



Hybrid & Multicloud Perceptions Survey



Hybrid & Multicloud Perceptions – Survey Results

Document Overview:

- This document is intended to share the results of the survey responses without interpretation.
- Question text and full response lists are provided, and question bases (i.e., a description of who was asked each question) is provided.
- Questions are shown in survey order, with the exception of select sample characteristics, which are shown on pages 21 to 25.

Methodology:

- This online survey was executed by The Harris Poll on behalf of Microsoft.
- Survey respondents were recruited via email and data was collected between October 18 and October 25, 2021.
- The survey was blind, meaning neither the invitation nor the survey named Microsoft as the sponsor.
- To qualify for the survey, respondents had to work in organization with 250 or more employees and be familiar with cloud technology.
- Collectively, the sample is composed of BDMs, ITDMs, and IT Pros, as they naturally occurred in the sample. Please see “Sample Description” section of this document for definitions of these groups.

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* In the survey, “multicloud” was referred to as use of “multiple clouds” to avoid confusing respondents. Here, we use “multicloud” for consistency except when presenting response options.

Part 1: Quantifying Cloud Usage

Gauging current – and anticipated future – use of cloud, multicloud, and hybrid cloud technology

Change in use of cloud technology over course of the pandemic

Q102. How, if at all, did your organization's use of any of the following change over the course of the pandemic?

| | Single cloud technology | Multicloud technology | Hybrid cloud technology | Cloud edge technology |
|------------------------------|-------------------------|-----------------------|-------------------------|-----------------------|
| Decreased significantly | 10% | 3% | 3% | 2% |
| Decreased somewhat | 10% | 6% | 6% | 6% |
| No change | 37% | 31% | 26% | 36% |
| Increased somewhat | 27% | 36% | 35% | 32% |
| Increased significantly | 16% | 24% | 30% | 24% |
| Total increased (Net) | 43% | 60% | 65% | 56% |

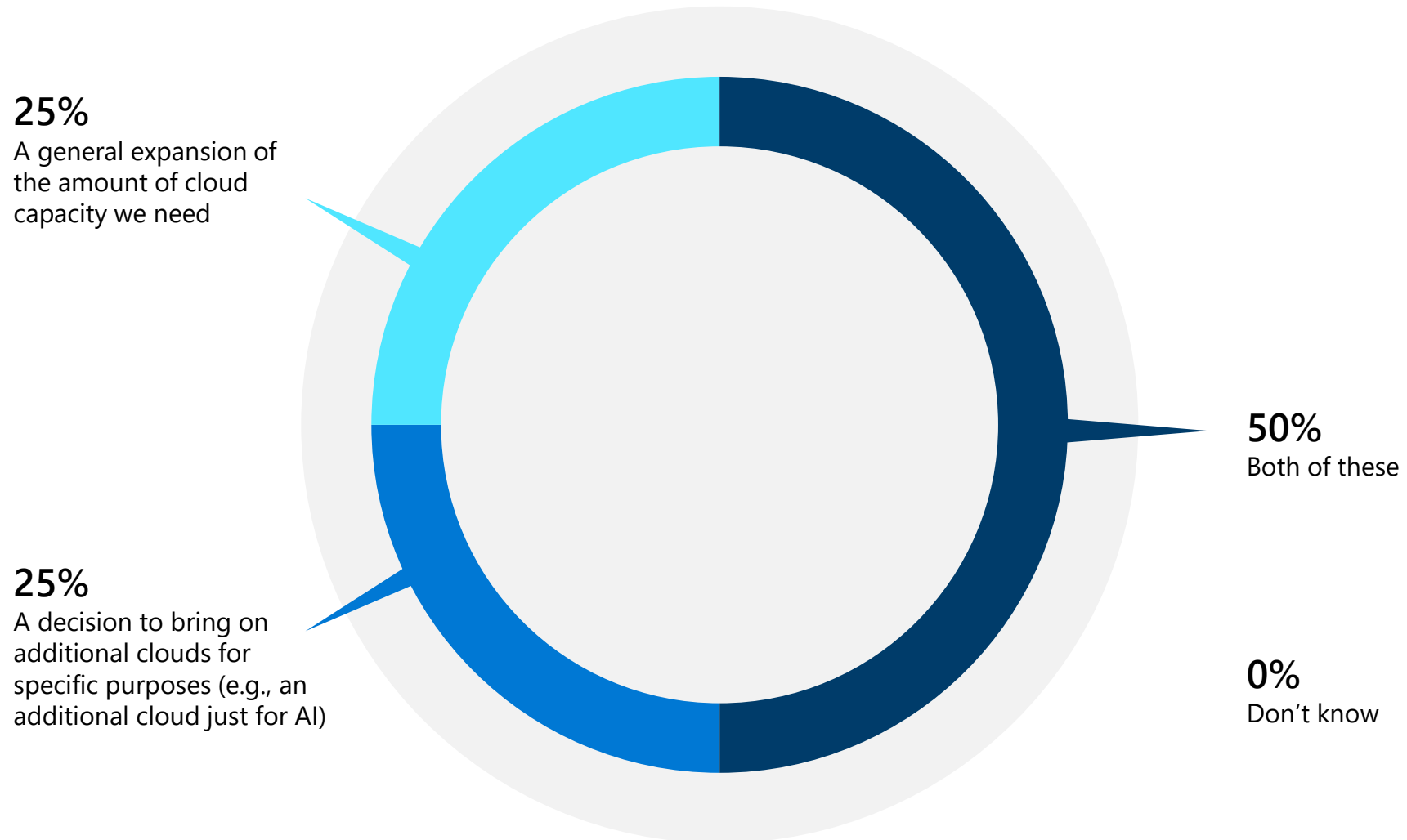
Anticipated change in cloud use in next year to two years

Q103. How, if at all, do you anticipate your organization's use of any of the following changing in the next year to two years?

| | Single cloud technology | Multicloud technology | Hybrid cloud technology | Cloud edge technology |
|------------------------------|-------------------------|-----------------------|-------------------------|-----------------------|
| Decreased significantly | 9% | 1% | 2% | 2% |
| Decreased somewhat | 11% | 6% | 4% | 3% |
| No change | 29% | 25% | 22% | 29% |
| Increased somewhat | 32% | 40% | 39% | 36% |
| Increased significantly | 18% | 27% | 33% | 30% |
| Total increased (Net) | 50% | 67% | 72% | 66% |

Reason for anticipated change in cloud use

Q104. Would you say the reason you anticipate that your organization will increase its use of multicloud in the next year to two years is primarily driven by...

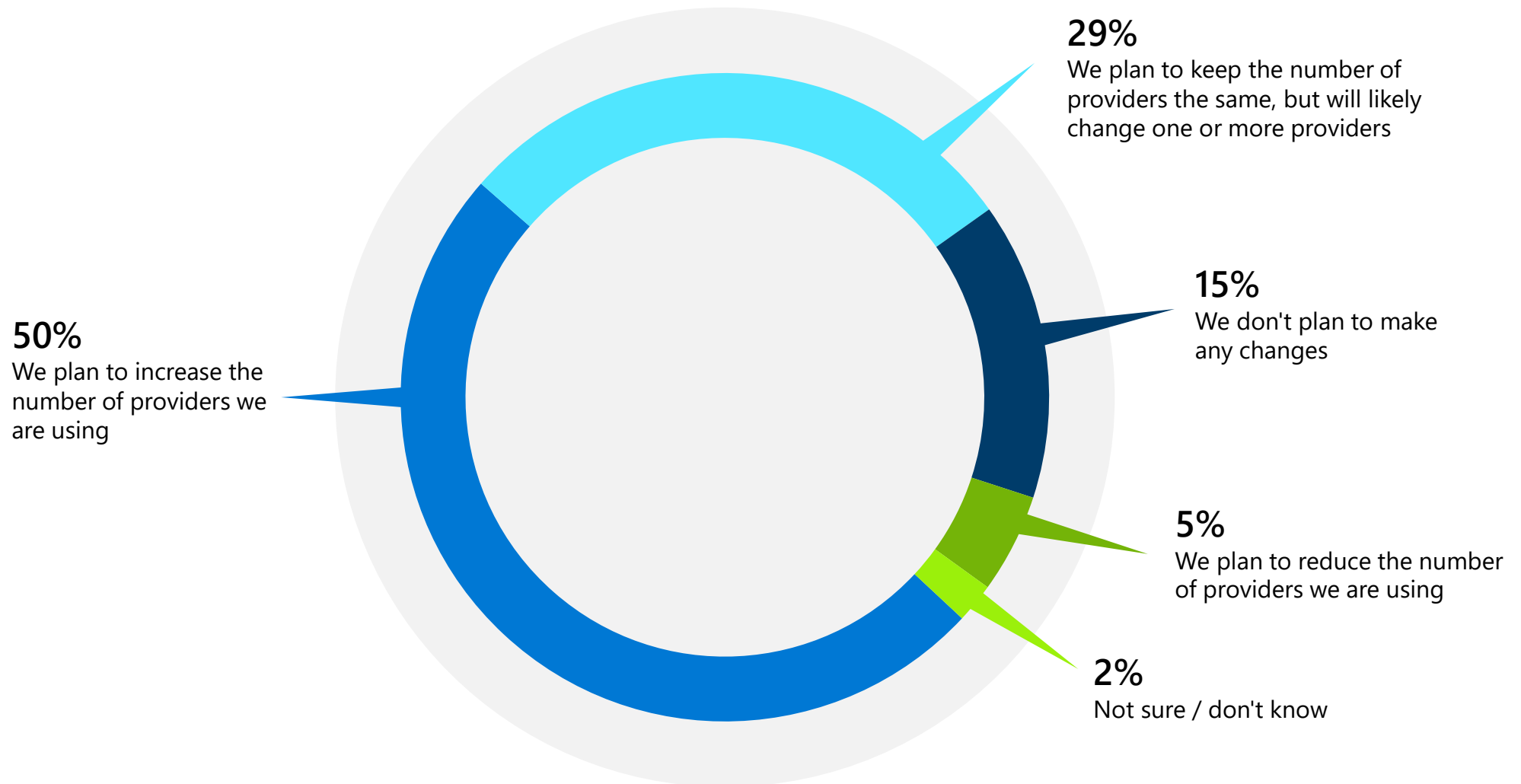


Part 2: Exploring Cloud Relationships

Capturing satisfaction and trajectory with cloud provider(s)

Planned changes in cloud providers in next year or so

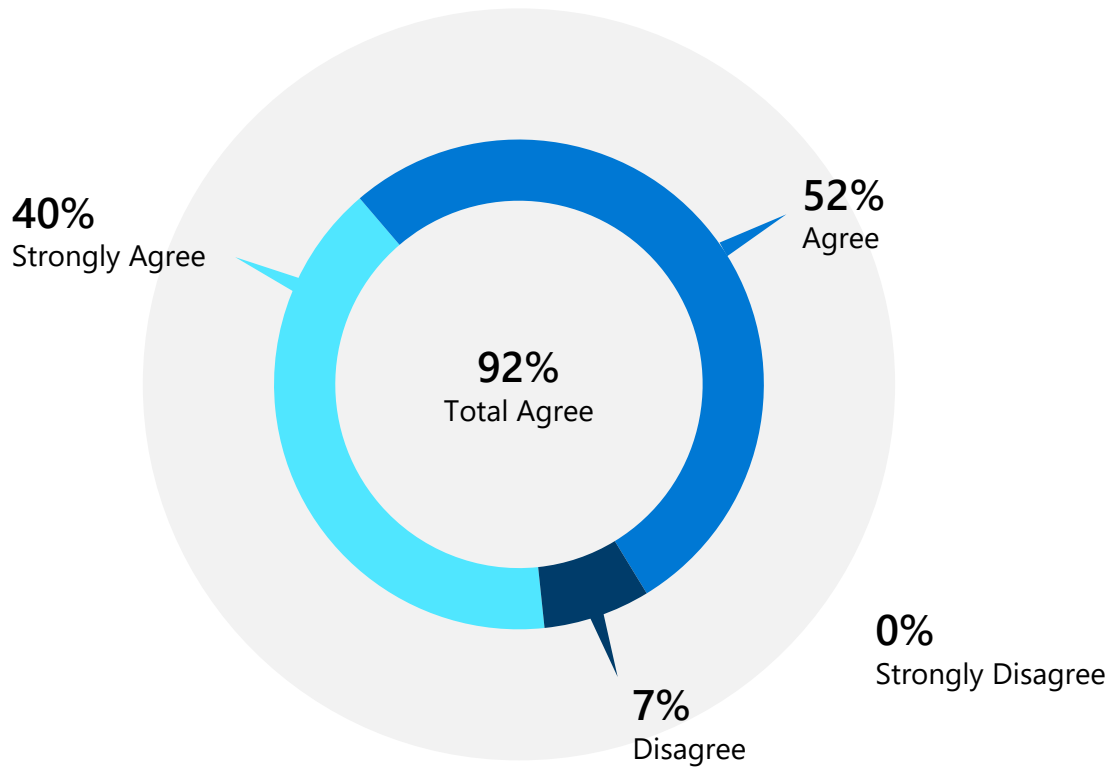
Q204. Which of the following best describes how you imagine your cloud provider relationship(s) evolving in the next year or so?



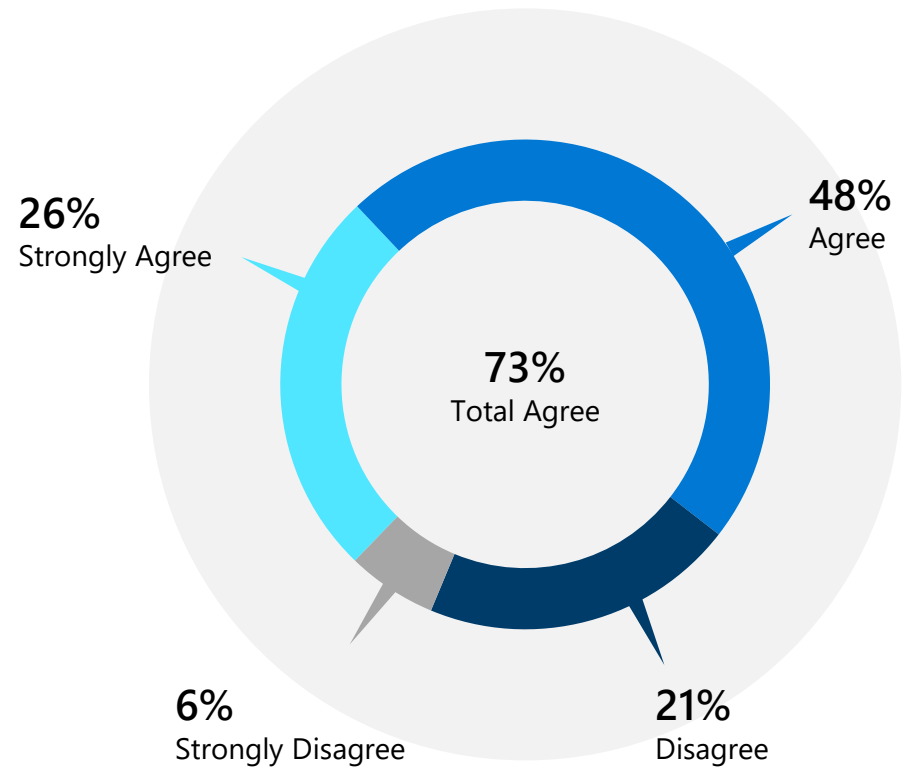
Attitudes towards cloud technology

Q206. How much do you agree or disagree with the following statements?

Compared to what we had planned, the pandemic accelerated the pace in which my organization adopted or increased its use of cloud technology



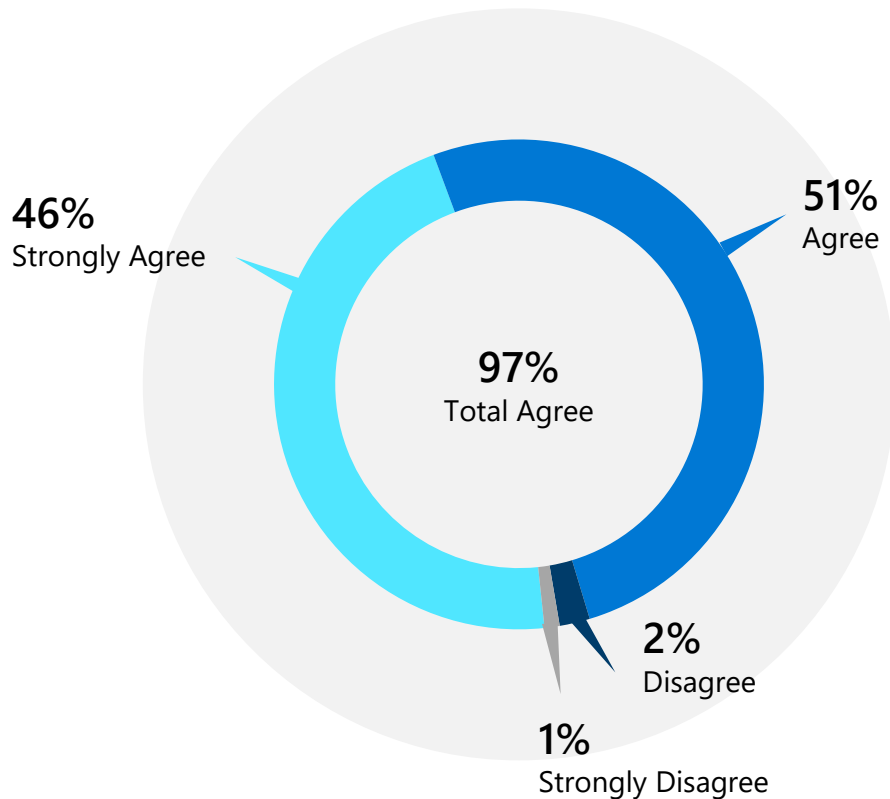
It is challenging to manage multicloud environments



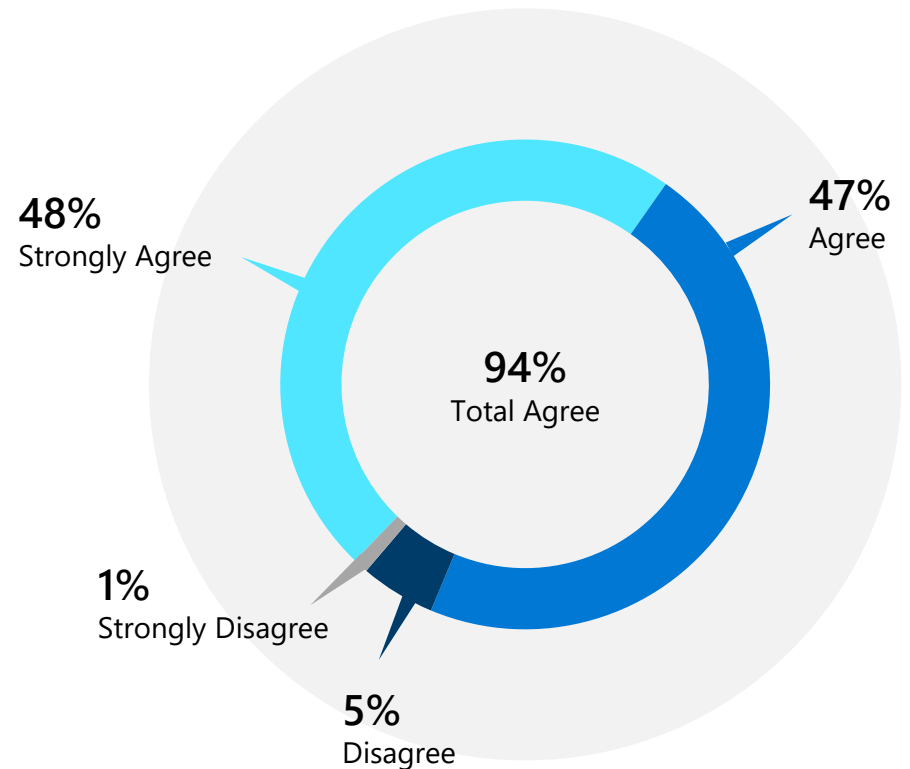
Attitudes towards cloud technology

Q206. How much do you agree or disagree with the following statements?

My company needs to be able to adopt cloud technology in some areas of business, while retaining other business information on-premise (e.g., systems, software, platforms)



My company must follow regulatory requirements that necessitate keeping at least some data, workloads and apps in on-premise datacenters

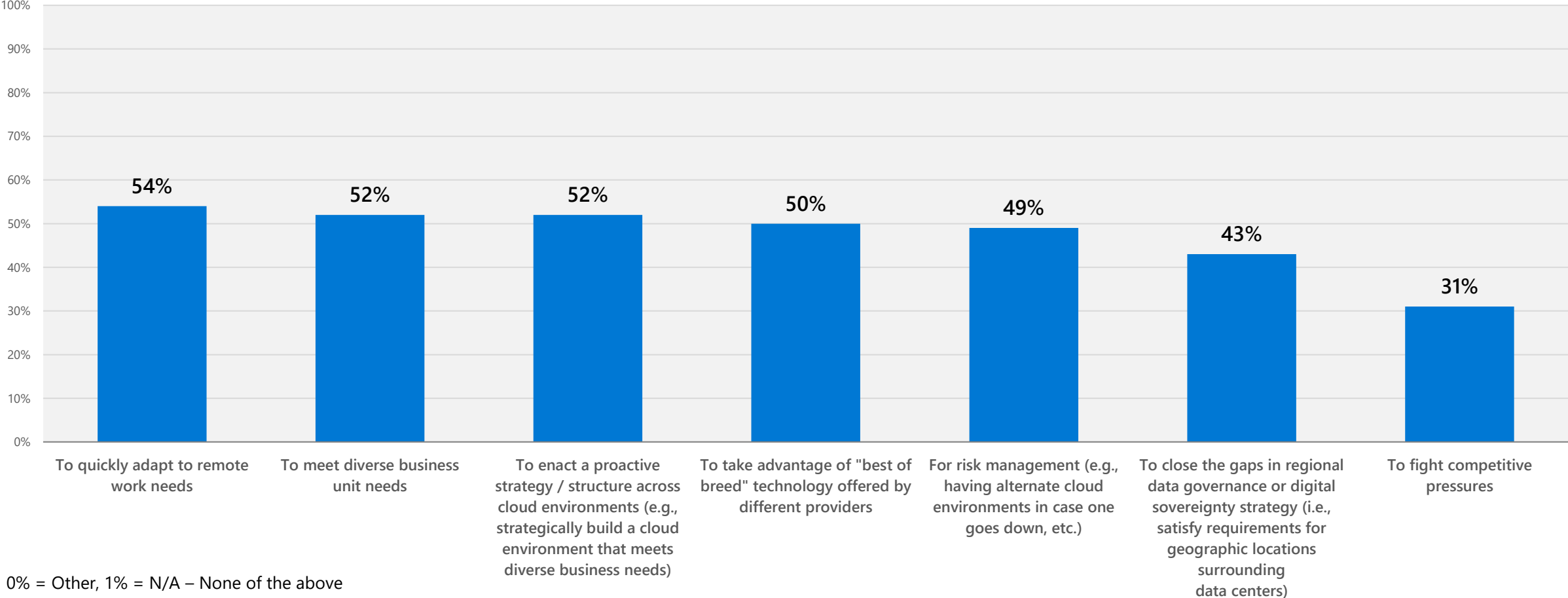


Part 3: Examining Cloud Attitudes

Motivators, benefits, and challenges of current cloud / technology systems

Reasons respondents started using hybrid or multicloud technology

Q301. Which of the following, if any, are reasons you / your company started using hybrid and/or multicloud technology? Please select all that apply.



0% = Other, 1% = N/A – None of the above

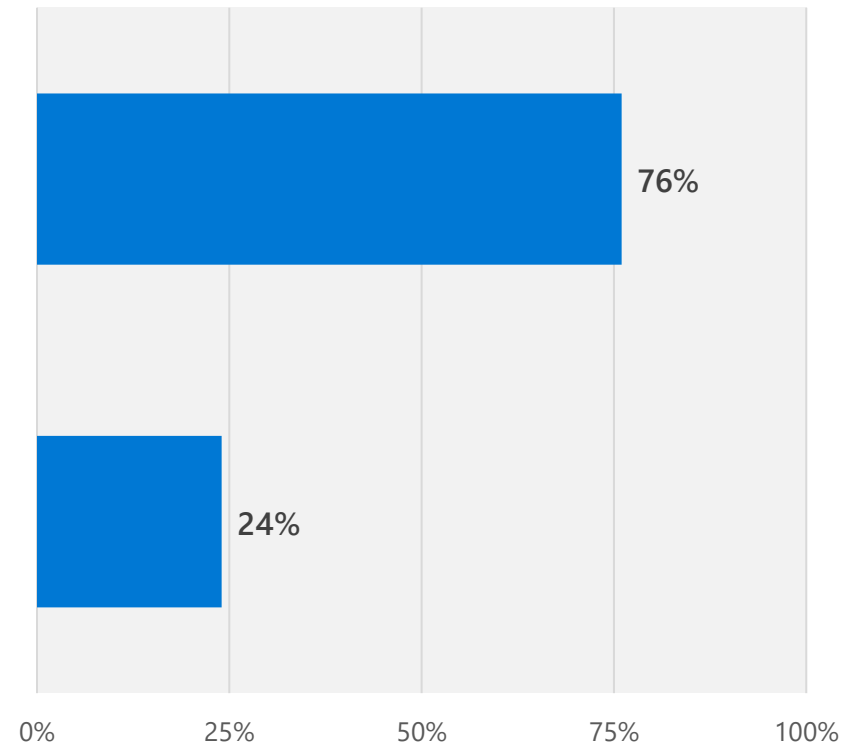
Base: ALL WHO USE HYBRID OR MULTICLOUD (Q101/2-3)

Whether adoption of hybrid or multicloud was proactive or reactive

Q302. Which of the following best describes how your organization came to use hybrid and/or multicloud technology?

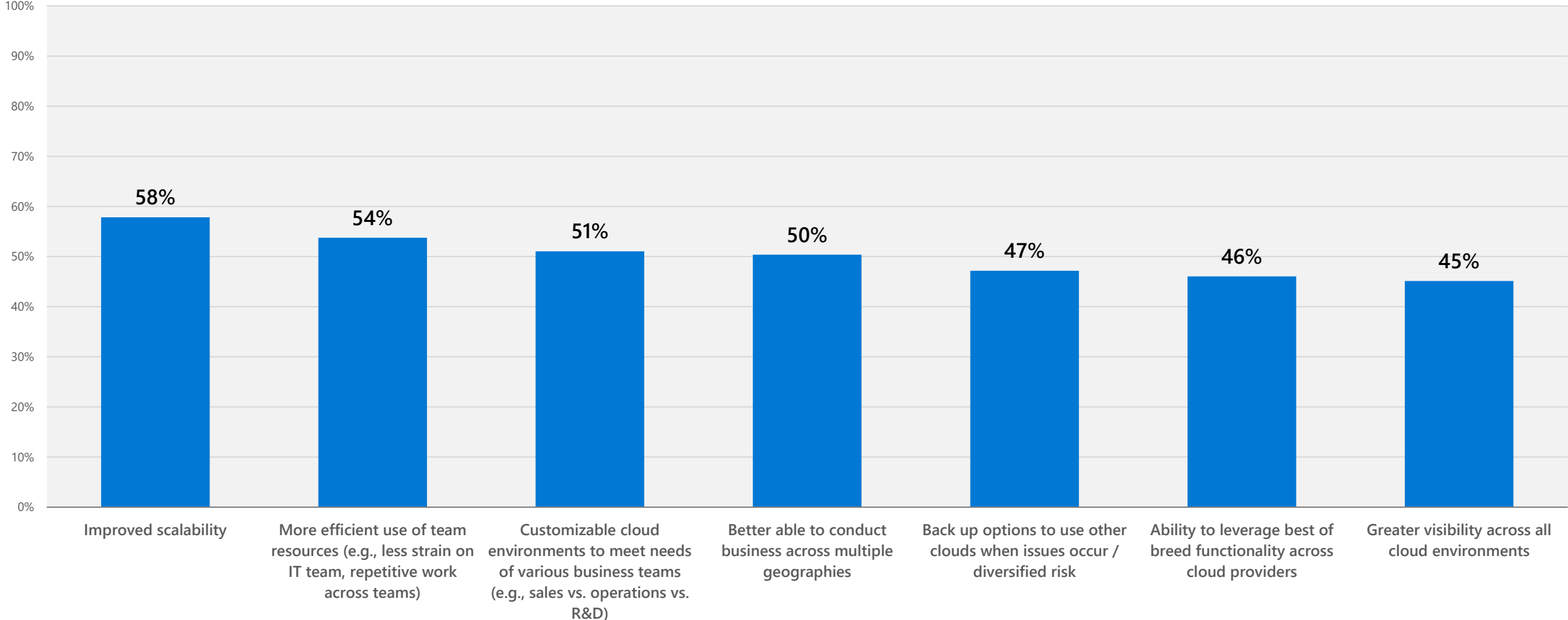
Proactive:
We have a set infrastructure or strategy and are able to choose vendors strategically to meet those objectives

Reactive:
Different pieces tend to be added over time to respond to business needs as they arise



Benefits of using hybrid or multicloud technology

Q303. In your point of view, which of the following, if any, are benefits of using hybrid and/or multicloud technology? Please select all that apply.



0% = Other, 0% = N/A – None of the above

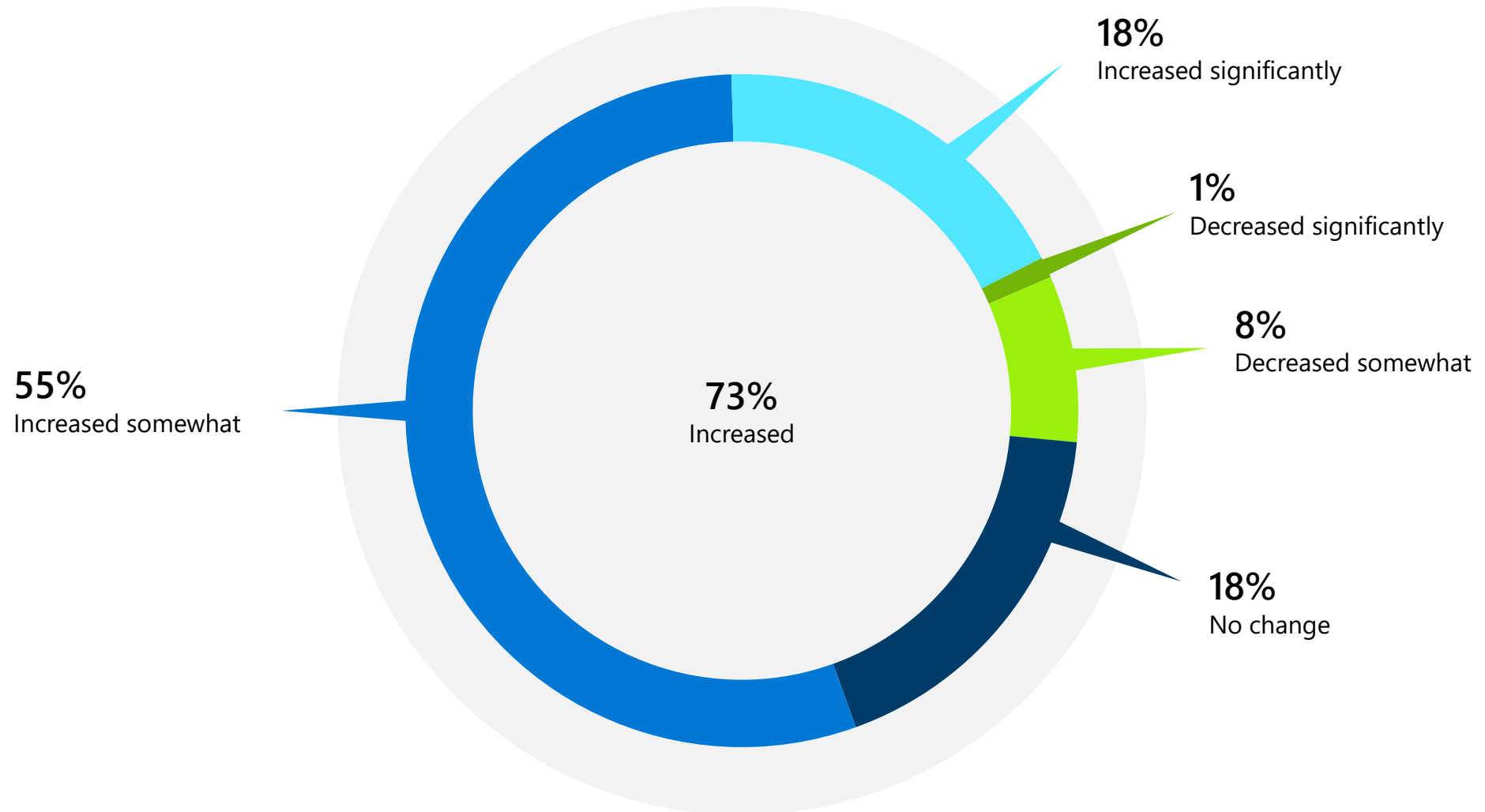
Base: ALL WHO USE HYBRID OR MULTICLOUD (Q101/2-3)

Part 4: The Business Case for Hybrid and Multicloud

Exploring ROI for hybrid and multicloud deployments

Organization's performance / revenue in last year

Q402. Which of the following best describes your organization's performance / revenue in the last year?



Planned changes in technology spending in next three years

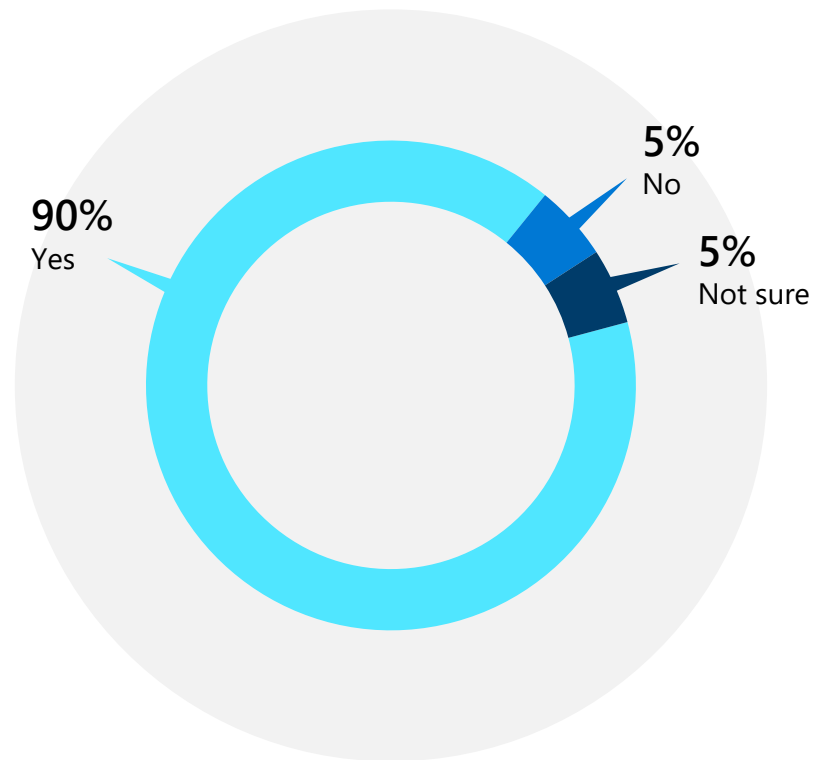
Q403. To your knowledge, how, if at all, is your organization planning to change spending on the following in the next 3 or so years?

| | IT overall | Cloud technology | Multicloud technology | Hybrid cloud technology |
|------------------------------|------------|------------------|-----------------------|-------------------------|
| Decreased significantly | 5% | 2% | 2% | 2% |
| Decreased somewhat | 3% | 3% | 3% | 4% |
| No change | 16% | 16% | 24% | 21% |
| Increased somewhat | 51% | 46% | 44% | 42% |
| Increased significantly | 26% | 33% | 28% | 32% |
| Total increased (Net) | 76% | 78% | 72% | 73% |

- 86% plan to increase spending on hybrid and/or multicloud
- 93% plan to increase any cloud technology

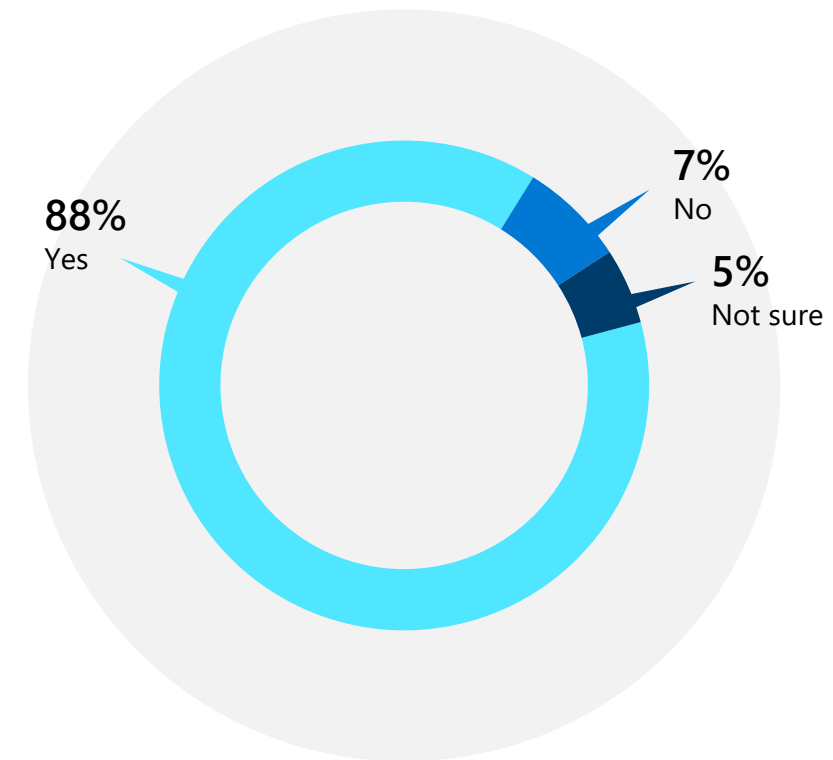
Whether hybrid / multicloud have contributed to meaningful business results

Q404. In your opinion, has your **hybrid cloud** set up contributed to driving meaningful business results?



Base: HYBRID CLOUD USERS (Q101 R1)

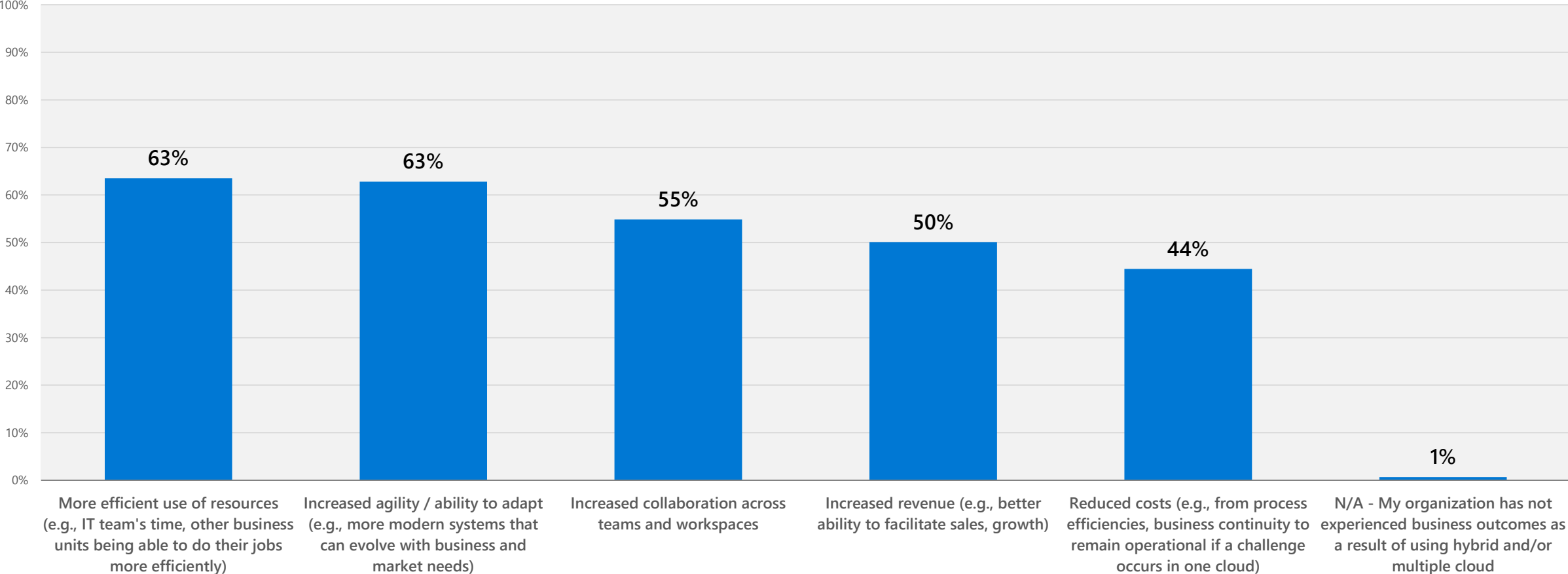
Q404a. In your opinion, has your **multicloud** set up contributed to driving meaningful business results?



Base: MULTICLOUD USERS (Q101 R3)

Business outcomes resulting from hybrid or multicloud use

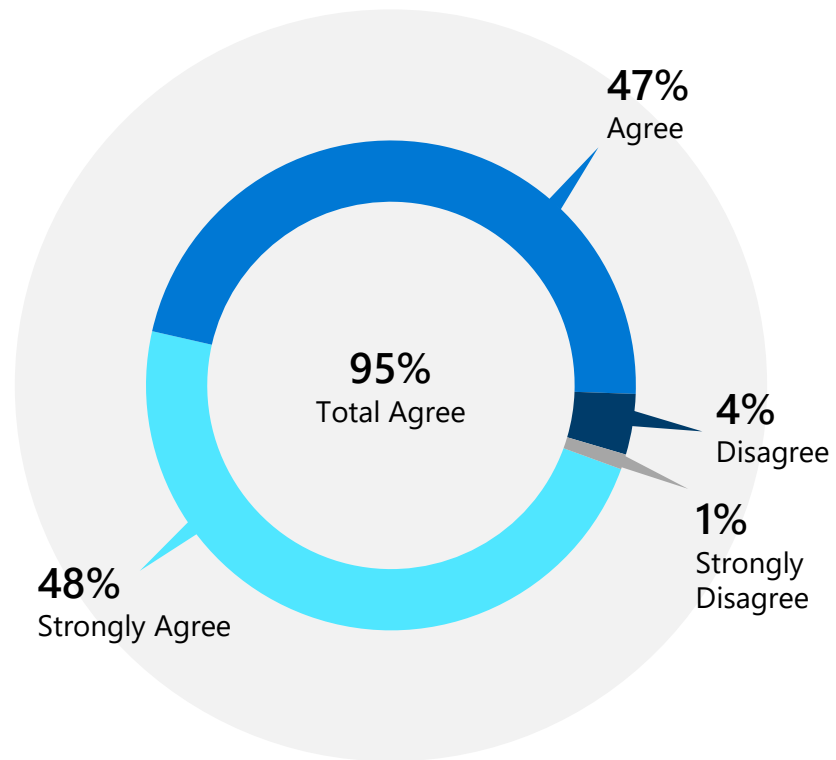
Q405. Have you experienced any of the following business outcomes as a result of using hybrid and/or multicloud technology?



Views in multicloud / hybrid cloud being critical to business success

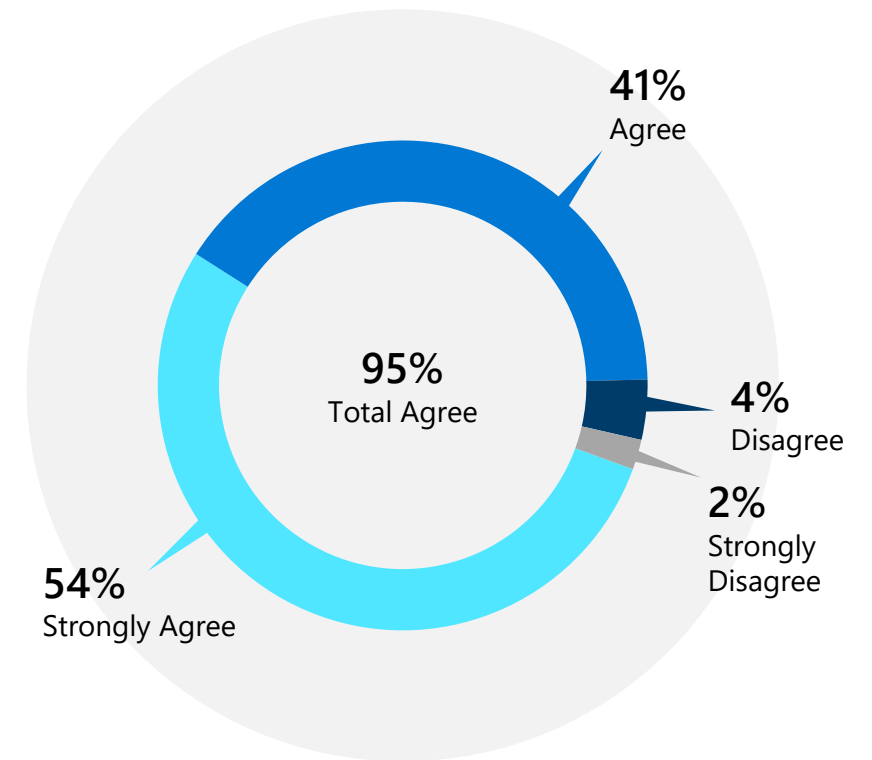
Q406. How much do you agree or disagree with the following statements?

Multicloud is critical to our business success



Base: MULTICLOUD USERS (Q101 R3)

Hybrid cloud is critical to our business success

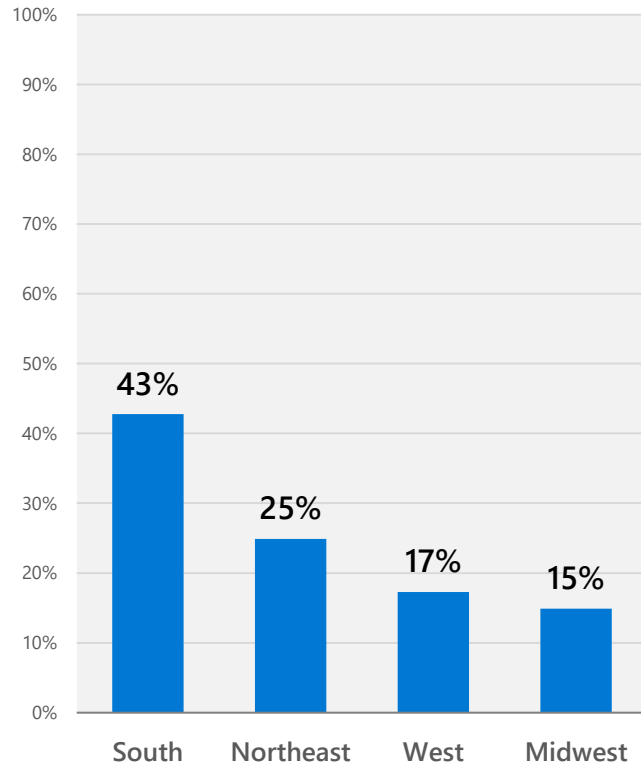


Base: HYBRID CLOUD USERS (Q101 R1)

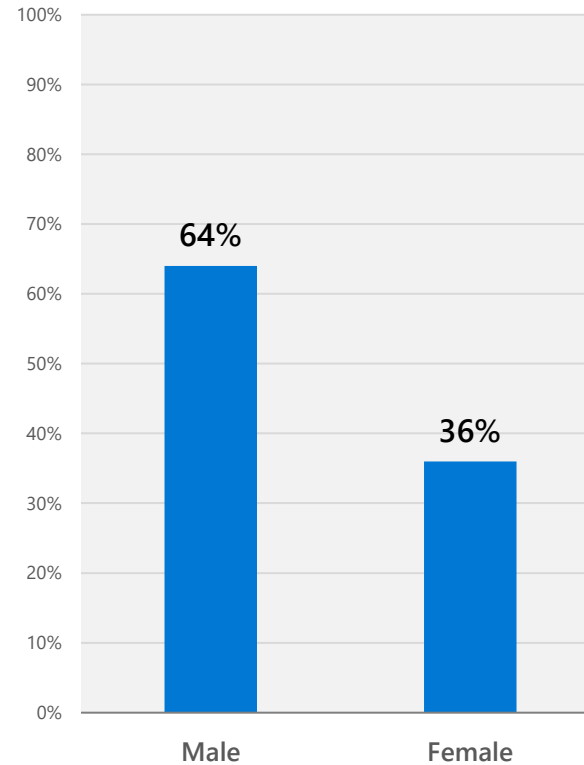
Sample Characteristics

Sample Description: Demographic characteristics

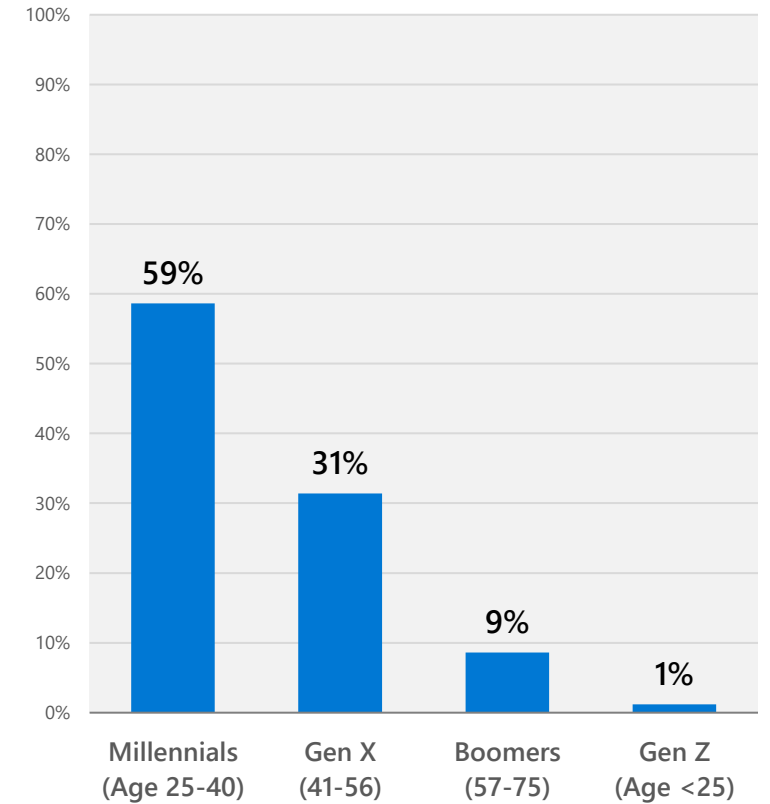
Census Region



Gender



Generation



Sample Description: Work characteristics

S2a. Which of the following is the closest to describing your current title within your company or place of work?

| | |
|-----------------------------------|-----|
| Chief Executive Officer (CEO) | 15% |
| Chief Technology Officer (CTO) | 14% |
| Chief Information Officer (CIO) | 5% |
| Chief Financial Officer (CFO) | 2% |
| Chief Operations Officer (COO) | 2% |
| Chief Security Officer (CSO) | 1% |
| Chief Marketing Officer (CMO) | 1% |
| Other C-suite | 1% |
| Managing Director | 6% |
| Executive / Senior Vice President | 5% |
| Vice President | 4% |
| Director | 17% |
| Senior Manager | 9% |
| Manager | 19% |
| Skilled Labor Professional | 2% |

Base: TOTAL UNLESS OTHERWISE NOTED

S2b. Which of the following, if any, come close to describing your current title or role within your company or place of work?

| | |
|---------------------------------------|-----|
| IT engineer (or similar) | 30% |
| IT security specialist (or similar) | 20% |
| IT support (or similar) | 16% |
| Database manager (or similar) | 10% |
| Benefits administrator | 4% |
| Data analyst | 4% |
| Talent acquisition partner | 2% |
| Graphic / creative designer | 2% |
| None of these describes my work/title | 1% |

S7. Would you say that you work in an IT related department or group within your organization?

| | |
|-----|-----|
| Yes | 89% |
| No | 11% |

Base: RESPONDENTS WITH NON-IT AND NON-C-SUITE TITLES.

S4. In which of the following industries do you work?

| | |
|--------------------------------|-----|
| Technology | 37% |
| Financial services | 13% |
| Manufacturing / Heavy Industry | 10% |
| Healthcare | 7% |
| Retail | 7% |
| Telecommunications | 4% |
| Education | 4% |
| Government / Policy | 3% |
| Defense / Cybersecurity | 2% |
| Automotive / Transportation | 2% |
| Energy | 1% |
| Other | 10% |

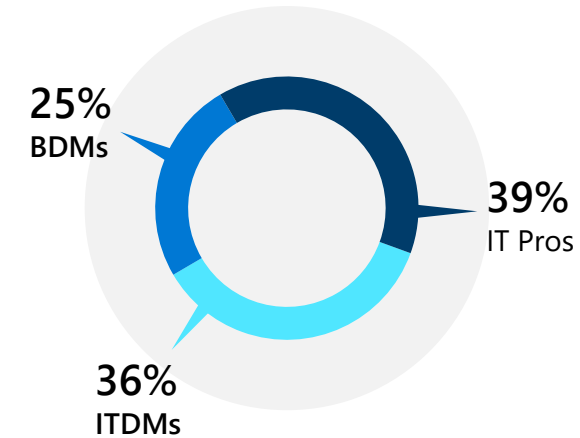
Sample Description: Work characteristics

S5. Do you have decision making authority over the following?

| | I have no influence nor decision-making authority | I have influence and/or some decision-making authority | I have primary decision-making authority |
|---|---|--|--|
| Finance/budgeting | 17% | 36% | 47% |
| Marketing/sales | 25% | 37% | 38% |
| Tech systems/software/services/hardware | 2% | 27% | 71% |
| Business strategy/organizational priorities | 11% | 35% | 55% |
| R&D/product development | 14% | 35% | 51% |

Base: TOTAL

RESPONDENT TYPE: Derived from title, whether work in an IT department, and degree of decision-making responsibility.



- ITDMs (IT Decision Makers) are senior IT professionals; titles could include: CTO, CIO, VP Technology, Director Technology, Director IT, etc. All work in an IT department.
- IT Pros are highly involved in IT implementation; titles could include: IT Support, IT Engineer, IT Security Specialist, Database Manager, etc.
- BDMs (Business Decision Makers) work at a VP level or higher within their organization and have at least some decision-making responsibility for IT/Technology decisions while NOT working in an IT department.

Sample Description: Work characteristics

S1a. Across all locations, approximately how many total employees work for your company or organization?
If you are not sure, please provide your best estimate.

| | |
|------------------|-----|
| 250 to 499 | 12% |
| 500 to 999 | 23% |
| 1,000 to 2,499 | 20% |
| 2,500 to 4,999 | 14% |
| 5,000 to 9,999 | 12% |
| 10,000 to 49,999 | 9% |
| 50,000 or more | 12% |

S1a. Is your company part of...

| | |
|----------------|-----|
| Fortune 100 | 7% |
| Fortune 500 | 49% |
| Fortune 1000 | 64% |
| Not sure | 15% |
| Not applicable | 22% |

For more information, contact:

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