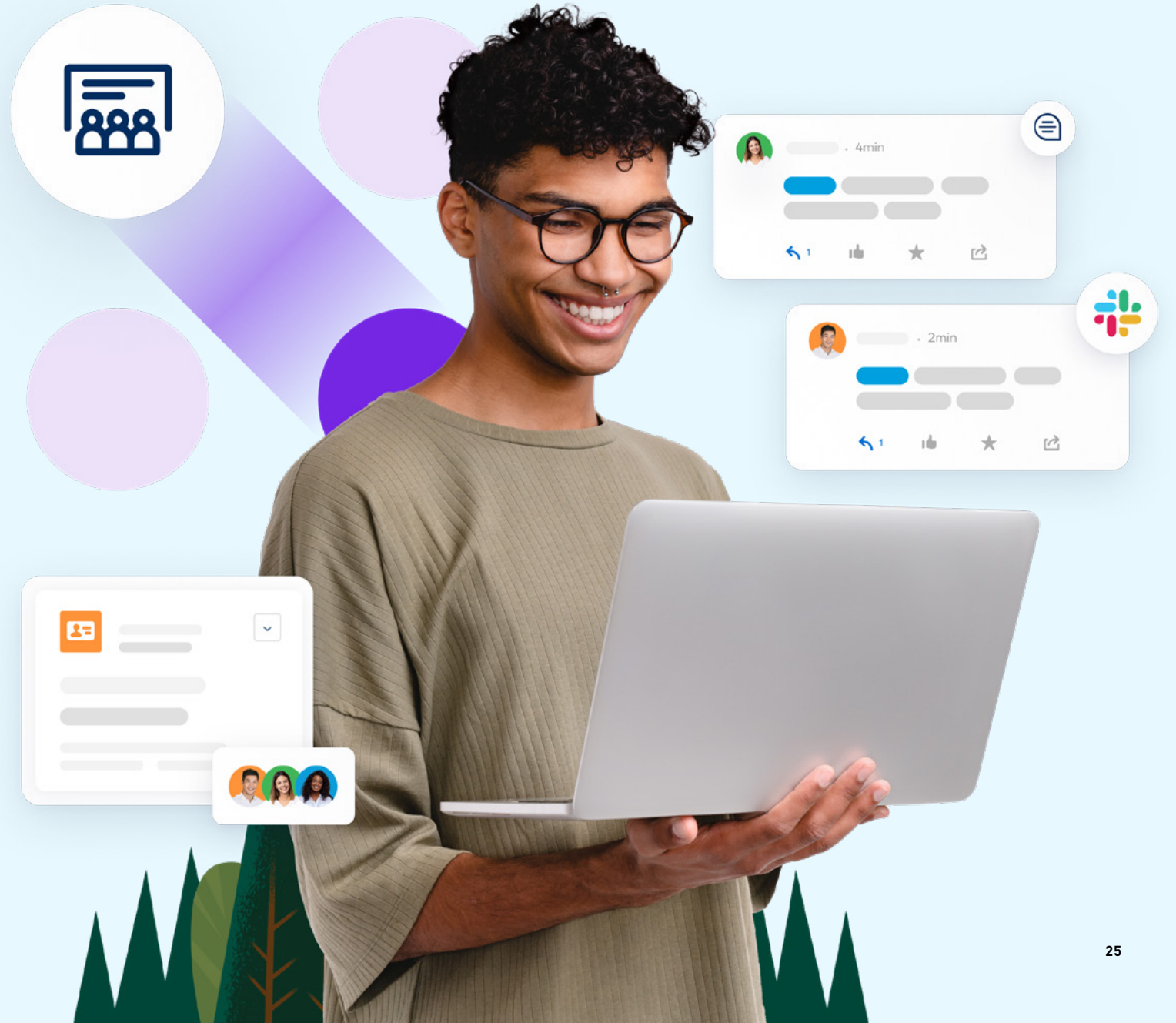
Data integration challenges facing enterprises today:





5

Customers Now Expect Connected Experiences



Key Trends

01

Over half (54%) of organizations find it hard to integrate end-user experiences. This figure is even higher among organizations that are behind their anticipated digital transformation progress (74%).

02

Businesses are working to improve customer engagement and satisfaction. More than a third (36%) say they provide a completely connected user experience across all channels – up from 30% in 2022.

03

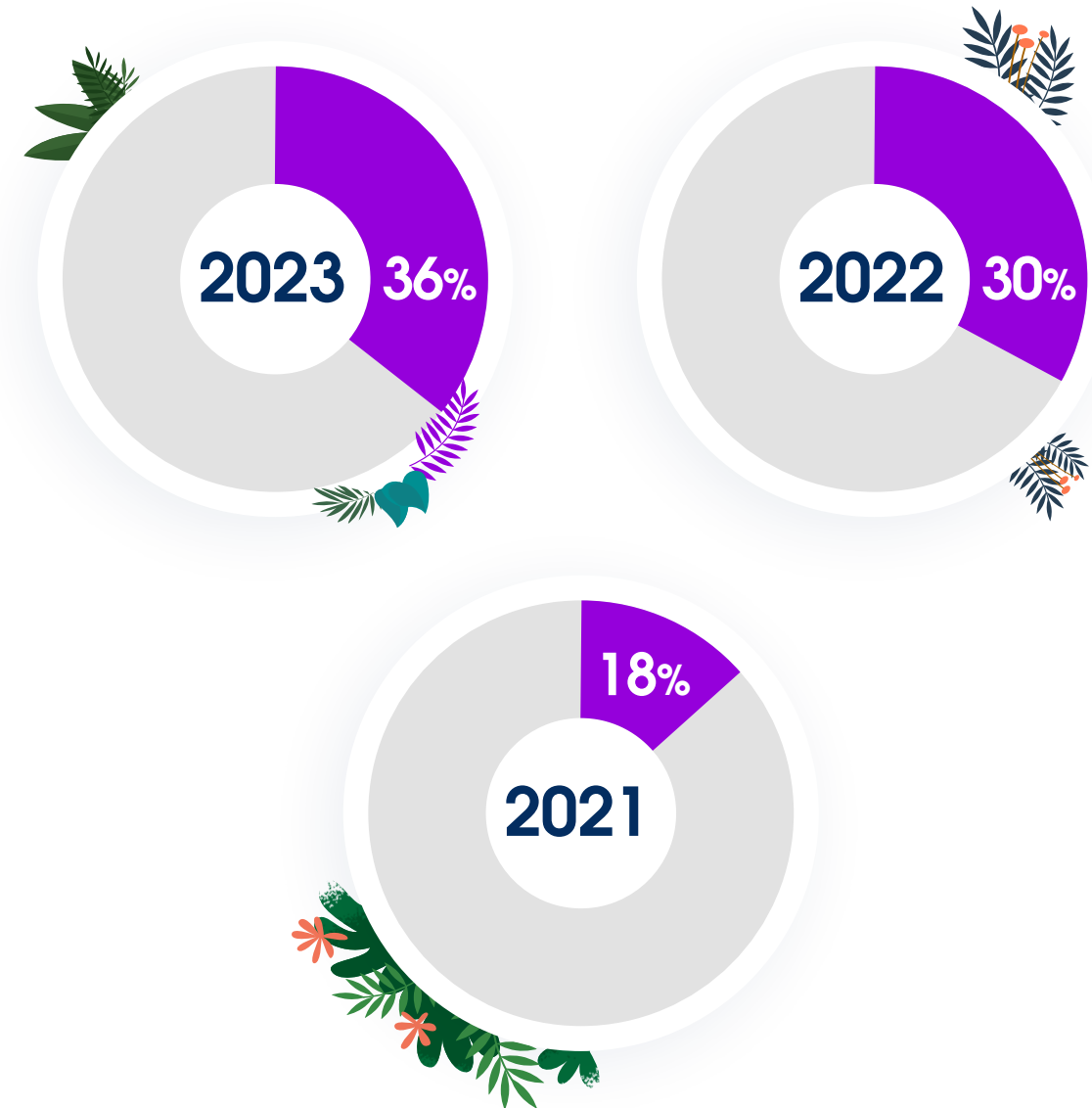
Integrated user experiences increase customer engagement (56%), provide better visibility into operations (53%), and help innovation (51%).



Connected Experiences Are the Norm

Integrating user experiences is tough, but organizations are making incremental progress. More than a third (36%) of organizations say they provide a completely connected user experience across all channels – compared to 30% a year ago.

Percentage of organizations that provide a completely connected user experience across all channels:

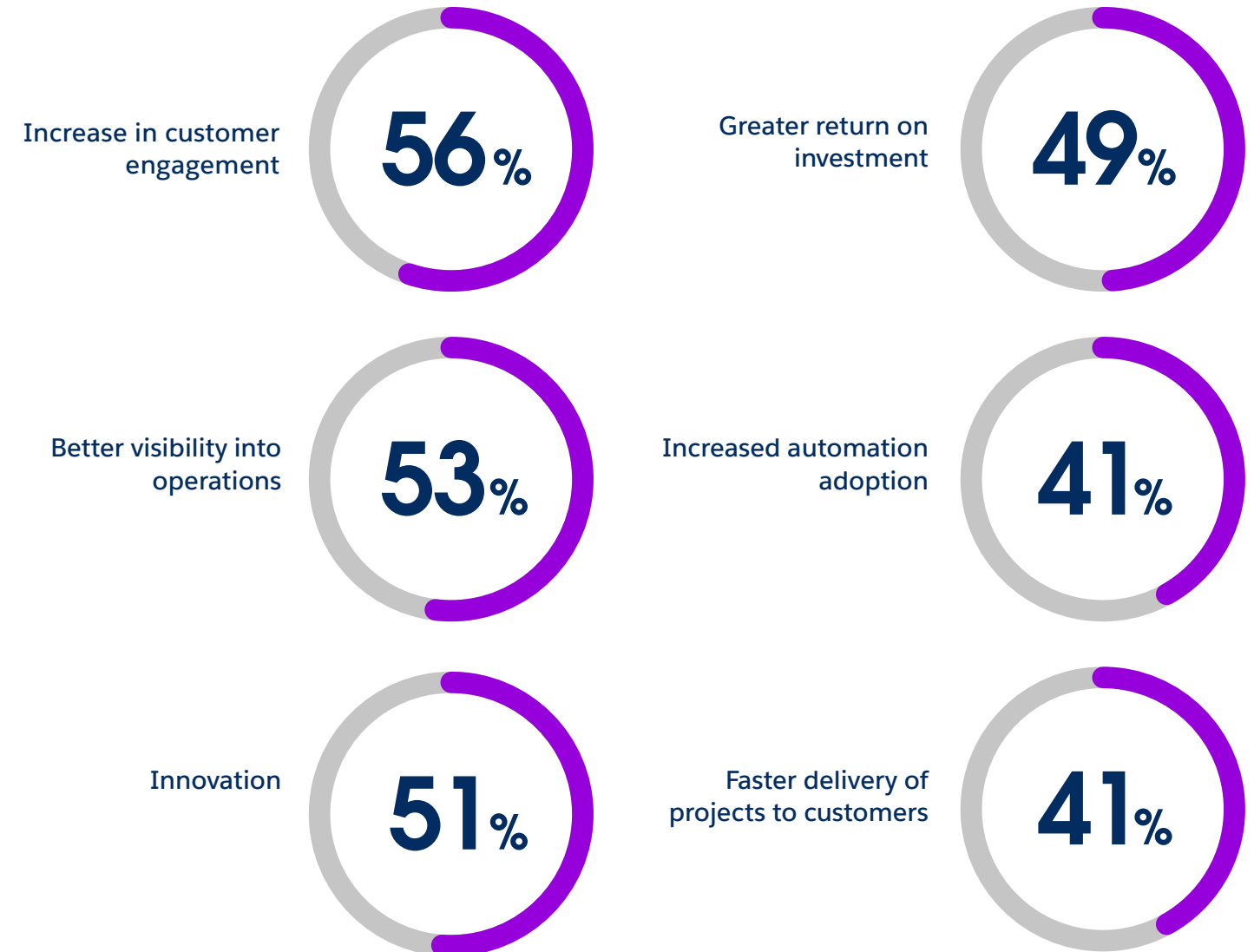


Integrated User Experiences Are Key to Success

Organizations need to integrate their applications and all of their user experiences to meet customer expectations and deliver success.

The top benefits of integrating user experiences are increased customer engagement (56%), better visibility into operations (53%), and bolstering innovation (51%).

Benefits of integrating user experiences:



But Integration Hurdles Remain

While the benefits of integrated user experiences are promising, many organizations struggle to deliver them. Over half (54%) of ITDMs say it's difficult to integrate end-user experiences. This increases to 74% among organizations that are currently behind their anticipated digital transformation progress.



How difficult is it to integrate end-user experiences?



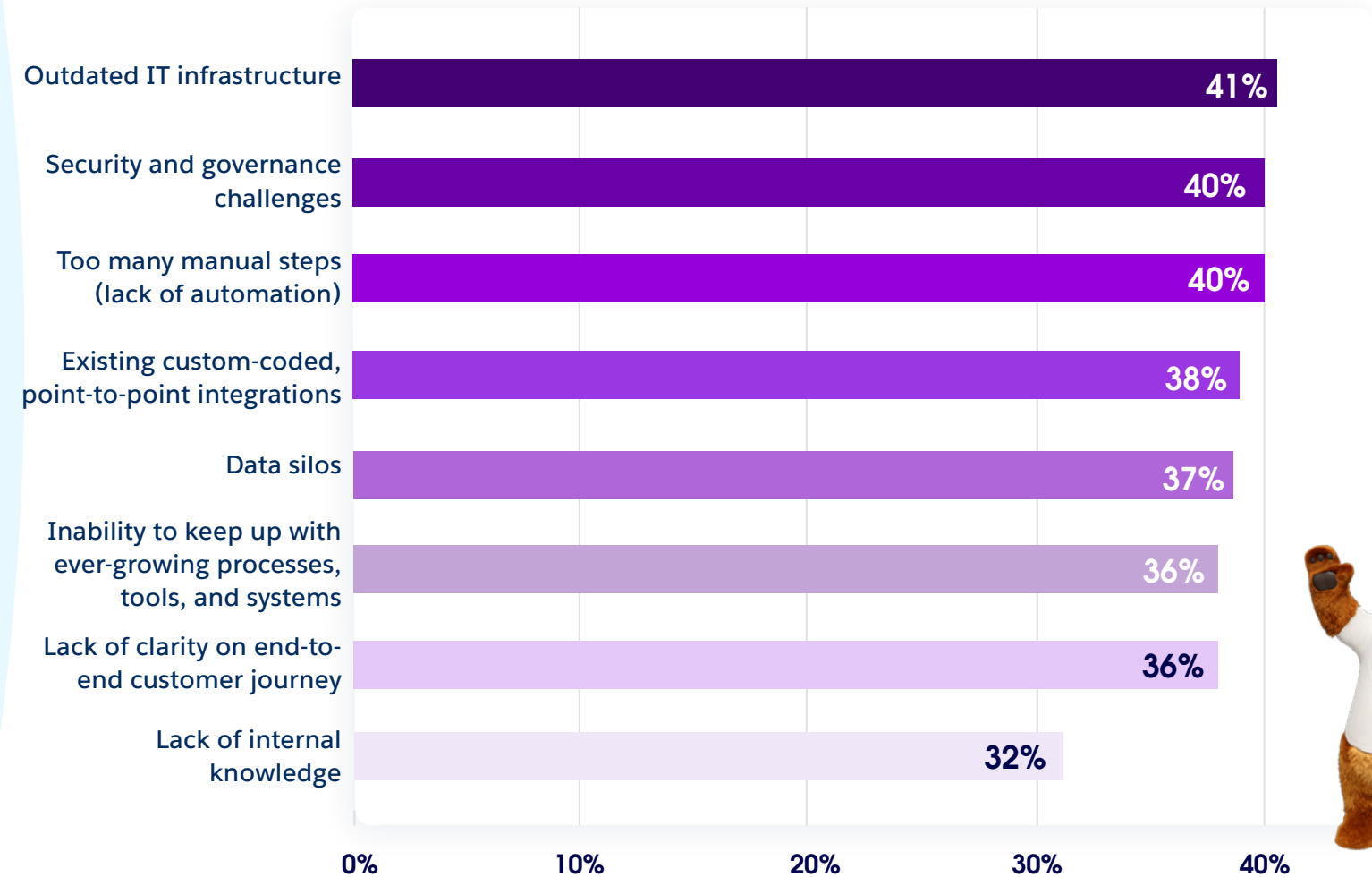
Hard or somewhat hard

Integration Challenges Come in Many Forms

There is no single source of failure when trying to connect user experiences across the enterprise. The most common challenges are outdated IT infrastructure (41%), security and governance (40%), lack of automation (40%), and existing custom-coded, point-to-point integrations (38%).



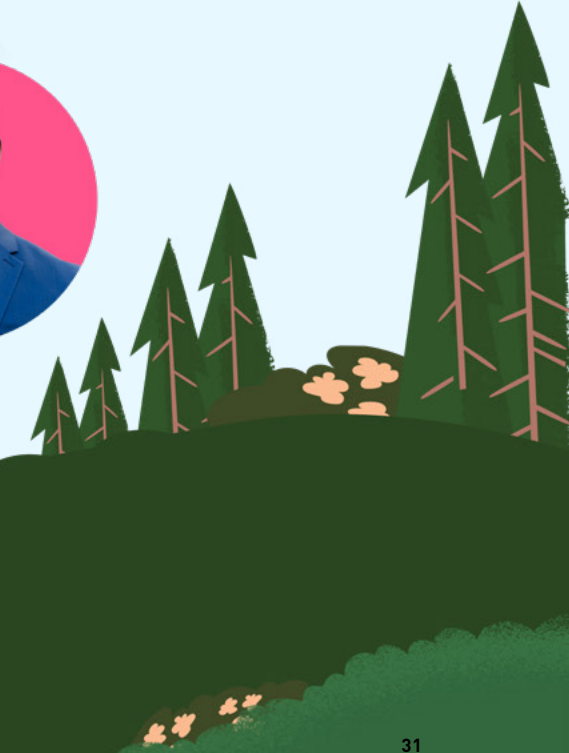
Challenges towards integrating end-user experiences:





6

Teams Across the Business Demand Automation



Key Trends

01

More organizations are automating their way to efficient growth. As a result, RPA adoption is increasing across the enterprise – 33% of organizations plan to invest in RPA, up from 13% two years ago.

02

As automation becomes a key component of transformation, IT is responsible for centrally managing (67%) and tracking (59%) automations.

03

A number of roles outside of IT need automation tools to complete their work, including data science (64%), product (62%), and business analysis (61%) teams.

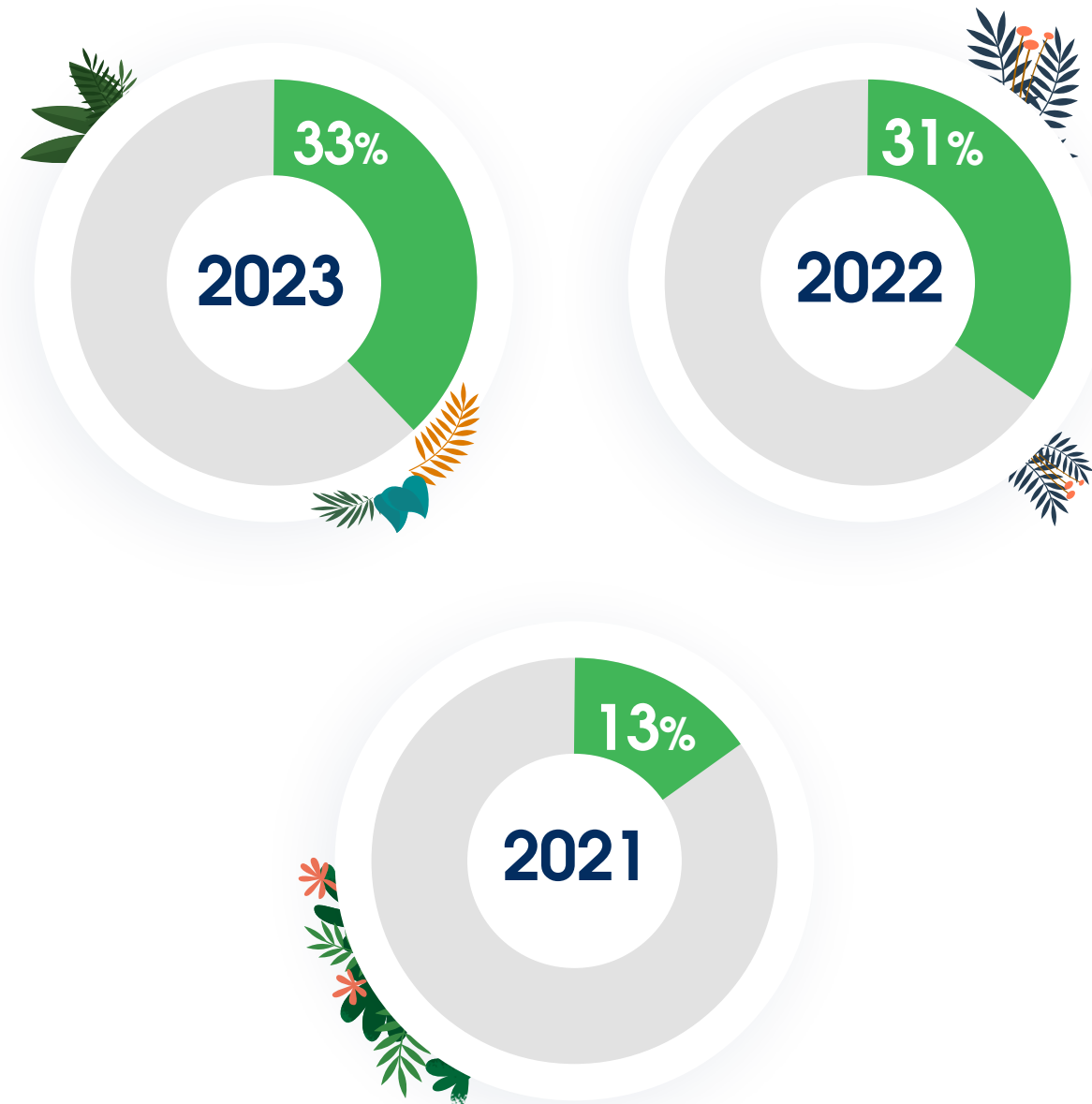


RPA Is On The Rise

Automation frees up employee time, allowing them to be more productive and efficient – which are both critical business goals in today’s uncertain economy.

A third (33%) of organizations plan to invest in robotic process automation (RPA), which is a substantial increase from 13% in 2021.

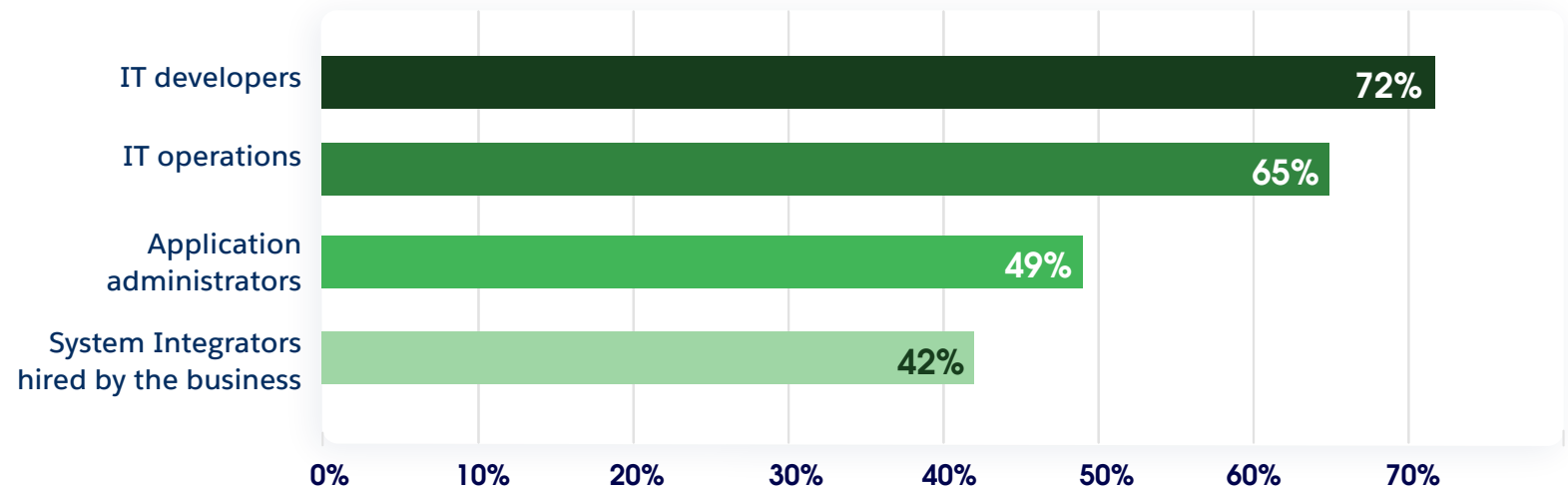
Growing investment in robotic process automation:



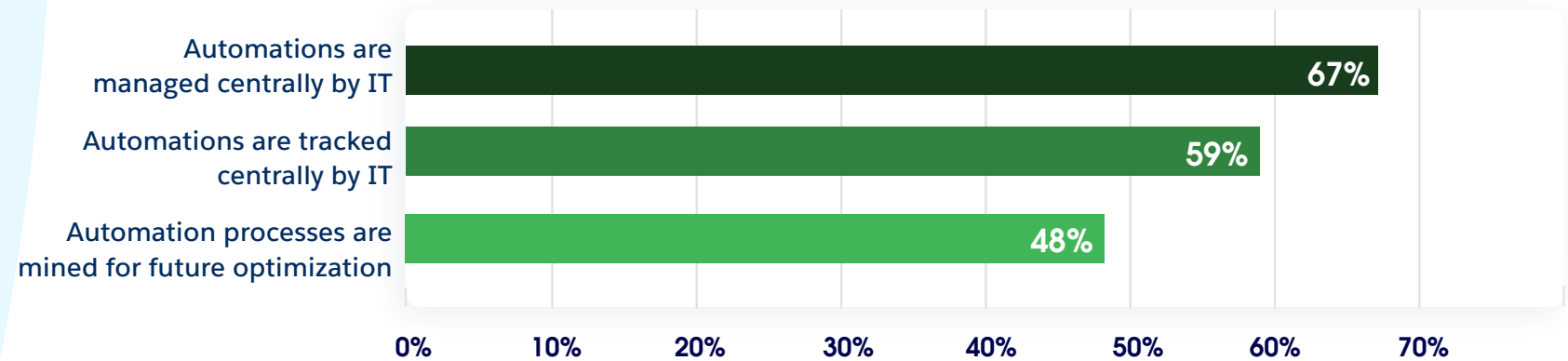
IT Controls Automation Projects

Automation is an aspect of digital transformation that is closely controlled by IT. Developers (72%), IT operations (65%), and app administrators (49%) are most often responsible for automating business processes. In most organizations, automations are also managed (67%) and tracked (59%) centrally by IT.

Roles responsible for automating business processes:



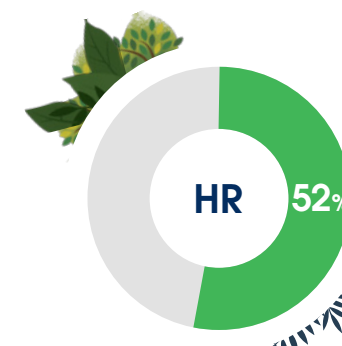
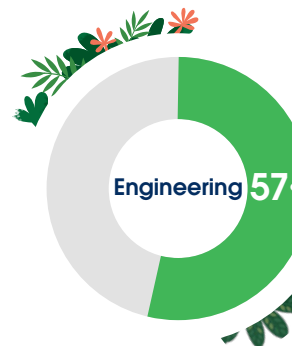
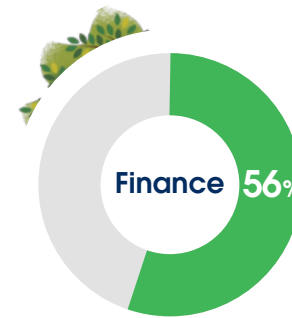
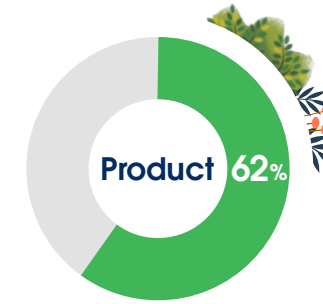
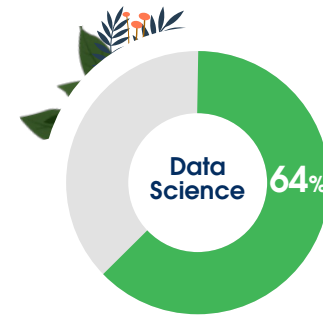
How automations are governed across the organization:



Non-IT Roles Want Autonomy

IT may manage the automation, but many non-tech roles require these capabilities in their parts of the business. These include data science (64%), product (62%), finance (56%), marketing (58%), business analysts (61%), customer support (58%), engineering (57%), and HR (52%).

With a centralized no-code platform, organizations can empower non-technical users to create their own automations while ensuring that IT keeps control over security and governance.



Some Departments Need Both Integration and Automation

Overall, 92% of organization say at least one of the departments listed require both integration and automation. API management and integration tools must work in tandem to effectively execute automation.

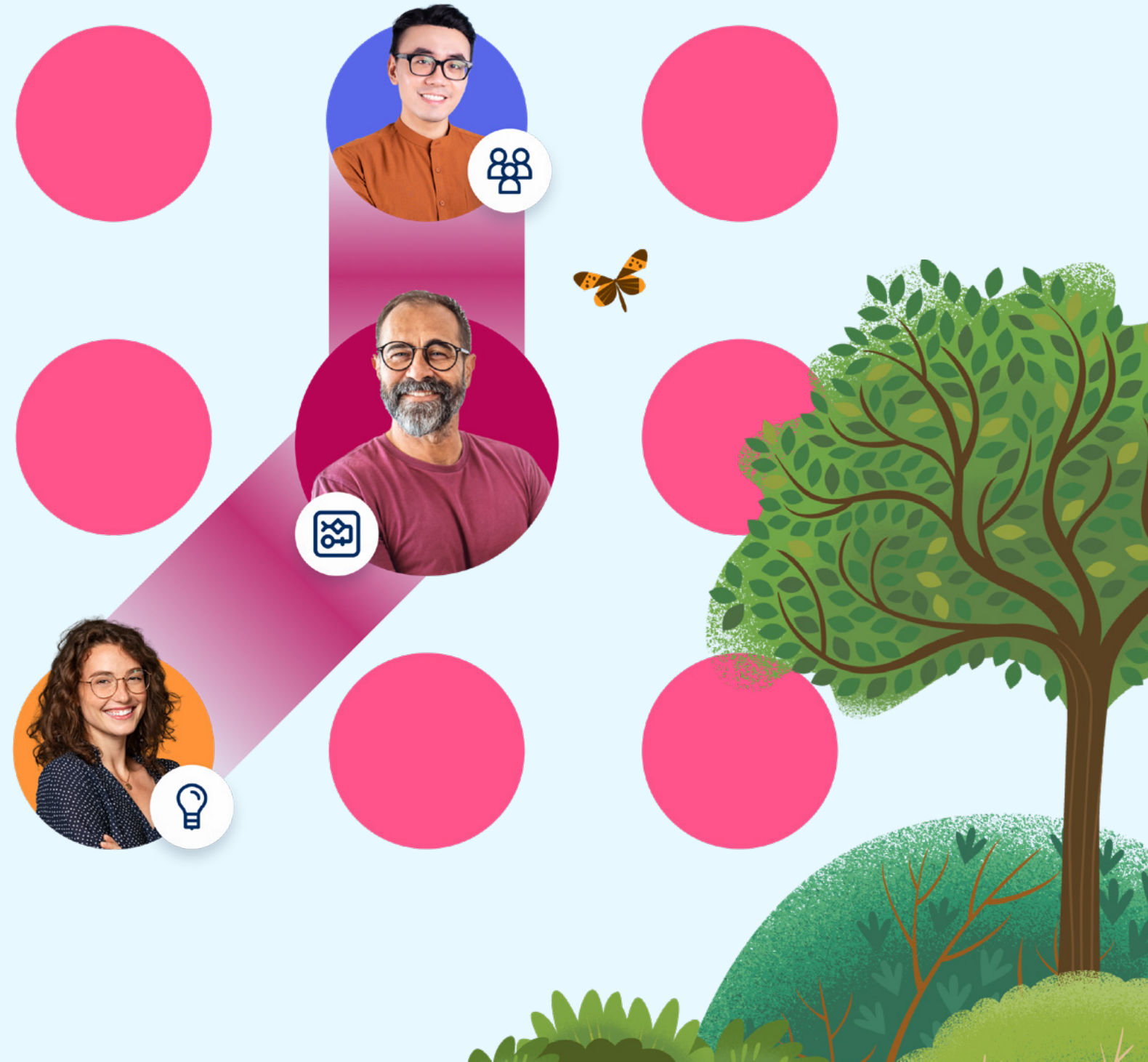


At least one department listed on the prior page requires both integration and automation



7

APIs Help Maximize Cost Saving and Revenue



Key Trends

01

Nearly all (99%) organizations use public/private APIs. Most commonly they're used to develop processes for new projects (53%) and for integrations (53%).

02

Over half (56%) of organizations say they have a mature API strategy that enables non-technical business users to easily integrate apps/data sources.

03

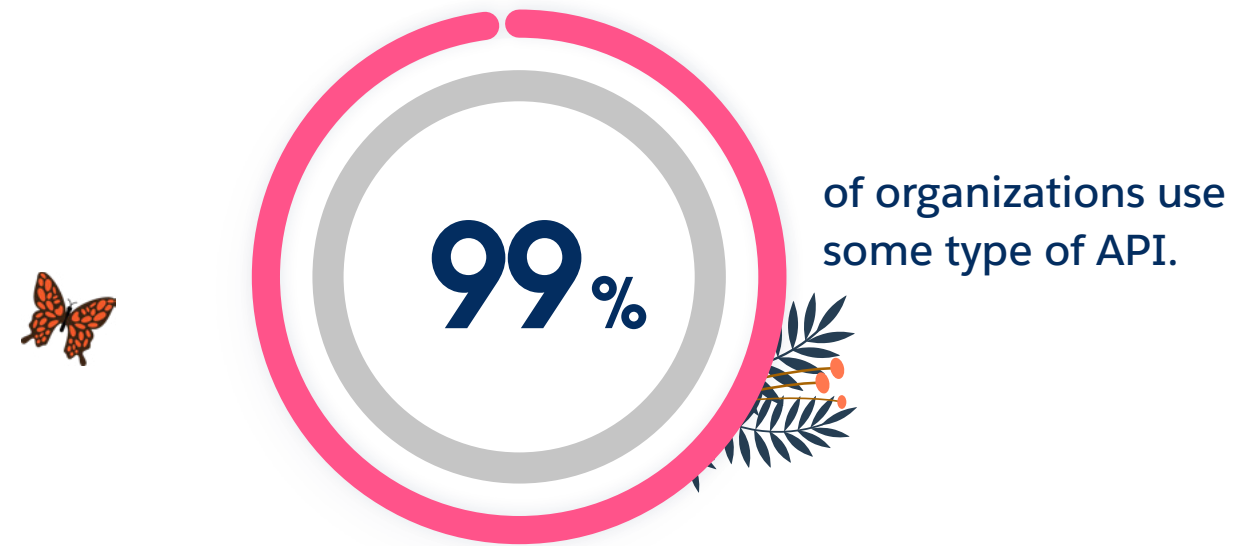
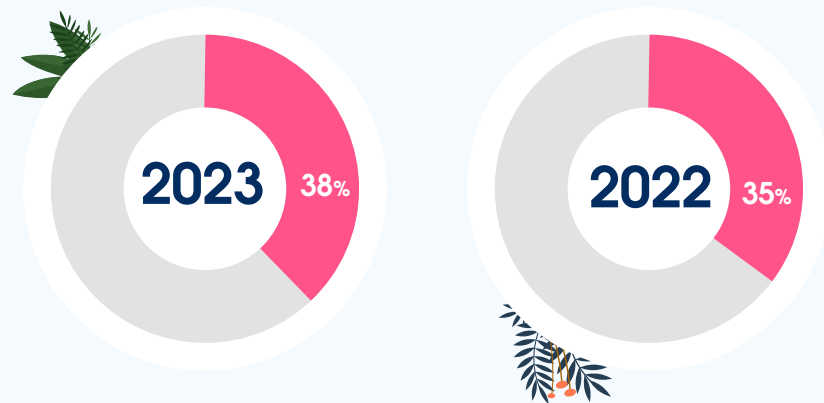
APIs support self-service IT capabilities in 52% of organizations (up from 35% in 2018), showing that APIs can save organizations money and boost efficiency.



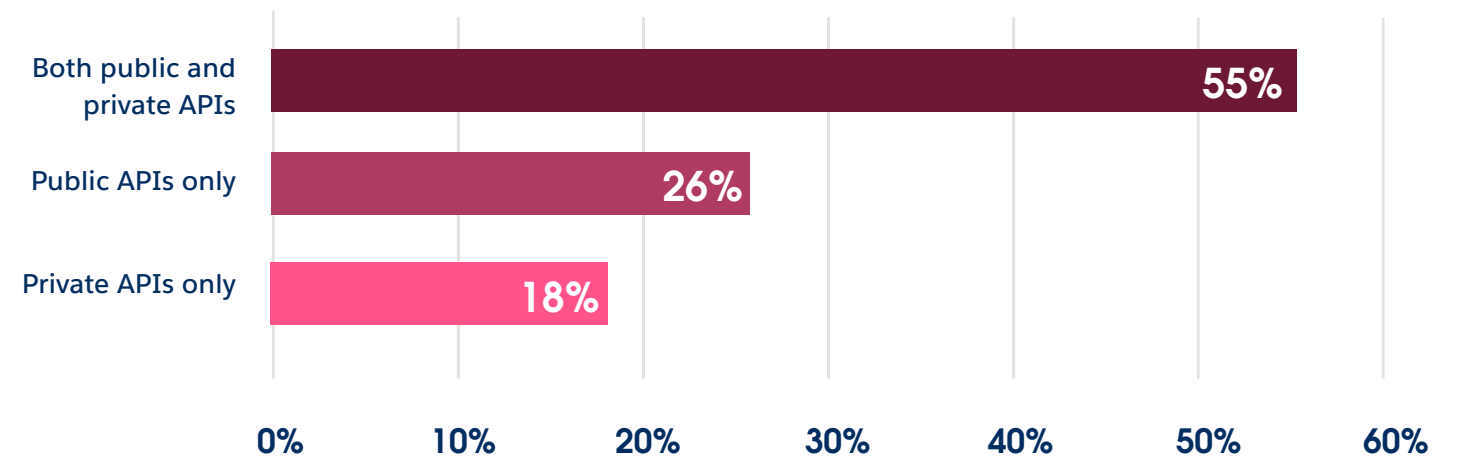
APIs Are Everywhere and Generate Revenue

Nearly every organization today recognizes the potential of APIs. On average, API projects generate 38% of an organization's revenue – compared to 35% in 2022.

Average percentage of revenue generated from API projects:



Types of API used within organizations:

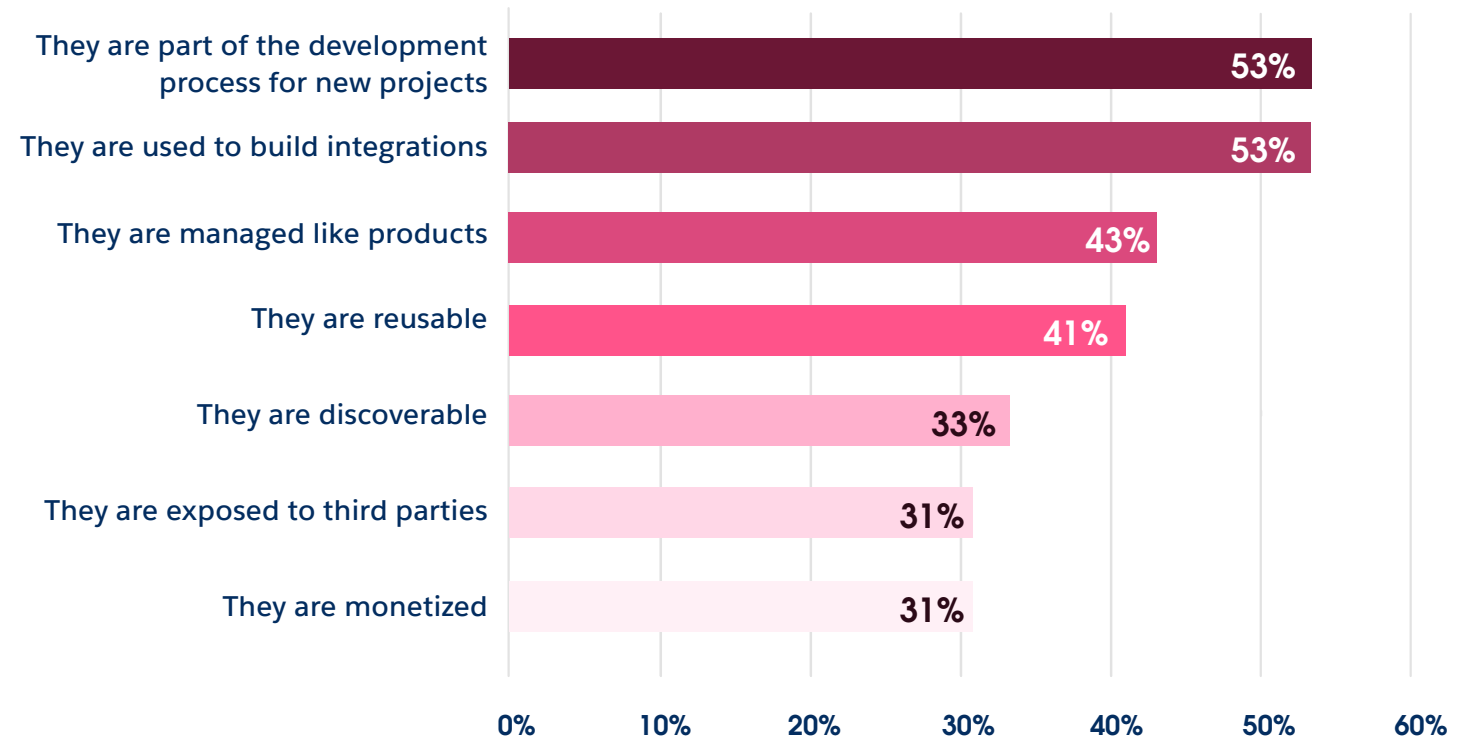


APIs Are Streamlining Development

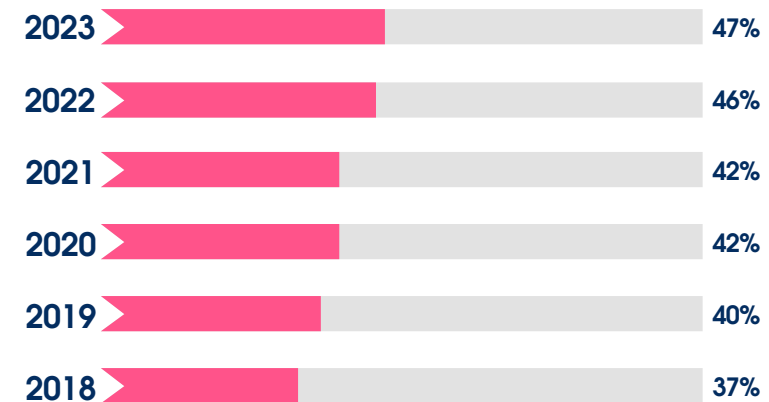
Many of these organizations are using APIs for new projects (53%) and to build integrations (53%). APIs are also improving application development (46%) and being reused to build new products and services (44%) as organizations embrace a more composable approach.

On average, 47% of an organization’s internal software assets and components are reusable – a number that’s been on the rise since 2018.

Types of API characteristics within organizations today:



Average percentage of reusable software components and assets:

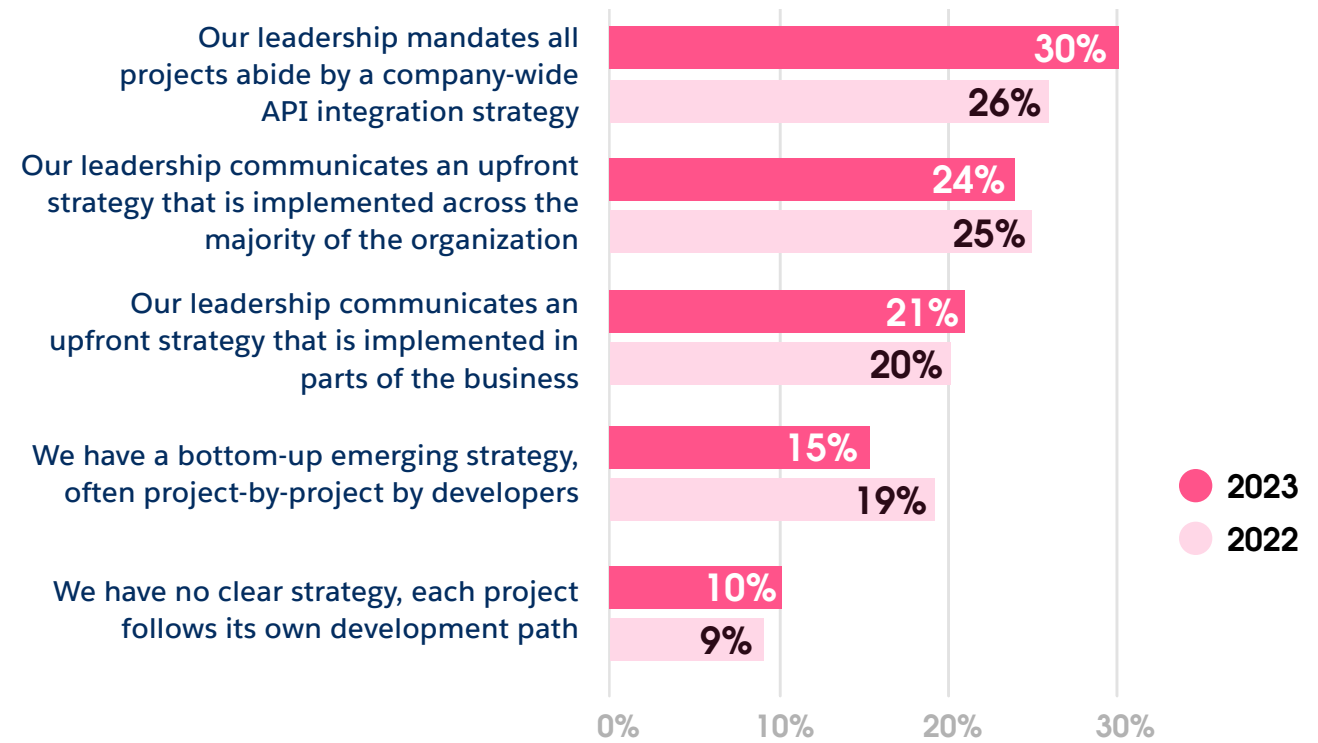


API Integration Strategies Are Not Yet Mandatory

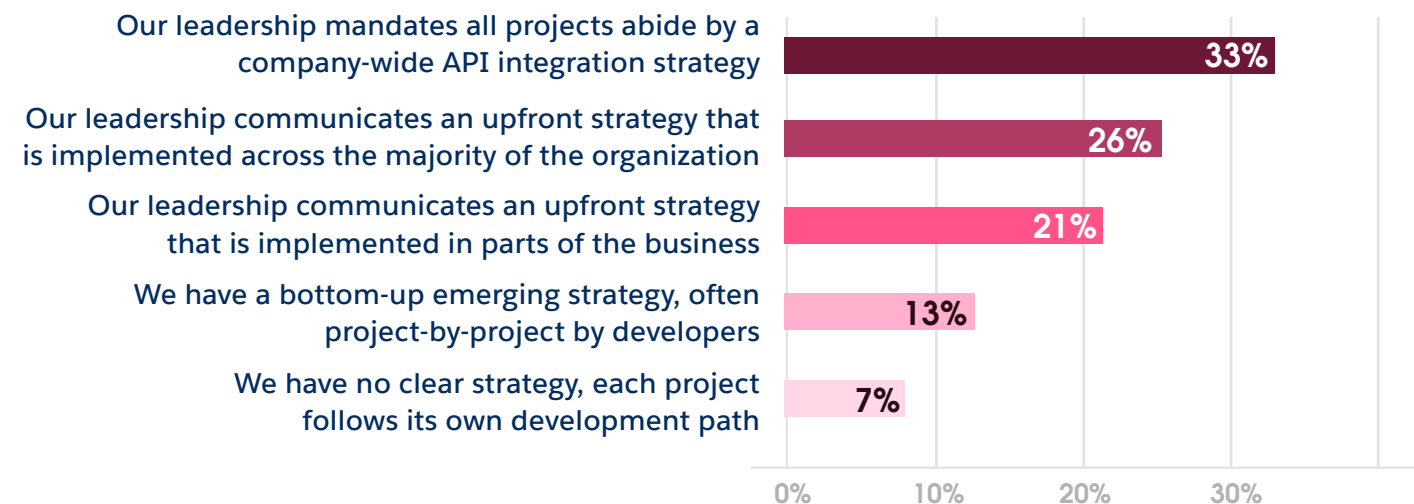
Most (90%) of organizations have a clear API integration strategy (unchanged from 2022). But a third (30%) mandate that these projects abide by a company-wide approach, an increase from 2022 (26%).

Organizations that are ahead of their digital transformation progress are more likely to use a top-down strategy.

How organizations approach and promote their API and integration strategies:



Organizations that are ahead of their anticipated digital transformation progress based on their API strategy:



Organizations Are Democratizing API-led Integration

When given to business users in the form of no-code tools, APIs can speed up digital transformation and help deliver more integrated experiences.

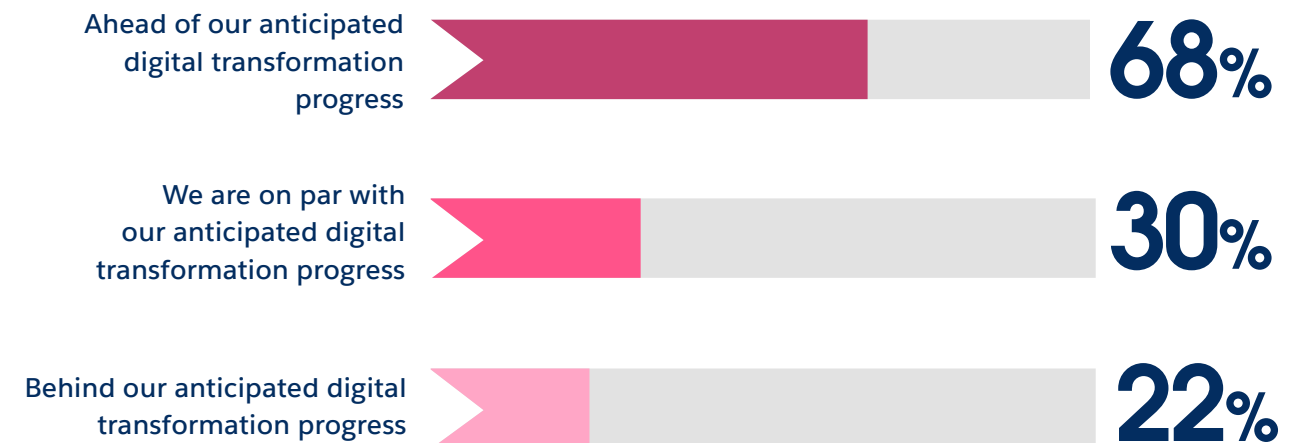
Of organizations ahead of their anticipated digital transformation progress, 68% have a mature strategy to empower non-technical business users (compared to the overall average of 56%).



56% of ITDMs consider their organization's strategy for enabling non-technical users to integrate apps and data sources via APIs as mature or somewhat mature.



Organizations with a mature strategy for enabling non-technical users:



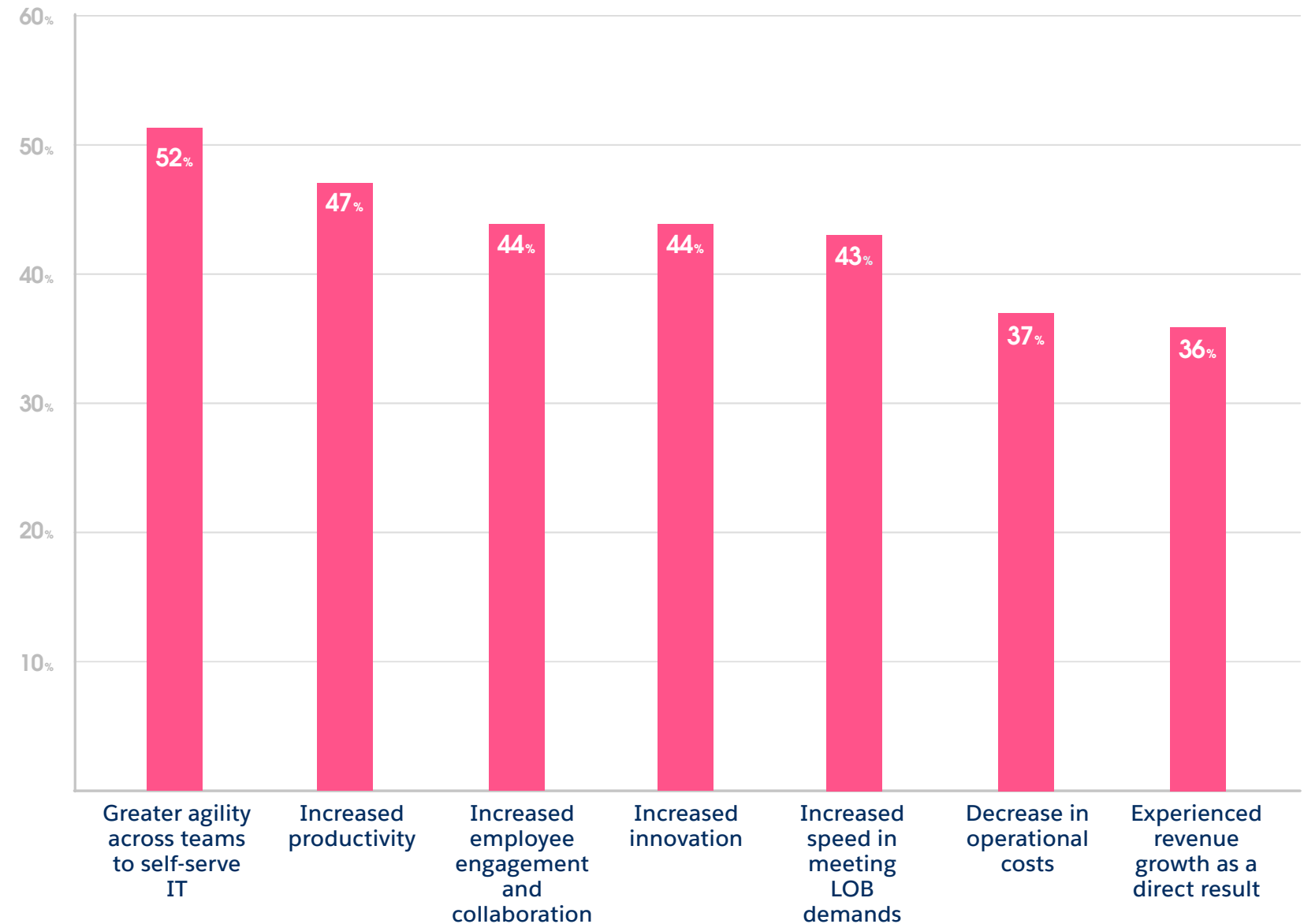
APIs Drive Agility and Potential Cost Savings

The most cited business benefit from APIs is the ability to self-serve IT – mentioned by over half (52%) of organizations, up from 35% in 2018.

Other business benefits, include increased productivity (47%), innovation (44%), and employee engagement/collaboration (44%).

As leaders navigate this challenging business environment, the value derived from APIs both from a cost-savings and efficiency perspective has never been greater.

Business benefits from APIs:

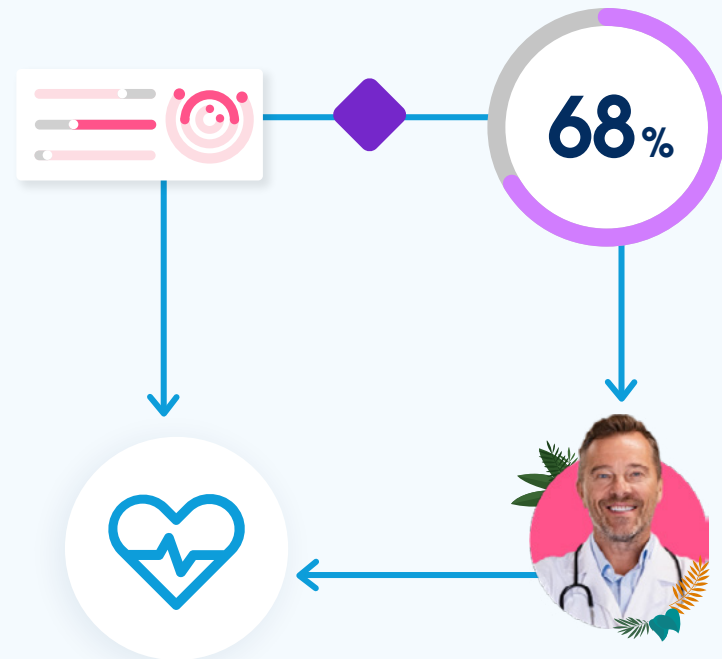


Appendix

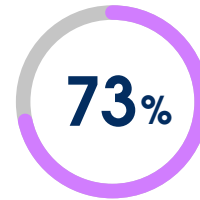
Sector and geographic breakdowns



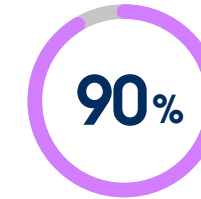
Healthcare and Life Sciences



68% of ITDMs in healthcare and life sciences say their IT infrastructure makes their systems overly dependent on one another (vs. 59% global average).



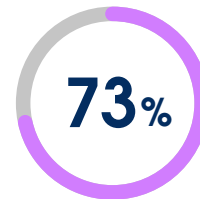
73% of healthcare and life sciences organizations are ahead of their anticipated digital transformation progress.



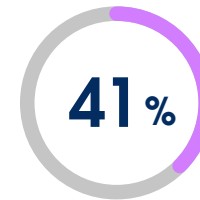
90% of ITDMs in healthcare and life sciences say data silos create challenges for their organization.

\$6.3 million

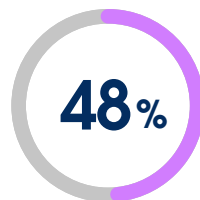
ITDMs in healthcare and life sciences say their organization could lose an average of \$6.3 million if digital transformation initiatives aren't successfully completed.



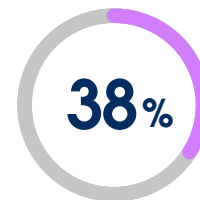
73% of ITDMs in healthcare and life sciences predict an increase to their IT budget in the coming year.



The average number of projects IT is being asked to deliver has increased by 41%.

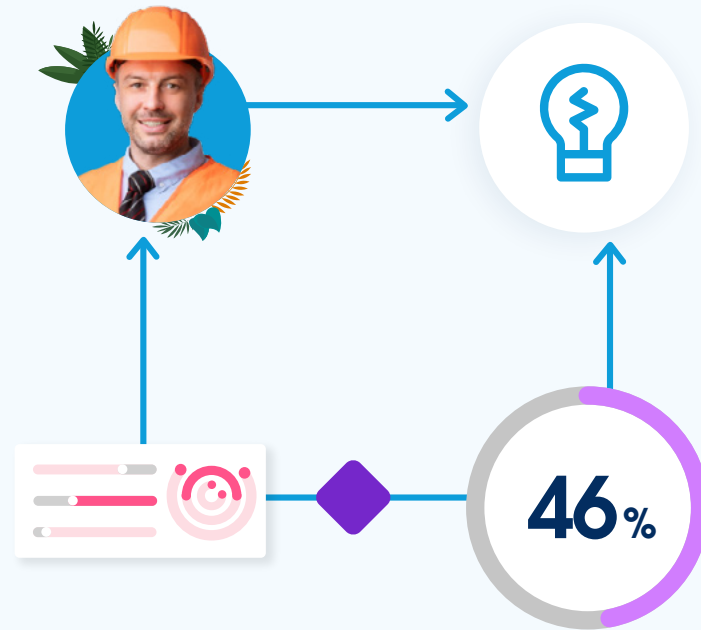


48% of respondents successfully delivered all the projects asked of them last year.

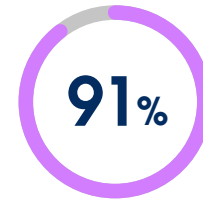


APIs and API-related implementations generated 38% of revenue for healthcare and life sciences organizations.

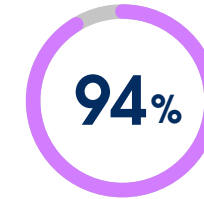
Energy, Oil & Gas, and Utilities



IT teams in this sector spend **46%** of their time designing, building, and testing new custom integrations between systems and data.

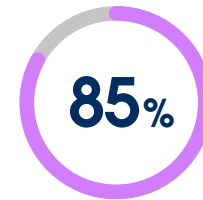


91% of energy, oil & gas, and utilities organizations are ahead of their anticipated digital transformation progress.

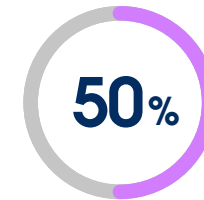


94% of IT decision makers in energy, oil & gas, and utilities think that data silos are creating challenges for their organization.

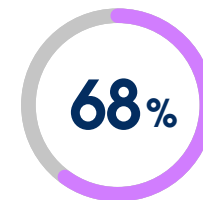
\$8.7 million | ITDMs in energy, oil & gas, and utilities say their organization could lose an average of \$8.7 million if digital transformation initiatives aren't successfully completed.



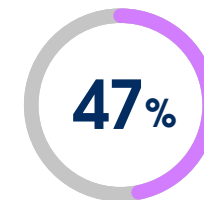
85% of IT decision makers in energy, oil & gas, and utilities predict an increase in their IT budget in the coming year.



The average number of projects IT is being asked to deliver has increased by **50%**.

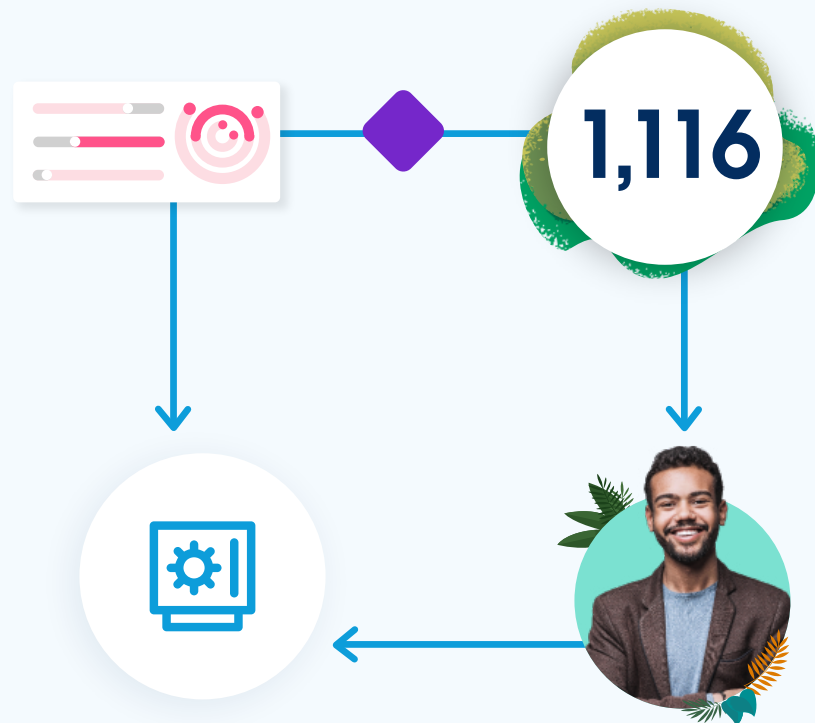


68% of respondents successfully delivered all the projects asked of them last year.

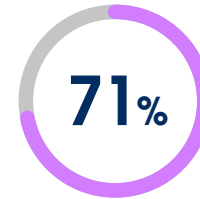


APIs and API-related implementations generated **47%** of revenue for energy, oil & gas, and utilities organizations.

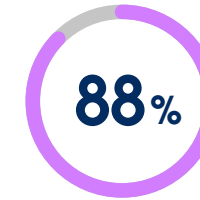
Financial Services and Insurance



On average, financial services and insurance organizations use **1,116** individual applications (vs. 1,061 global average).



of financial services and insurance organizations are ahead of their anticipated digital transformation progress.

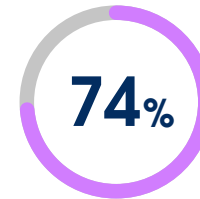


of IT decision makers in financial services and insurance think that data silos are creating challenges for their organization.

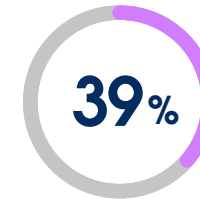


\$16.4 million

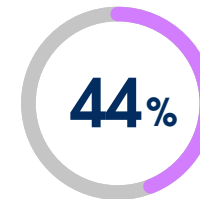
ITDMs in financial services and insurance say their organization could lose an average of \$16.4 million if digital transformation initiatives aren't successfully completed.



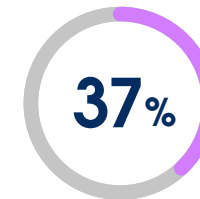
of IT decision makers in financial services and insurance predict an increase in their IT budget in the coming year.



The average number of projects IT is being asked to deliver has increased by 39%.

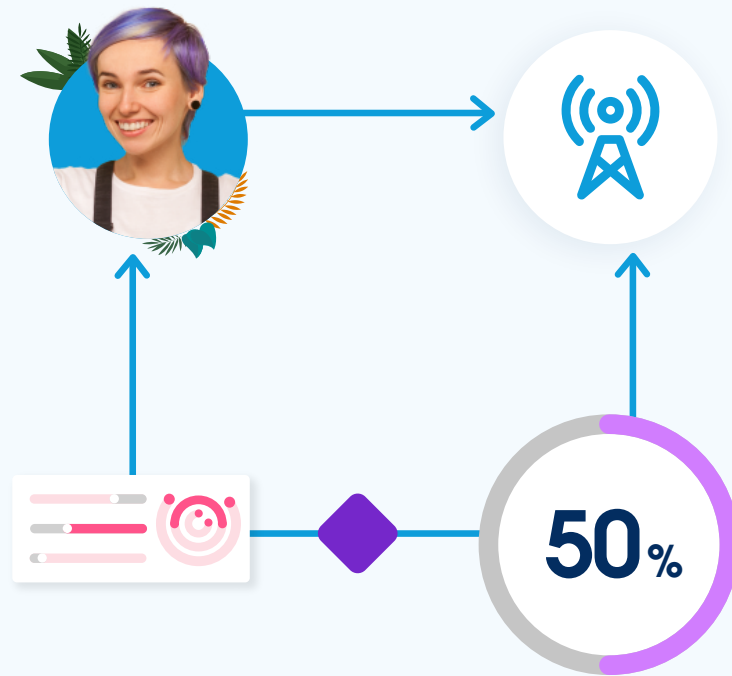


of respondents successfully delivered all the projects asked of them last year.

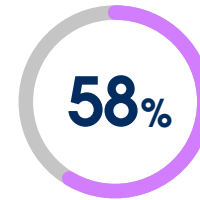


APIs and API-related implementations generated 37% of revenue for financial services and insurance organizations.

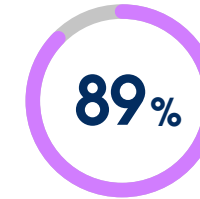
Communications, Media, and Technology



50% of ITDMs in communications, media, and technology cite application and data silos as one of the biggest challenges to digital transformation (vs. 36% global average).

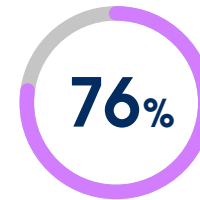


58% of communications, media, and technology organizations are ahead of their anticipated digital transformation progress.

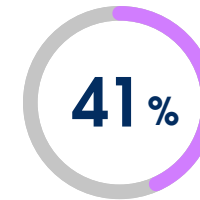


89% of IT decision makers in communications, media, and technology think that data silos are creating challenges for their organization.

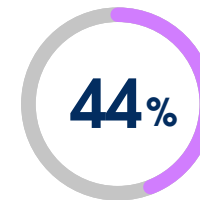
\$14.8 million | ITDMs in communications, media, and technology say their organization could lose an average of \$14.8 million if digital transformation initiatives aren't successfully completed.



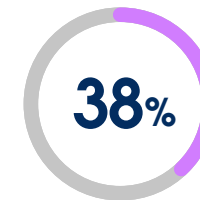
76% of IT decision makers in communications, media, and technology predict an increase in their IT budget in the coming year.



The average number of projects IT is being asked to deliver has increased by 41%.

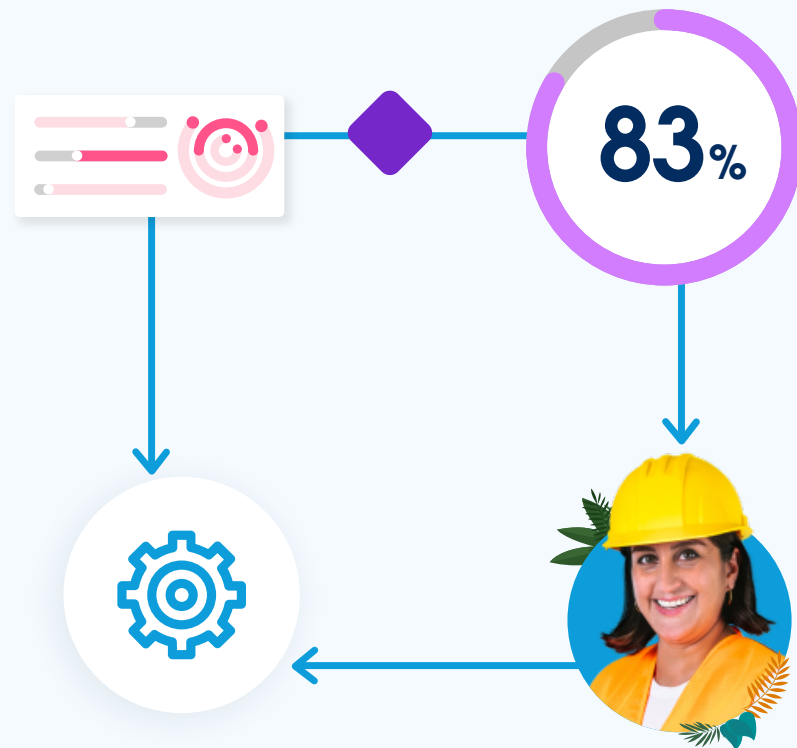


44% of respondents successfully delivered all the projects asked of them last year.

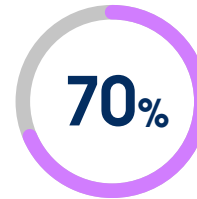


APIs and API-related implementations generated 38% of revenue for communications, media, and technology organizations.

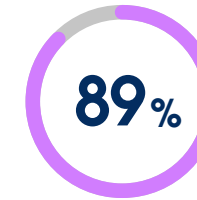
Manufacturing and Production



83% of ITDMs in manufacturing and production anticipate an increase to their IT staff headcount over the next 12 months (vs. 78% global average).



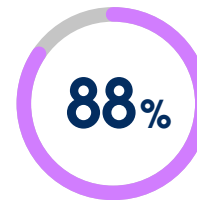
70% of manufacturing and production organizations are ahead of their anticipated digital transformation progress.



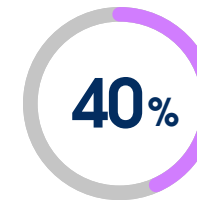
89% of IT decision makers in manufacturing and production think that data silos are creating challenges for their organization.

\$7.2 million

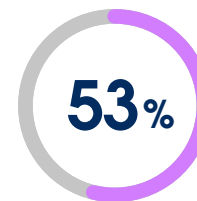
ITDMs in manufacturing and production say their organization could lose an average of \$7.2 million if digital transformation initiatives aren't successfully completed.



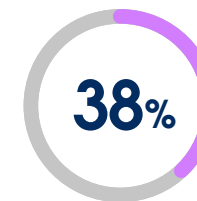
88% of IT decision makers in manufacturing and production predict an increase in their IT budget in the coming year.



The average number of projects IT is being asked to deliver has increased by 40%.

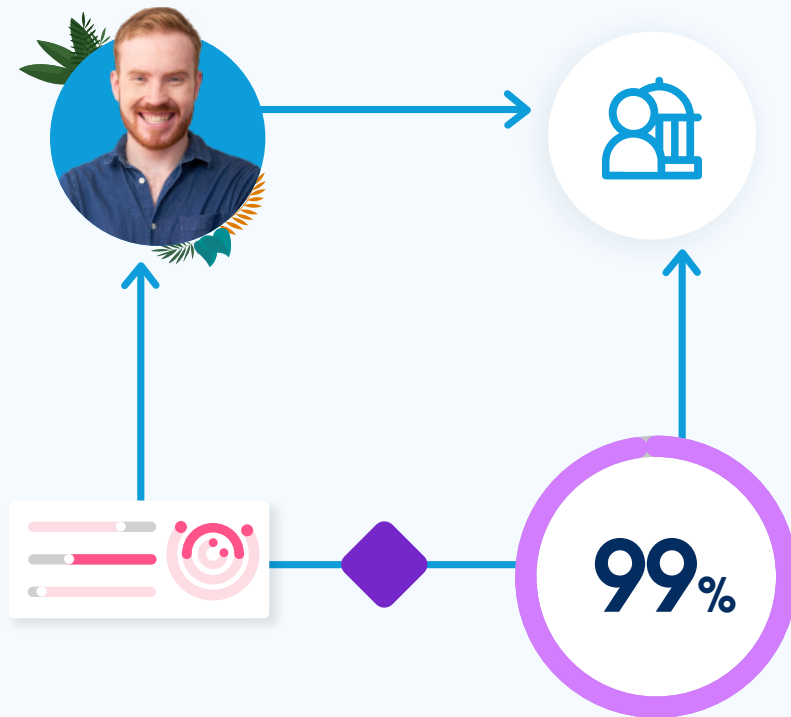


53% of respondents successfully delivered all the projects asked of them last year.

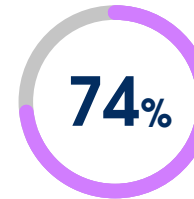


APIs and API-related implementations generated 38% of revenue for manufacturing and production organizations.

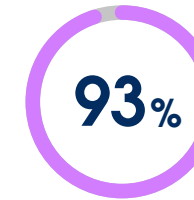
Public Sector/ Government



Almost all (99%) ITDMs in the public sector admit that integration challenges hinder digital transformation progress (vs. 94% global average).



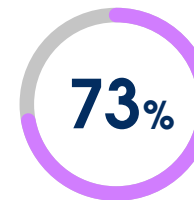
74% of public sector organizations are ahead of their anticipated digital transformation progress.



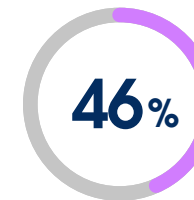
93% of IT decision makers in the public sector think that data silos are creating challenges for their organization.

\$10.7 million

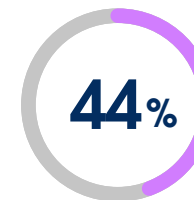
ITDMs in the public sector say their organization could lose an average of \$10.7 million if digital transformation initiatives aren't successfully completed.



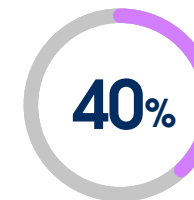
73% of IT decision makers in the public sector predict an increase in their IT budget in the coming year.



46% The average number of projects IT is being asked to deliver has increased by 46%.

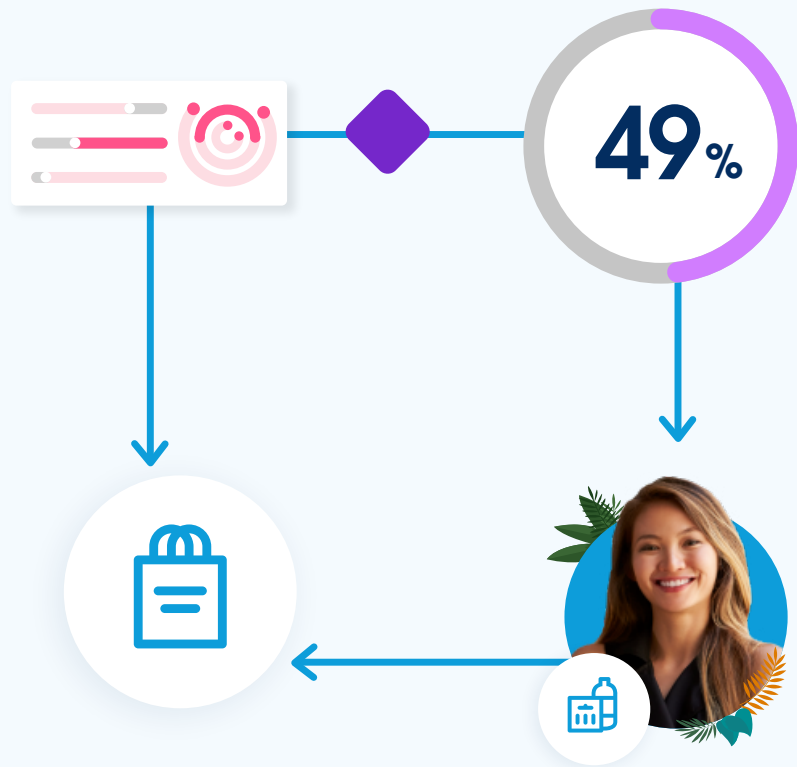


44% of respondents successfully delivered all the projects asked of them last year.

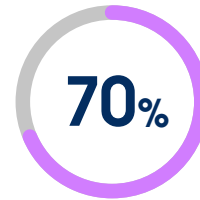


40% APIs and API-related implementations generated 40% of revenue for public sector organizations.

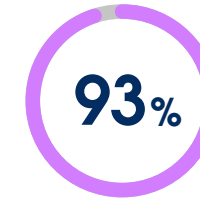
Retail and Consumer Packaged Goods



49% of retail and consumer goods organizations are either currently or plan to invest in AI/machine learning (vs. 40% global average).



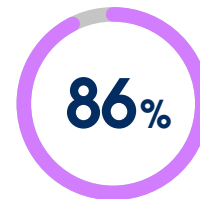
70% of retail and consumer packaged goods organizations are ahead of their anticipated digital transformation progress.



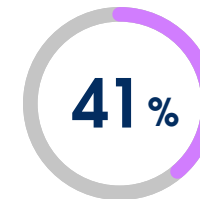
93% of IT decision makers in retail and consumer packaged goods think that data silos are creating challenges for their organization.

\$6.5 million

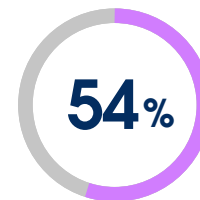
ITDMs in retail and consumer packaged goods say their organization could lose an average of \$6.5 million if digital transformation initiatives aren't successfully completed.



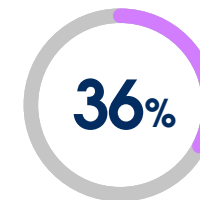
86% of IT decision makers in retail and consumer packaged goods predict an increase in their IT budget in the coming year.



The average number of projects IT is being asked to deliver has increased by 41%.



54% of respondents successfully delivered all the projects asked of them last year.

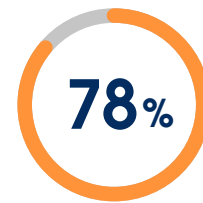


APIs and API-related implementations generated 36% of revenue for retail and consumer packaged goods organizations.

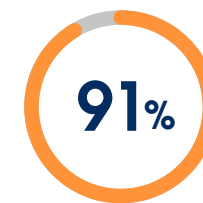
Region Profile: United States



On average, **31%** of applications are integrated at organizations in the U.S. (vs. 29% global average).



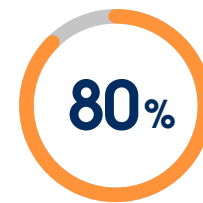
78% of organizations in the U.S. are ahead of their anticipated digital transformation progress.



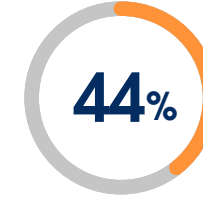
91% of IT decision makers in the U.S. think that data silos are creating challenges for their organization.

\$12.9 million

ITDMs in the U.S. say their organization could lose an average of \$12.9 million if digital transformation initiatives aren't successfully completed.



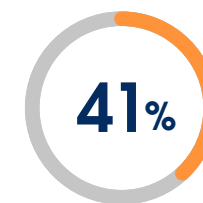
80% of IT decision makers in the U.S. predict an increase in their IT budget in the coming year.



The average number of projects IT is being asked to deliver has increased by 44%.

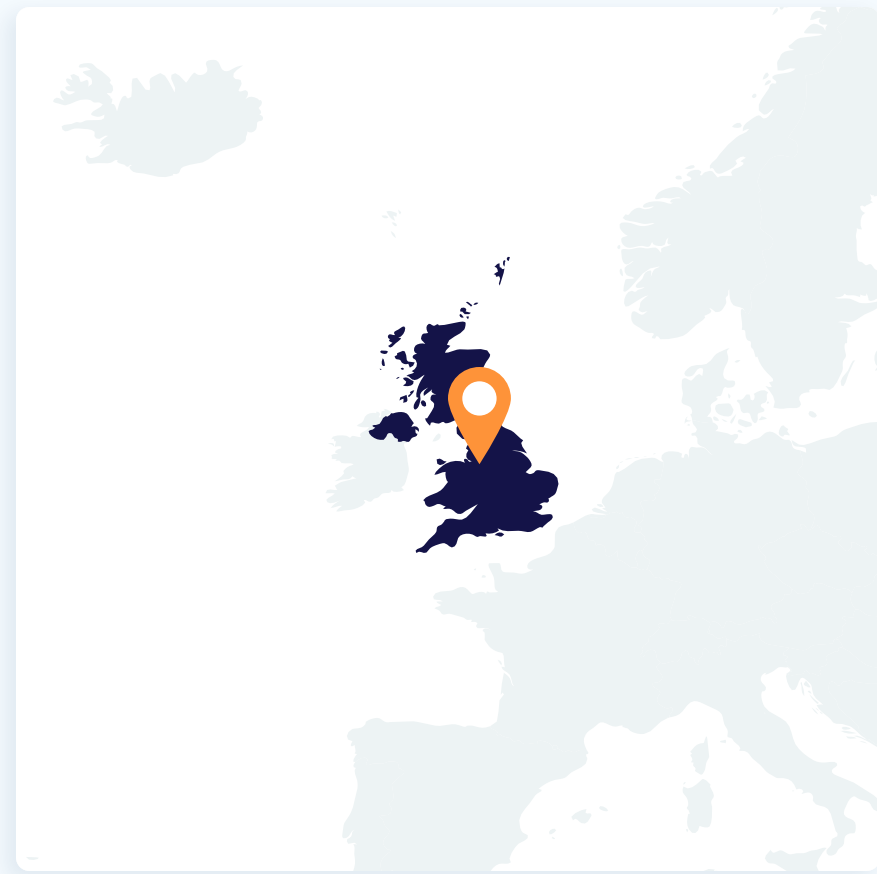


56% of respondents successfully delivered all the projects asked of them last year.

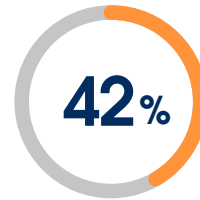


APIs and API-related implementations generated 41% of revenue for organizations in the U.S.

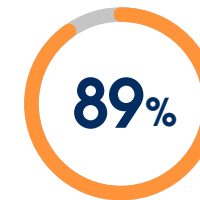
Region Profile: United Kingdom



67% of customer interactions from UK organizations are digital (vs. 72% global average).



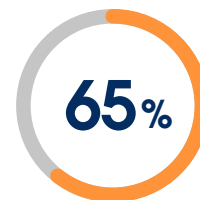
of organizations in the UK are ahead of their anticipated digital transformation progress.



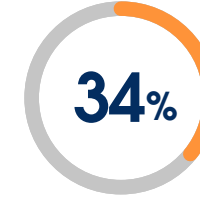
of IT decision makers in the UK think that data silos are creating challenges for their organization.

\$7.4 million

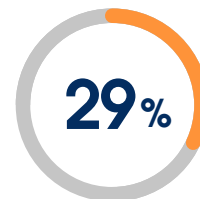
ITDMs in the UK say their organization could lose an average of \$7.4 million if digital transformation initiatives aren't successfully completed.



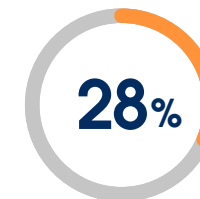
of IT decision makers in the UK predict an increase in their IT budget in the coming year.



The average number of projects IT is being asked to deliver has increased by 34%.



29% of respondents successfully delivered all the projects asked of them last year.

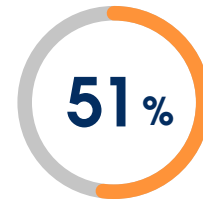


APIs and API-related implementations generated 28% of revenue for organizations in the UK.

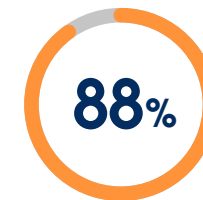
Region Profile: France



45% of ITDMs in France cite risk management, compliance, and/or legal implications among the top challenges to digital transformation (vs. 36% global average).



of organizations in France are ahead of their anticipated digital transformation progress.

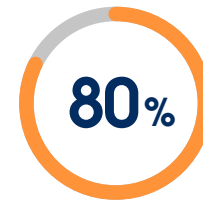


of IT decision makers in France think that data silos are creating challenges for their organization.

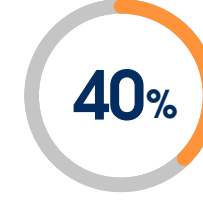


\$5.9 million

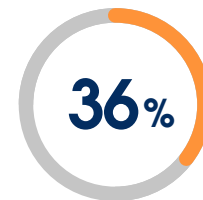
ITDMs in France say their organization could lose an average of \$5.9 million if digital transformation initiatives aren't successfully completed.



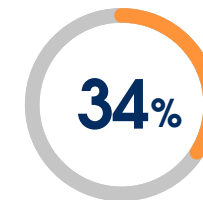
of IT decision makers in France predict an increase in their IT budget in the coming year.



The average number of projects IT is being asked to deliver has increased by 40%.



of respondents successfully delivered all the projects asked of them last year.

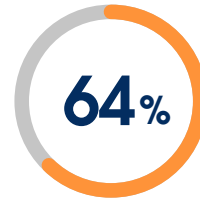


APIs and API-related implementations generated 34% of revenue for organizations in France.

Region Profile: Germany



Only **22%** of organizations in Germany have delivered projects late (vs. 30% global average).



of organizations in Germany are ahead of their anticipated digital transformation progress.

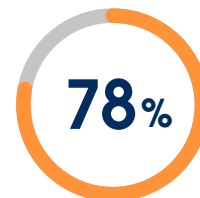


of IT decision makers in Germany think that data silos are creating challenges for their organization.

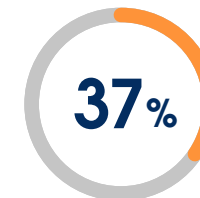


\$6.4 million

ITDMs in Germany say their organization could lose an average of \$6.4 million if digital transformation initiatives aren't successfully completed.



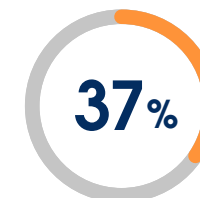
of IT decision makers in Germany predict an increase in their IT budget in the coming year.



The average number of projects IT is being asked to deliver has increased by 37%.



of respondents successfully delivered all the projects asked of them last year.

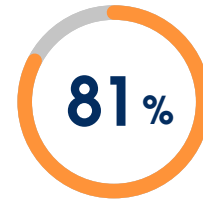


APIs and API-related implementations generated 37% of revenue for organizations in Germany.

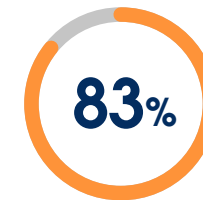
Region Profile: Netherlands



74% of organizations in the Netherlands have delivered projects late (vs. 68% global average).



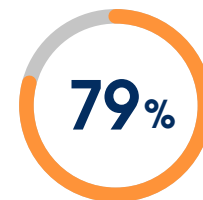
of organizations in the Netherlands are ahead of their anticipated digital transformation progress.



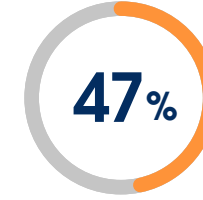
of IT decision makers in the Netherlands think that data silos are creating challenges for their organization.

\$17 million

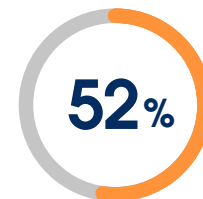
ITDMs in the Netherlands say their organization could lose an average of \$17 million if digital transformation initiatives aren't successfully completed.



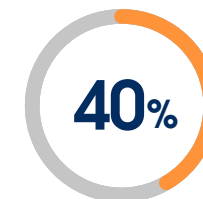
of IT decision makers in the Netherlands predict an increase in their IT budget in the coming year.



The average number of projects IT is being asked to deliver has increased by 47%.



of respondents successfully delivered all the projects asked of them last year.

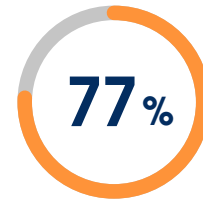


APIs and API-related implementations generated 40% of revenue for organizations in the Netherlands.

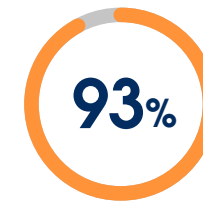
Region Profile: Australia



68% of ITDMs in Australia say their existing IT infrastructure makes it difficult to make changes to a particular system or application (vs. 54% global average).



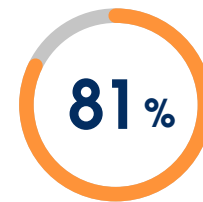
77% of organizations in Australia are ahead of their anticipated digital transformation progress.



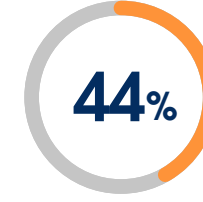
93% of IT decision makers in Australia think that data silos are creating challenges for their organization.

\$9.3 million

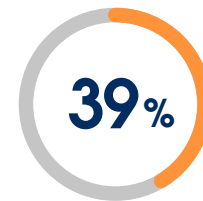
ITDMs in Australia say their organization could lose an average of \$9.3 million if digital transformation initiatives aren't successfully completed.



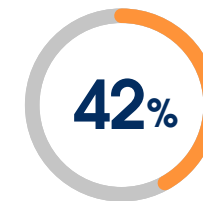
81% of IT decision makers in Australia predict an increase in their IT budget in the coming year.



The average number of projects IT is being asked to deliver has increased by 44%.



39% of respondents successfully delivered all the projects asked of them last year.

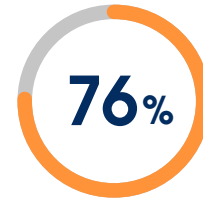


APIs and API-related implementations generated 42% of revenue for organizations in Australia.

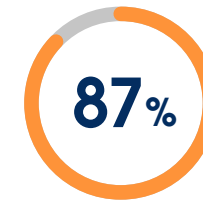
Region Profile: Singapore



85% of ITDMs in Singapore anticipate an increase to their IT staff headcount over the next 12 months (vs. 78% global average).



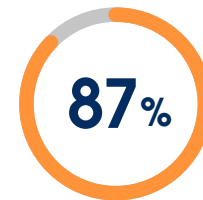
76% of organizations in Singapore are ahead of their anticipated digital transformation progress.



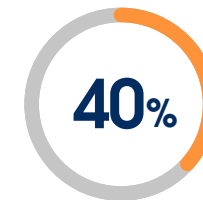
87% of IT decision makers in Singapore think that data siloes are creating challenges for their organization.

\$10.2 million

ITDMs in Singapore say their organization could lose an average of \$10.2 million if digital transformation initiatives aren't successfully completed.



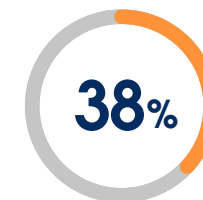
87% of IT decision makers in Singapore predict an increase in their IT budget in the coming year.



The average number of projects IT is being asked to deliver has increased by 40%.



55% of respondents successfully delivered all the projects asked of them last year.

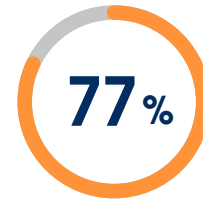


APIs and API-related implementations generated 38% of revenue for organizations in Singapore.

Region Profile: Hong Kong



84% of ITDMs in Hong Kong say that one of their top integration challenges is incorporating data-derived insights into user-facing applications (vs. 77% global figure).



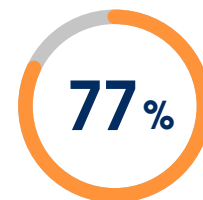
of organizations in Hong Kong are ahead of their anticipated digital transformation progress.



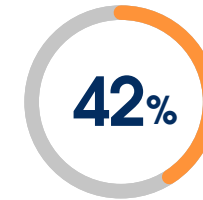
of IT decision makers in Hong Kong think that data silos are creating challenges for their organization.

\$5.3 million

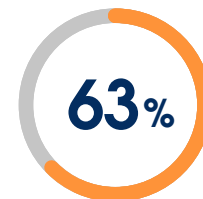
ITDMs in Hong Kong say their organization could lose an average of \$5.3 million if digital transformation initiatives aren't successfully completed.



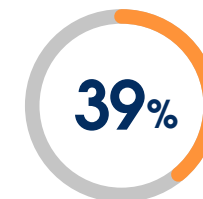
of IT decision makers in Hong Kong predict an increase in their IT budget in the coming year.



The average number of projects IT is being asked to deliver has increased by 42%.



of respondents successfully delivered all the projects asked of them last year.

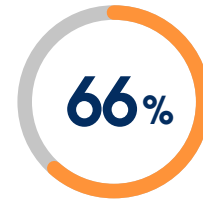


APIs and API-related implementations generated 39% of revenue for organizations in Hong Kong.

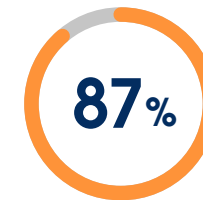
Region Profile: Japan



39% of organizations in Japan mandate that all projects abide by a company-wide API integration strategy (vs. 30% global average).



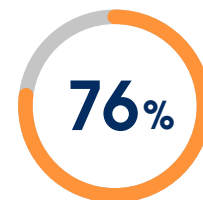
66% of organizations in Japan are ahead of their anticipated digital transformation progress.



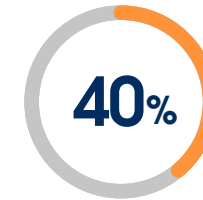
87% of IT decision makers in Japan think that data silos are creating challenges for their organization.

\$5.5 million

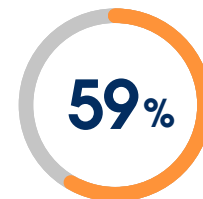
ITDMs in Japan say their organization could lose an average of \$5.5 million if digital transformation initiatives aren't successfully completed.



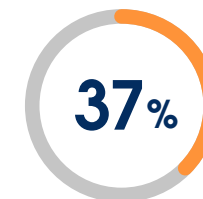
76% of IT decision makers in Japan predict an increase in their IT budget in the coming year.



The average number of projects IT is being asked to deliver has increased by 40%.



59% of respondents successfully delivered all the projects asked of them last year.



APIs and API-related implementations generated 37% of revenue for organizations in Japan.

About the Report

MuleSoft's 8th annual Connectivity Benchmark Report, in collaboration with Vanson Bourne and Deloitte Digital, was produced from interviews with 1,050 IT leaders across the globe.

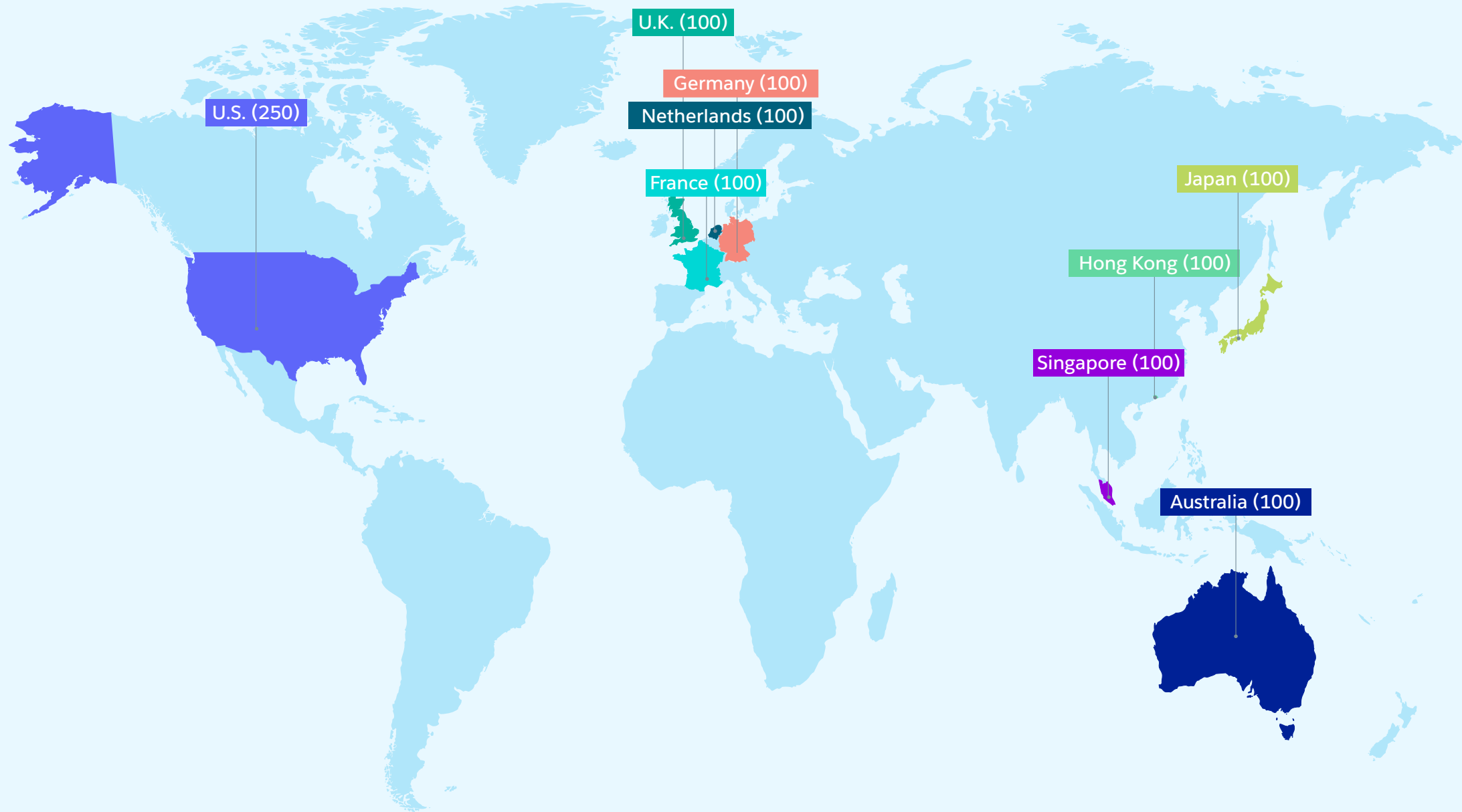
We conducted an online survey between October and November 2022 across the United States, the United Kingdom, France, Germany, the Netherlands, Australia, Singapore, Hong Kong, and Japan. We ensured that only suitable participants responded to the survey by using a rigorous, multi-level screening process.

Respondents are all IT leaders, which are defined as those who hold a managerial position or above in an IT department. All respondents work at an enterprise organization in the public or private sector with at least 1,000 employees.



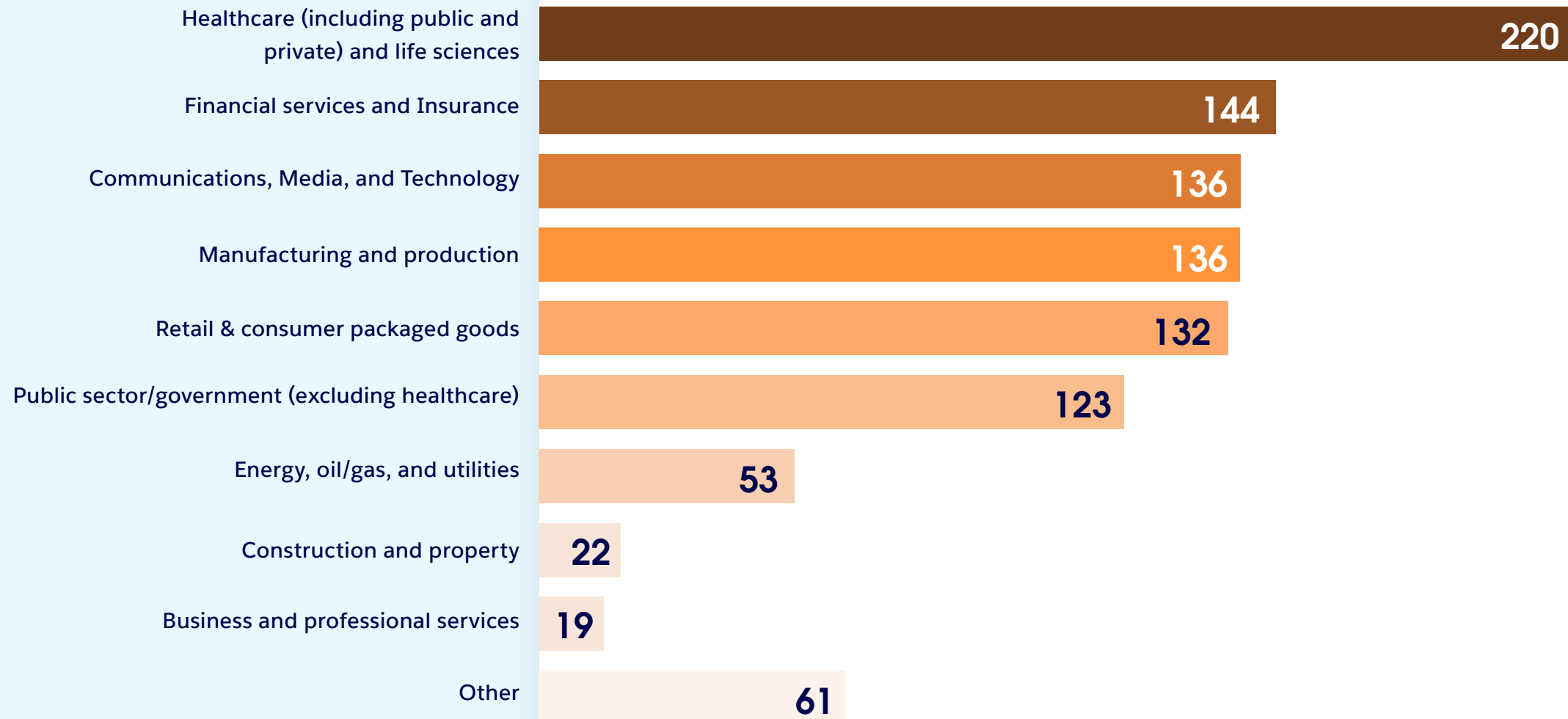
Methodology

Connectivity Benchmark Report by the numbers



Methodology

Connectivity Benchmark Report by the numbers



Methodology

Connectivity Benchmark Report by the numbers



- Departmental or intermediate management
- Board member; CXO; Director/SVP; senior manager of unit; function or department
- Owner; co-owner; partner; CEO; MD; most senior level in the organization
- Team or group supervisor



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