2012 IT Decision-Maker Trends

Prepared by Technology Business Research, Inc. for:

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TECHNOLOGY BUSINESS RESEARCH, INC.

Technologies that deliver results fast hit the bullseye for IT

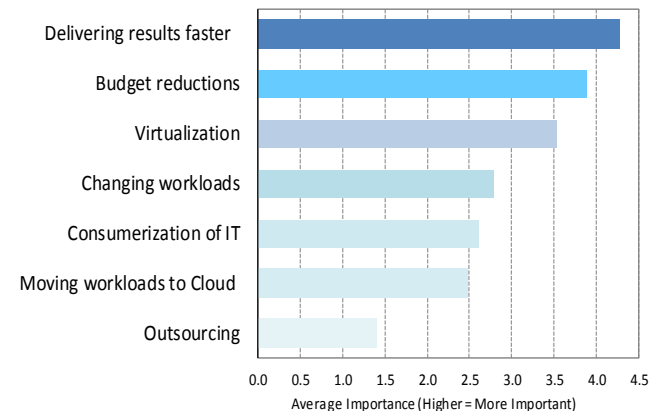**A TBR study of IT managers found:**

- **IT managers have an eye on their businesses:** "Delivering results faster" ranked highest in importance when asked what they hoped to achieve with their IT infrastructures.

- **IT managers emphasize speed to a result** when prioritize projects and measuring success:

  - "Speed to deliver business results" ranked first 46% of the time as a priority.

  - When IT decision makers were then asked how they preferred to measure success, 48% chose "Speed to deliver business results."

- When asked what they hoped to achieve with their IT infrastructure, "Delivering results faster" had the highest average score.

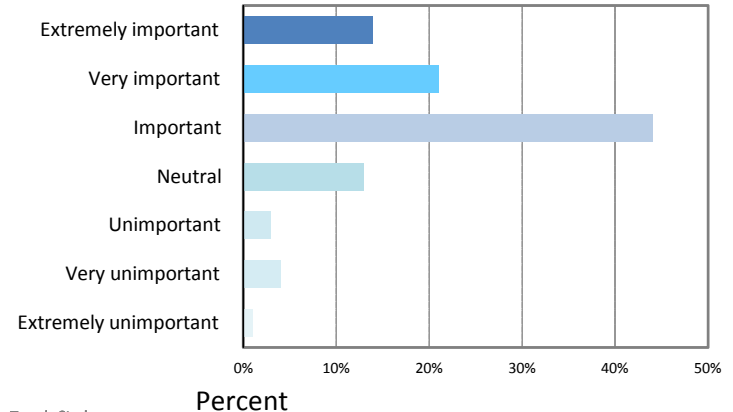## Average Organizational Importance of IT Trends

Average Importance (Higher = More Important)

Source: TBR 2012 IT Decision-Maker Trends Study

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IT organizations want a single partner that understands end-user computing *and* the datacenter

- **IT managers want partners that have wide range:** 79% of IT decision makers considered it "important," "very important," or "extremely important" that vendors understand both end-user computing and the datacenter.

- **IT managers want x86-based technologies:** 28% of respondents had 75% or more of their mission-critical workloads on an x86 system, and very few respondents had less than 25% of their mission-critical workloads on x86 systems; 56% reported they were supplanting mainframe architectures with x86.

- **IT managers are at the heart of their businesses:** 87% were working with their CEOs to discuss the potential IT can bring to the business.
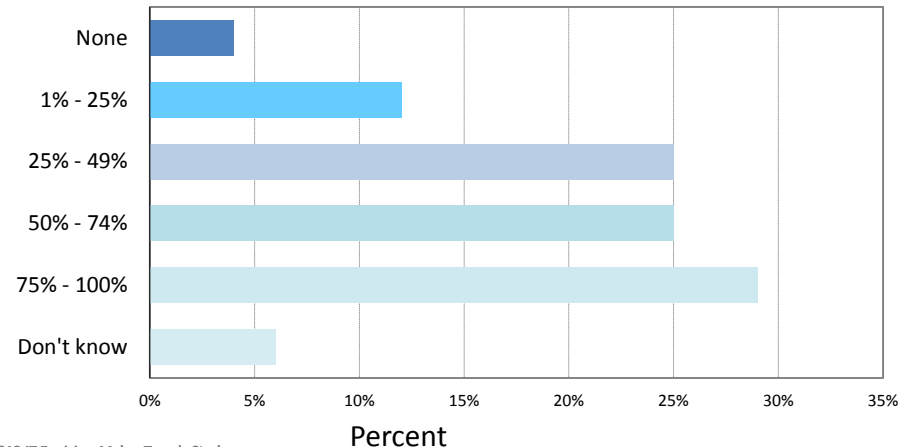
Importance of Understanding End-User Computing AND the Datacenter

Source: TBR 2012 IT Decision-Maker Trends Study
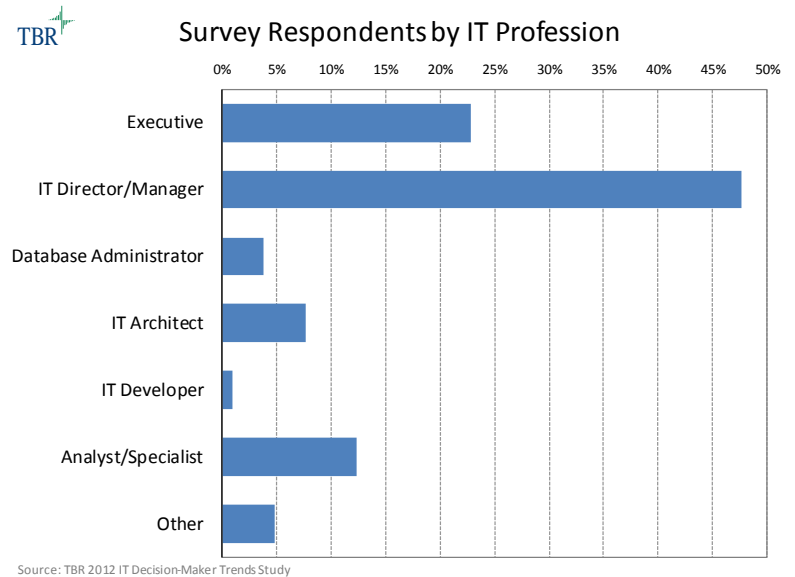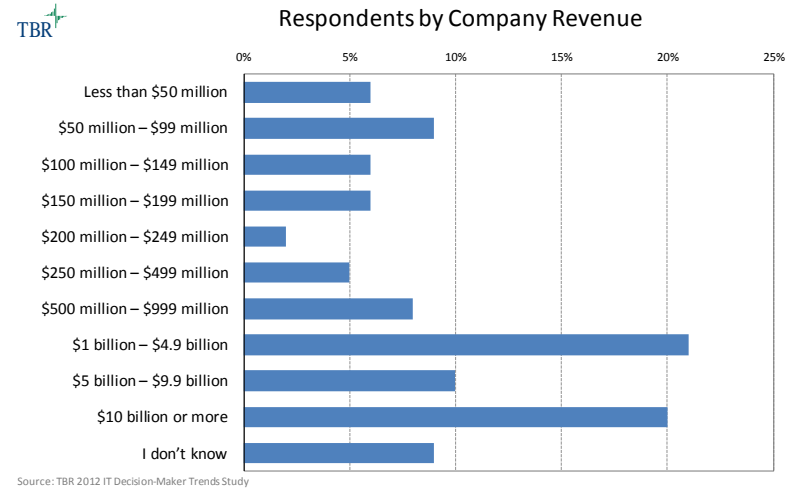
Mission Critical Workloads on x86

Source: TBR 2012 IT Decision-Maker Trends Study

TBR surveyed a range of IT decision makers to gather a cross section of buyers

Survey Breakdown

- TBR surveyed **105 IT professionals** from mid-large companies in North America that have influenced an IT purchase decision at their organization in the last 12 months. The majority of these respondents held executive titles, such as chief technology officer, or were currently in a management role.

- The survey targeted a broad range of different-sized organizations across various vertical industries, which helped establish a more realistic view of the overall IT landscape.

Respondents by Company Revenue

Source: TBR 2012 IT Decision-Maker Trends Study

Survey Respondents by IT Profession

Source: TBR 2012 IT Decision-Maker Trends Study

Survey Findings

The speed at which business results are delivered is the ruler used by IT organizations to measure the success of technology today

Question: How do you measure the success of technology within your organization <u>today</u>?
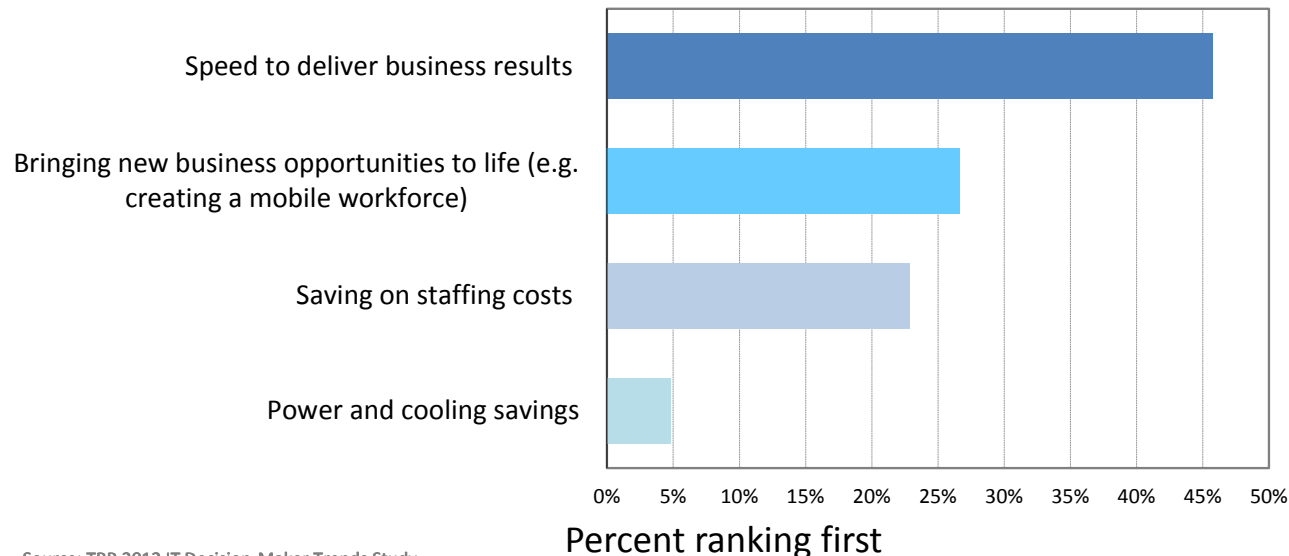
The ability to deliver business results quickly was:

• The overwhelming overall top choice for measuring success

• Most consistently ranked as the most important gauge of success

Top instruments used to measure the success of technology

TBR

Measuring Success

Percent ranking first

Source: TBR 2012 IT Decision-Maker Trends Study

Delivering business results quickly is the preferred benchmark for future technology initiatives and deployments
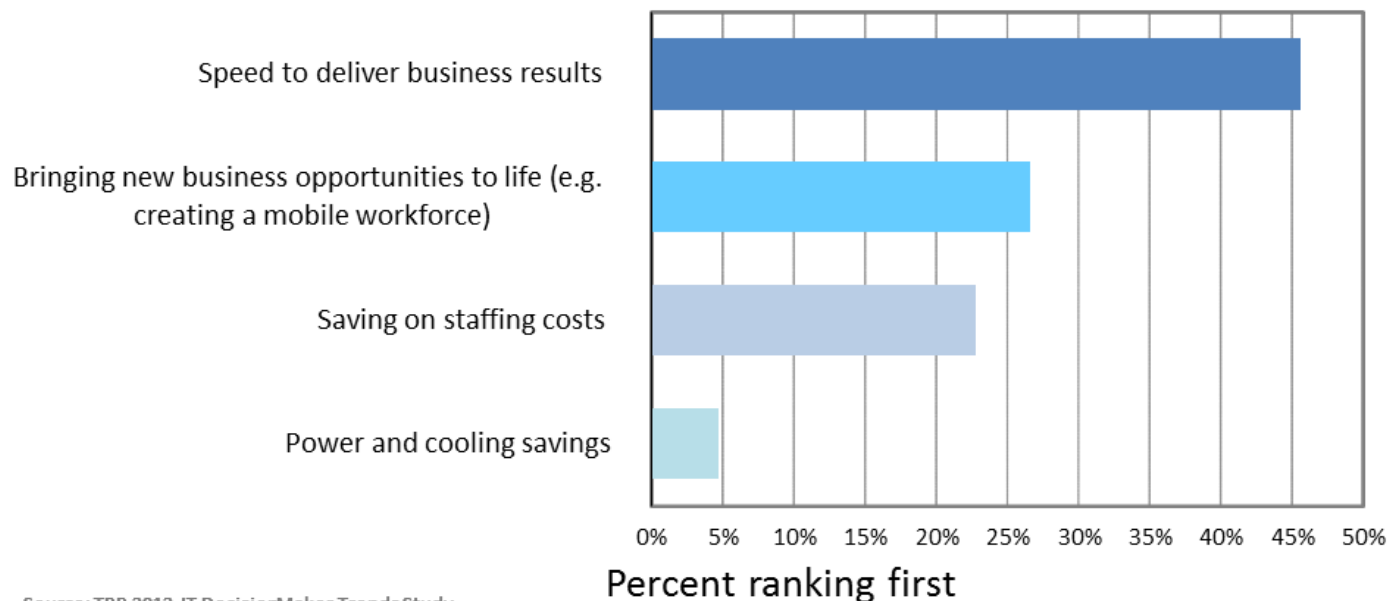
Question: How would you prefer to measure the success of technology?

The ability to deliver business results quickly remained the top choice when respondents were asked how they would prefer to measure success of technology.

Top metrics preferred to measure the success of technology

Preferred Success Measurement

Source: TBR 2012 IT DecisionMaker Trends Study

IT's effect on business is routinely discussed with C-level executives and management
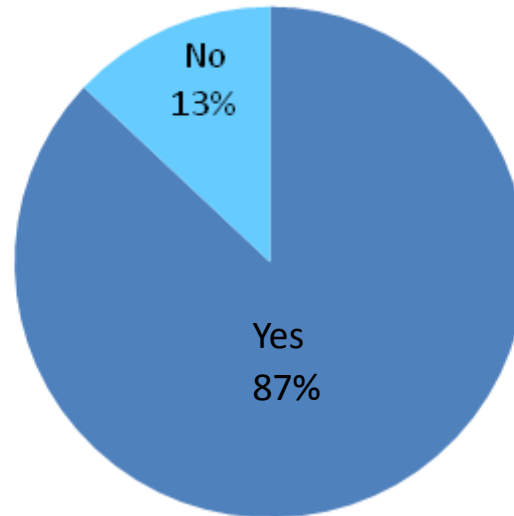
Question: Are you discussing the potential IT can bring to the business with your CEO?

The vast majority of IT organizations – 87% – stated they are discussing how their businesses will be affected by technology.

Measure of IT interaction with Chief Executive Officers

Discussing IT Benefits with CEO?

No
13%

Yes
87%

Source: TBR 2012 IT Decision-Maker Trends Study

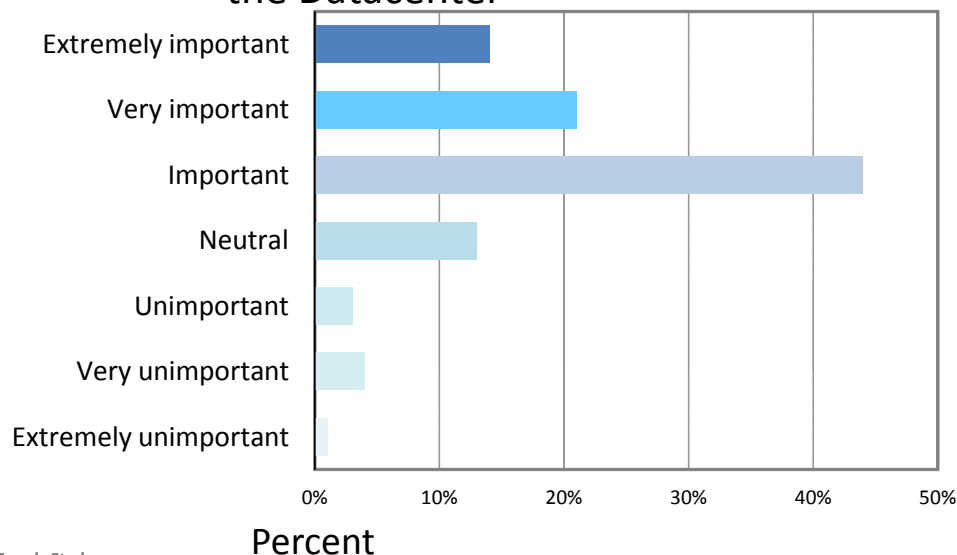# IT organizations want a single partner with expertise in datacenter technology and end-user computing

Question: How important is it to have a vendor that understands end-user computing *and* the datacenter?

IT organizations place great emphasis on demonstrable knowledge in end-user computing and the datacenter; 79% of respondents placed increasing degrees of importance on vendors that understand both.

Ranking of Importance of Vendor Knowledge

TBR

Importance of Understanding End-User Computing <u>AND</u> the Datacenter

Percent

Source: TBR 2012 IT Decision -Maker Trends Study

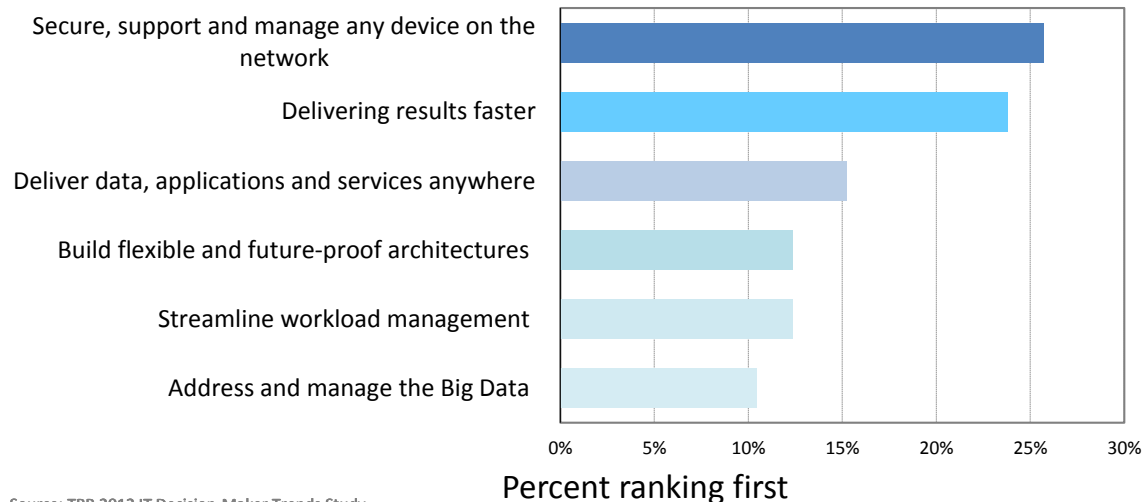# Rapid results is a top priority, but IT decision makers are burdened by the breadth of their network

Question: What do you most hope to achieve with your IT infrastructure?

- Securing, supporting, and managing any device on the network slightly outranked rapid results as the top choice, followed closely by delivering rapid results, which had the highest average score.

- Delivering "anywhere" ranked third, demonstrating the IT decision-makers conflicting needs to control a growing network while responding rapidly.

Top Desires for What IT Infrastructure Achieves

Goals for IT Infrastructure

Goal	Percent ranking first
Secure, support and manage any device on the network	~26%
Delivering results faster	~24%
Deliver data, applications and services anywhere	~15%
Build flexible and future-proof architectures	~12%
Streamline workload management	~12%
Address and manage the Big Data	~10%

Percent ranking first

Source: TBR 2012 IT Decision-Maker Trends Study

Landline telecommunications and mainframes are the most likely candidates for technology migration
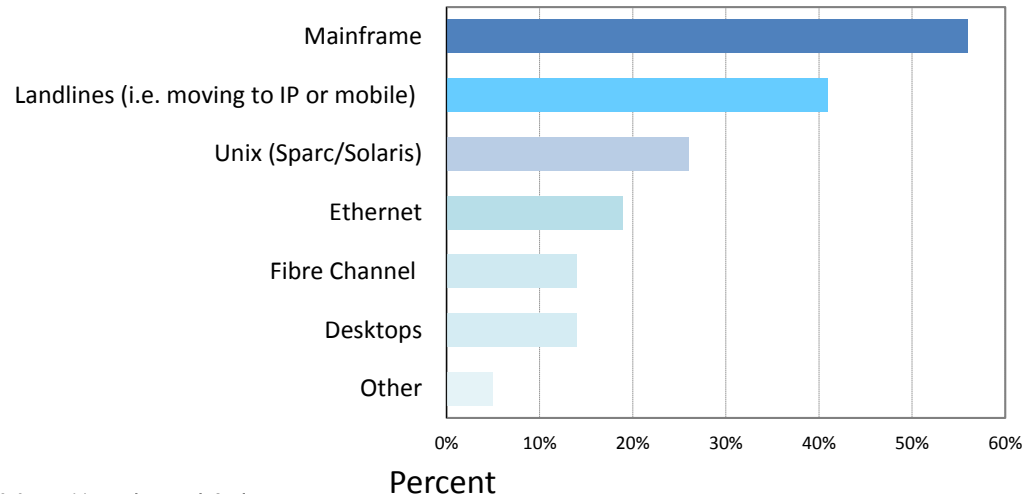
Question: Specifically, which of these technologies are you moving away from?

Legacy technologies, such as mainframes (at 56%) and landline telecommunications (at 41%), lead the list of technologies targeted for transition.

Technologies Most Likely to be Targeted for Migration

Mature Technologies Supplanted

Source: TBR 2012 IT Decision-Maker Trends Study

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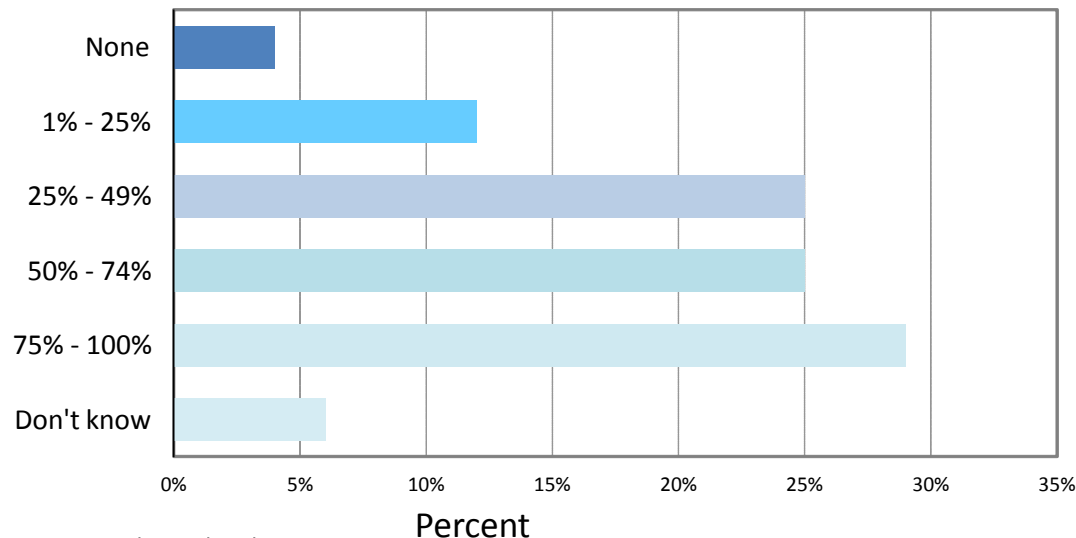# x86-based servers shoulder today's business-critical workloads

Question: What percentage of your mission-critical workloads are running on x86 server?

- 30% of respondents stated at least 75% of their mission-critical workloads are deployed on x86 servers.

- Overall, 65% said at least 50% of their mission-critical workloads use x86 servers.

Percentage of Mission-Critical Workloads Running on x86 Servers

Mission-critical Workloads on x86

Source: TBR 2012 IT Decision -Maker Trends Study

Clients weigh vendors' effectiveness and partnership capabilities the most when making technology decisions
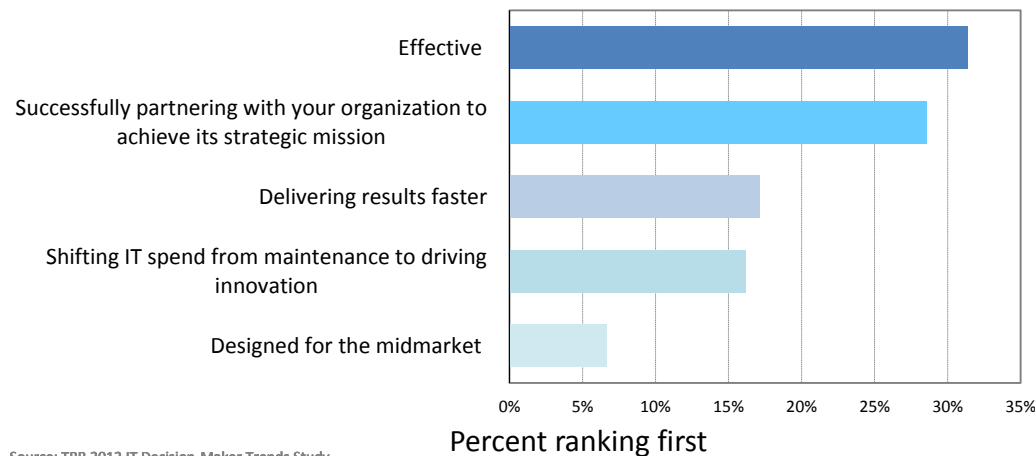
Question: Which of the following is <u>most</u> important to you when evaluating technology decisions?

- 31% of respondents placed the effectiveness of a technology as the most important criteria in their decision-making process.

- Additionally, effectiveness was most consistently ranked, on average, as the primary factor in technology decisions.

- At 29%, a vendor's ability to successfully partner with their client's IT organization ranked a close second in our study.

Top criteria utilized for evaluating technology decisions
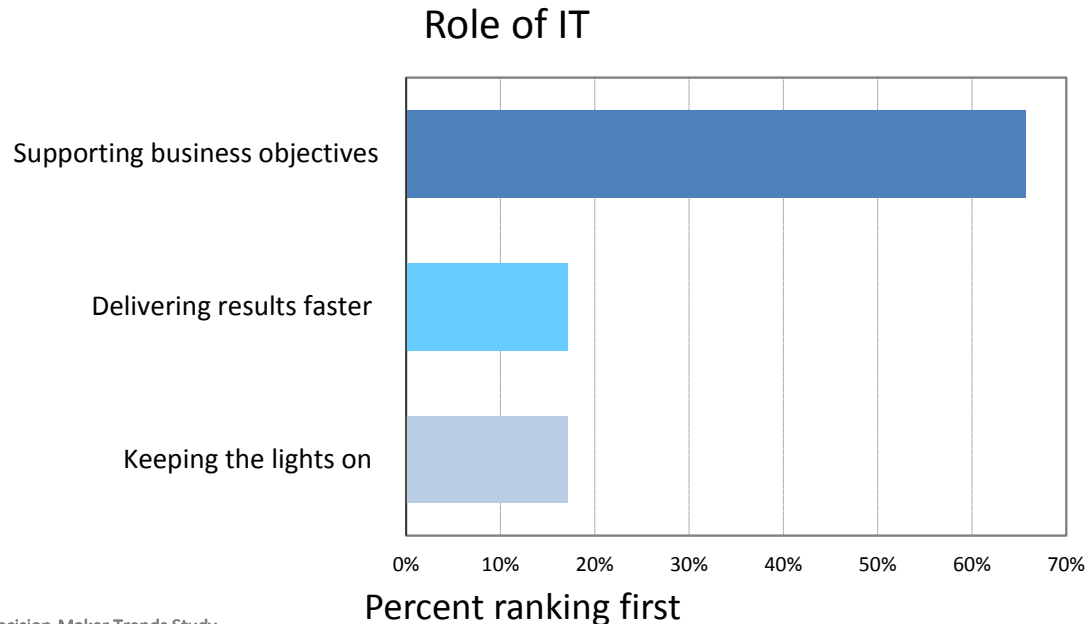
Evaluating Technology Decisions

Percent ranking first

Source: TBR 2012 IT Decision-Maker Trends Study

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IT organizations are perceived to play a fundamental role in supporting business objectives

Question: What is the role of IT within your organization?

66% of respondents felt their organization was best described as playing a role in supporting business objectives.

Top definitions of the role IT plays within today's enterprises

Role of IT

Supporting business objectives

Delivering results faster

Keeping the lights on

0%   10%   20%   30%   40%   50%   60%   70%

Percent ranking first

Source: TBR 2012 IT Decision-Maker Trends Study

IT customers prefer vendors that establish an open, capable relationship and offer affordable solutions
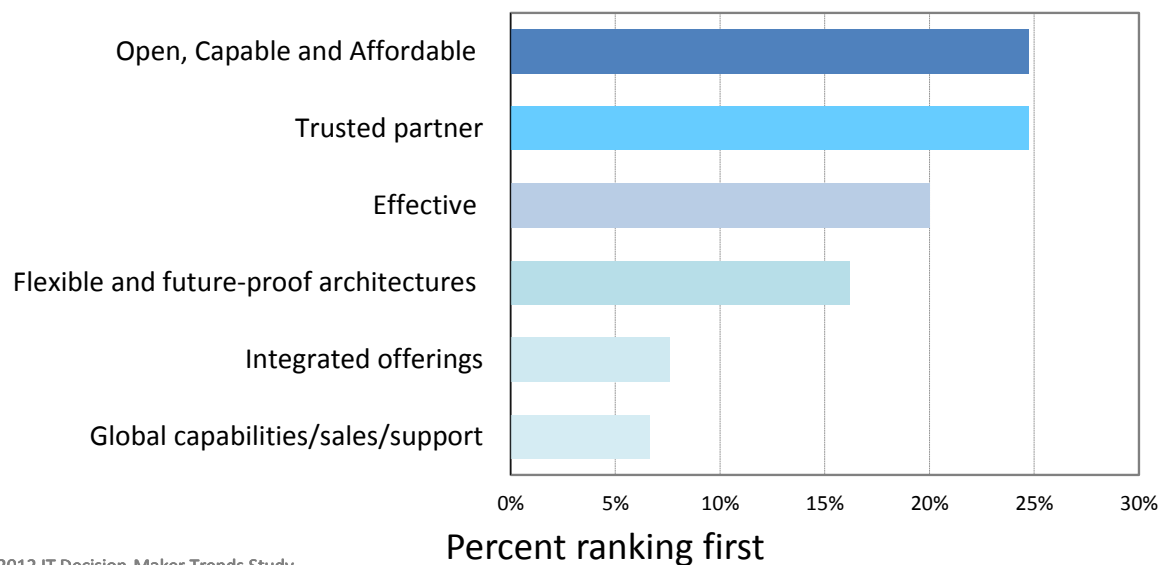
Question: Which of the following qualities matter most to you when purchasing products/solutions/services from IT vendors?

- The abilities of a vendor to be viewed as a strategic partner and be "open, capable, and affordable" were most highly ranked. Both were ranked first by 25% of respondents.

- "Open, capable, and affordable" achieved a better average score, however.

Top Qualities of IT Vendors When Purchasing

Vendor Qualities

Source: TBR 2012 IT Decision-Maker Trends Study

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Change is occurring in the datacenter as IT organizations are increasingly implementing newer technology

Question: How much of your datacenter infrastructure are you shifting from mature technologies to future technologies (e.g., iSCSI to Fibre, mainframe to x86, 802.11 to Ethernet)?
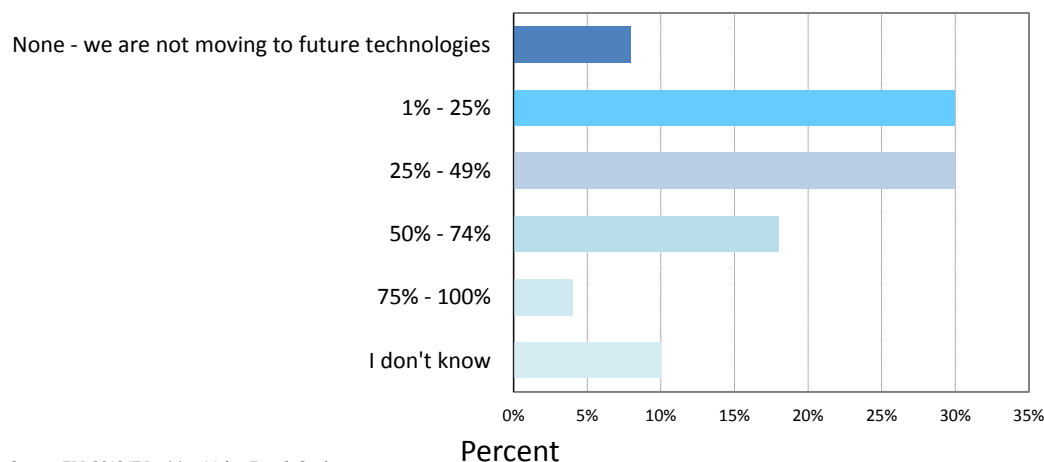
60% of those surveyed indicated the infrastructures they operate, manage, and support are in some state of change:

- Half of those respondents said they expect to migrate between 25% and 50% of their datacenter to new technologies.
- Half of those respondents stated between 1% and 25% of their datacenter technologies will shift to newer technologies.

Percentage of Datacenter Infrastructure Migrating to Newer Technologies

IT Infrastructure Shifting to Future Technologies

Source: TBR 2012 IT Decision-Maker Trends Study

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