MANAGING THE APPLICATION ENVIRONMENT

A MarketPulse Survey for Connection

SEPTEMBER 2022
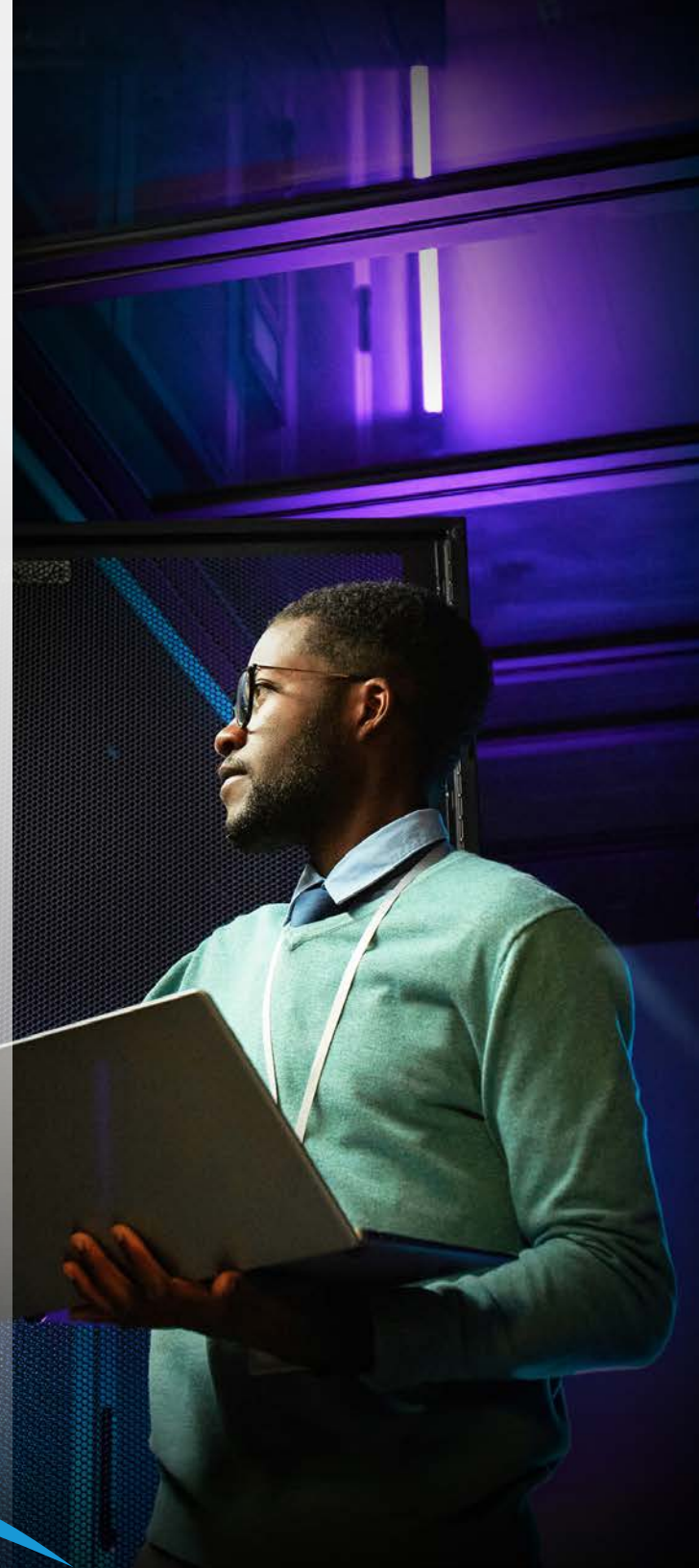
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INTRODUCTION

Managing a modern application environment can be a tricky proposition. As more organizations expand their office borders into the home, the demands for productivity enhancing software— and a data center optimized to deliver it—increase. Don't fall behind. Connection partnered with Foundry to deliver this peer-level review of the information you need to know when taking a fresh look at your application environment.

METHOD AND OBJECTIVES

Survey Goals

In this survey we evaluate:

- Challenges in supporting and managing application environments

- Visibility into application workloads

- Status with respect to application rationalization and DevOps adoption

- Perceived benefits of leveraging third-party services to help support the application environment

Total Respondents:

100

Collection Method:

Online questionnaire

Geography:

U.S.

Field Dates:

September 7–20, 2022

Number of Questions:

8

Company Size:

500 employees or more

Senior Decision-makers:

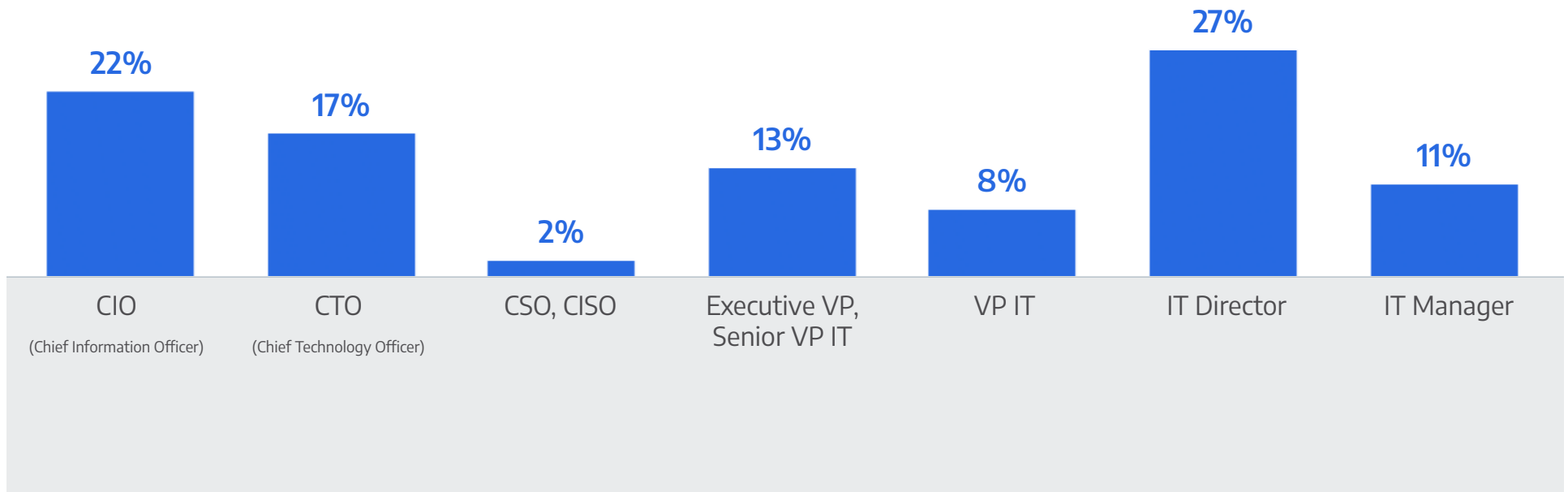Respondents are employed in IT management roles

RESPONDENT PROFILE

41% HOLD C-LEVEL I.T. TITLES; 89% ARE DIRECTOR AND ABOVE

Job Titles

Question S3: What is your primary job title?

Base 100

SIX IN TEN (60%) ARE EMPLOYED AT COMPANIES WITH 5,000+ EMPLOYEES

Company Size (Number of Employees)

500 - 999	1,000 - 2,499	2,500 - 4,999	5,000 - 7,499	7,500 - 9,999	10,000 - 19,999	20,000 or more
5%	10%	25%	14%	5%	8%	33%
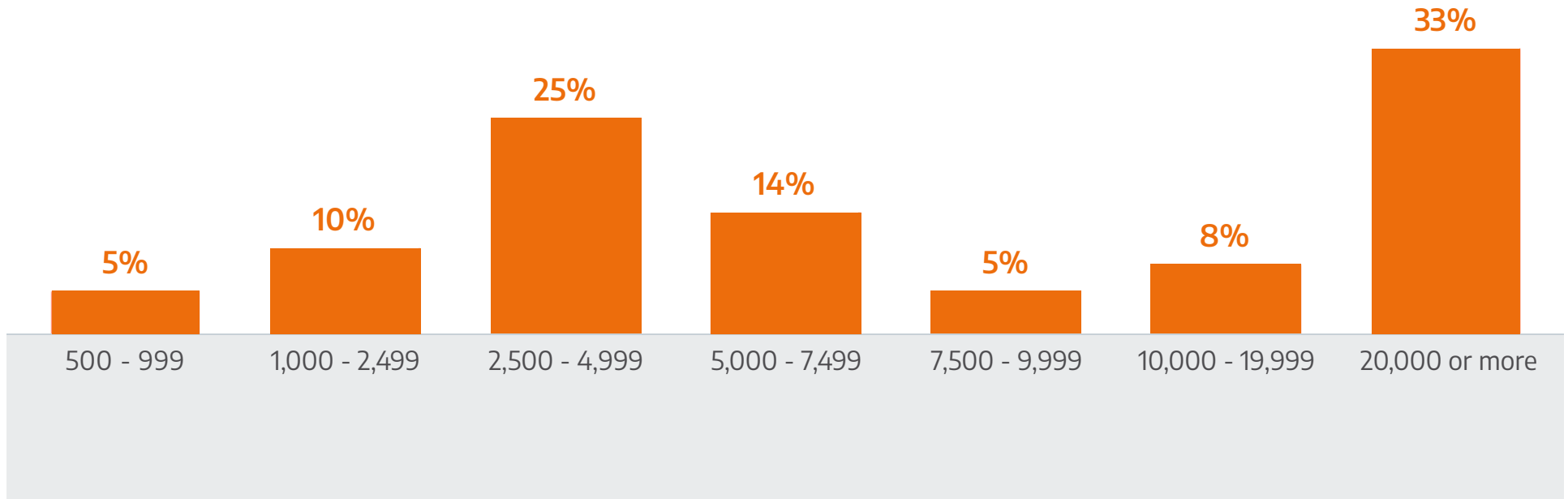
Question S1: Approximately how many people are employed in your entire organization or enterprise?
(Please include all plants, divisions, branches, parents, and subsidiaries worldwide.)

Base 100

RETAIL, FINANCIAL SERVICES, TECHNOLOGY, AND MANUFACTURING ARE TOP VERTICALS

Primary Industry

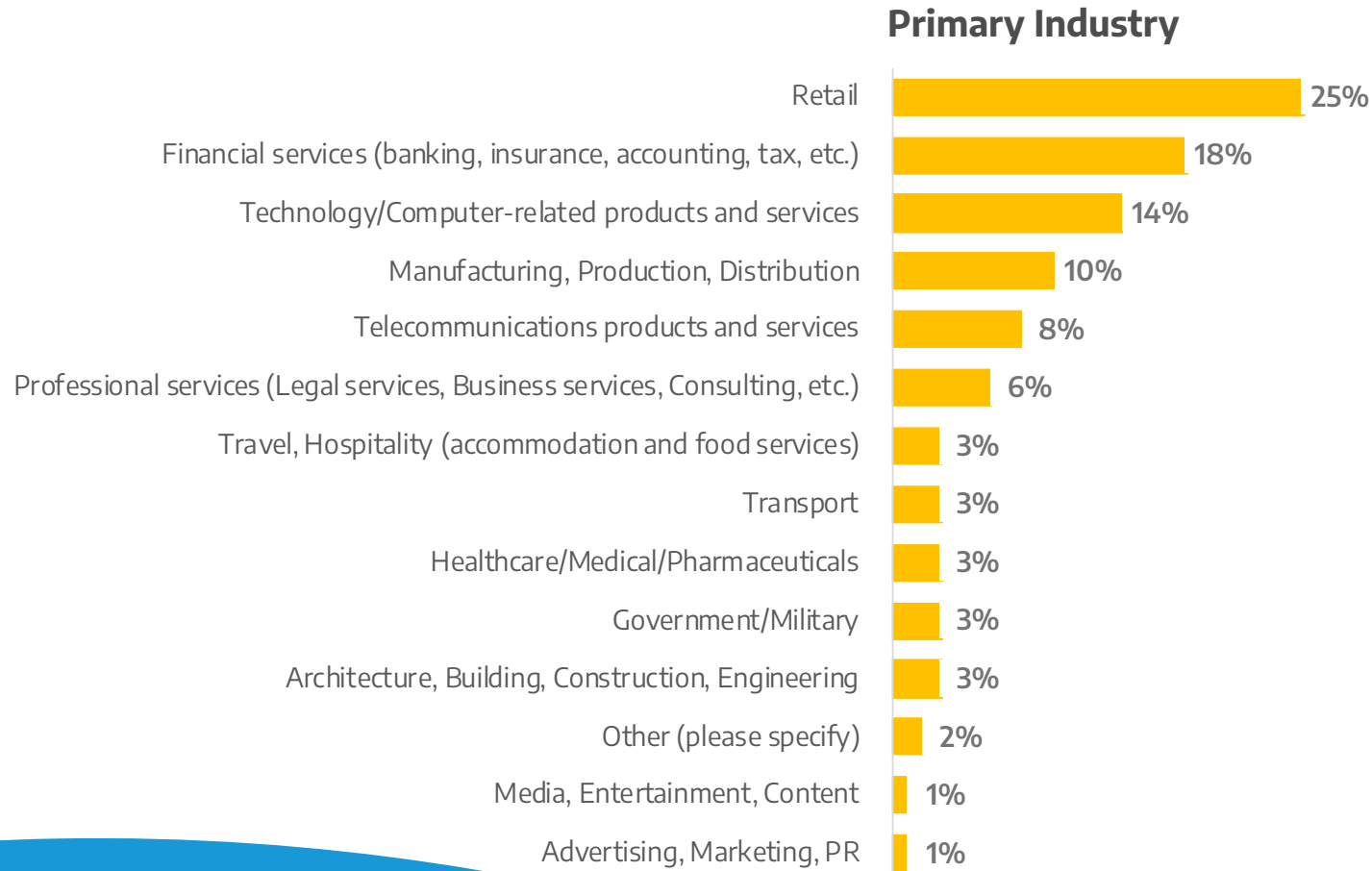| Industry	Percentage
Retail	25%
Financial services (banking, insurance, accounting, tax, etc.)	18%
Technology/Computer-related products and services	14%
Manufacturing, Production, Distribution	10%
Telecommunications products and services	8%
Professional services (Legal services, Business services, Consulting, etc.)	6%
Travel, Hospitality (accommodation and food services)	3%
Transport	3%
Healthcare/Medical/Pharmaceuticals	3%
Government/Military	3%
Architecture, Building, Construction, Engineering	3%
Other (please specify)	2%
Media, Entertainment, Content	1%
Advertising, Marketing, PR	1%

Question 9: Which of the following best describes your organization's industry or function?

Base 100

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EXECUTIVE SUMMARY

- **More than half (53%) report applications are running in a hybrid environment today.**

  One third (36%) are running applications in a private data center/private cloud, and 11% in a public cloud/multi-cloud environment.

- **Budget constraints (73%), lack of visibility (55%), legacy technology (46%), and security (46%) are top challenges in supporting application environments.**

  Challenges vary by type of application environment. Those with private data centers more often struggle with budget, visibility, legacy technology, and security.

- **More than two-thirds of all respondents report it's challenging to gain adequate visibility into various types of application workloads.**

  Those running applications in hybrid environments report higher levels of visibility overall into application workloads. A total of 36% of those with hybrid environments report very high visibility versus 2% of those exclusively running in private data centers.

- **More than one-third (39%) indicate their organizations have an enterprise-wide strategy for application rationalization.**

  An enterprise-wide strategy is more often in place among those running applications exclusively in a private data center/private cloud.

- **Most organizations (93%) report using DevOps either across the entire application environment or in one or more areas.**

  There are no significant differences by type of application environment.

- **The vast majority (90% or more) would find services such as application workload assessments—and access to development and/or DevOps resources—to be highly valuable.**

- **Increasing productivity/speed is perceived as the top benefit of leveraging third-party services to support application environments.**

  Perceived advantages of third-party application support services vary by type of application environment.

SURVEY RESULTS

MORE THAN HALF (53%) REPORT APPLICATIONS ARE RUNNING IN A HYBRID ENVIRONMENT TODAY

Which of the following best describes the environment running your applications today?

Public cloud / Multi-cloud

11%

Private data center / private cloud

36%

Hybrid (mix of public cloud(s) and private environment)

53%
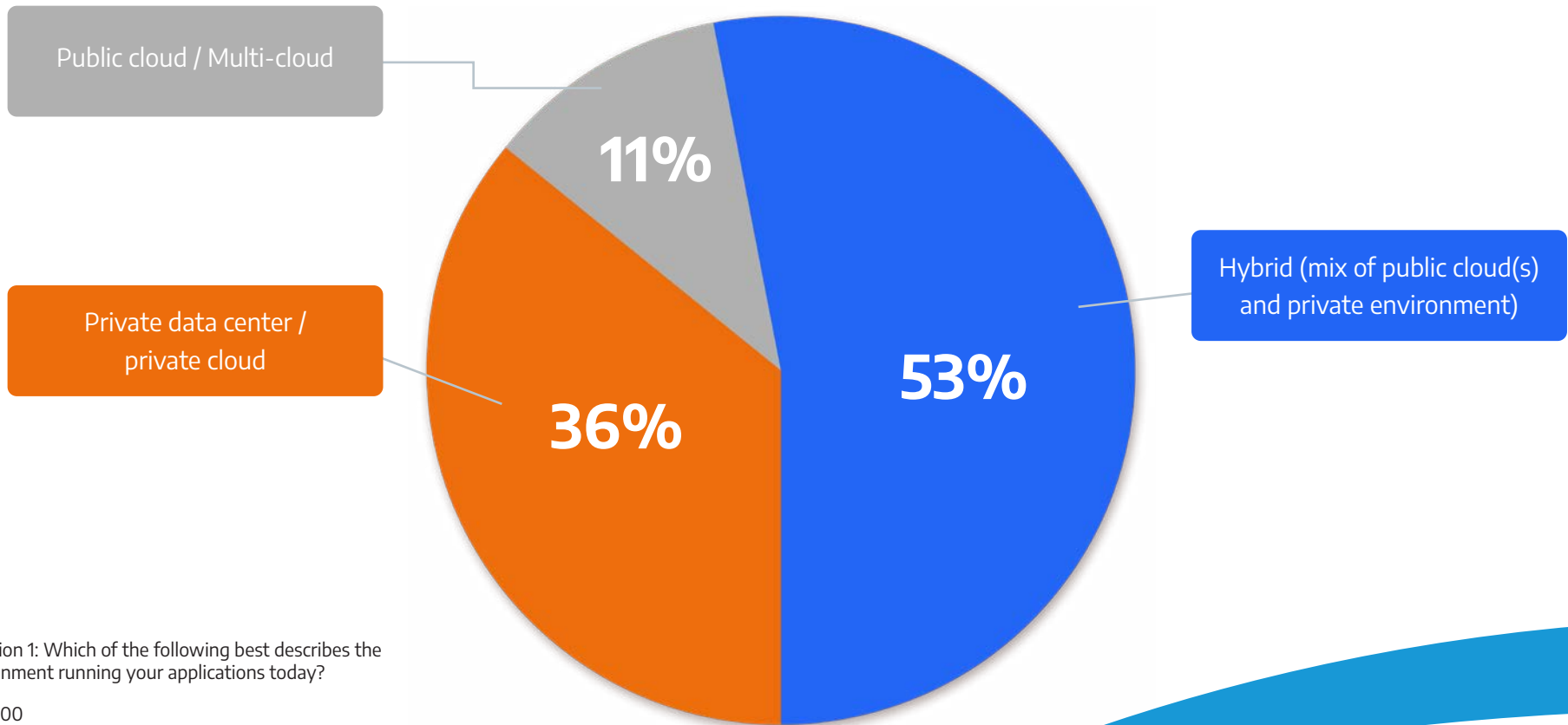
Question 1: Which of the following best describes the environment running your applications today?

Base 100

TOP CHALLENGES IN SUPPORTING APPLICATION ENVIRONMENTS

Budget Constraints, Lack of Visibility, Legacy Technology, and Security

Challenges in supporting application environment

73%	Budget constraints
55%	Lack of visibility
46%	Legacy systems and technologies
46%	Security risks and concerns
35%	Lack of the right technical skills
29%	Internal processes and governance structures
23%	Lack of time or resources
2%	None
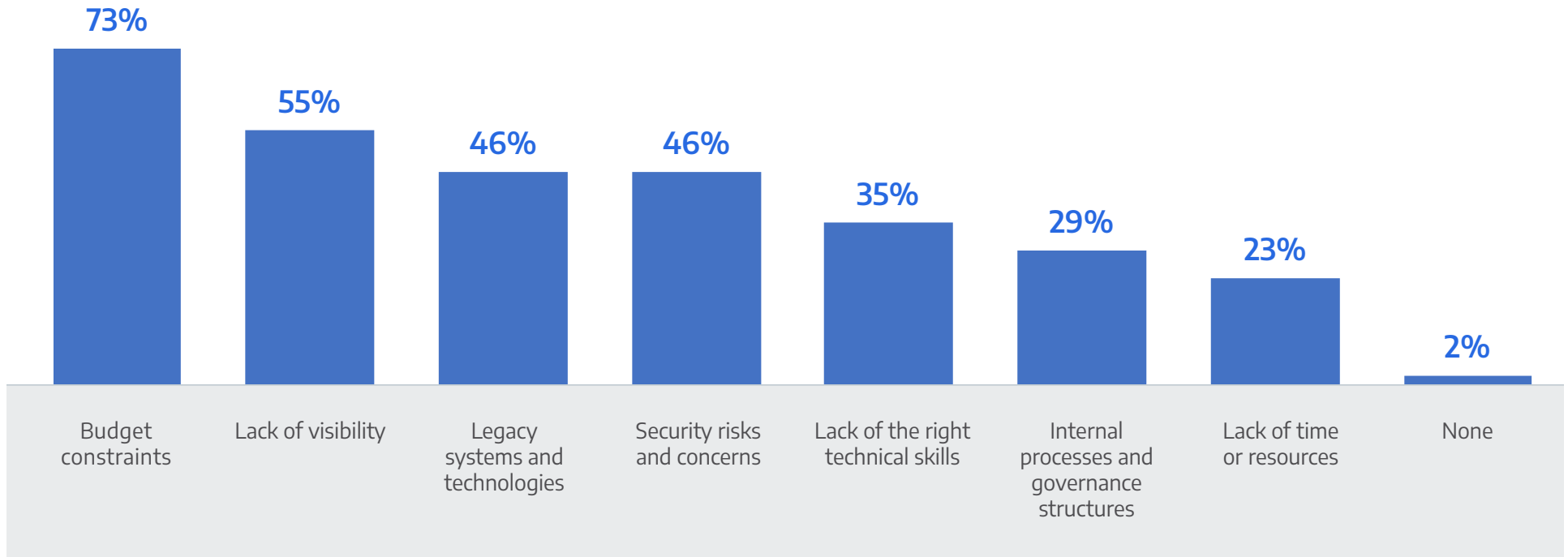
Question 2: What are your organization's challenges with respect to supporting your application environment? (Please select all that apply.)

Base 100

CHALLENGES VARY BY TYPE OF APPLICATION ENVIRONMENT

Private Data Centers More Often Struggle with Budget, Visibility, Legacy Technology, and Security

Challenges in supporting application environment

■ Hybrid environment　　■ Private data center/Private cloud

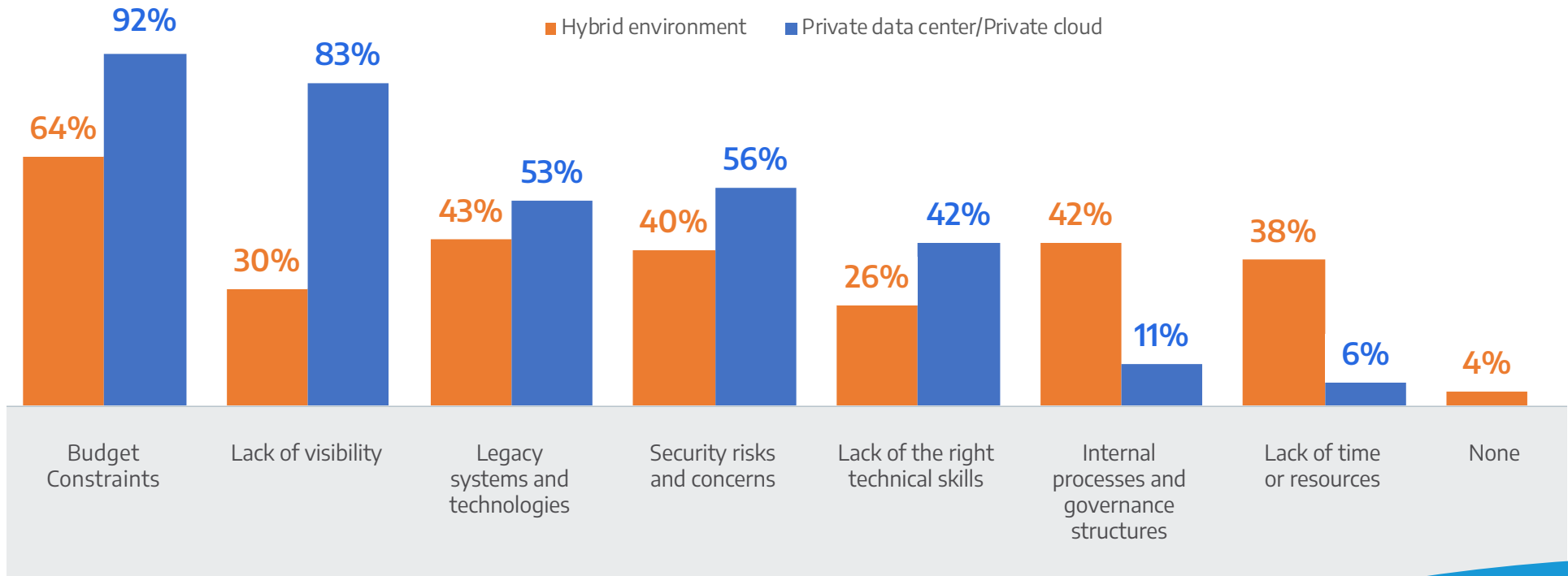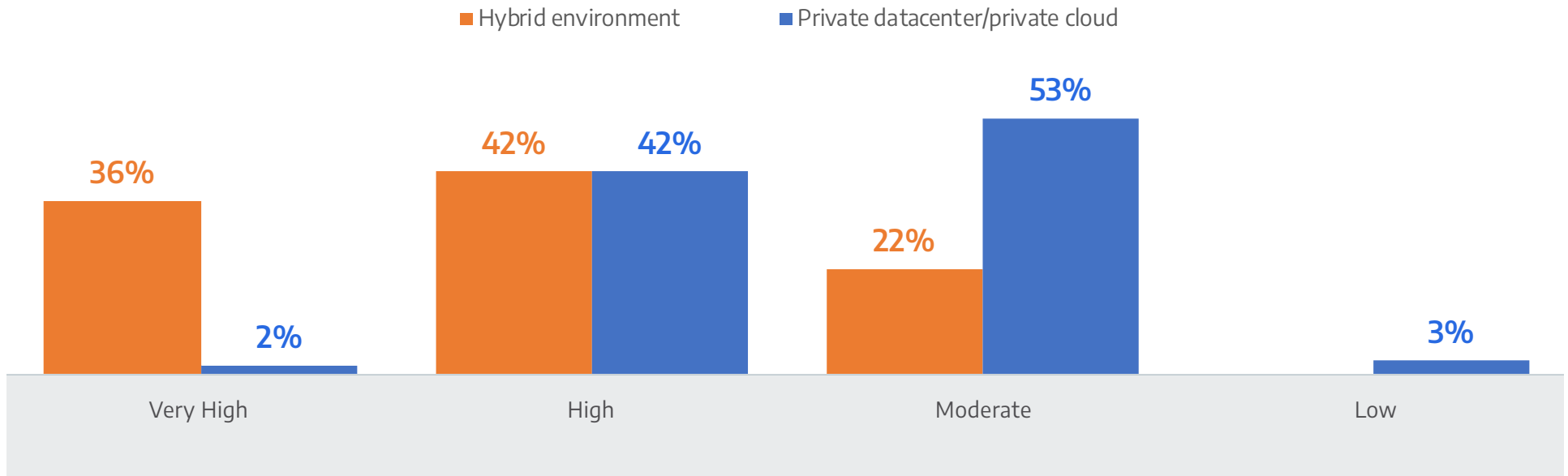| Challenge	Hybrid environment	Private data center/Private cloud
Budget Constraints	64%	92%
Lack of visibility	30%	83%
Legacy systems and technologies	43%	53%
Security risks and concerns	40%	56%
Lack of the right technical skills	26%	42%
Internal processes and governance structures	42%	11%
Lack of time or resources	38%	6%
None	4%	

Question 2: What are your organization's challenges with respect to supporting your application environment? (Please select all that apply.)

Base 53 with a hybrid environment; 36 with a private data center

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THOSE RUNNING APPLICATIONS IN HYBRID ENVIRONMENTS REPORT HIGHER LEVELS OF VISIBILITY INTO APPLICATION WORKLOADS

Visibility into application workloads

■ Hybrid environment ■ Private datacenter/private cloud

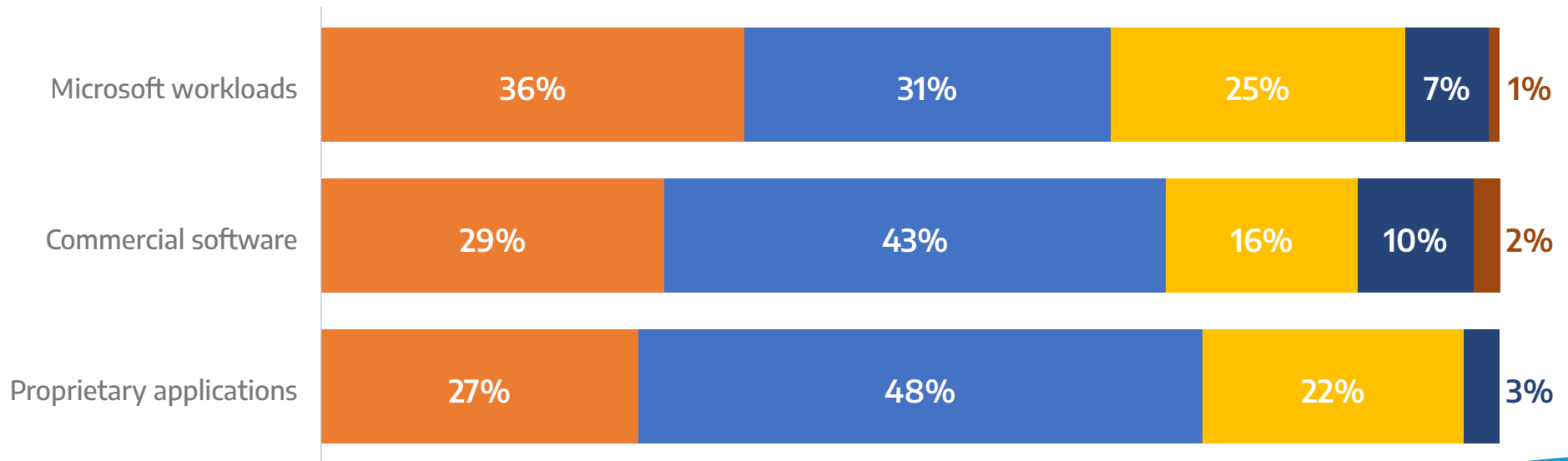|	Very High	High	Moderate	Low
Hybrid environment	36%	42%	22%	
Private datacenter/private cloud	2%	42%	53%	3%

Question 3: How would you rate your organization's overall level of visibility into your application workloads?
By "visibility", we are referring to the ability to gain insights into application performance, health, cost effectiveness, and other such aspects of an application.

Base 53 with a hybrid environment; 36 with a private data center

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MORE THAN TWO-THIRDS OF ALL RESPONDENTS REPORT IT'S CHALLENGING TO GAIN ADEQUATE VISIBILITY INTO VARIOUS TYPES OF APPLICATION WORKLOADS

How challenging is it to gain adequate visibility into the following types of application workloads?

■ Extremely challenging　■ Very challenging　■ Somewhat challenging　■ Not very challenging　■ Not at all challenging

| Workload	Extremely	Very	Somewhat	Not very	Not at all
Microsoft workloads	36%	31%	25%	7%	1%
Commercial software	29%	43%	16%	10%	2%
Proprietary applications	27%	48%	22%	3%	

Question 4: How challenging is it to gain adequate visibility into the following types of application workloads?
Base 100

MANAGING THE APPLICATION ENVIRONMENT

MORE THAN ONE-THIRD (39%) INDICATE THEY HAVE AN ENTERPRISE-WIDE STRATEGY FOR APPLICATION RATIONALIZATION

Status with respect to application rationalization
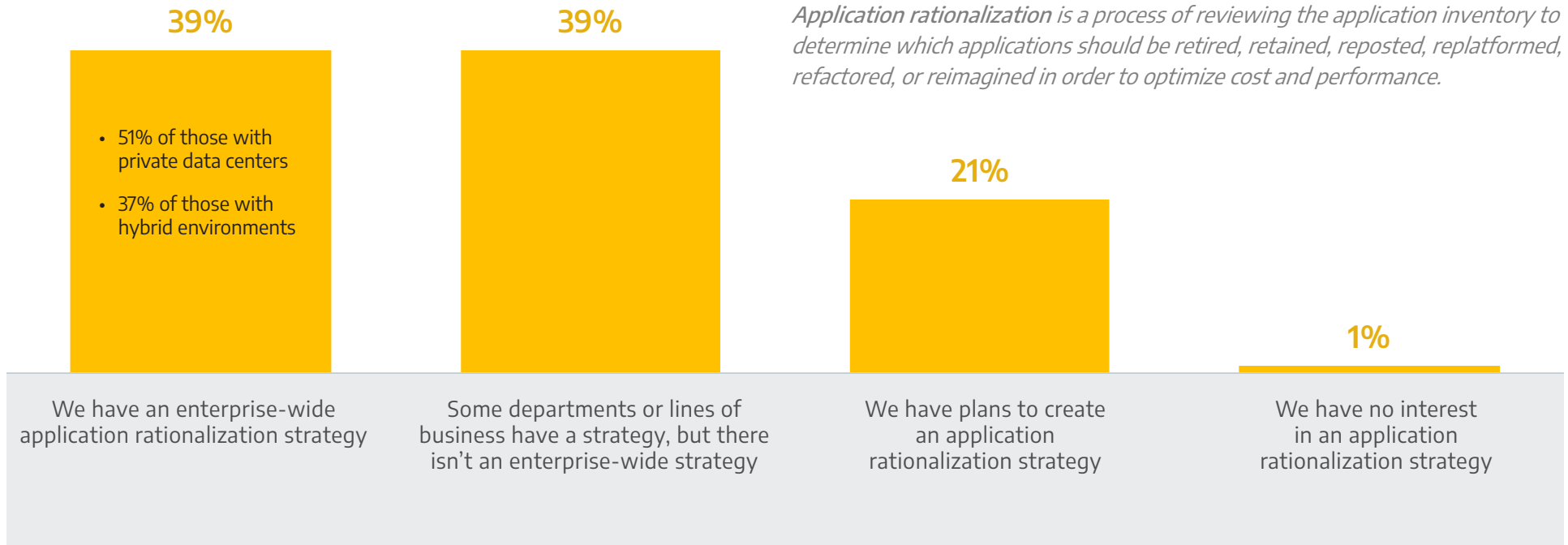
Application rationalization is a process of reviewing the application inventory to determine which applications should be retired, retained, reposted, replatformed, refactored, or reimagined in order to optimize cost and performance.

39%

- 51% of those with private data centers
- 37% of those with hybrid environments

We have an enterprise-wide application rationalization strategy

39%

Some departments or lines of business have a strategy, but there isn't an enterprise-wide strategy

21%

We have plans to create an application rationalization strategy

1%

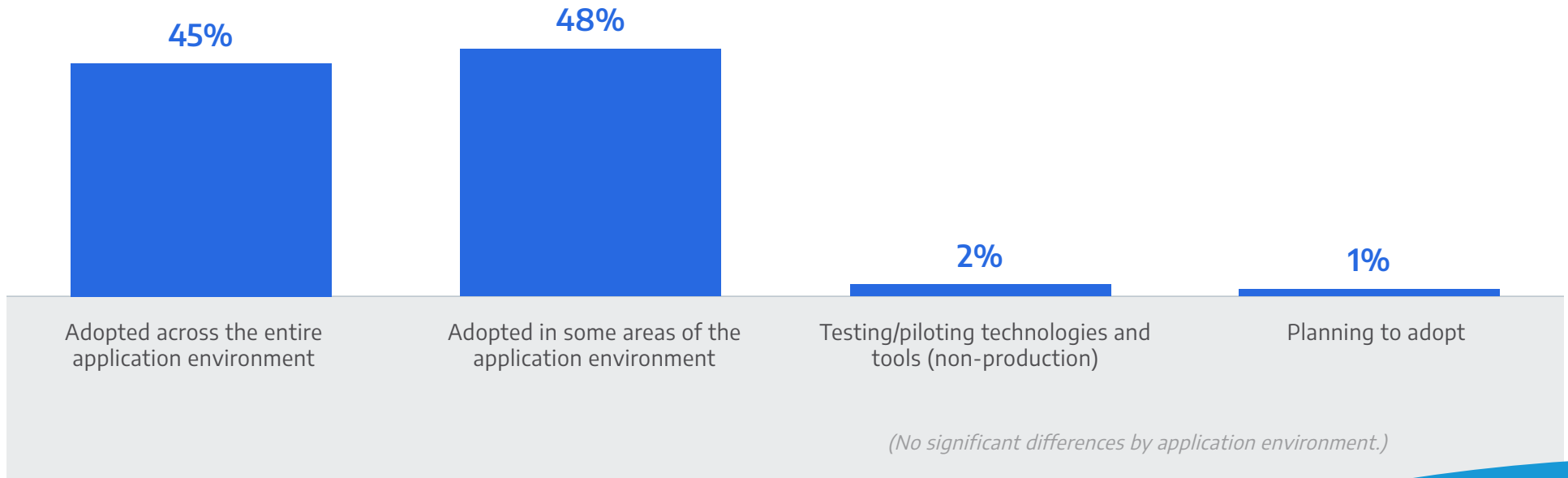We have no interest in an application rationalization strategy

Question 5: Application rationalization is a process of reviewing the application inventory to determine which applications should be retired, retained, reposted, replatformed, refactored, or reimagined in order to optimize cost and performance. Which of the following best describes your organization's status with respect to a rationalization strategy?

Base 100

MOST ORGANIZATIONS (93%) REPORT USING DEVOPS EITHER ACROSS THE ENTIRE APPLICATION ENVIRONMENT OR IN ONE OR MORE AREAS

Use of DevOps

45%	**48%**	**2%**	**1%**
Adopted across the entire application environment	Adopted in some areas of the application environment	Testing/piloting technologies and tools (non-production)	Planning to adopt

(No significant differences by application environment.)

Question 6: Which of the following best describes your organization's use of DevOps?

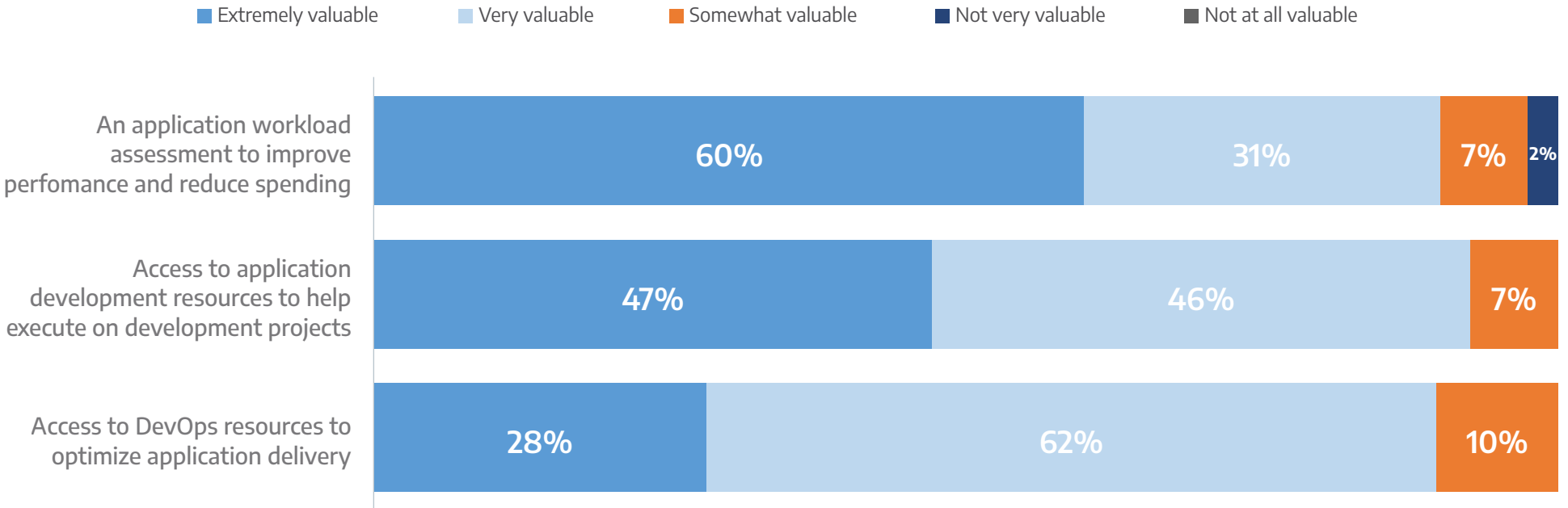Base 100

90% OR MORE

Find Services Such as Application Workload Assessments and Access to Development and/or DevOps Resources Highly Valuable

How valuable would the following third-party services be for your organization in helping to support your application environment?

■ Extremely valuable   ■ Very valuable   ■ Somewhat valuable   ■ Not very valuable   ■ Not at all valuable

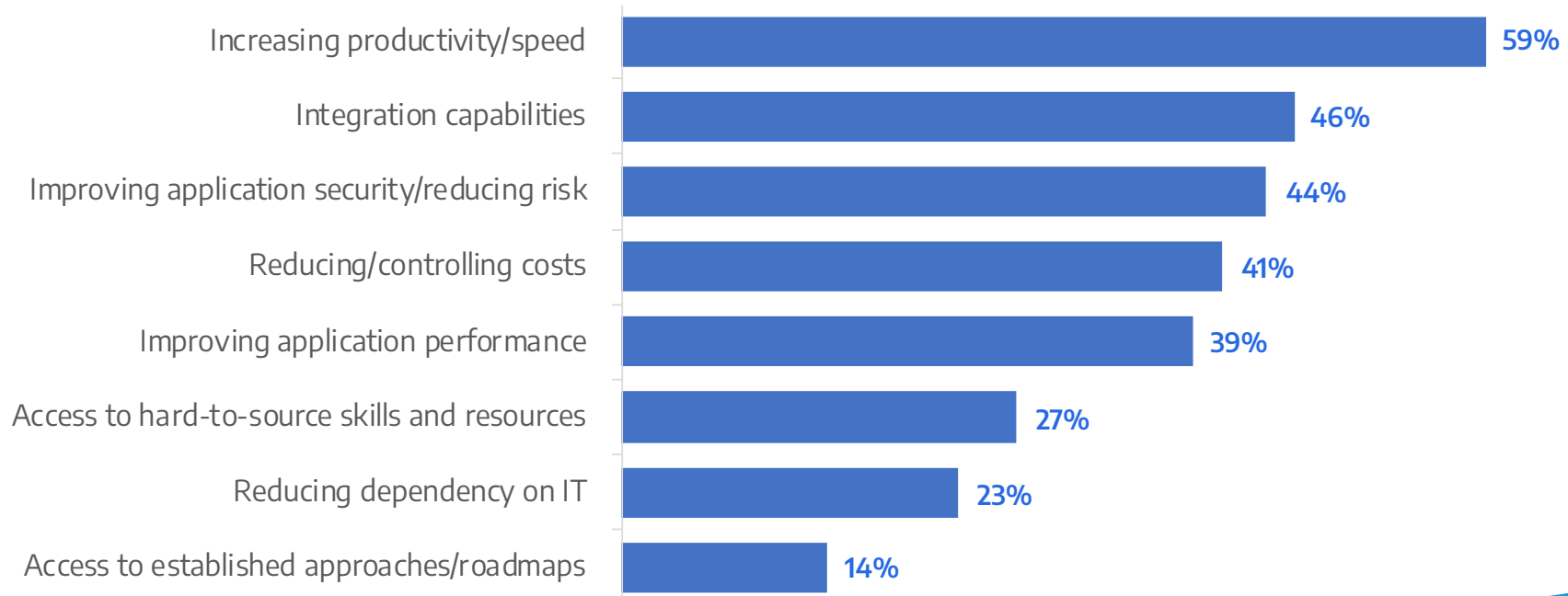|			
An application workload assessment to improve perfomance and reduce spending	60%	31%	7% 2%
Access to application development resources to help execute on development projects	47%	46%	7%
Access to DevOps resources to optimize application delivery	28%	62%	10%

Question 7: How valuable would the following third-party services be for your organization in helping to support your application environment?

Base 100

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INCREASING PRODUCTIVITY/SPEED IS PERCEIVED AS THE TOP BENEFIT OF LEVERAGING THIRD-PARTY SERVICES TO SUPPORT APPLICATION ENVIRONMENTS

Attractive potential advantages of leveraging third-party services to help support an application environment.

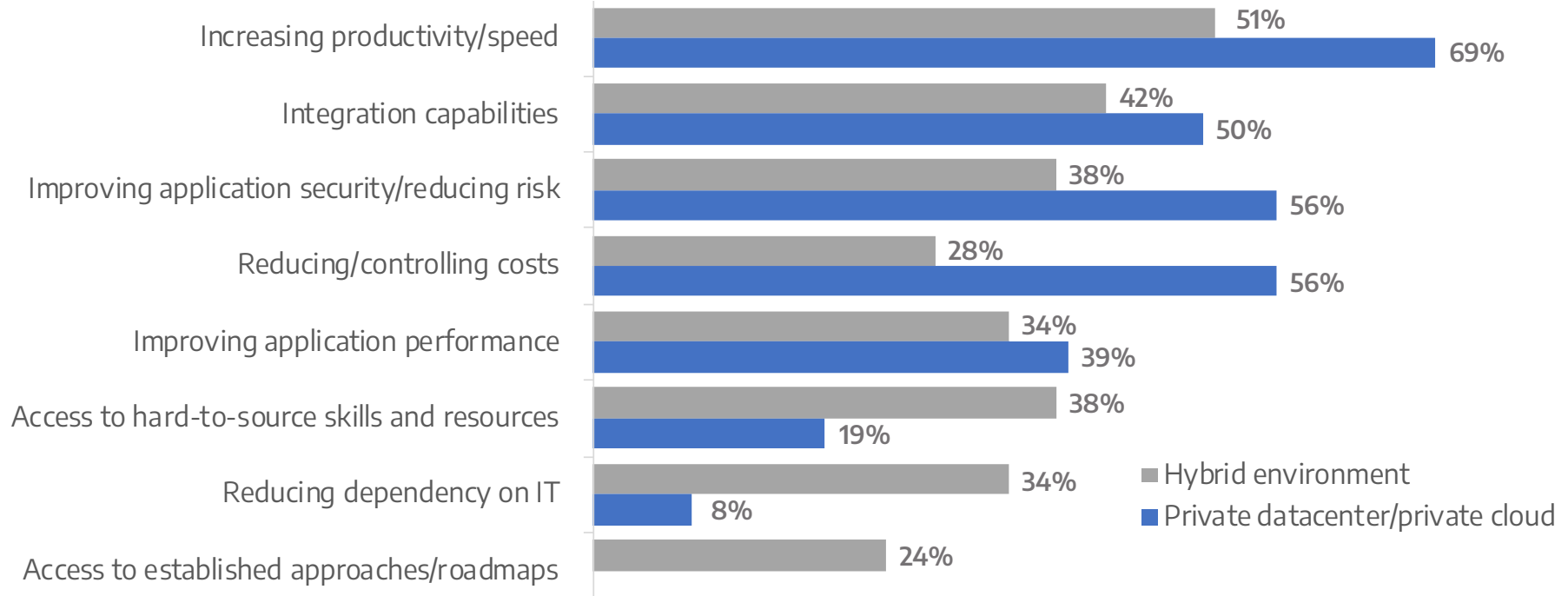| Advantage	Percentage
Increasing productivity/speed	59%
Integration capabilities	46%
Improving application security/reducing risk	44%
Reducing/controlling costs	41%
Improving application performance	39%
Access to hard-to-source skills and resources	27%
Reducing dependency on IT	23%
Access to established approaches/roadmaps	14%

Question 8: From your perspective, what are the most attractive potential advantages of leveraging third-party services to help support your application environment? (Please select up to 3.)

Base 100

PERCEIVED ADVANTAGES OF THIRD-PARTY APPLICATION SUPPORT SERVICES VARY BY TYPE OF APPLICATION ENVIRONMENT

Attractive potential advantages of leveraging third-party services to help support an application environment.

	Hybrid environment	Private datacenter/private cloud
Increasing productivity/speed	51%	69%
Integration capabilities	42%	50%
Improving application security/reducing risk	38%	56%
Reducing/controlling costs	28%	56%
Improving application performance	34%	39%
Access to hard-to-source skills and resources	38%	19%
Reducing dependency on IT	34%	8%
Access to established approaches/roadmaps	24%	

Question 8: From your perspective, what are the most attractive potential advantages of leveraging third-party services to help support your application environment? (Please select up to 3.)

Base 53 with a hybrid environment; 36 with a private data center

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