Hybrid and Multi-Cloud Study: The New Enterprise Computing Reality

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Goal, Agenda and Methodology

Determine cloud platform and workload usage and reasons why they're used

- What platforms
- Public and private
- Workloads by platform
- Goals and challenges

Online survey of 600 US-based businesses using cloud computing

- Medium and Large Businesses
- Over 5,000 in initial sample

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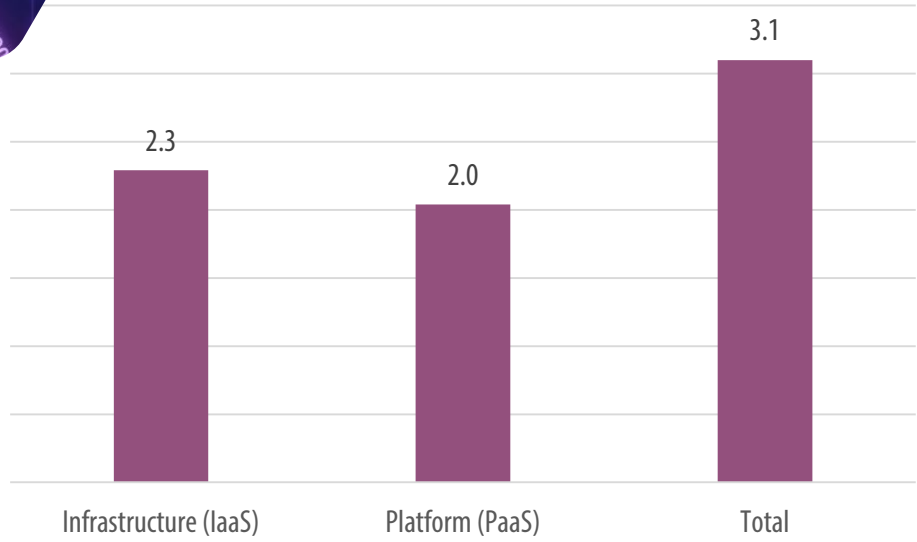
It's a Multi-Cloud World

Average Number Of Cloud Providers



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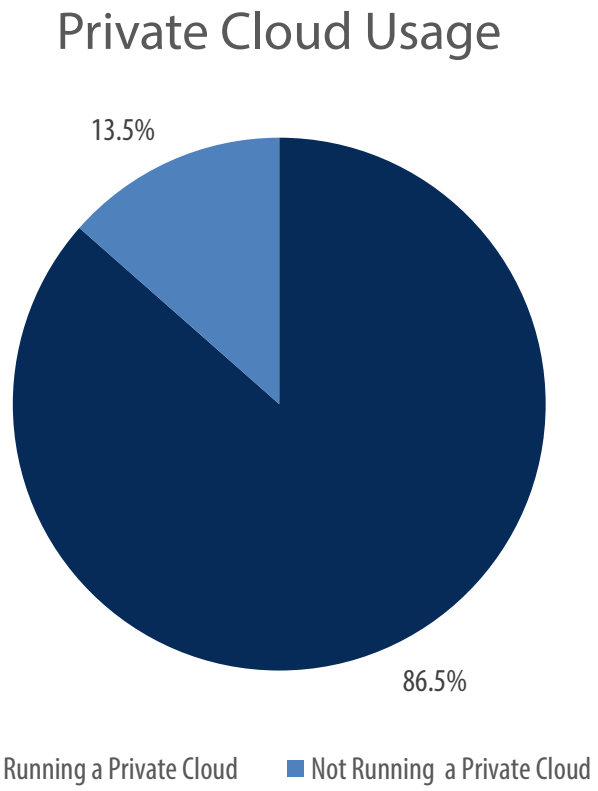
It's a Hybrid Cloud World, Too



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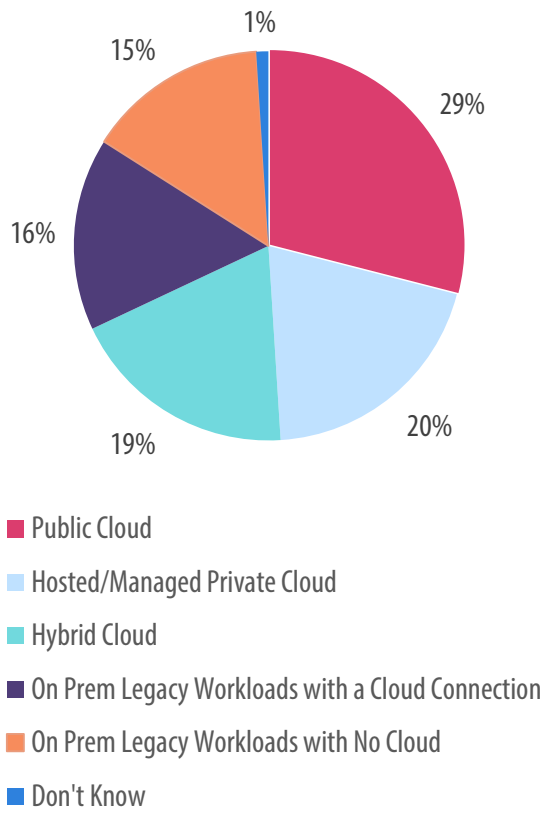
1.6

Average Number of Private Cloud Platforms

Workload Diversity



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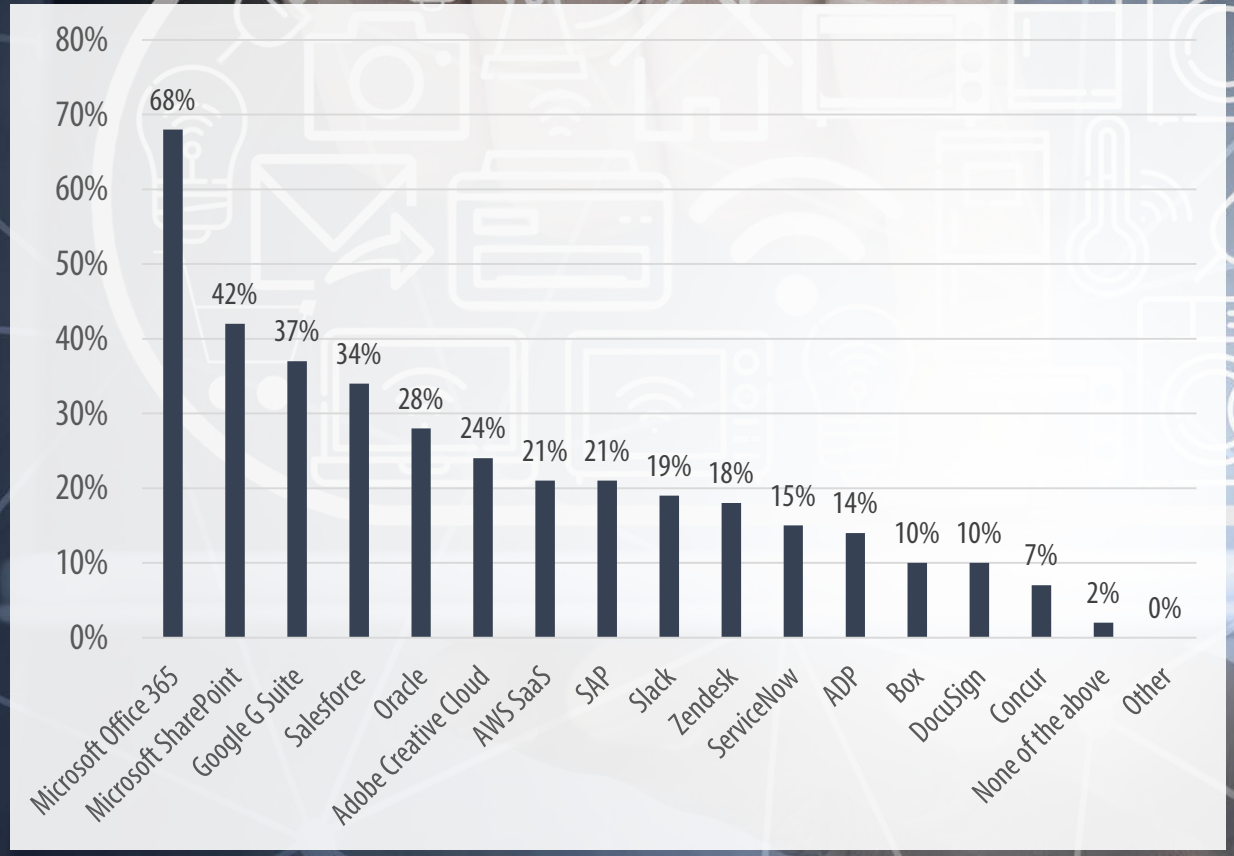
In sum, roughly 30% of workloads are public cloud, 30% are data center legacy, and the remaining 40% are a combination of private and hybrid cloud

Top SaaS Applications



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Average Number of SaaS Applications Used

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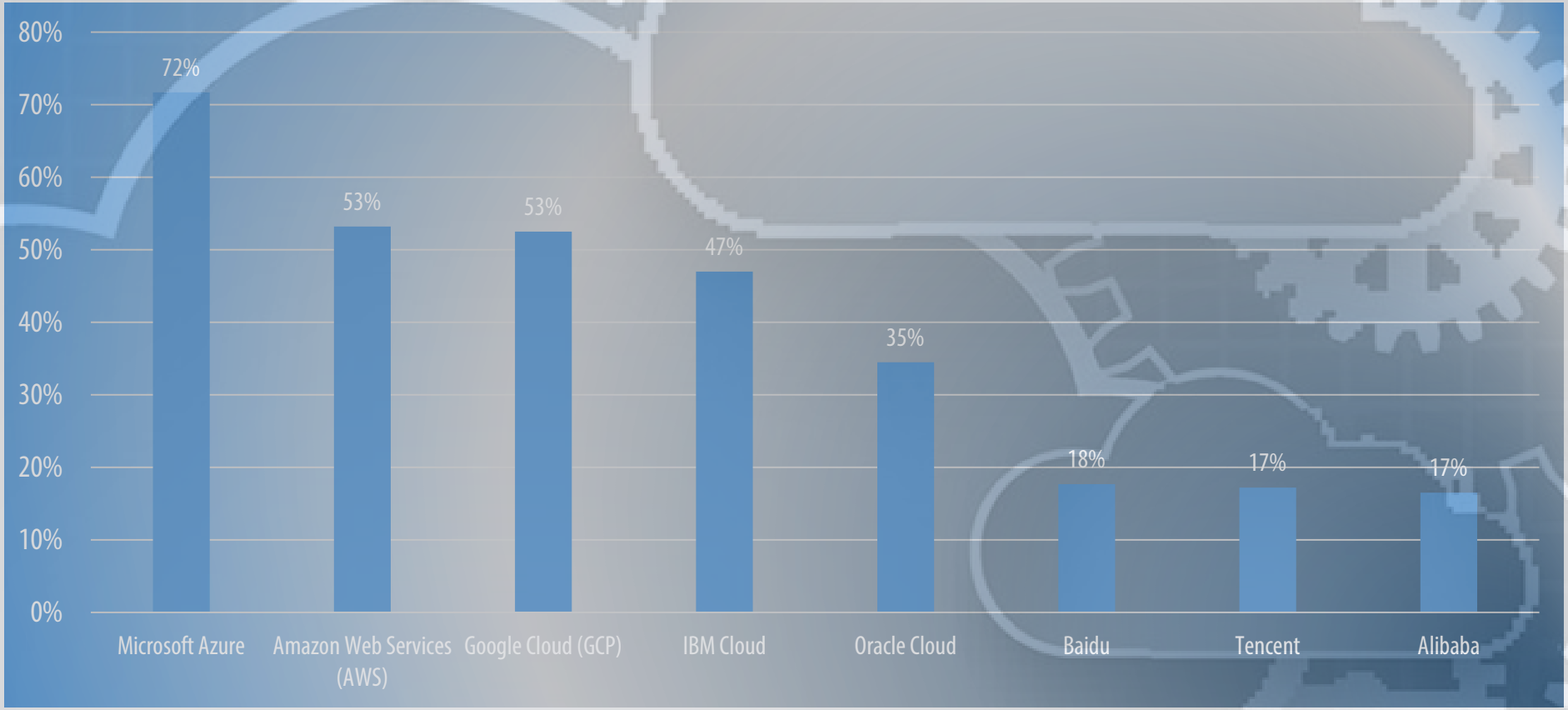
Cloud Platforms Used by Survey Participants



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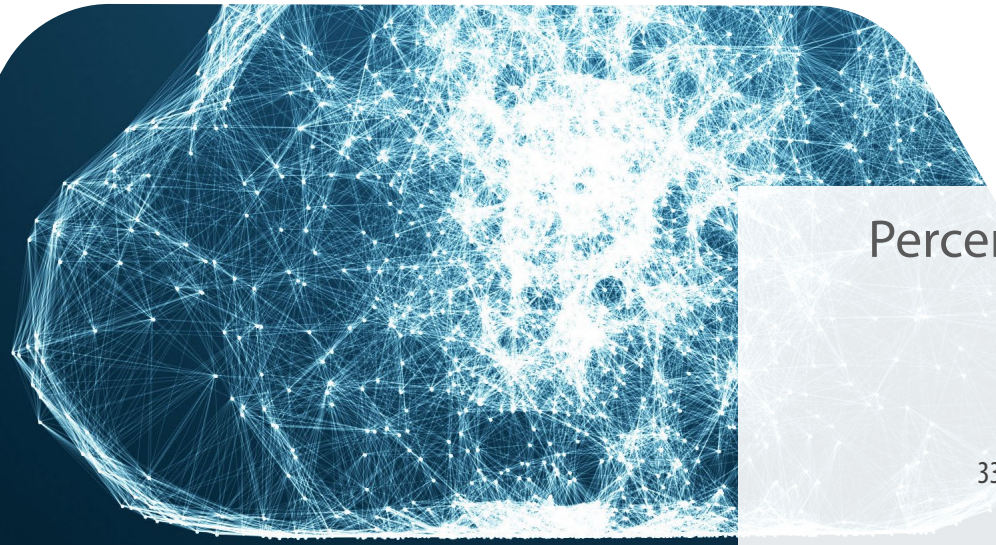
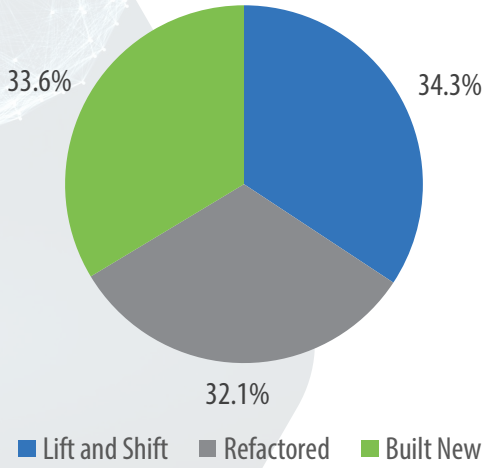
Cloud App Maturity Levels Still Low



Percentage of Each Application Type



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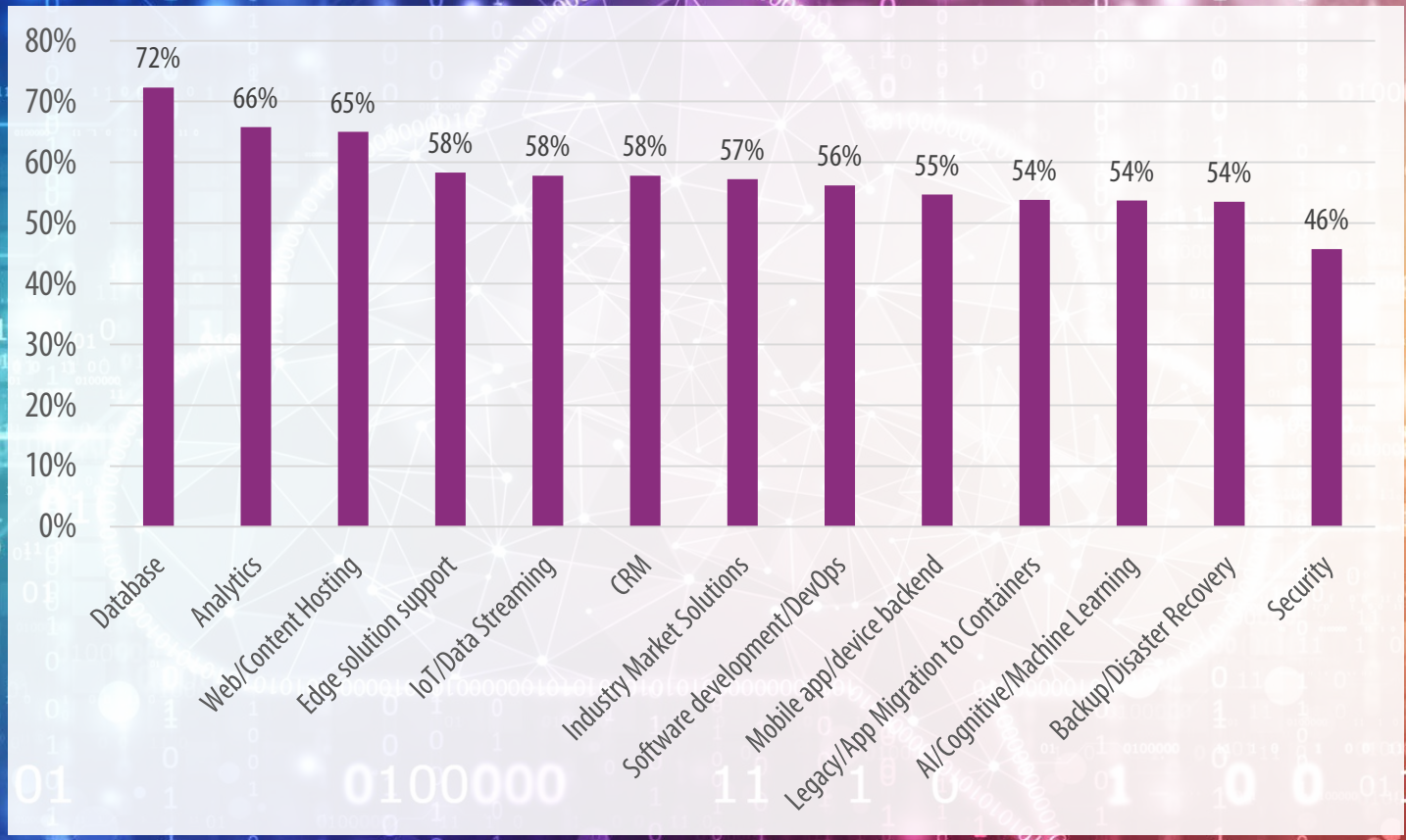
Top Cloud Workloads

- The most popular workloads across public, private and hybrid clouds are:
  - Databases
  - Analytics
  - Web/Content Hosting



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Different Workloads

Require Different Providers

AVERAGE CLOUD WORKLOADS

3.4 Per Provider

Top 5 AWS Workloads
Web/Content Hosting
Database
Edge Solution Support
IoT/Data Streaming
Analytics

Top 5 Azure Workloads
Database
Vertical Industry Market Solutions
Web/Content Hosting
IoT/Data Streaming
Software Development/DevOps

Top 5 GCP Workloads
Database
Software Development/DevOps
Vertical Industry Market Solutions
Analytics
Legacy/App Migration to Containers

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Total Cloud Workloads/Applications Per Company

Platform Types	Platform Count	Workload Average	Total Workloads
Public Cloud	3.1	3.4	10.5
Private/Hybrid Cloud	1.6	2.9	4.6
SaaS Applications			3.7
TOTAL			**18.9**

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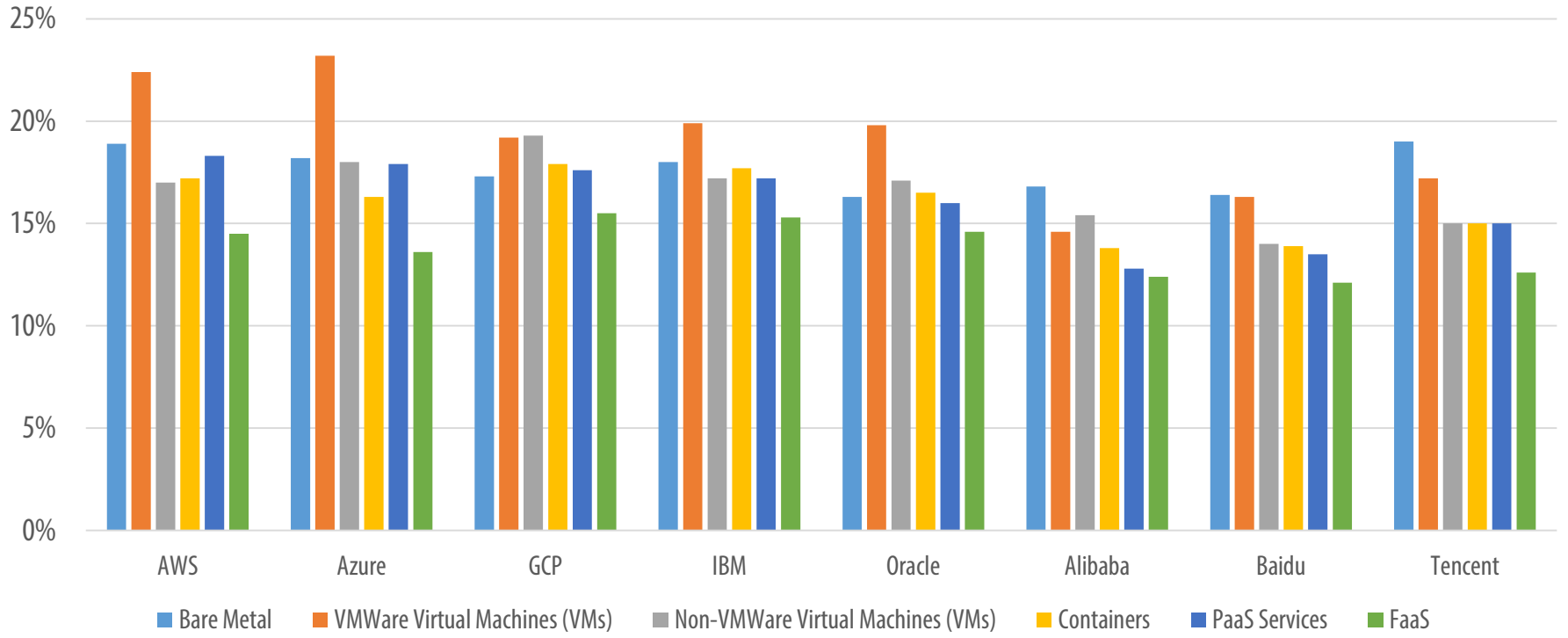
Workload Types Vary by Provider



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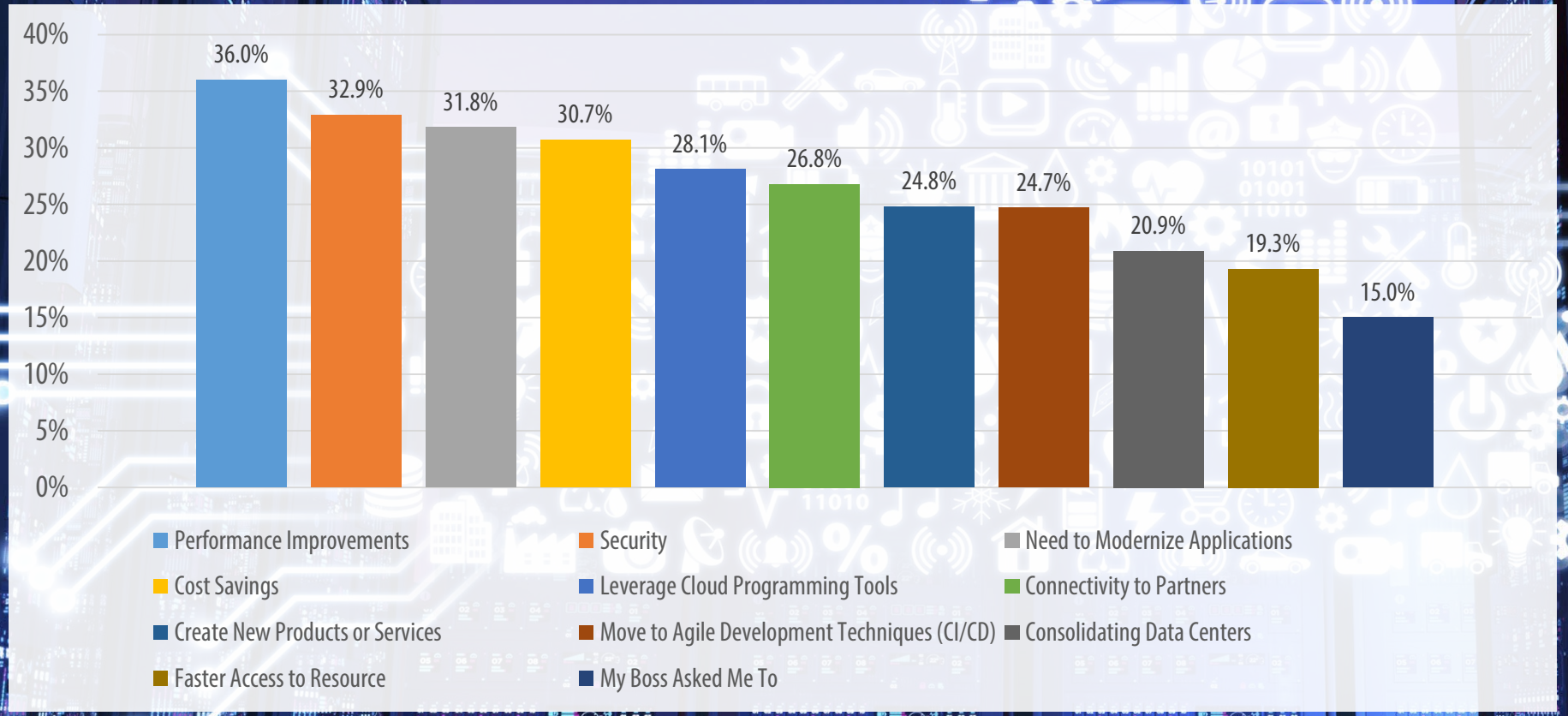
17%

Percentage of Public Cloud Workloads Using Containers

Reasons for Moving to Cloud



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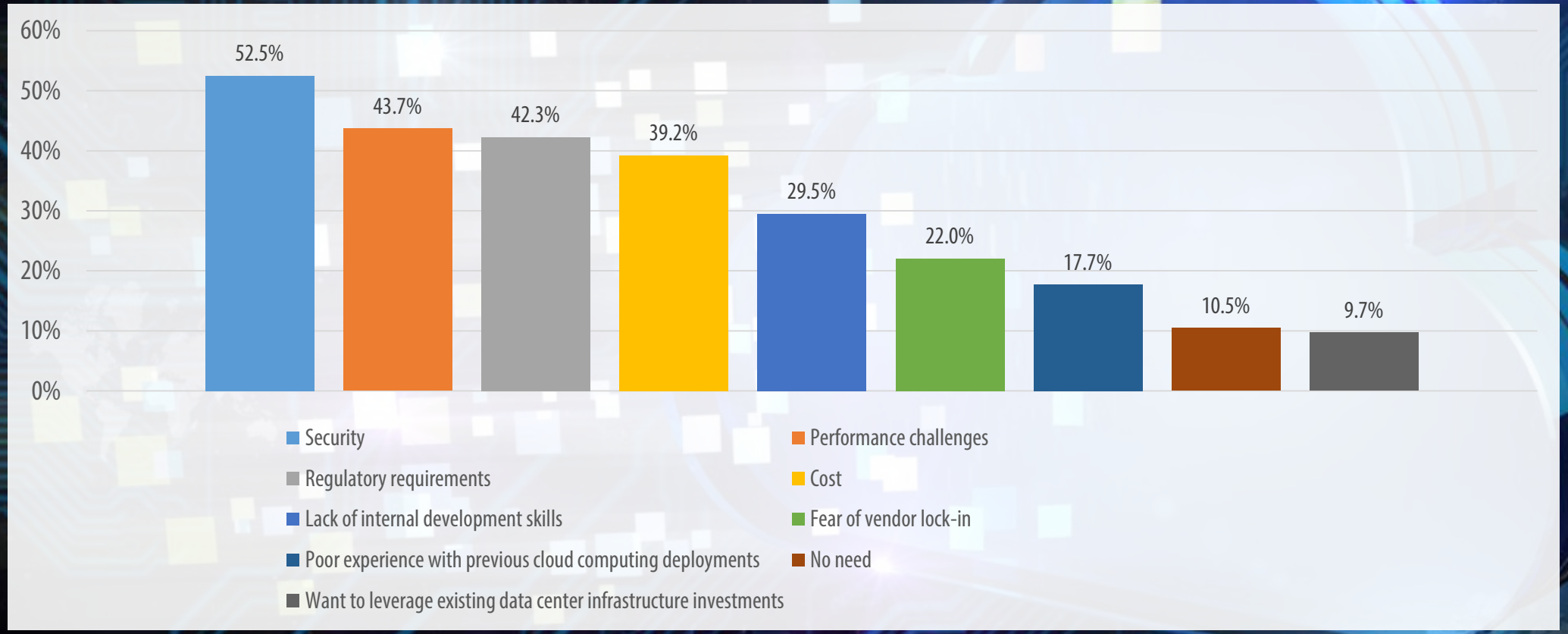
Reasons for Not Moving to Cloud



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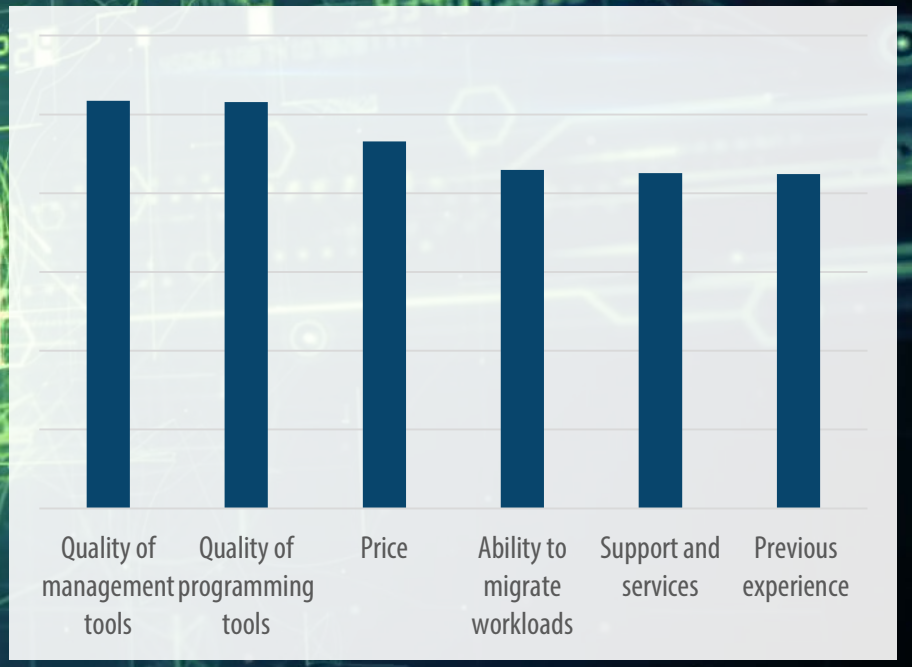
Most Important Factors in Selecting Cloud Providers

Price was selected as a Top 2 factor by more people, but technical capabilities rank highest overall



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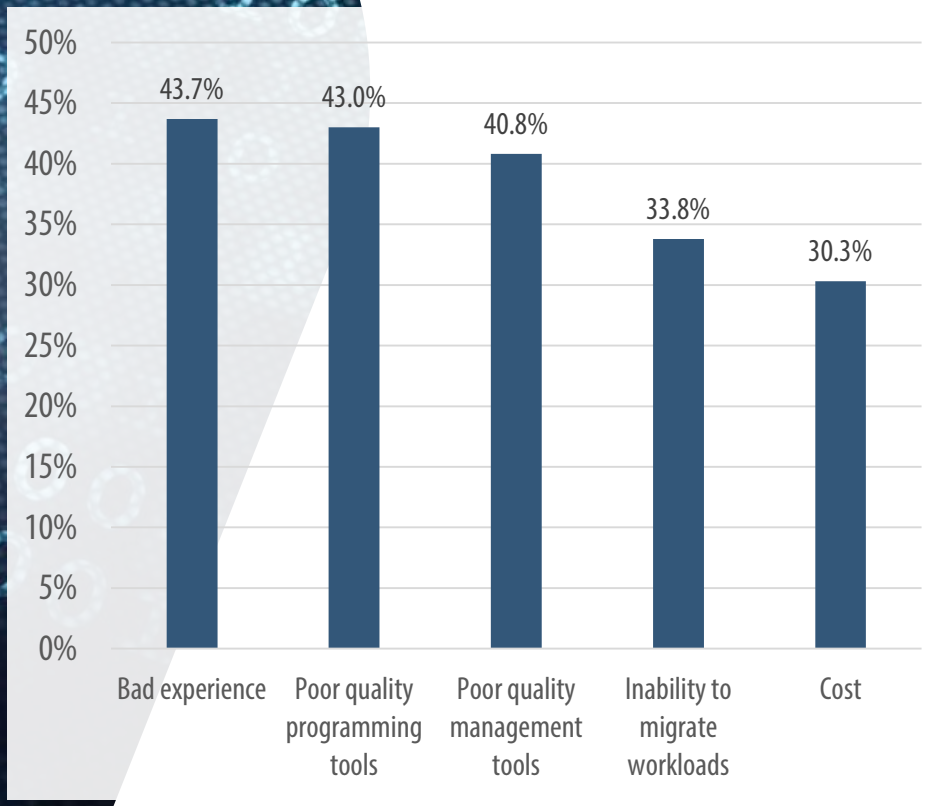
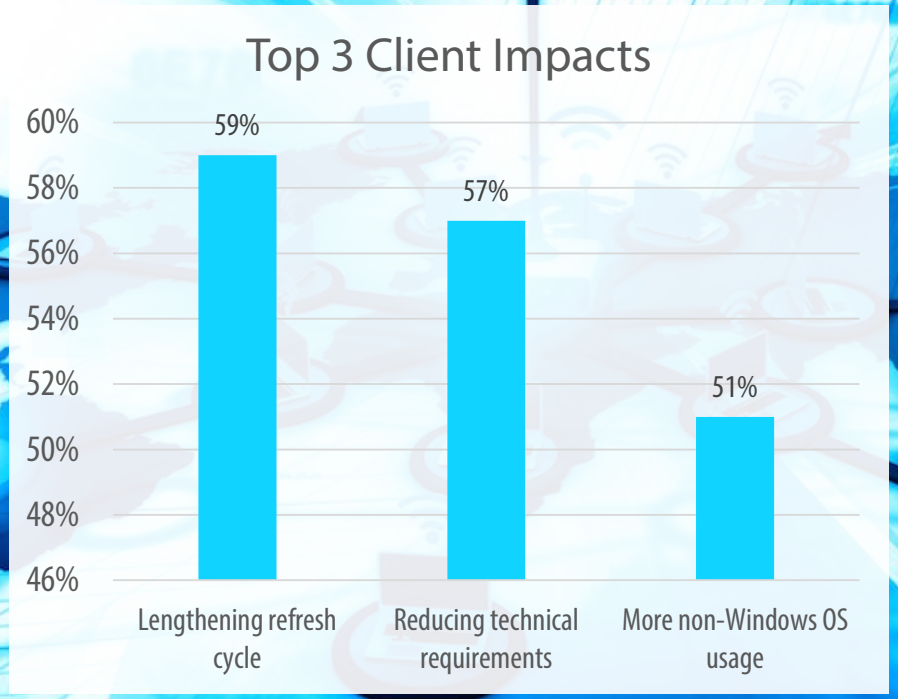
Reasons for Abandoning Cloud Project



Cloud Computing Impact on Clients

Expect an Impact

93% On Client Devices



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Final Thoughts

- Multi-Cloud is Real But Cloud Migrations Are Slowing
  - Workloads Are Split Among Many Different Computing Environments
- Private Cloud is Critical For Many Organizations
- Workload Specialization Drives Cloud Provider Preferences
  - Companies Putting Many Diverse Applications in Cloud
- Companies Have Different Reasons for Migrating Different Workloads
- Cloud Computing Providers Need to Emphasize the Technical Tools They Have
- Client Devices Are Starting to Be Impacted by Cloud Computing Initiatives

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A complete 123-slide version of the Hybrid and Multi-Cloud report with full details from the study is available for purchase. Please contact Bob O'Donnell for additional information.

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