ESG RESEARCH SUMMARY

The Impact of Accelerating Storage and Data Protection Environments

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Overview

ESG recently surveyed 2,000 IT decision makers to understand whether, and to what degree, organizations' comprehensive technology transformations are delivering competitive advantages. The study focused on organizations' progress delivering modern digital end-user experiences, innovating with data, and delivering more flexible IT services. Organizations making the most progress across all three areas were categorized as Technology Accelerators, and ESG observed that they outperform their peers lagging in these transformations (Technology Reactors) in many areas.

Additionally, a subset of 659 IT respondents directly involved in managing their storage and data protection environments were asked several questions about those specific environments. This portion of the survey asked respondents to assess their organizations' storage and data protection capabilities and covered several related key performance indicators. The resulting data shows organizations with advanced storage and data protection technologies, referred to as Storage and Data Protection Accelerators, are:

- 3.3x more likely than their peers to have completely integrated their data, putting them in a better position to use data to create value for the organization.

- Reducing the number of person hours needed to manage and resolve tickets in their storage and data protection environments by nearly one-third relative to their peers, freeing up teams for other tasks.

- More aggressively adopting as-a-Service consumption models across their entire IT footprint: 21% more of their environment is delivered as-a-Service, allowing IT to deliver resources to end-users faster.

- Prioritizing solutions that are cloud compatible and delivering hybrid cloud consistency, as well as integrations with developer tools like Ansible, Puppet, and PowerShell, improving developer support.

- 2.9x more likely to describe their cost-to-store data as market-leading, reinforcing a positive view of IT by the business.

Measuring What it Means to be a Storage and Data Protection Accelerator

ESG's survey asked respondents to assess their storage and data protection capabilities in a few key areas, including the ability to collect, store, and protect data from all sources; the operational efficiency of storage management and data protection tools; and the capabilities of their management tools to proactively alert IT stakeholders of issues (e.g., resource constraints, unprotected data, etc.). Only organizations that rated all their storage and data protection capabilities as market-leading are categorized as Storage and Data Protection Accelerators in this summary. All other organizations are categorized as Storage and Data Protection Reactors.

Just eight percent of organizations surveyed operate a storage and data protection environment that accelerates their outcomes, highlighting the opportunity for many to significantly improve their operations. Examining data from Storage and Data Protection Accelerators, two correlations are clear:

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- Storage and data protection acceleration is correlated with overall technology acceleration: organizations accelerating their storage and data protection environments are more than twice as likely to be Technology Accelerators (26% versus 10%), while those not accelerating storage and data protection are more than twice as likely to be Technology Reactors (61% versus 26%).

- The data shows a strong correlation between increased automation and achieving improved IT outcomes.

Why Storage and Data Protection Acceleration Matter

Accelerators are seeing a substantial payoff from their efforts to optimize storage and protection operations. For starters, Accelerators have a more comprehensive view of all their data. We asked respondents to describe all the data their organizations possess and could potentially use to create value on a spectrum from completely integrated to completely siloed (see Figure 1). It's clear that Storage and Data Protection Accelerators have far superior data integration in their environments compared to Reactors. Organizations can't effectively monetize their data assets if they are siloed, inaccessible, or only viewable in isolation, so achieving this level of data integration is critical.

Figure 1. Data Integration Capabilities

Think about all the data your organization could potentially use to create value. How would you describe it today?

■ Storage and Data Protection Accelerators   ■ Storage and Data Protection Reactors

Leaders are 3.3x more likely to have a completely integrated view of their data assets

39% / 13% — Completely integrated
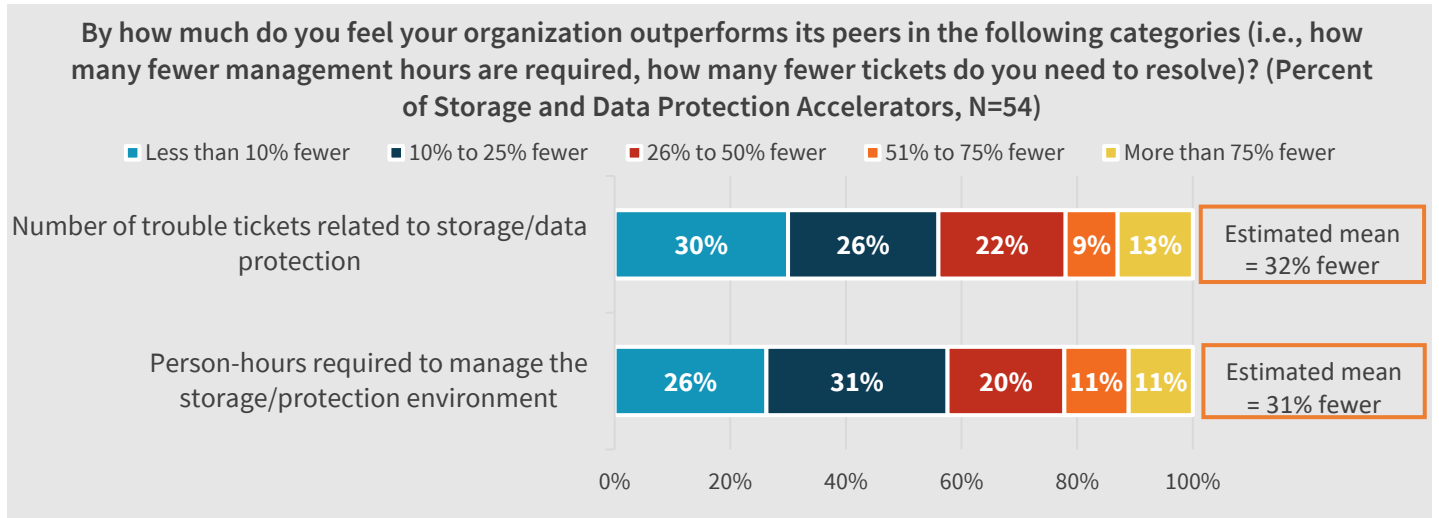
35% / 55% — Somewhat to highly siloed

Source: Enterprise Strategy Group

Storage and Data Protection Accelerators also achieve an extremely high level of operational efficiency compared to their peers.Figure 2 Accelerators report their organizations outperform others by a wide margin (see Figure 2), estimating they:

- Have to resolve **32% fewer trouble tickets** in their storage and data protection environment.

- Spend **31% fewer person hours** managing their storage and data protection infrastructure.

Accelerators are freeing up their teams from mundane management and break/fix issues, allowing them to spend their time on more value-add activities, like strategic planning, architecture, data integration, and collaborating with their line-of-business counterparts on initiatives to drive business value.

Figure 2. Data Storage and Protection Operational Efficiencies

By how much do you feel your organization outperforms its peers in the following categories (i.e., how many fewer management hours are required, how many fewer tickets do you need to resolve)? (Percent of Storage and Data Protection Accelerators, N=54)

Legend: ■ Less than 10% fewer ■ 10% to 25% fewer ■ 26% to 50% fewer ■ 51% to 75% fewer ■ More than 75% fewer

Category	Less than 10% fewer	10% to 25% fewer	26% to 50% fewer	51% to 75% fewer	More than 75% fewer	
Number of trouble tickets related to storage/data protection	30%	26%	22%	9%	13%	Estimated mean = 32% fewer
Person-hours required to manage the storage/protection environment	26%	31%	20%	11%	11%	Estimated mean = 31% fewer

0% 20% 40% 60% 80% 100%

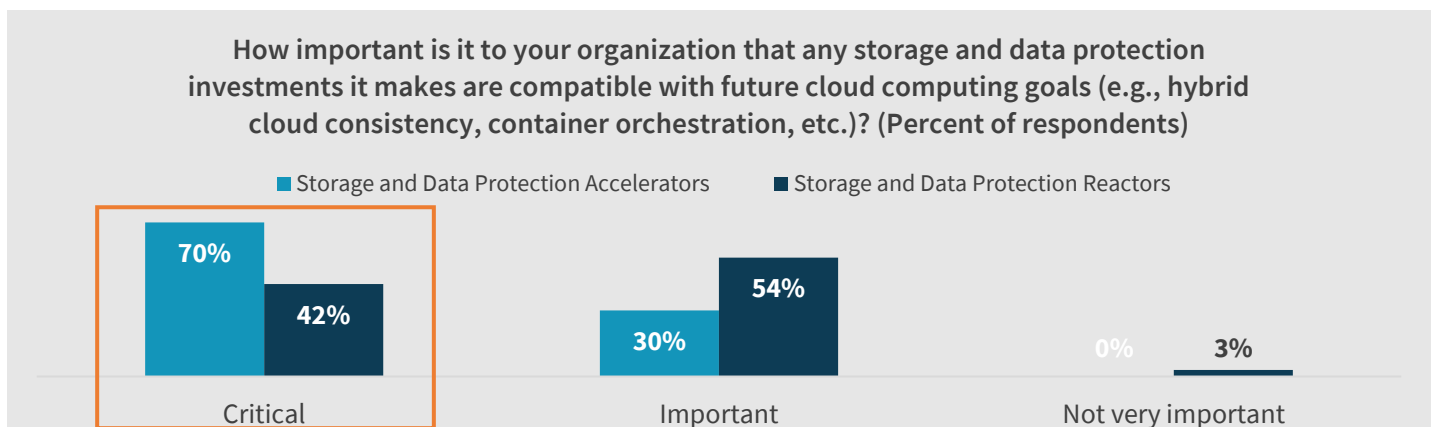*Source: Enterprise Strategy Group*

Learning from Accelerators

In addition to quantifying key benefits of storage and data protection acceleration, the research gives us insight into what Accelerators prioritize in their environments that other organizations either do not or do not to the same degree.

Cloud Compatibility

The survey asked respondents how much importance their organizations place on investing in storage and data protection solutions that are compatible with future cloud computing goals. These include solutions like multi-cloud compatibility to ensure the organization has the flexibility to choose the optimal cloud environment for their workloads, the ability to run data-intensive applications in the public cloud without racking up exorbitant data egress costs, and the ability to leverage common storage and data protection management tools regardless of where the infrastructure resides (private cloud, edge, or public cloud). While cloud compatibility matters to most organizations, the data shows that Accelerators focus much more on this than their counterparts (see Figure 3). While 70% of Accelerators say the cloud compatibility of storage and data protection investments is critical to their organizations, just 42% of Reactors report the same.

Figure 3. The Priority Placed on the Cloud Compatibility of Storage and Data Protection Investments

How important is it to your organization that any storage and data protection investments it makes are compatible with future cloud computing goals (e.g., hybrid cloud consistency, container orchestration, etc.)? (Percent of respondents)

Legend: ■ Storage and Data Protection Accelerators ■ Storage and Data Protection Reactors

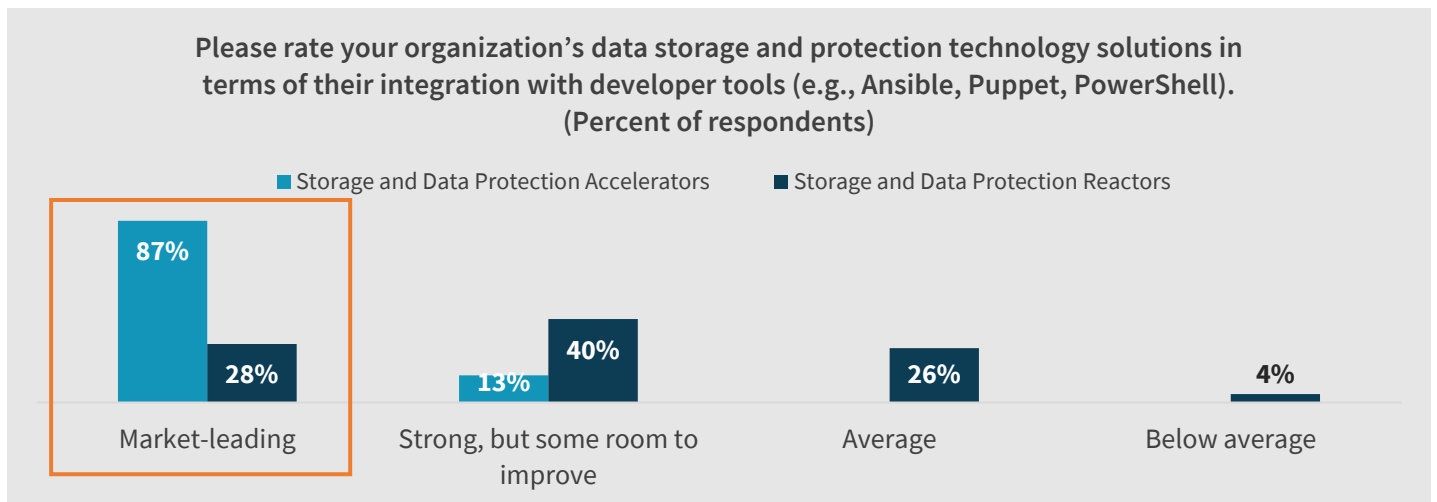|	Critical	Important	Not very important
Storage and Data Protection Accelerators	70%	30%	0%
Storage and Data Protection Reactors	42%	54%	3%

Source: Enterprise Strategy Group

Accelerators are putting cloud compatibility into action, which is evident by the fact that many more of their environments, 58% on average, are delivered as-a-Service today. By contrast, Reactors report that 46% of their IT environments are delivered as-a-Service today. ESG believes that by prioritizing cloud-compatible storage and data protection technologies, Accelerators are advancing their cloud transformations.

DevOps enablement

So much of organizations' differentiation today is driven by digital experiences, which in turn are powered by developers. As such, IT teams should be motivated to transform IT service delivery to empower developer speed and efficacy. This type of service delivery can be achieved through integration with infrastructure orchestration tools and automation frameworks that enable ITOps and developer teams to implement infrastructure as code (IAC). Accelerators recognize this opportunity: 87% of them say their storage and protection environments have excellent integrations with developer tools like Ansible, Puppet, and PowerShell. Just 28% of Reactors report this level of strength in integrations (see Figure 4).

Figure 4. Integration of Storage and Protection Infrastructure with DevOps Tools

Please rate your organization's data storage and protection technology solutions in terms of their integration with developer tools (e.g., Ansible, Puppet, PowerShell). (Percent of respondents)

- Storage and Data Protection Accelerators
- Storage and Data Protection Reactors

	Market-leading	Strong, but some room to improve	Average	Below average
Accelerators	87%	13%		
Reactors	28%	40%	26%	4%

Source: Enterprise Strategy Group

The Bigger Truth

An accelerated storage and data protection environment is characterized by the ability to:

- Store all data no matter where or how it is produced.

- Manage the storage and protection environment efficiently and proactively.

- Back up and recover data no matter where it is stored.

While Accelerators are rare (just 8% of the market), the performance they deliver makes it clear that the other 92% of the market should prioritize investments to achieve Accelerator status.

If fact, these organizations not only deliver top-tier performance in terms of data integration, more efficient operations, and cloud transformation, but they are also nearly 3x more likely to deliver that value with excellent cost to store (76% versus 26% among non-Accelerators). It is not surprising to note that IT teams at Accelerators are nearly 2x as likely to be viewed as a competitive differentiator for the organization than their Reactor counterparts (52% versus 27%).

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How Dell Technologies, Intel, and VMware Can Help

Dell Technologies' storage portfolio includes comprehensive IT infrastructure offerings for organizations looking for proven, mature, and high-performance solutions; a strong reputation for good customer experience; responsive and high-quality tech support; deep cross-product integration; and the availability of multiple consumption models' value. From the data center to cloud and core, Dell Technologies can help redefine storage economics with scalable products that allow organizations to expand storage on demand, adapt to business needs, and intelligently manage your data.

The VMware Tanzu portfolio enables teams to embrace key DevOps automation of workloads and data services running on Kubernetes. VMware Tanzu unites application developers and operations teams around the shared goals of fast release cycles and superior application and data availability so customers can ship great data-rich and contextual software faster. DevOps teams can build and operate a platform (container or application platform), ensuring a self-service developer experience; automated path to production; and built-in security, stability, and scalability.

Complimenting both the storage and VMware Tanzu portfolios is the Dell Technologies' data protection appliances and software offerings. As innovative offerings, the data protection portfolio simplifies cloud data protection through automation with proven and agile backup solutions across private, hybrid, and multi-cloud environments. Additionally, the portfolio accelerates transformations with tight, industry-led integration with VMware Tanzu for backup and management of modern data applications (i.e., Kubernetes). Assuring that storage and VMware portfolios are protected, customers can rely on securing their business with cyber confidence as well via Cyber Recovery, which ensures ransomware recovery from destructive attacks.

Dell Technologies and Intel are driving innovation and next-generation capabilities with the broadest portfolio of trusted client and enterprise solutions for cloud and data management, enabling organizations to move faster, innovate more, and operate efficiently.

Enterprise Strategy Group is an IT analyst, research, validation, and strategy firm that provides market intelligence and actionable insight to the global IT community.

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