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State Of Public Cloud Migration, 2022

How To Get Things Right Throughout The Cloud Migration Journey

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FORRESTER OPPORTUNITY SNAPSHOT: A CUSTOM STUDY COMMISSIONED BY GOOGLE | FEBRUARY 2022

As Maturity Increases, Post-Migration Optimization Leads To Increased IT And Business Benefits

In 2020, Forrester Consulting produced the following Opportunity Snapshot, “[State Of Public Cloud Migration, 2020](#).”¹ We found then that technology leaders had previously shifted many of their apps and workloads to the public cloud. Additionally, 63% at that time were planning to further expand their number of apps and workloads over the next 12 months. With all that happened in 2021, it is important to understand how the state of public cloud migration has been impacted.

With evolving remote work and digital transformation requirements, it was unsurprising that most survey respondents agree COVID-19 further amplified the value and accelerated their implementation of cloud migration. Business leaders who previously began their migration are now reaping those benefits, while challenges of mid- and late-phase migration maturity have become their new focus.

Key Findings



Firms’ cloud migration journeys are maturing. External support has expanded to include both pre- and post-migration support. With this growth in maturity, post-migration challenges are emerging.



Cloud migration streamlines operations. Seventy-eight percent experience consistent or improved application/workload performance due to a recent cloud migration. Additional IT and business benefits are experienced.



Cloud vendors are considered key partners in migration success. The top attributes sought by decision-makers are ease-of-use, technical capabilities, security and compliance, and service/support.

As Cloud Migration Journeys Mature, So Does External Support

In 2021, firms continued their cloud migration journeys for virtually all applications, especially software development suites, databases, internal tools, emerging tech, and customer experience (CX) platforms. To facilitate these migrations, companies relied on the third-party migration of professional services and third-party tools — as they did in 2020.

It's worth noting that leveraged support has expanded to accompany mid- and late-stage migration journeys. Organizations have increased reliance on outside consultants and other service providers from early-stage cloud migration tasks to ongoing management post-implementation.



78% agree that changes in customer expectations due to COVID-19 required their organizations to accelerate their migration.

“In your most recent/for your planned cloud migration, for which stages did you leverage outside consultants or other service providers?”



44%	Increase education of costs, risks, and benefits associated with cloud usage	#1 in 2020
42%	Work more closely with the cloud provider as a strategic/business partner	
41%	Identify best-fit workloads to run on public cloud infrastructure	#3 in 2020
41%	Spend more time on change management to maximize the benefits we can get from cloud	
40%	Work more closely with the cloud provider as a migration partner	
39%	Invest in tools to increase performance visibility	#2 in 2020

With Accelerated Cloud Migrations, Post-Implementation Challenges Emerge

In 2020, organizations faced early-phase migration challenges of strategy, skills, and security. Now, as migrations have increased and accelerated, mid- and late-phase migration challenges are more prominently being experienced. Specifically, 41% face challenges when optimizing apps in the cloud post-migration, and 38% struggle with performance issues on workloads migrated to the cloud.

IT decision-makers (ITDMs) are increasing their consideration of mid- to late-phase cloud migration activities to support long-term success. These include education and strategic support opportunities, i.e., working more closely with cloud providers as a strategic business and migration partner.

“Thinking of your most recent/planned migration to cloud, which of the following issues were the most challenging?”

41%	Optimizing apps in cloud post-migration	
38%	Performance issues with workloads migrated to cloud	
37%	Costs associated with migration (including advisory or support services)	
35%	Speed at which we were able to complete our migration(s)*	
34%	Training existing staff on cloud services	#2 in 2020
33%	Identifying best-fit workloads to run on public cloud infrastructure	#1 in 2020
33%	Regulatory/governance/compliance concerns	#3 in 2020
33%	Supportability issues with workloads migrated to the cloud	

Cloud Migration Brings Big IT And Business Benefits

As organizations work to address their cloud migration challenges, they continue to support streamlined operations now as they did in 2020. Eighty percent experience increased speed of application development and delivery due to a recent cloud migration, and 78% experience consistent or improved application/workload performance due to a recent cloud migration.

The top IT outcomes that were experienced in 2021 include easier IT operations and management, improved application performance, and improved security or compliance. In tandem, while business benefits in 2020 were more tactical, 2021 saw amplified strategic benefits, including improved employee experience (EX) and better innovation.

“Which of the following are the most important IT outcomes your organization expects/has experienced as a result of migrating to cloud?”

60%

Easier IT operations and management

50%

Improved application performance

49%

Improved security or compliance

“Which of the following are the most important business outcomes your organization expects/has experienced as a result of migrating to cloud?”

53%

Better end-user experiences from apps running in cloud*

52%

Better positioned to focus on innovation (versus day-to-day infrastructure management)

50%

More reliable platform for workloads

Advanced Features And Usability Are Most Valued

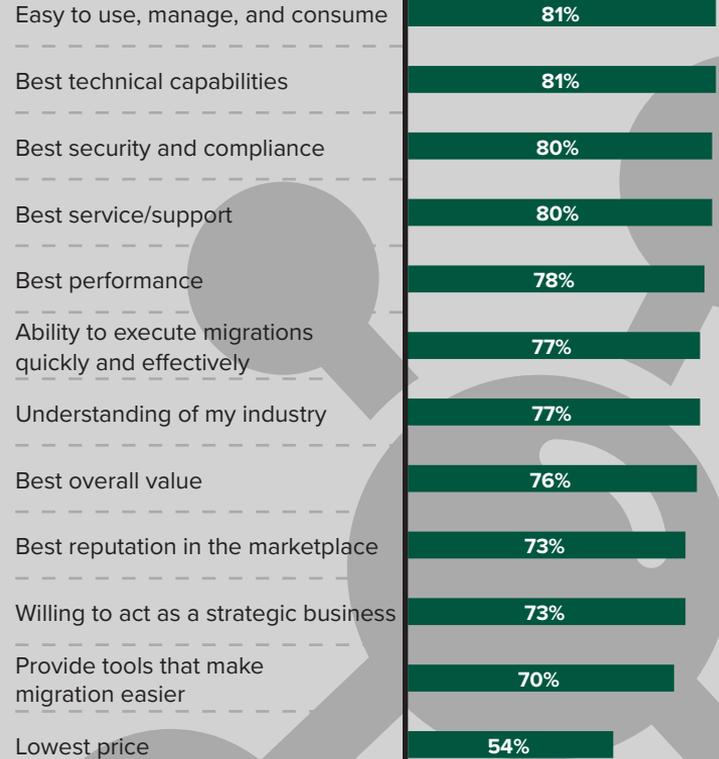
When evaluating cloud vendors, decision-makers prioritize solutions which further amplify usability, technical capabilities, and security and compliance. They want to know: which solution is easiest to use, manage, and consume; the technical capabilities it has; and how it compares to others for security and compliance, service and support, and performance.

Surprisingly, decision-makers note that their least concern is the overall price. Only 54% rated price as an important attribute when selecting a cloud vendor, well below all other attributes.

82% agree the cloud migration provider they selected was a key partner in their migration success.



“When considering cloud vendors, how important are the following attributes in making a decision?” (Showing critical/very important responses)



Conclusion

With the acceleration of cloud migration planning and execution due to COVID-19, many organizations have moved past the early stage of cloud migration to begin unlocking the IT and business benefits which accompany post-migration cloud adoption and optimization. To amplify the benefits, decision-makers:

- Plan to shift actions in their next cloud migrations to improve success. Top-ranked actions include increasing education on costs, risks, and benefits associated with cloud usage and working more closely with the cloud provider as a strategic partner.
- Seek advanced features and usability when evaluating cloud vendors, above the lowest price. The following attributes were rated as being the most important when considering cloud vendors: 1) easy to use, manage, and consume; 2) best technical capabilities; and 3) best security and compliance.

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Methodology

This Opportunity Snapshot was commissioned by Google. To create this profile, Forrester Consulting supplemented this research with custom survey questions asked of 359 global infrastructure and operations decision-makers who are responsible for migrating infrastructure to cloud platforms. The custom survey began and was completed in November 2021.

ENDNOTES

¹ Source: "State Of Public Cloud Migration, 2020," a commissioned study conducted by Forrester Consulting on behalf of Google, May 2020.

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Demographics

COUNTRY	
United States	32%
Canada	24%
United Kingdom	15%
France	15%
Germany	14%

RESPONDENT LEVEL	
C-level	10%
Vice president	20%
Director	43%
Manager	26%

TOP-FIVE INDUSTRIES	
Healthcare	15%
Manufacturing and materials	14%
Financial services/ insurance	14%
Media/gaming	14%
Retail	14%

COMPANY SIZE	
500 to 999 employees	6%
1,000 to 4,999 employees	70%
5,000 to 19,999 employees	17%
20,000 or more employees	8%



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