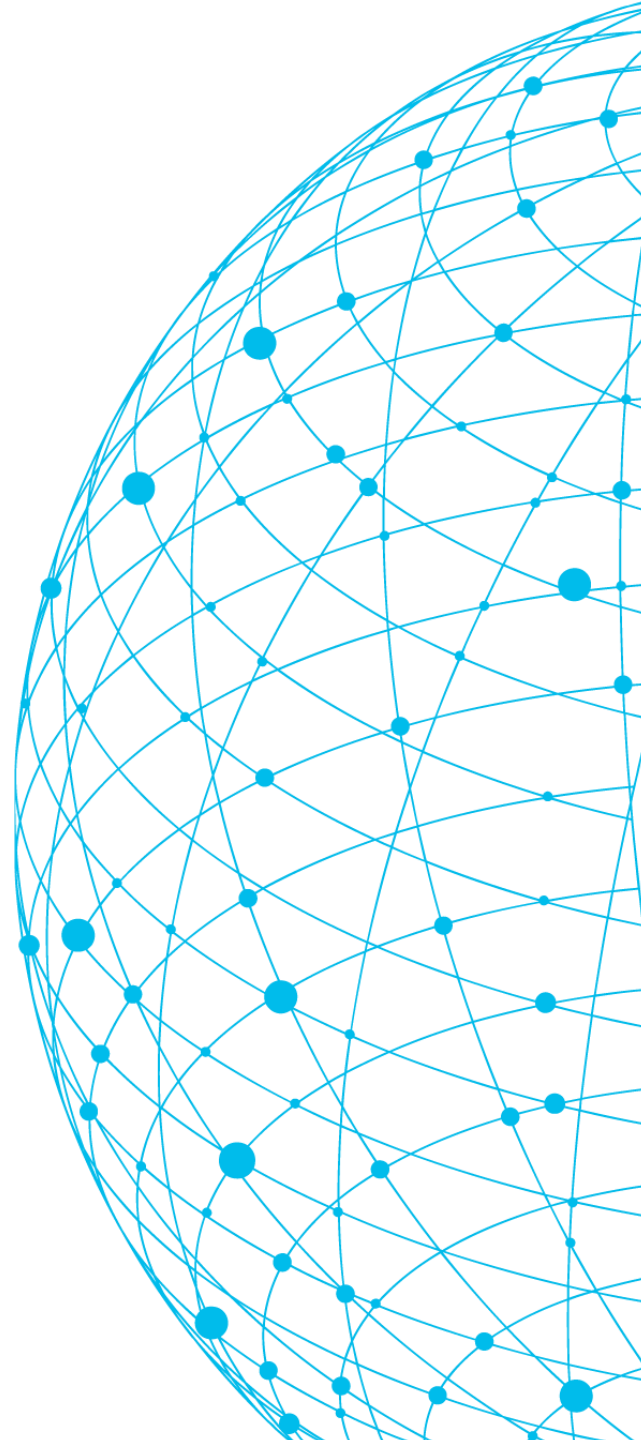




2023 Global Networking Trends Survey Results



About this document

Companion document to the 2023 Global Networking Trends Report, published by Cisco

- The survey data included in this document was commissioned by Cisco and collected by 451 Research, part of S&P Global Market Intelligence, to provide insights into how multicloud environments are influencing network technology and operations priorities, preferences, and choices.
- More than 2,500 global IT decision-makers and professionals in cloud computing, DevOps, and enterprise networking roles participated in the survey. The results provide the foundation for the 2023 Global Networking Trends Report, compiled in February 2023, which also includes executive perspectives and insights to provide guidance to help IT organizations evolve their networking models in support of dynamic business needs.
- Any use of the data in this document or in the report itself for any purpose should reference the source as “The Cisco 2023 Global Networking Trends Report”.

[Read the full report](#)

Cisco 2023 Global Networking Trends Survey

Research methodology and objectives

Objectives

- Share emerging networking trends in multicloud world
- Identify primary challenges and opportunities for securing multicloud access
- Offer guidance

Respondents
Surveyed: 2577

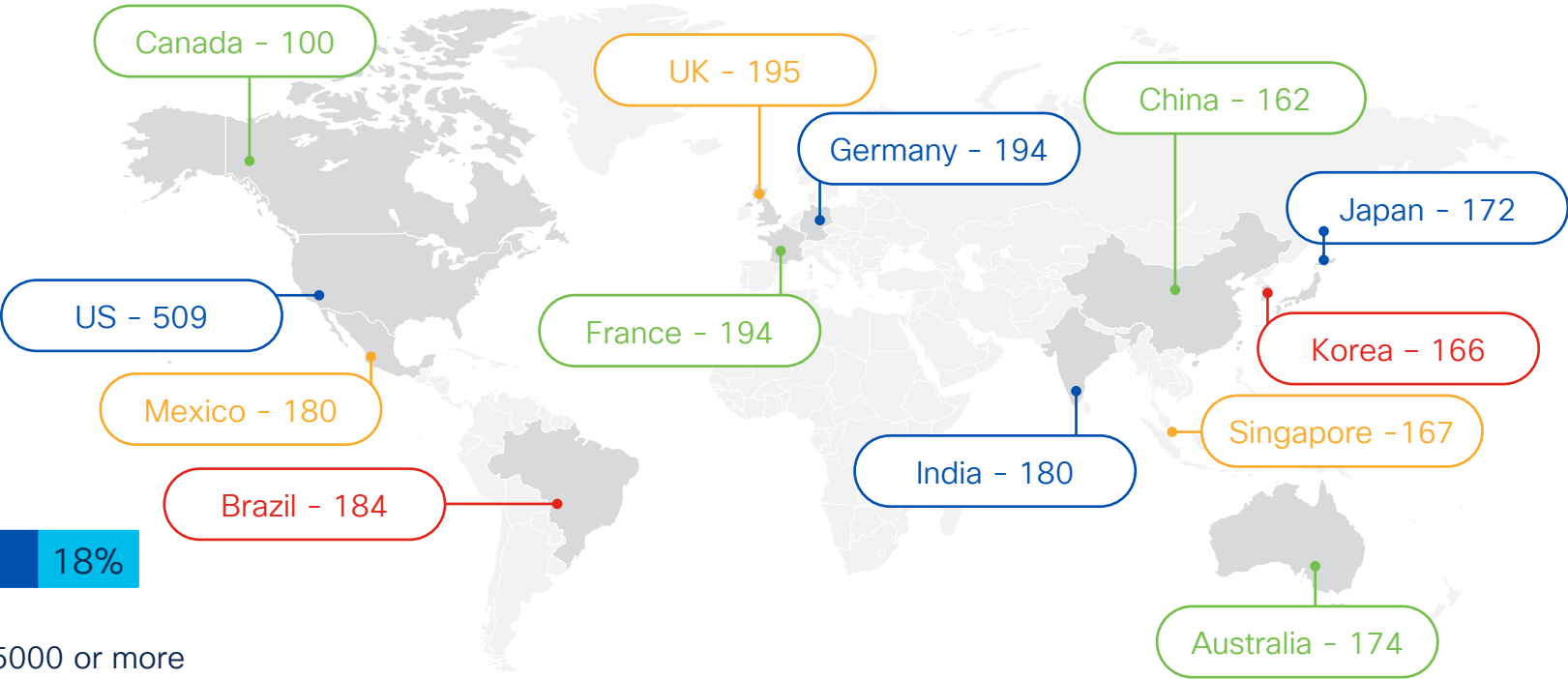
Demographics

NetOps—1291

CloudOps—639

DevOps—647

13 Countries

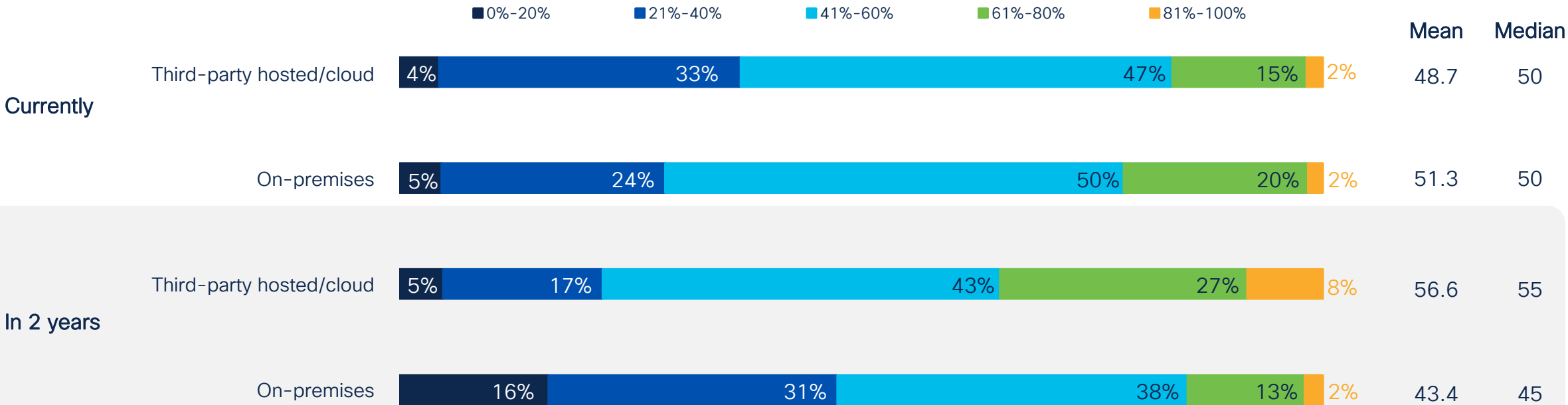


Number of Employees



Workload deployment

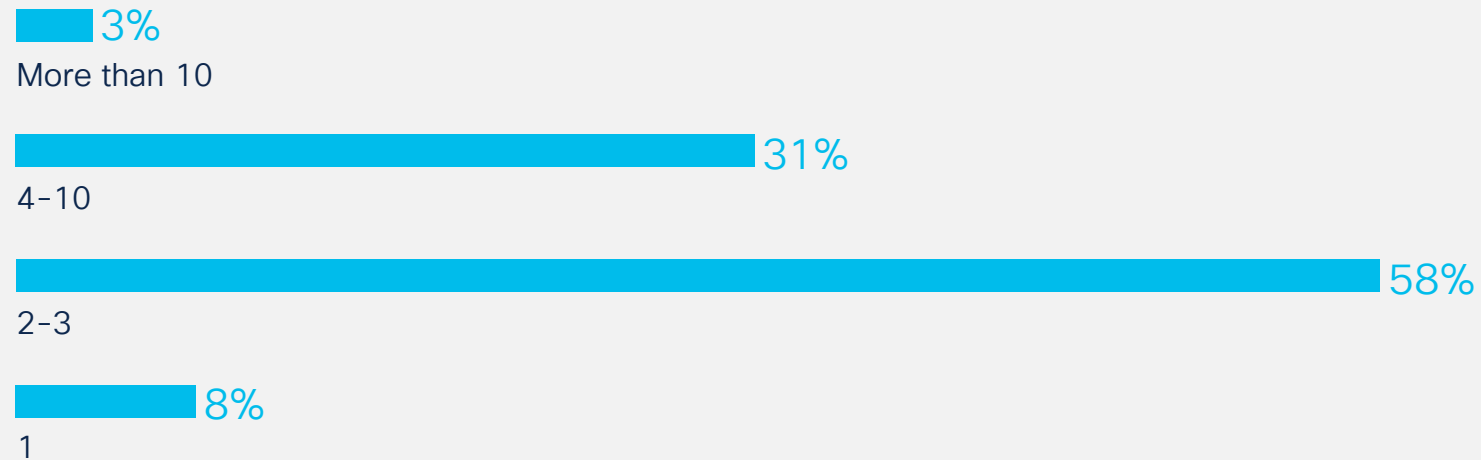
The shift off-premises is continuing and is seen as inverting the current workload mix in two years



What percentage of your workloads are currently deployed in the following environments?

Base: n = 1994

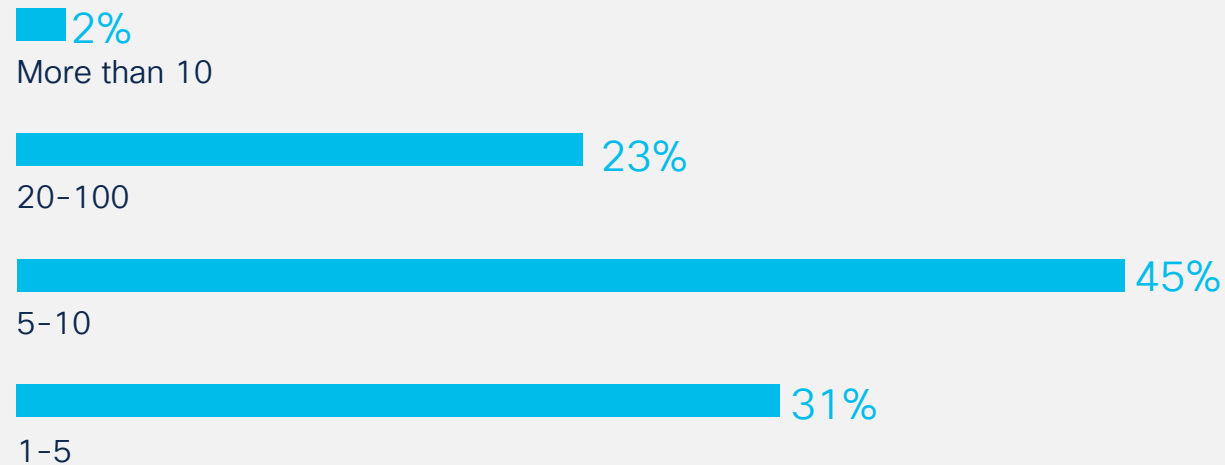
Public cloud providers currently used



Multicloud is the norm,
with 92% reporting using
more than one public cloud

How many public cloud providers, such as AWS or Azure, do you currently use for these workloads and processes?
Base: n = 2577

Software as a Service (SaaS) providers currently used

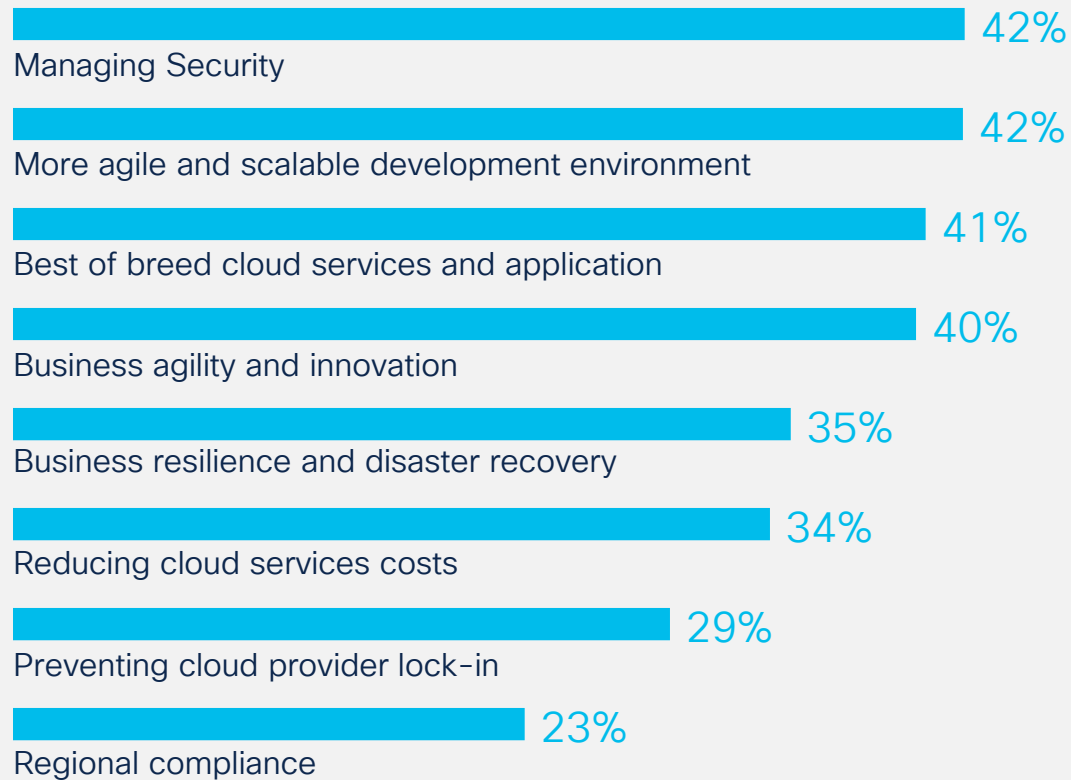


SaaS application use is proliferating, with 69% saying they use more than 5 services

How many different Software as a Service (SaaS) providers, such as Office 365, salesforce, Workday or Zoom do you currently use for your business?

Base: n = 2577

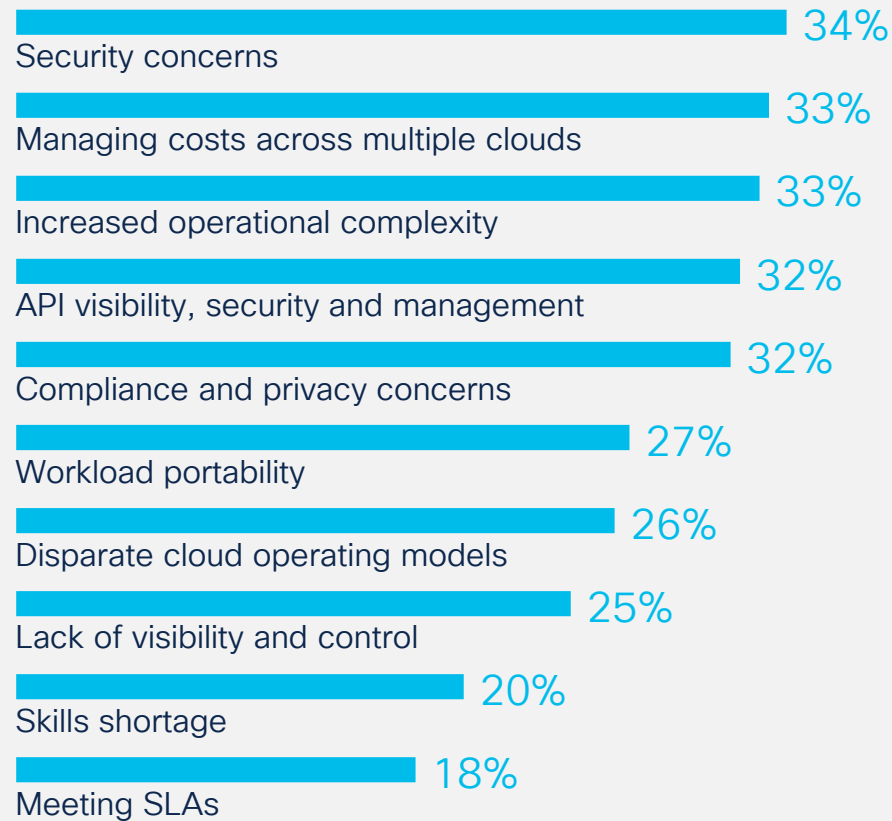
Significant motivations for the organization to use multiple (public and private) clouds



Enterprises report using **multicloud** to balance security needs, be more agile and gain access to new capabilities

What are the most significant motivations for your organization to use multiple (public and private) clouds for all services such as Infrastructure as a Service (IaaS), Platform as a Service (PaaS) and SaaS?
Base: n = 2577

Significant motivations for the organization to use multiple (public and private) clouds

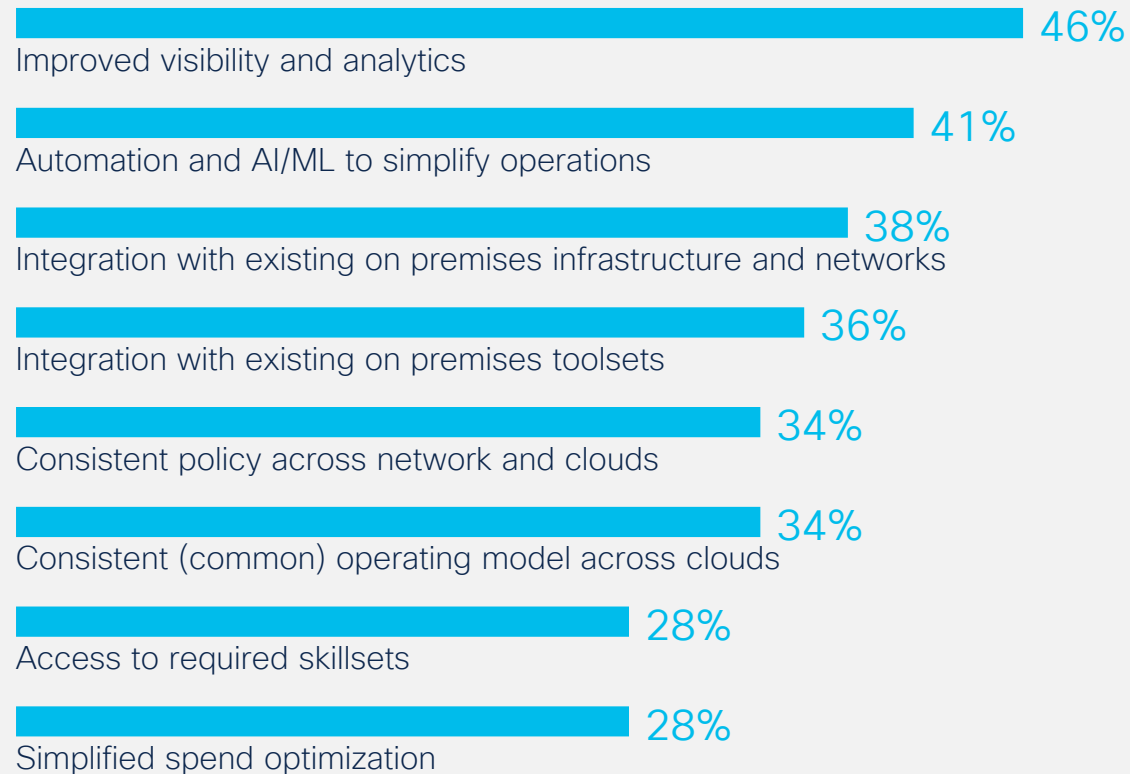


Security, cost and complexity top challenges identified in multicloud

What are the most significant challenges your organization faces or would face using multiple clouds?

Base: n = 2577

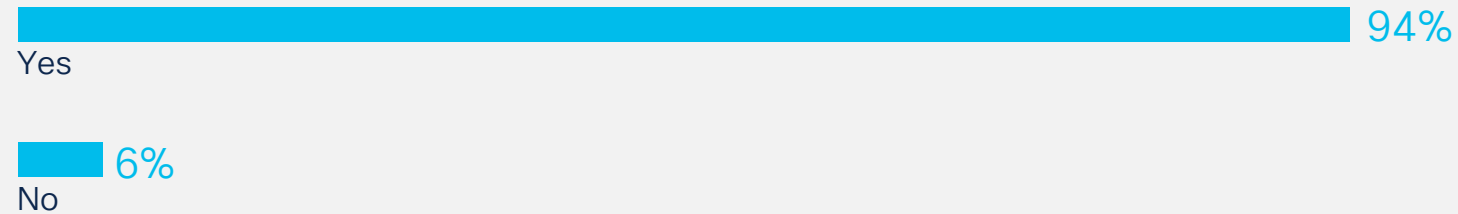
Top requirements when supporting multiple cloud operating models



Top requirements
indicated for multicloud
are visibility and
operational simplification

What are your top requirements when
supporting multiple cloud operating models?
Base: All respondents (Respondents selected
Cloud Ops in S9) n = 639

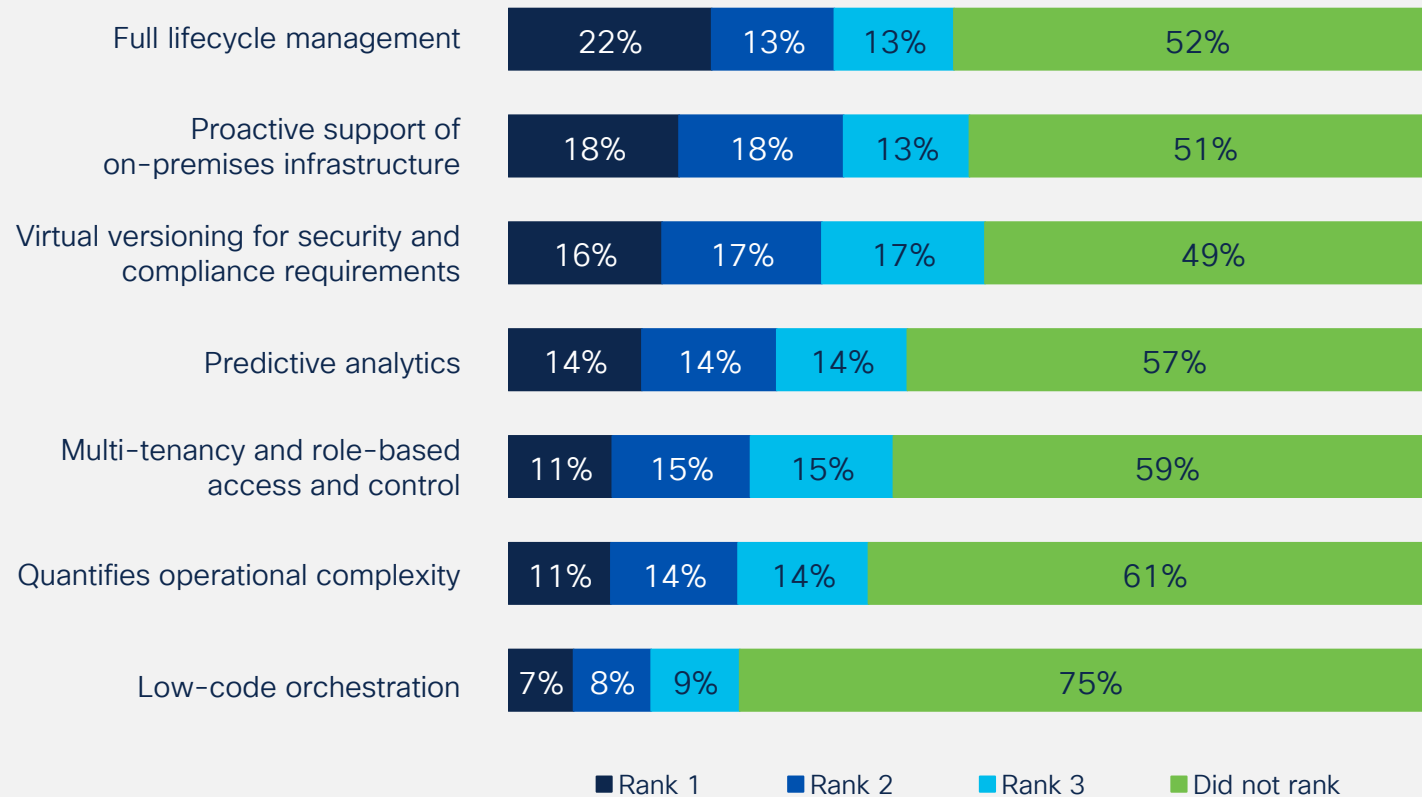
Use of cloud-based IT operations management platforms delivered as a service



Almost all use an **operations management platform** delivered as a service

Do you use cloud-based IT operations management platforms delivered as a service?
Base: All respondents (Respondents selected Cloud Ops in S9) n = 639

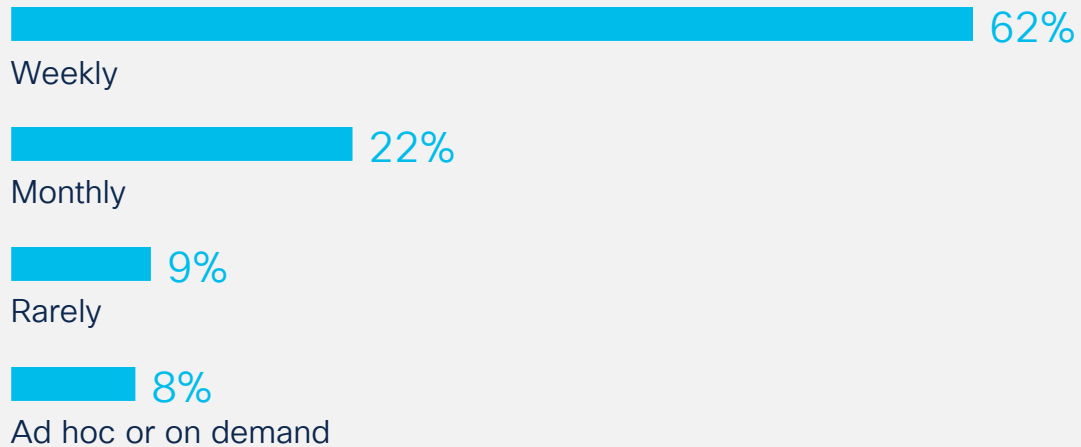
Top criteria for adopting cloud-based operations management platforms



Operational efficiency seen as leading technology push, with automation and AIOps out front

What are your top criteria for adopting cloud-based operations management platforms?
Base: All respondents (Respondents selected Yes in D4) n = 601

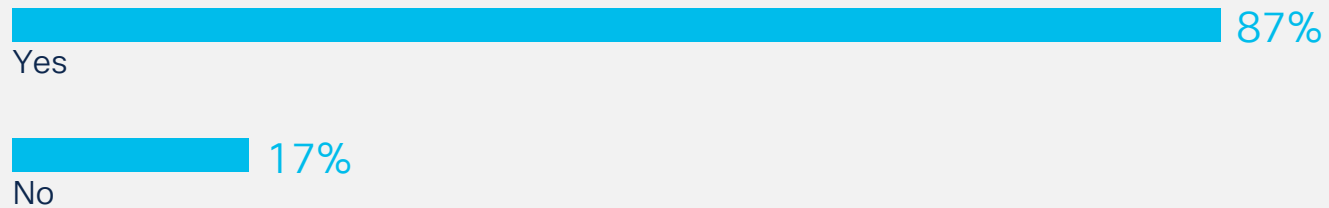
Collaboration with Network Operations team



Over half indicate collaborating with networking teams weekly

How often do you collaborate with your Network Operations team?
Base: All respondents (Respondents selected DevOps in S9) n = 647

Adequacy of collaboration



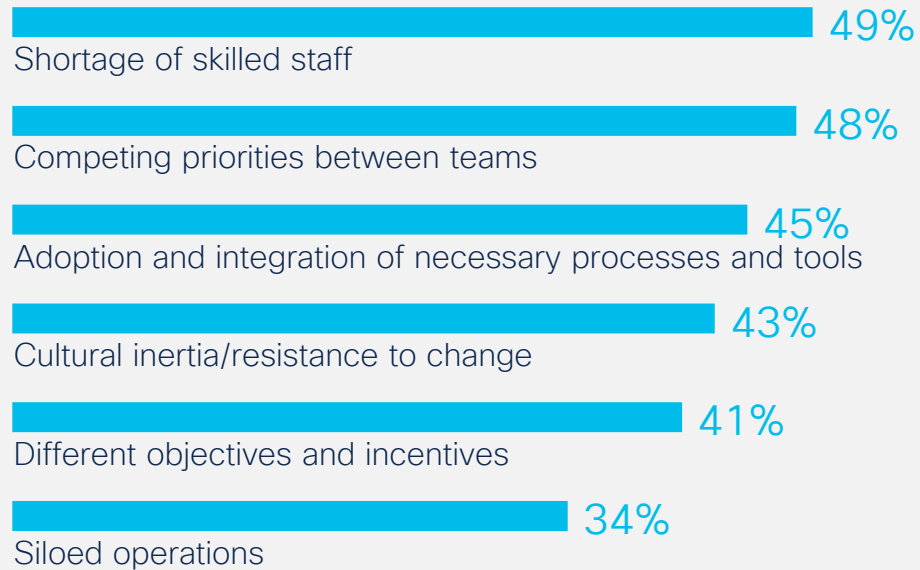
Most feel that current level of **collaboration with networking teams** is **adequate**

Do you feel this is sufficient?

Base: All respondents (Respondents selected

Base: All respondents (Respondents selected DevOps in S9) n = 647

Top roadblocks preventing more collaboration with Network Operations team

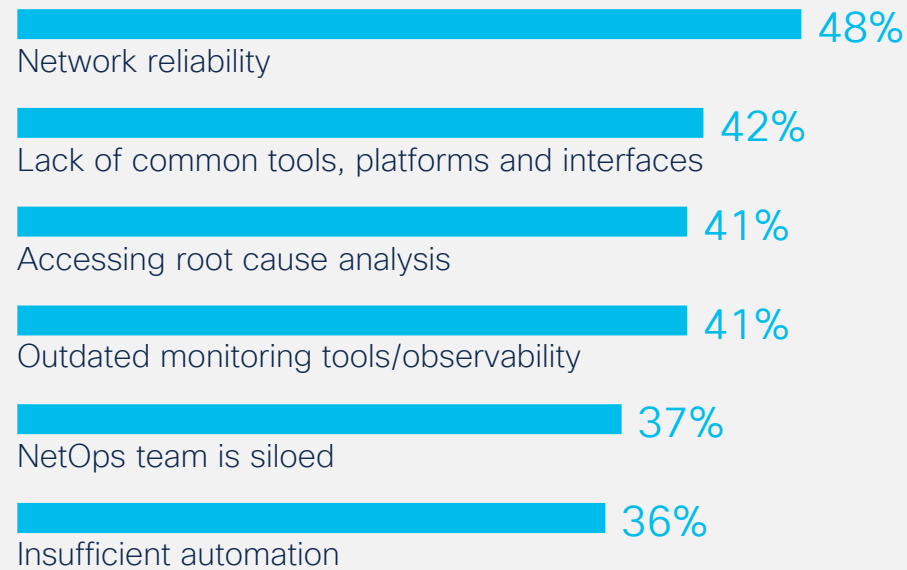


Lack of skilled staff and competing priorities said to be top roadblocks in better collaboration with network operations

What are the top roadblocks preventing more collaboration between you and Network Operations?

Base: All respondents (Respondents selected No in E1a) n = 111

Most pressing challenges DevOps team encounter when it comes to networking



Network reliability
reported as most pressing
networking challenge for
DevOps teams

Which of the following are the most pressing challenges your DevOps team encounters when it comes to networking?
Base: All respondents (Respondents selected DevOps in S9) n = 647

Level of agreement with – ‘It is important for the DevOps team to have a seat at the table to help determine my organization’s networking strategy/priorities’



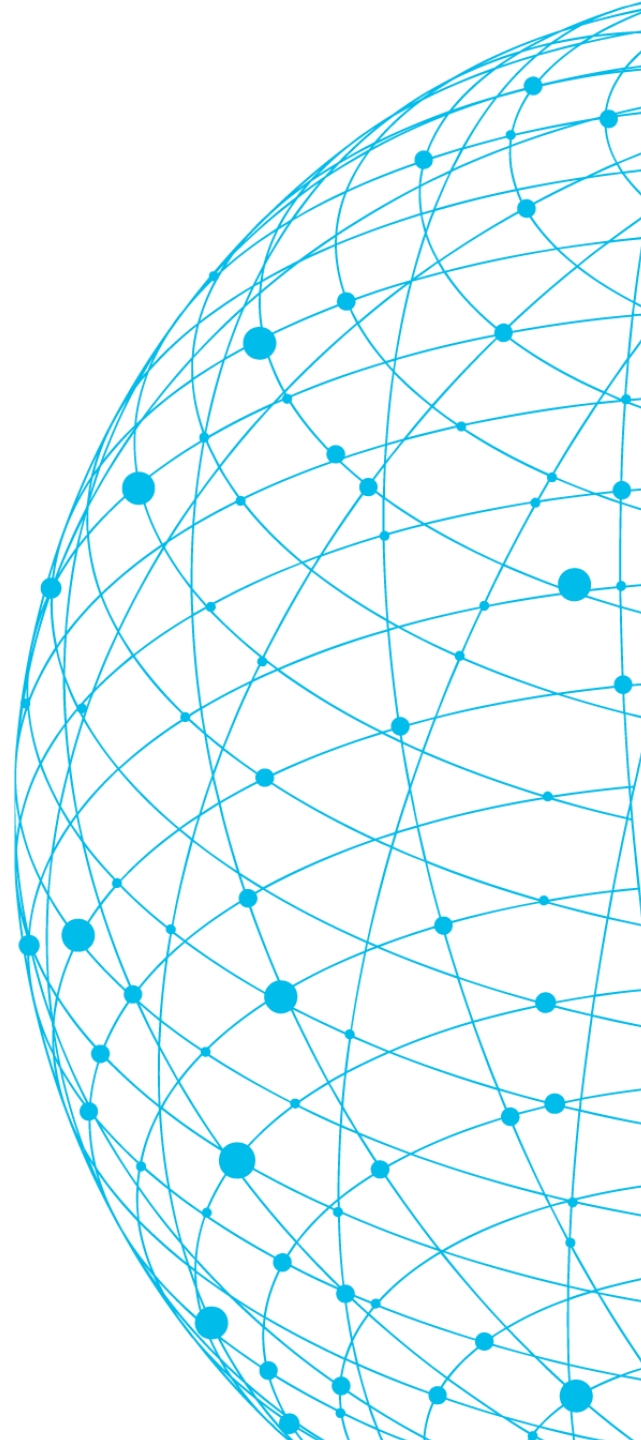
Almost all agree on **importance of DevOps** having a seat at networking table

On a scale of 1-5, using the guideline below please indicate your level of agreement with the following statement

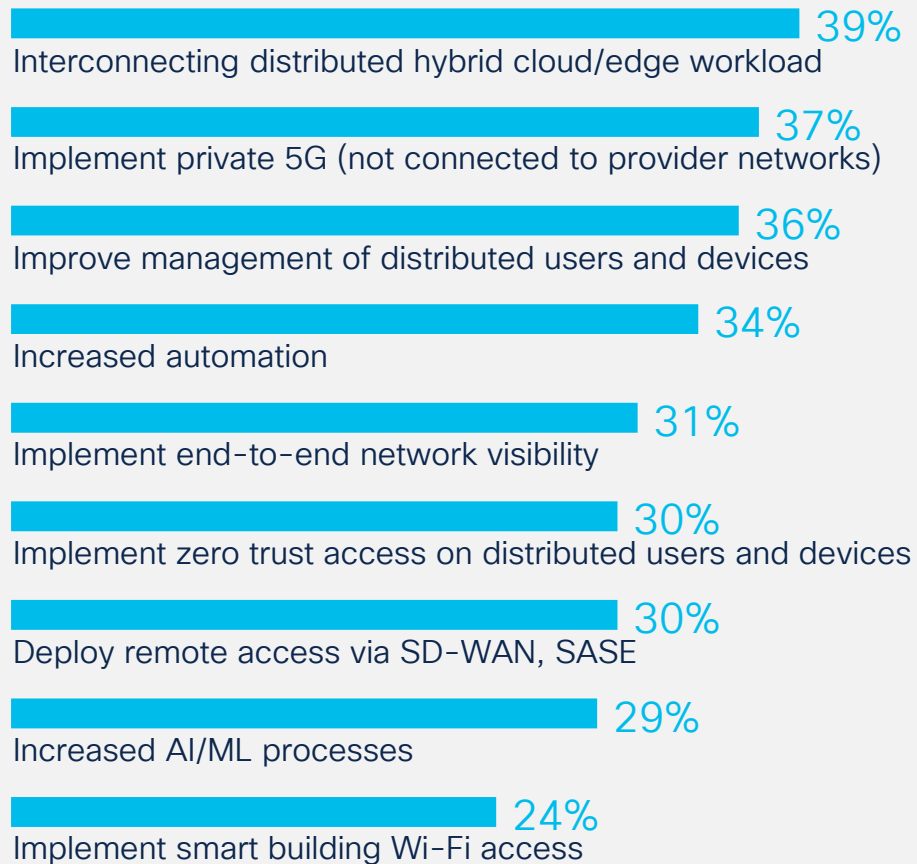
‘It is important for the DevOps team to have a seat at the table to help determine my organization’s networking strategy/priorities’?

Base: All respondents (Respondents selected DevOps in S9) n = 647

Enterprise Networking (Network Architecture)



Top 3 Network Technology actions that would best enable to achieve digital initiatives for 2023

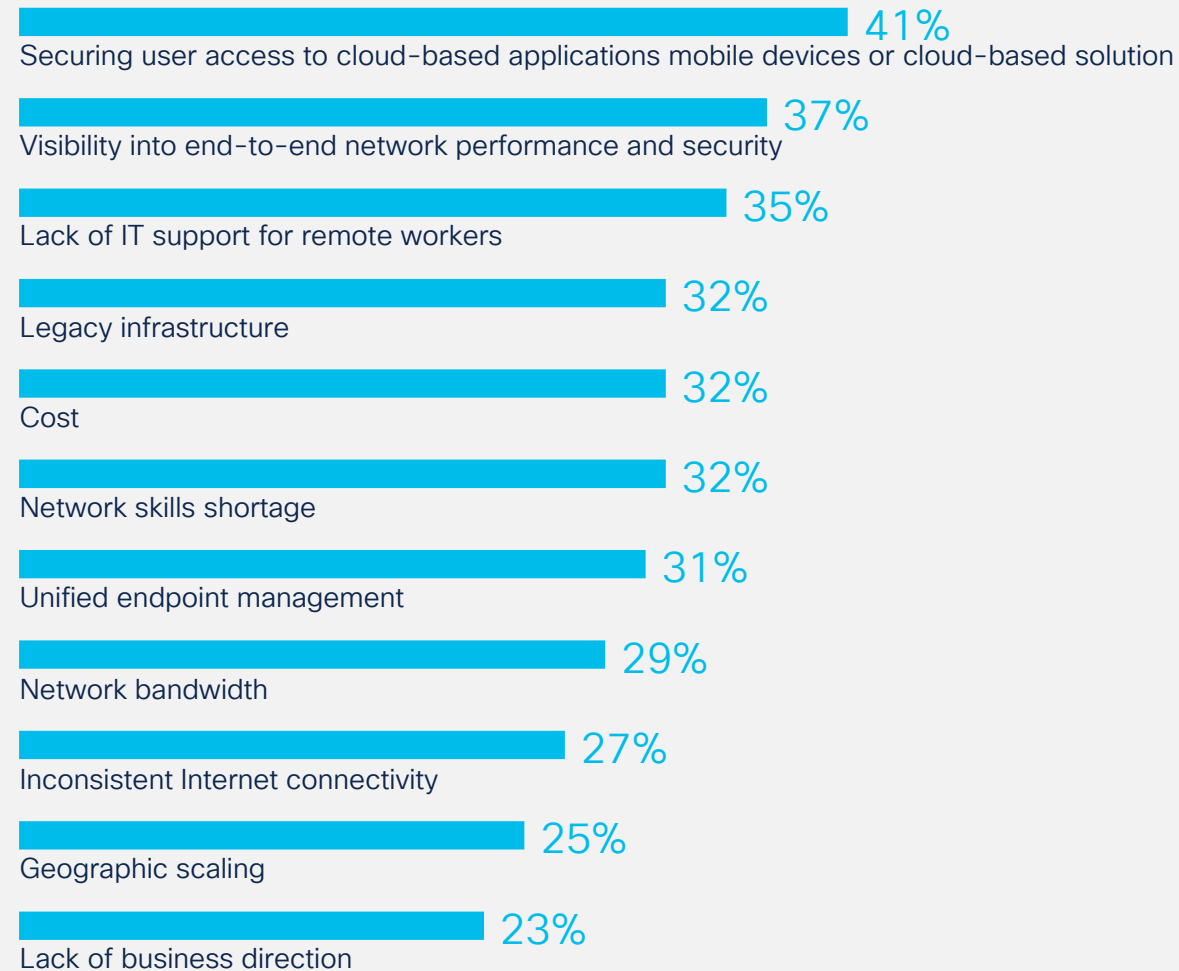


**Hybrid interconnect
and private 5G** seen
as top networking
technologies to achieve
digital initiatives

Select the top 3 Network Technology actions that would best enable your organization to achieve its digital initiatives for 2023?

Base: All respondents (Respondents selected Enterprise Networking in S9) n = 1291

Biggest obstacles networking teams must overcome to deliver on digital initiatives

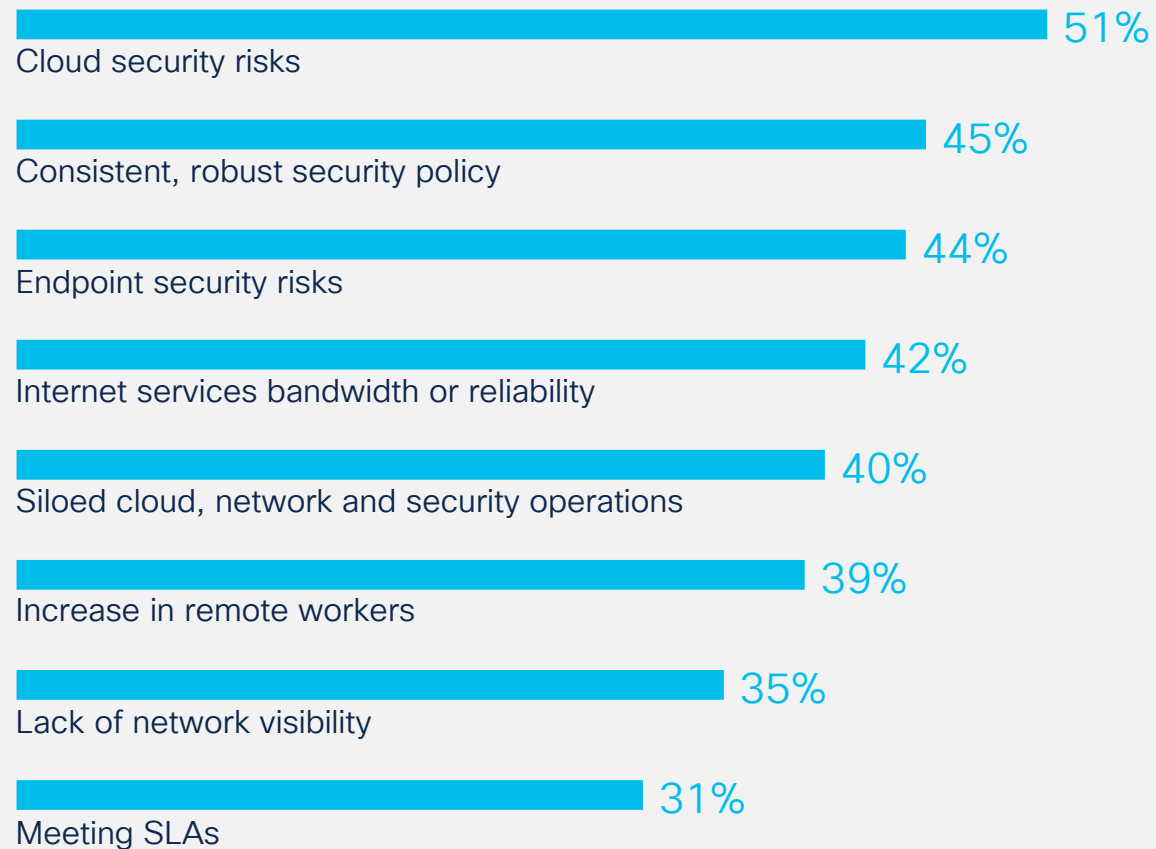


Securing user access and visibility are reported as leading networking obstacles to digital initiatives

What are the biggest obstacles your networking teams must overcome to deliver on digital initiatives?

Base: All respondents (Respondents selected Enterprise Networking in S9) n = 1291

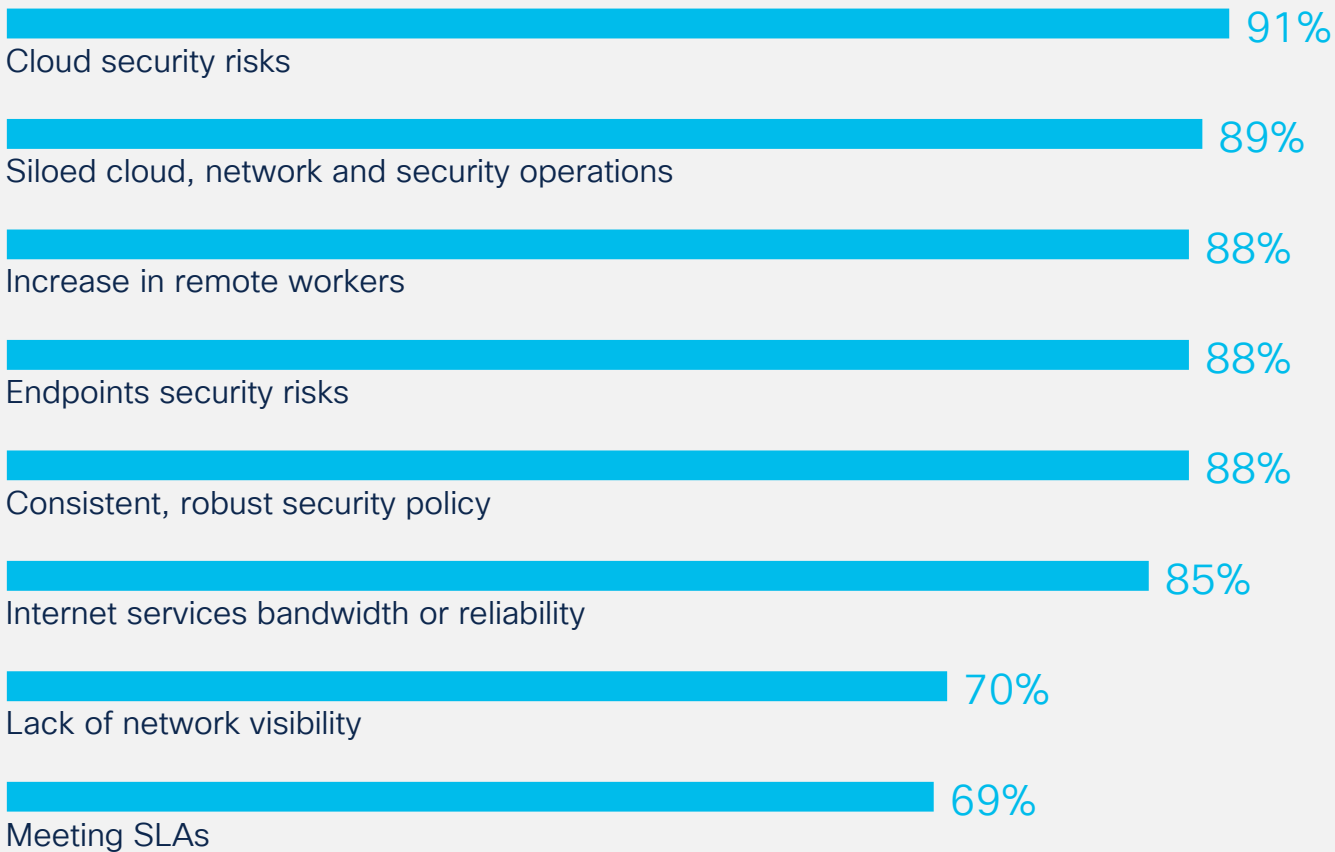
Challenges in providing secure user access from distributed locations to multiple cloud-based applications (IaaS/SaaS)



Cloud and endpoint security risks and robust policy said to be top challenges in user access to multicloud

What are the challenges in providing secure user access from distributed locations to multiple cloud-based applications (IaaS/SaaS)?
Base: All respondents (Respondents selected Enterprise Networking in S9) n = 1291

Top 3 challenges in providing secure user access from distributed locations to multiple cloud-based applications (IaaS/SaaS)




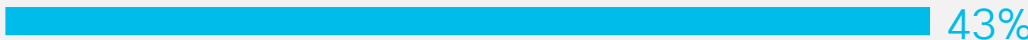
Many challenges seen in **providing secure user access to multicloud**

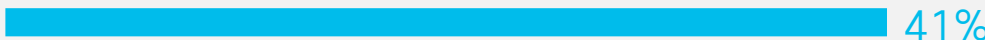
You chose challenges. Now please select the top 3 from your list?
Base: All respondents (Responses based on F4) n = 1291

Two-Year Secure Access Outlook: Maturity model increasing in sophistication

How organizations are supporting user access to cloud-based applications in two years.

 47%
Branches and remote clients primarily use a SASE model with contextually load balanced WAN links and cloud security that relies on machine learning and artificial intelligence for performance, security, and operations


 43%
Branches and remote clients primarily use contextually load balanced WAN links such as SD-WAN with integrated cloud delivered endpoint security i.e. Secure Access Secure Edge (SASE)

 41%
Branches and remote clients primarily use contextually load balanced WAN links such as SD-WAN with on premises endpoint security

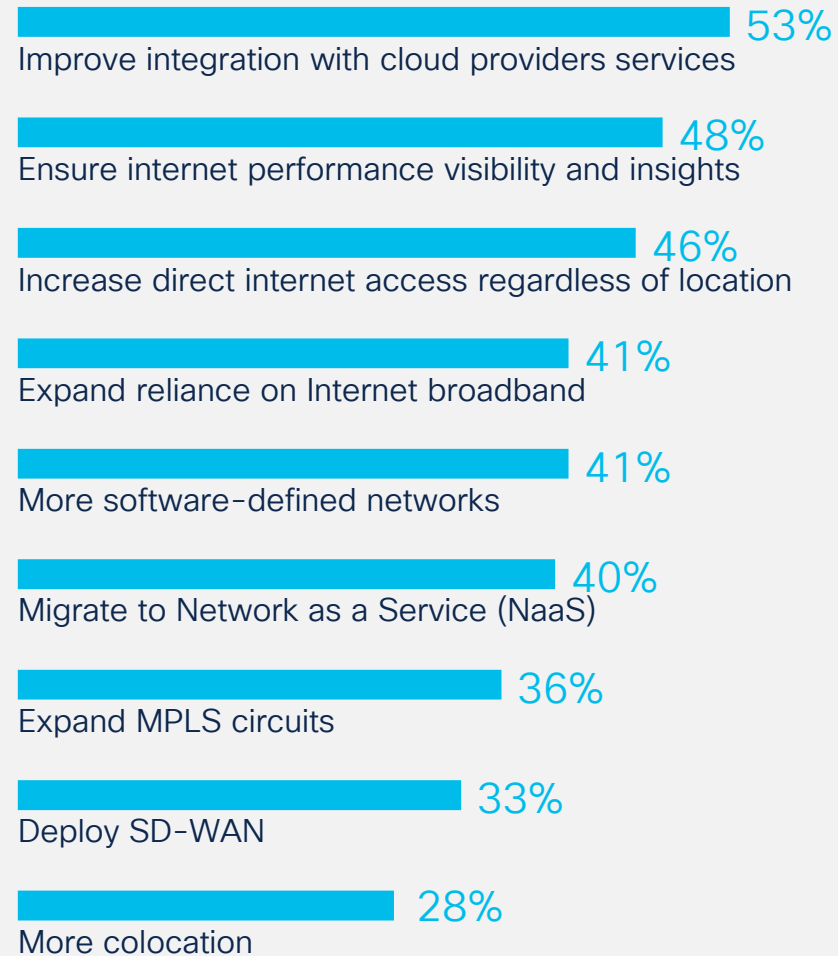
 40%
Branches remote clients primarily use multiple load balanced WAN links (not SD-WAN) with cloud delivered endpoint security

 39%
Branches primarily use outbound load balanced WAN links (not SD-WAN) with on-premises endpoint security

 32%
Branches and remote clients primarily use VPN with on-premises endpoint security and performance functions

 14%
Clients primarily use SSL/TLS for application connectivity with on-premises endpoint security

Approach to improve connectivity from all locations to cloud-based applications over the next two years

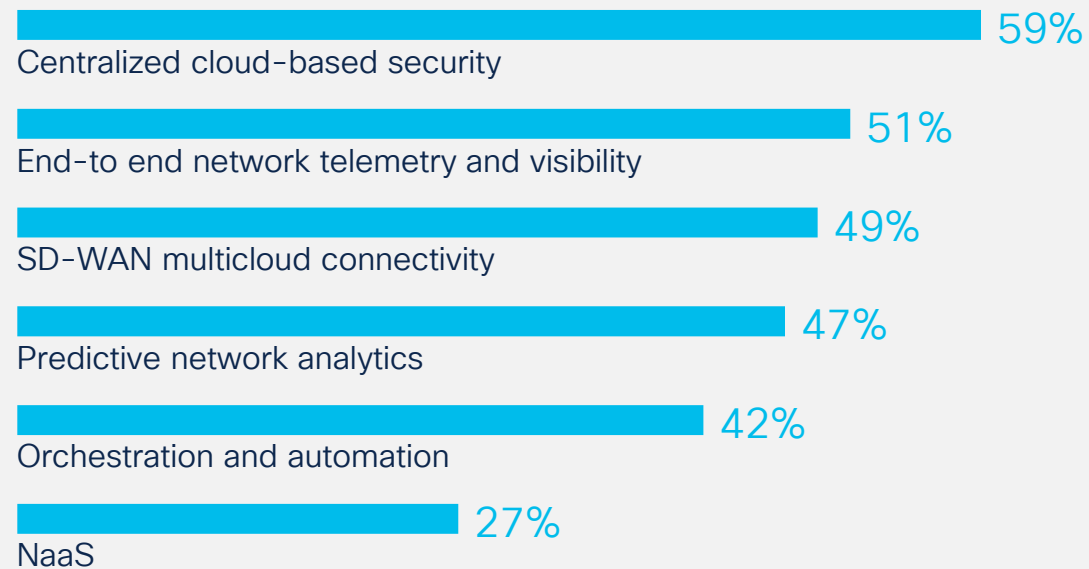


Improving integration with cloud services and access said to be top approaches to better connectivity over next two years

What approaches will your organization take to improve connectivity from all locations to cloud-based applications over the next two years?

Base: All respondents (Respondents selected Enterprise Networking in S9) n = 1291

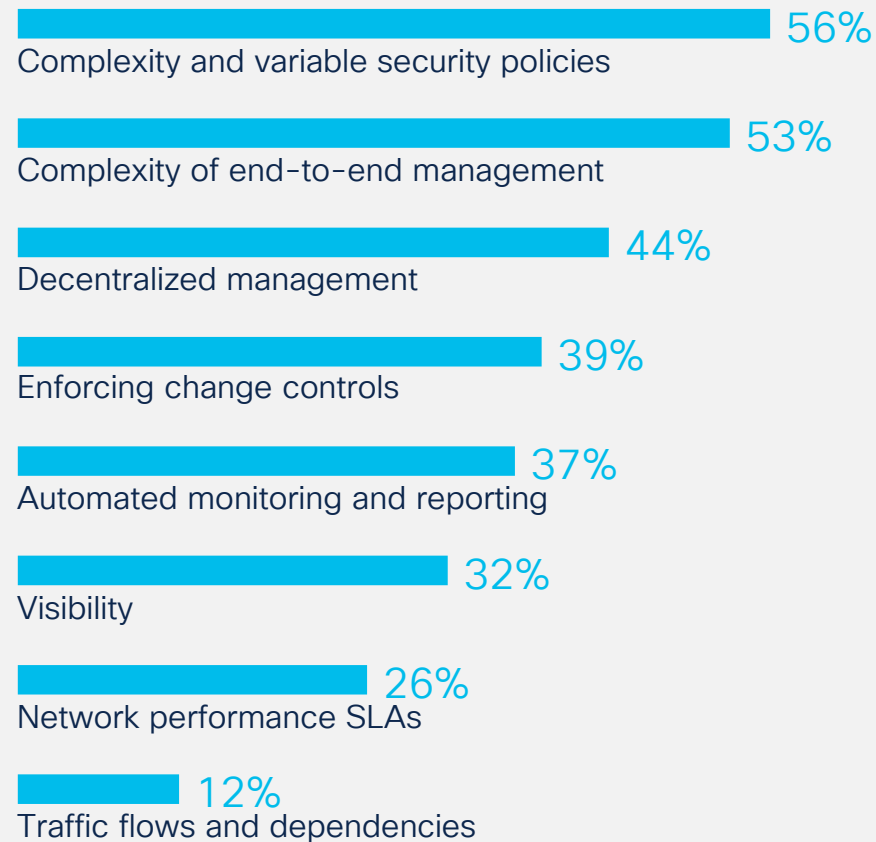
Top 3 multiple cloud access network initiatives in the next 24 months



Centralized cloud-based security reported as top network initiative over next two years

What are the top 3 multiple cloud access network initiatives for your organization in the next 24 months?
Base: All respondents (Respondents selected Enterprise Networking in S9) n = 1291

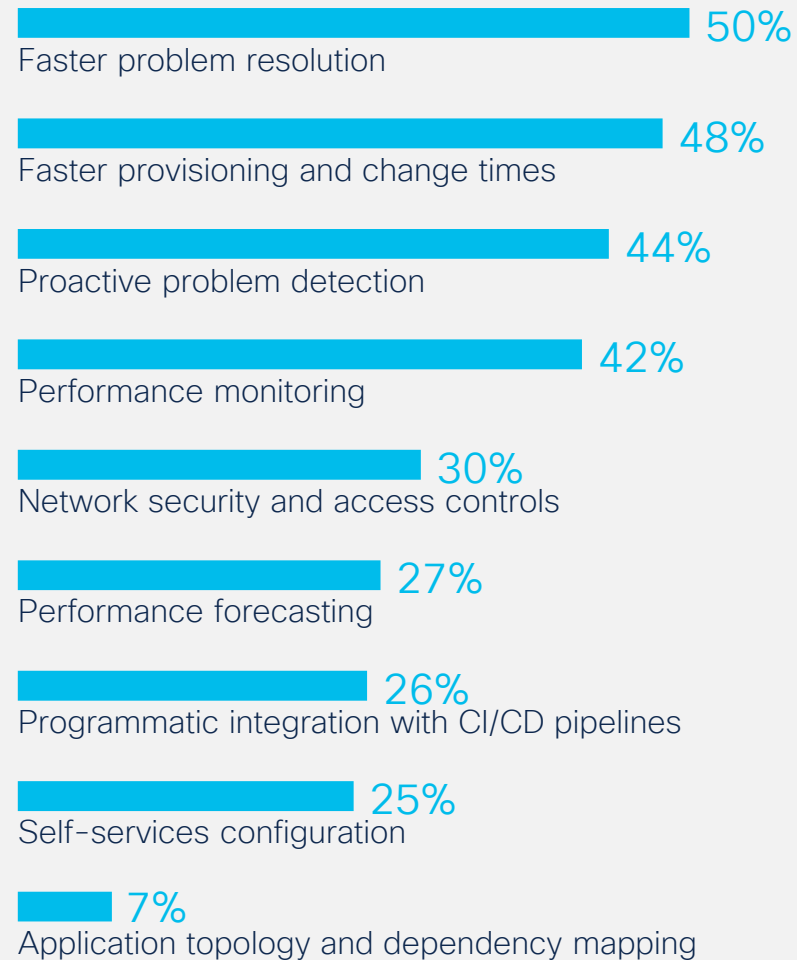
Top 3 most significant networking challenges faced when managing hybrid cloud and distributed workloads



Complexity of security policies and management reported as most significant networking challenges with hybrid cloud

What are the 3 most significant networking challenges you face when managing hybrid cloud and distributed workloads?
Base: All respondents (Respondents selected Enterprise Networking in S9) n = 1291

Top 3 features or benefits for hybrid cloud networking that are most in demand

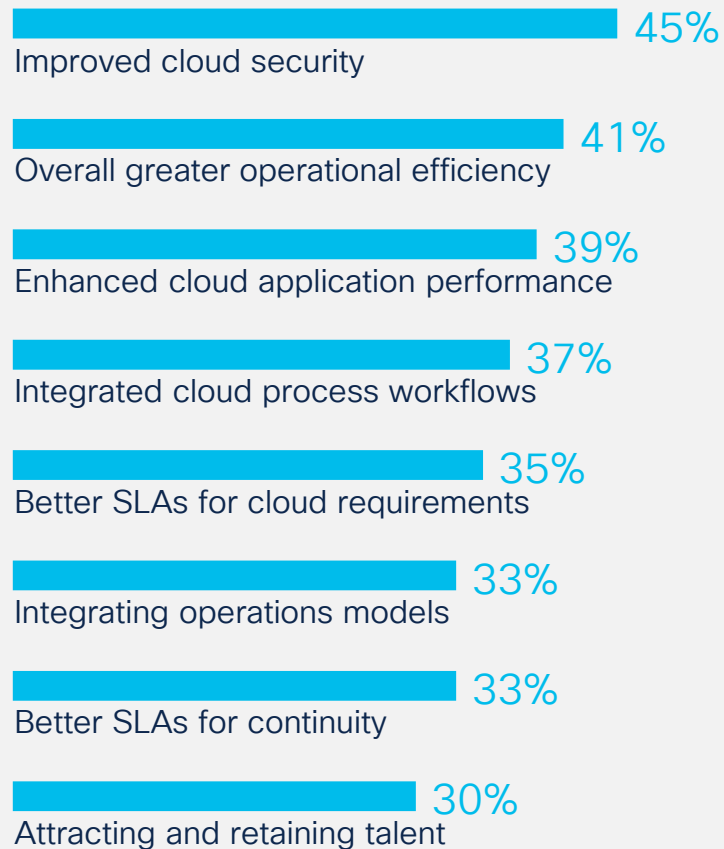


Speed in problem resolution and provision said to be most in demand aspects of hybrid cloud networking

What top 3 features or benefits for hybrid cloud networking are most in demand?

Base: All respondents (Respondents selected Enterprise Networking in S9) n = 1291

Top 3 motivations for greater collaboration between networking and cloud teams



Security and efficiency
seen as top motivations for
greater cloud and network
team collaboration

What are the top 3 motivations for greater collaboration between networking and cloud teams?
Base: All respondents (Respondents selected Enterprise Networking in S9) n = 1291



The bridge to possible