Hybrid Cloud Matures

Pragmatism in a Post-COVID-19 World

A Research Study by:
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Table of Contents

Today's Enterprise Hybrid Cloud User Perceptions

Hitting the "Pause" Button on the Hybrid Cloud

    Hybrid cloud is more complex than originally thought

    Hybrid cloud is more expensive than originally thought.

    Staffing/expertise is a challenge.

    Data egress charges continue to be an inhibitor.

Pre-Integrated Solutions Continue to Dominate

Cloud Storage Is Being Used to Reduce the Cost of On-Premises Storage

Cloud Data Management Headaches Are Surfacing

Presentation of Results

Critical Hybrid Cloud Issues

Hoped-for Objectives

Hybrid Cloud Deployment Models

Workload Deployment

Biggest Challenges with Hybrid Cloud Implementation

Biggest Public Cloud Storage Problem Areas

Controlling Hybrid Cloud Costs

Is Cost Control Difficult?

Why Is Cost Control Difficult?

What Strategies Are Used to Control Cost?

What Is Needed Most to Control Cost?

Do Data Egress Charges Have an Impact?

Hybrid Cloud Storage and Data Management

Why Use Public Cloud Storage?

When Is Public Cloud Storage Less Expensive than On-Premises Storage?

> ## Included in full Research Study available with purchase

Table of Figures

Figure 5: Hoped-for Hybrid Cloud Deployment Objectives

Figure 6: Preferred Enterprise Hybrid Cloud Deployment Models, 2021

Figure 7: Hybrid Cloud Implementation Strategies, 2017

Figure 8: Top Use Cases for Hybrid Cloud (2017 Survey)

Figure 9: Hybrid Cloud Workloads (2021 Survey)

Figure 10: Biggest Challenges with Hybrid Cloud Implementation

Figure 11: Biggest Public Cloud Storage Problem Areas

Figure 12: Is Controlling Cloud Computing Costs Difficult?

Figure 13: Factors that Make Controlling Hybrid Cloud Cost the Most Difficult

Figure 14: Strategies for Controlling and/or Reducing Hybrid Cloud Cost

Figure 15: Hybrid Cloud Cost Control Measure Needed the Most

Figure 16: Reasons for Using Public Cloud Storage

Figure 17: Use Cases for Public Cloud Storage that Are Less Expensive than Data Center Storage

Figure 18: Main Challenges Encountered When Managing Data in a Hybrid Cloud Environment

Figure 19: Main Objectives Driving Use of Data Tiering to the Public Cloud

Figure 20: Most Often Used Public Cloud for Data Copy/Migration

Figure 21: Use of CSP Data Protection Services for On-Premises and Cloud-Based Data

Figure 22: Use Cases for Containers in Production

Figure 23: Significant Drawbacks to the Adoption of Containers

Figure 24: Current or Planned Deployment of Persistent Storage for Containers

Figure 25: Current and Planned Container Backup Strategies

Figure 26: Current and Planned Deployment of Kubernetes

Figure 27: Top Five Kubernetes Platforms

Figure 28: Implementation of Data Management Functions for Kubernetes

Figure 29: Groups with the Most Influence over Hybrid Cloud Infrastructure Decision Making

Figure 30: Sources of Friction in the Public Cloud Decision Making Process

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Introduction

In 2017, Evaluator Group published a report entitled "*The Enterprise Hybrid Cloud —a Work in Progress.*" This year, as enterprises return to more normal IT operations post-COVID-19, Evaluator Group conducted a hybrid cloud research study that sought to ascertain movement on issues explored in the previous survey research and to introduce new lines of inquiry, including those concerning cloud storage, cost, containers/Kubernetes, multi-cloud data management (MCDM)[1] and cloud decision making. Evaluator Group asked respondents questions to help expose barriers to adoption, problems encountered, and aspects they find of value and that help increase hybrid cloud adoption.

Not surprisingly, Evaluator Group saw that enterprises had matured. Signs of this maturity include a progression from exploratory use cases, such as deploying hybrid clouds for disaster recovery or application development, to more critical application hosting. Along the way, they are learning that cost control is something of an art form and that staffing hybrid clouds with qualified administrators is challenging at best.

The hybrid cloud is often cited as a final destination. But in the minds of enterprise IT users, the hybrid cloud is a resource to be treated and managed as any other IT resource. Users are pragmatic, finding the best way to deliver IT services at the lowest cost, given their unique circumstances. Evaluator Group sees and presents this pragmatism at work in this study.

Survey Statistics/Demographics

Total Responses

The survey had 313 total responses from IT end users, 92% of which were from enterprise IT users. The balance (8%) was from IT end users within cloud service providers (CSPs) or value-added resellers (VARs)/distributors.

Number of Employees

The survey had 60% of responses from IT organizations with between 1,000 and 5,000 employees, while another 22% came from organizations with 5,000 employees or more, yielding a total of 82% from organizations of 1,000 employees or more.

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[1] Multi-Cloud Data Management Fundamentals | Evaluator Group
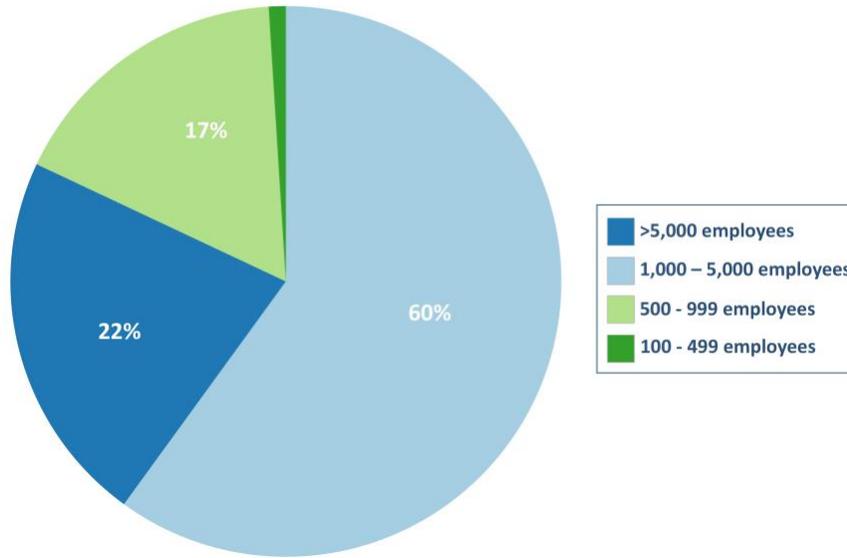
Figure 1: Respondent Company Size by Number of Employees
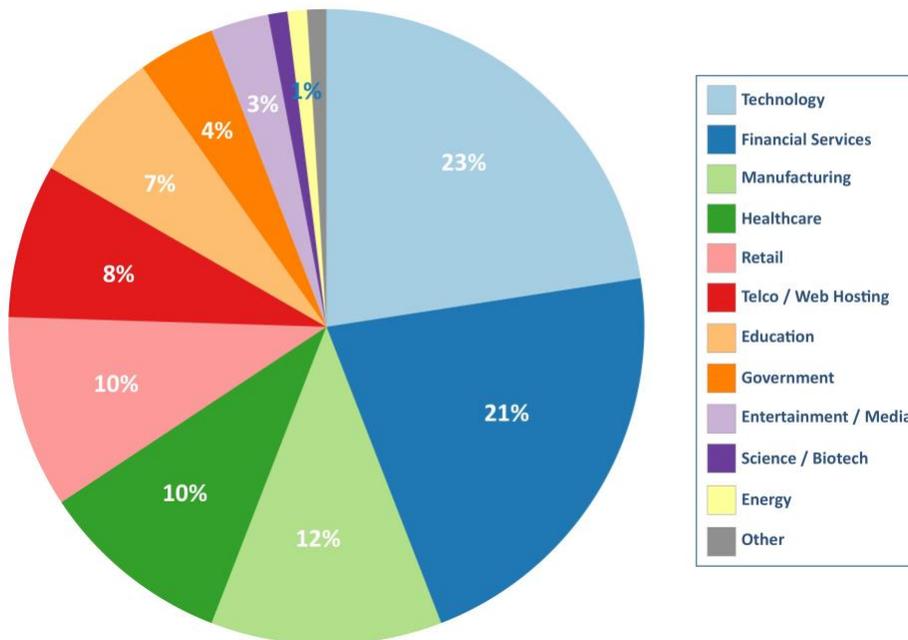
Industry Representation

Figure 2: Industry

Job Description

The overwhelming majority of responses came from IT management and IT technical staff.

What is your title or job description?

Legend:
- IT Management
- IT Technical Staff
- CIO - or chief IT decision maker
- Line of business

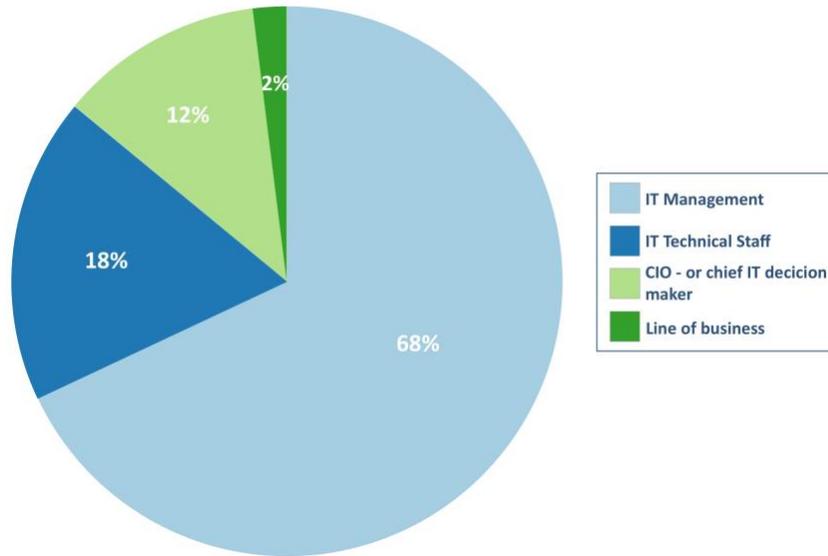Values shown: 2%, 12%, 18%, 68%

Figure 3: Title of Job Description

Job Responsibilities

Again, management of IT infrastructure dominates the respondent job responsibilities as can be seen below:

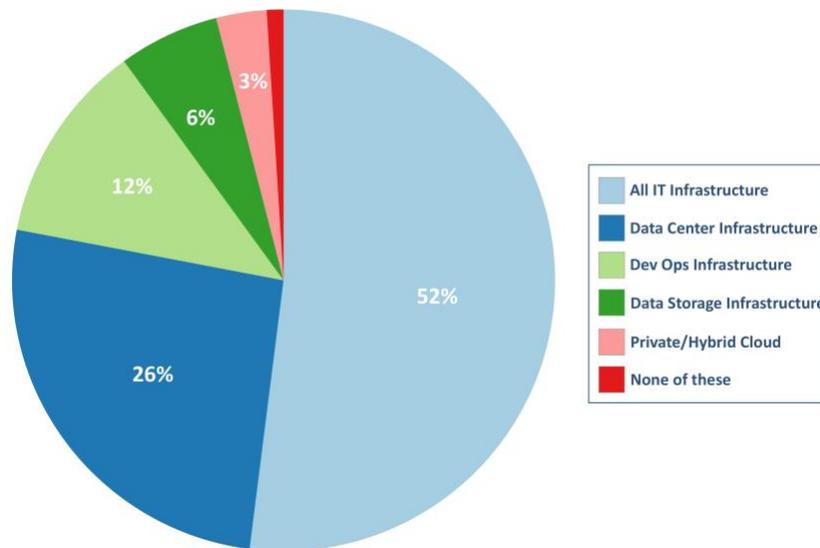**What is your primary responsibility inside your organization?**

Legend:
- All IT Infrastructure
- Data Center Infrastructure
- Dev Ops Infrastructure
- Data Storage Infrastructure
- Private/Hybrid Cloud
- None of these

Values shown: 3%, 6%, 12%, 52%, 26%

Figure 4: Primary Responsibility

Size of Storage Environment

Among the survey respondents, 89% were managing 100 TB or more, and 42% were managing 500 TB or more.

Commitment to Cloud Storage

More than a third (34%) of respondents have procured more than 50% of their total storage through the public cloud; 32% have procured between 25% and 50% of their total storage through the public cloud. Net: two-thirds of respondents have procured 25% or more of their total storage through the public cloud.

Top-Line Observations

Looking Back to 2017

In October 2017, Evaluator Group published the results and analysis of a survey of potential and current enterprise hybrid cloud users.[2] We surveyed enterprise administrators who were focusing their IT management skills on hybrid cloud and multi cloud initiatives. In addition, Evaluator Group conducted in-depth interviews with these respondents.

At that time, 62% of our survey respondents had deployed hybrid clouds and indicated this architecture was their long-term future, while 30% said they were "just getting started." More than half (58%) of the respondents indicated they would increase their hybrid cloud workloads. In the 2021 survey, Evaluator Group found that 98% of respondents had deployed a hybrid cloud architecture, with the remaining 2% planning to deploy one, but still deciding on the architecture. No respondents indicated they had no plans to deploy a hybrid cloud environment.

With regard to issues experienced, Evaluator Group thought that public cloud security would top the list of hybrid cloud concerns and 48% of the medium to large enterprise respondents agreed. But a larger group (58%) regarded network security as an even greater concern. Meanwhile, nearly 60% of the enterprise IT respondents in 2017 indicated that a lack of interoperability was a significant technology-related issue that they must overcome.

The 2021 survey shows some shifting of challenges currently experienced by enterprise IT users. Today, public cloud security tops the list with 40% of respondents identifying this as one of their biggest challenges, while network security falls to second place at 35%. Lack of interoperability fell well down the list to the number eight spot at 14%. Evaluator Group suspects that the increase of external attacks, such as ransomware and phishing, during 2020 and continuing to today has much to do with the gravity of this concern among IT administrators. At the same time, two other challenges rose to prominence in this survey. Respondents indicated that the hybrid cloud is more complex than originally thought (31%) and the hybrid cloud is more expensive than originally thought (25%). Difficulty in assuring application performance was also cited by 21% of respondents.

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[2] [The Enterprise Hybrid Cloud—a Work in Progress | Evaluator Group](#)

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This survey, when taken in total, shows some pullback from the cloud euphoria of a few years ago when a majority of enterprise users were either all-in on moving to public clouds or were excercising a "cloud first" strategy. For example, one of the 2017 interview candidates reported that his insurance company had a goal of moving 100% of its IT operations to Microsoft Azure. Today, he reports that, after spending at least two years trying to get into the Azure cloud, "We brought it all back and started over. Business user groups wanted to bring things back on prem because of cost and performance issues." As a result, they diversified to include Amazon Web Services (AWS) and made a better determination as to what were best-fit worklods for public cloud hosting based on experience. "We saw that there were aplications that just weren't designed to work as cloud apps." At the top of this list were database workloads that experienced latency issues. Data egress charges were also driving them to return workloads to their data centers. New applications are now built in the cloud, while existing applications are getting a more thorough review.

Based on the survey results, Evaluator Group sees a simlar reevaluation process going on within this group of survey respondents, due to the following reasons:

Remaining study information available with purchase or subscription.

About John Webster

John Webster's focus at Evaluator Group include Hybrid Cloud, as-a-Service offerings and Big Data. This is John's third research report on Hybrid Cloud requirements covering public, on premises and cloud storage. He is responsible for coverage on offerings 'as-a-service' including Public Cloud, CaaS, STaaS and financial subscriptions. Early in his career he became interested in Big Data and co-authored a book entitled Inescapable Data: Harnessing the Power of Convergence, which is an early look at what is now known as IoT. You can find more publication by John at Evaluator Group and on Forbes as a popular contributor.

About Evaluator Group

Evaluator Group Inc., an Information management and data storage analyst firm, has been covering systems for over 20 years. Executives and IT Managers rely upon us to help make informed decisions to architect and purchase systems supporting their data management objectives. We surpass the current technology landscape by defining requirements and providing an in-depth knowledge of the products as well as the intricacies that dictate long-term successful strategies.