

Survey Results

The 2022 Connected Enterprise

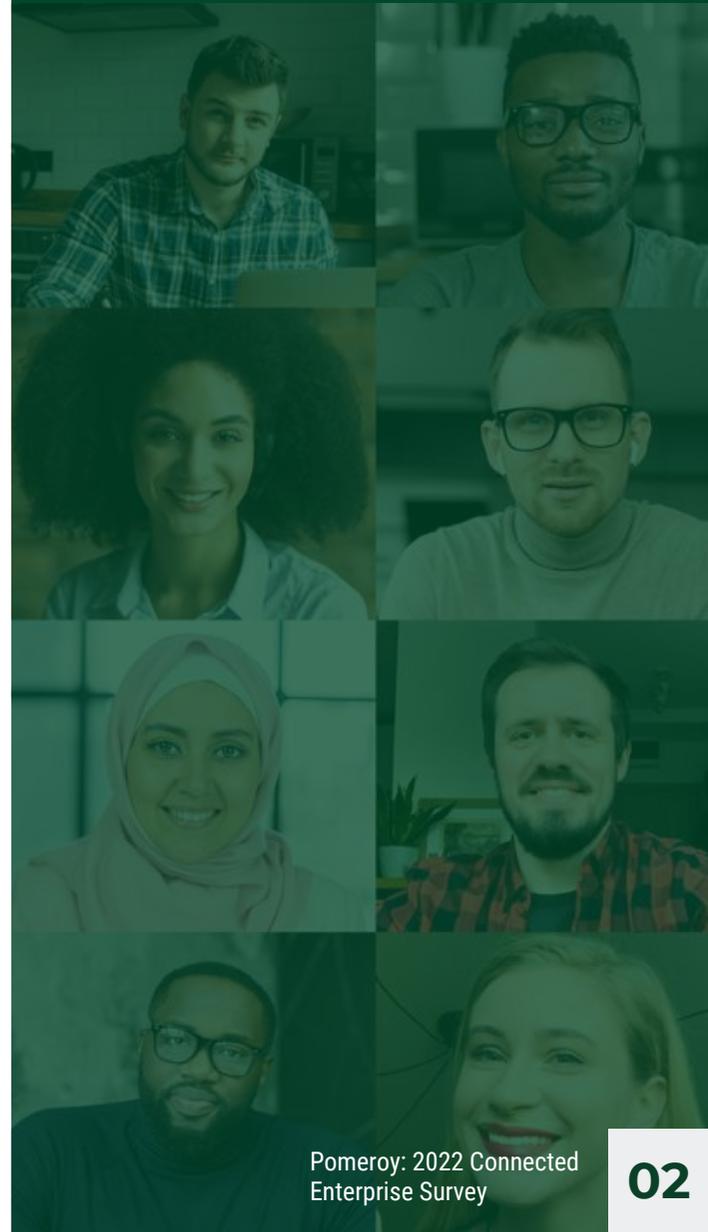
A seamless network experience that is always available, always connected and secure

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Executive Summary



The corporate data center was the center of the universe

In the past enterprise connectivity was a binary question. You were either on the corporate network or not.

On the network meant you had access to everything you needed to do your job based upon tightly controlled and secured access to your applications which for the most part resided in a physical data center. Remote connectivity simply meant extending the network over some type of wide area transmission to offices, branches, and stores, or if you wanted to be “mobile”, connecting based upon encrypted VPN tunnels to get you to the corporate mothership.

In very real terms, the corporate network was the center of the universe.



...where people,
applications, data
and compute can
be anywhere

Executive Summary

Today, enterprise connectivity is a multiple-choice answer, where people, applications, data and compute can be anywhere. The traditional corporate network is no longer the center of the universe. The end point is now the center of a highly matrixed set of distributed applications, delivered from a hybrid cloud-enabled infrastructure with the same access and security as any other end point on the “corporate network”.

2022 Connected Enterprise Survey Results

As we look at the results of our **2022 Connected Enterprise Survey**, we see continued progress on the journey to delivering a frictionless user experience for people working from anywhere. Enterprise connectivity from the cloud to the digital edge based upon a seamless network fabric that is always available, always connected and secure is the ultimate goal, as well as continued transition to SD-WAN and ultimately, Secure Access Service Edge (SASE) as a unified approach to managing the network and security.



Enterprise connectivity **from the cloud to the digital edge** based upon a seamless network fabric that is always available, always connected and secure

The top areas of focus for our survey respondents in 2022 are *Network Connectivity*, *Cybersecurity* and the *Work From Anywhere Experience* which are the 3 key goals we highlight in our summary report - **The Network is Anywhere You Are, Defending the Everywhere Perimeter** and **Creating a Frictionless User Experience**

For your remote connectivity in 2022, what are your primary areas of focus? (choose all that apply)



“Home is where I work and I work everywhere.”

Alfred Nobel, 1833 – 1896,
Founder of the Nobel Prize

The **Network** Is Anywhere You Are

Prior to the global pandemic, the word “remote” in the IT world generally referred to an office or branch that stood on the fringes of the corporate network requiring a dedicated circuit back to the data center for any work to get done. Remote employees also had to be connected to the network via VPN to access their applications and data. But things have changed in the last 18 months.

Today “remote” means anywhere an end user can work and remain productive. Because of COVID-19, **the home (or coffee shop) is the new branch office** - and there's a good chance it's going to stay that way. Survey respondents agree as 58% of them had less than 10% of their employees working from anywhere pre-COVID; however only 14% of respondents expect the same in 2022.



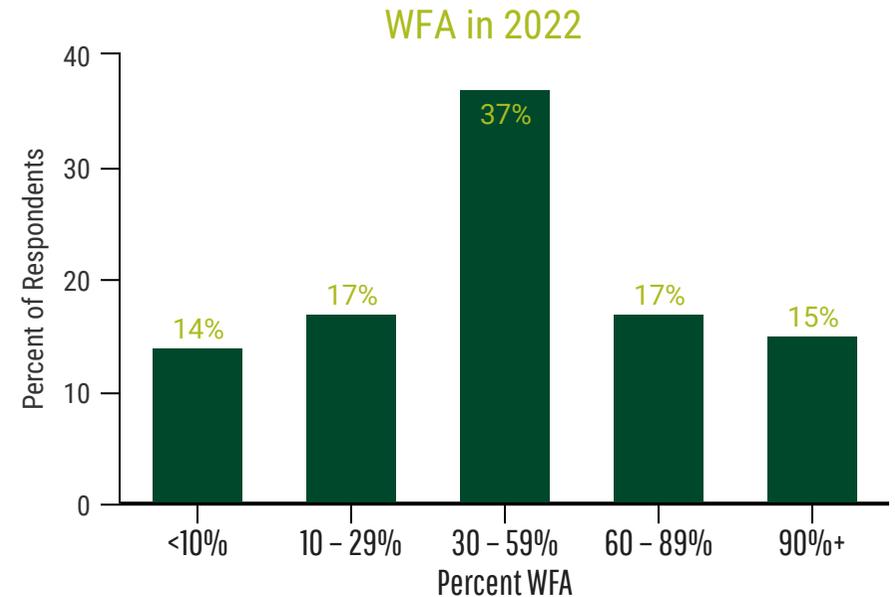
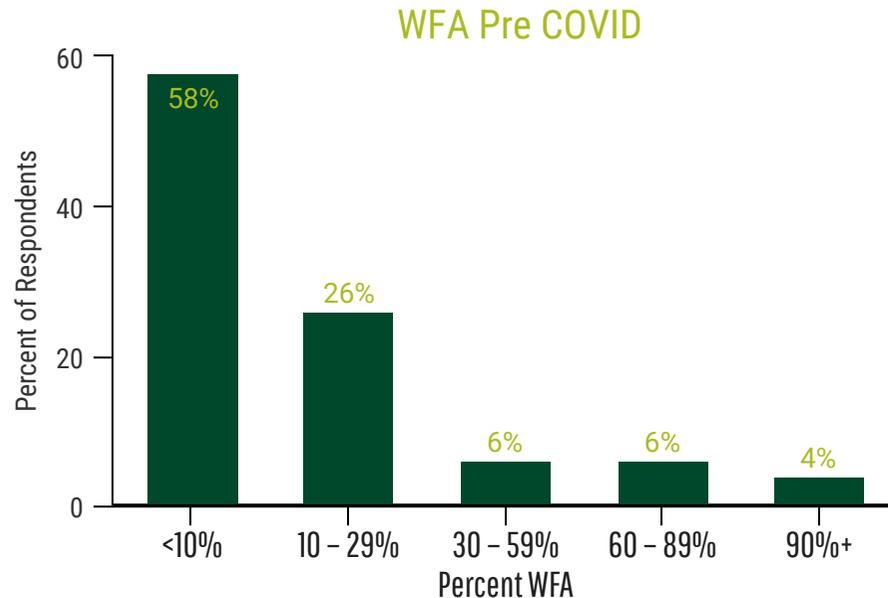
Pre COVID

In 2022

Percent of organizations with less than **10%** of their people **Working from Anywhere**

Working from Anywhere continues to be the headline in 2022

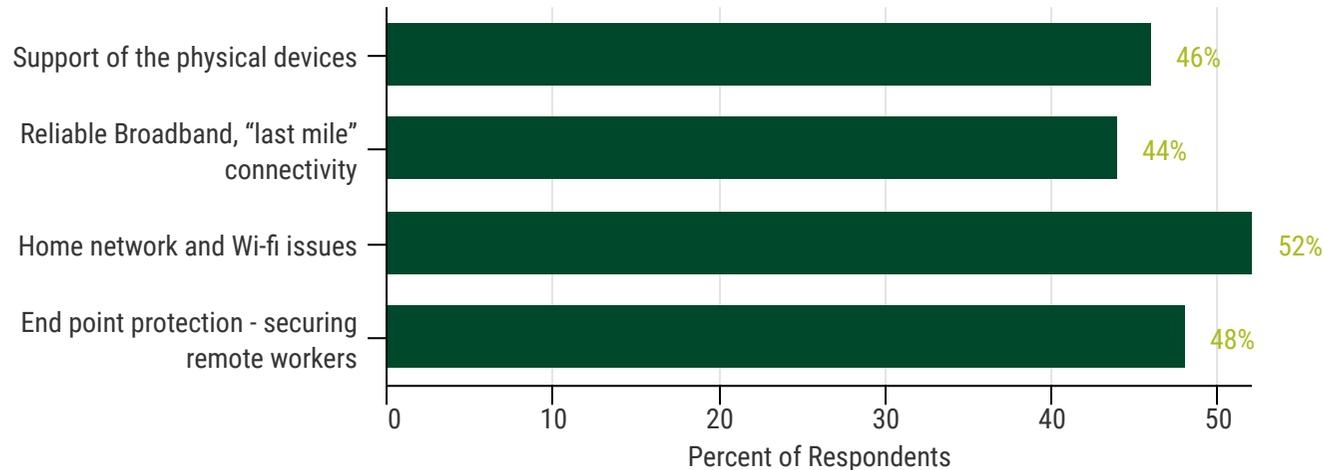
The shift from working in buildings to working from anywhere creates one of the most striking comparisons in our survey results. It's also the least surprising based upon what we have all experienced over the last 2 years. Important to note is that this is what respondents indicated will be their Work from Anywhere (WFA) percentage as they look out into 2022. It's yet to be seen how much of a shift back into buildings there will be over the next few years as we approach a future steady state.



Supporting Work from Anywhere workers can still be a challenge

Supporting remote workers continues to create challenges for IT organizations, especially for the physical devices; reliable 'last mile' connectivity; home connectivity problems; and end point security. To the survey respondents, these are all relatively equal challenges that need to be addressed.

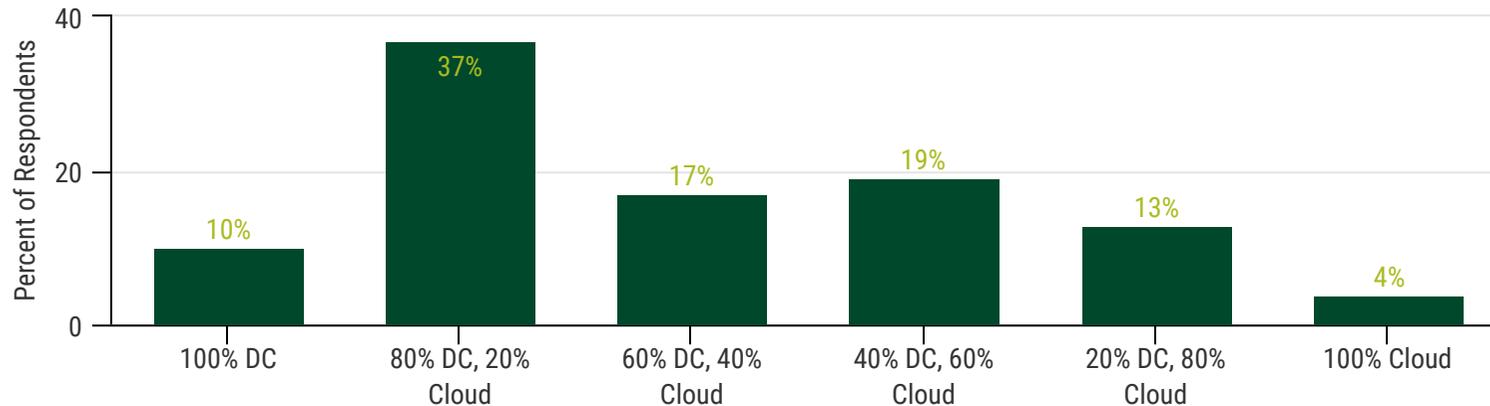
What are your biggest challenges supporting people working from anywhere? (choose all that apply)



Cloud-based applications are transforming the workplace by meeting users where they prefer to work

The movement of enterprise applications to the cloud is also a big factor contributing to a seamless work from anywhere experience by eliminating the need for users to connect back to the corporate data center. And most organizations are heading in that direction. While 37% of respondents indicated they still deliver 80% of their applications from a traditional data center, the tide is changing with over half (53%) of the respondents saying that 40% or more of their applications will be delivered via the cloud in 2022.

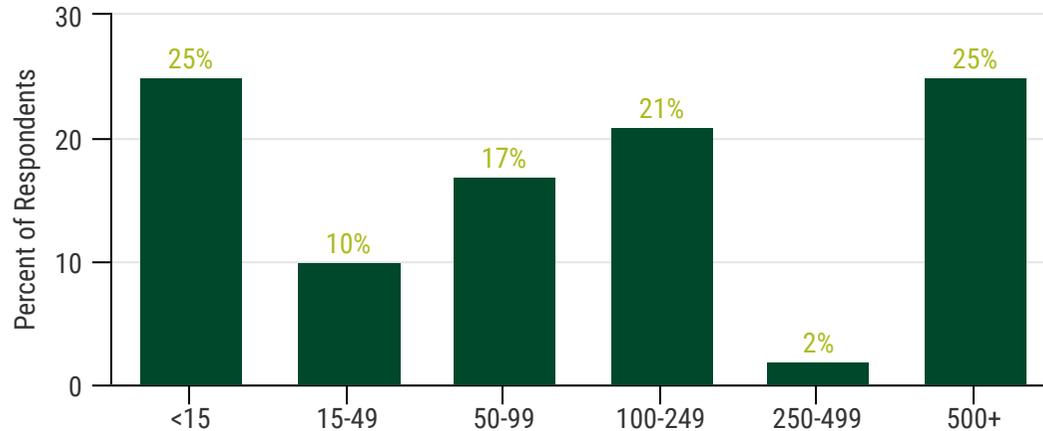
In 2022, what percentage of your applications will be delivered from a traditional data center versus cloud (SaaS)?



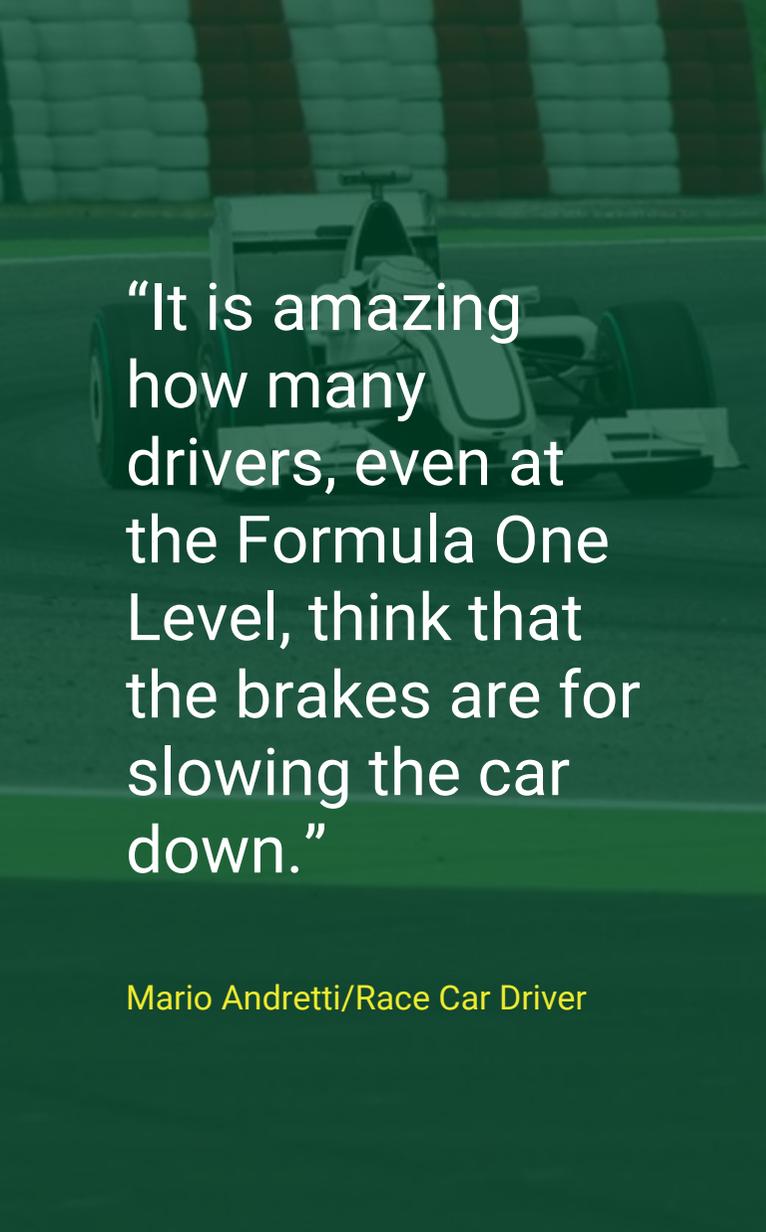
Physical 'brick and mortar' remote locations remain an essential element of supporting the digital edge

Even with the significant shift to working from anywhere, organizations continue to support large numbers of remote locations. To truly deliver on the promise of ubiquitous connectivity regardless of where a person is located in the hybrid environment we find ourselves in today, a seamless network fabric that is always available, always connected and secure is not an option...it's essential.

How many remote locations (offices/branches/stores, etc.) do you support today?



Respondents have an average of **170 sites** with a significant group with **500 or more**



“It is amazing how many drivers, even at the Formula One Level, think that the brakes are for slowing the car down.”

Mario Andretti/Race Car Driver

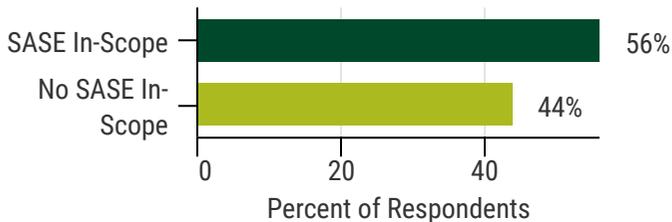
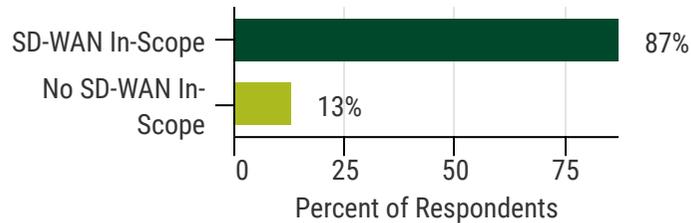
Defending the Everywhere Perimeter

If you've ever taken a drivers' education class, you know that braking with your left foot is discouraged. For race car drivers though it's a different story. A common technique is to brake with their left foot and accelerate with their right at the same time while going around turns. This creates an aerodynamic force that shifts the weight of the car forward allowing better traction for the tires and making the car go faster. The same concept holds true with IT security.

Security is often seen as an inhibitor and actually can be if implemented incorrectly. Organizations don't purposely try to limit their employees' productivity, but many times do just that by not having a proper solution in place.

Network security is critical to user productivity - not an inhibitor

Progressive organizations view security as a competitive enabler. Instead of limiting creativity, collaboration and research, it can free up people to leverage all of the power of the internet but do so protected from the bad guys no matter where they're working.



Core to this strategy is implementing Secure Access Service Edge (SASE) using SD-WAN as the stepping stone. Survey respondents appear to be adopting this approach. 87% of respondents have either already deployed SD-WAN or at the very least are considering it, whereas only 13% have no plans to deploy SD-WAN at all. Also, a majority of respondents have either deployed SASE already or have it on their roadmap for the next few years.

By combining SD-WAN with SASE, an organization can dynamically manage their networks with the assurance that security will be delivered the same regardless of where the end point and user are located.



“Always treat your employees exactly as you want them to treat your best customers.”

Stephen R. Covey
Author & Businessman

Creating a **Frictionless** User Experience

Friction can be defined as “the resistance that one surface or object encounters when moving over another”. But what does it mean to an end user? If you’re a worker trying to do your job from any place, on any device, at any time, you can’t afford to be slowed down or impeded.

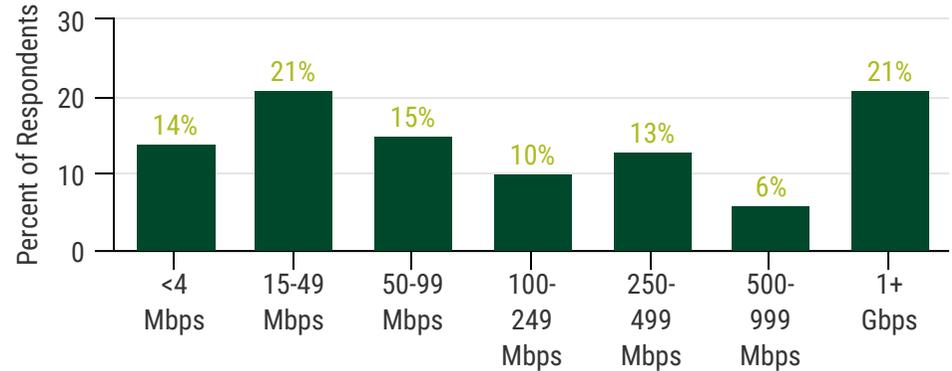
Providing employees with an **exceptional User Experience** includes their ability to **access their applications without any speed or connectivity issues**. This has become increasingly difficult as bandwidth intensive applications such as video conference/streaming, cloud storage and virtual desktops push existing throughput to its limits. The pandemic is a contributing factor. Prior to COVID, video on conference calls was a rarity. Today, video is the norm. The result? An exponential increase in the amount of high def 1080P video packets traversing all points of the network.

Bandwidth, application throughput and reliability are key ingredients

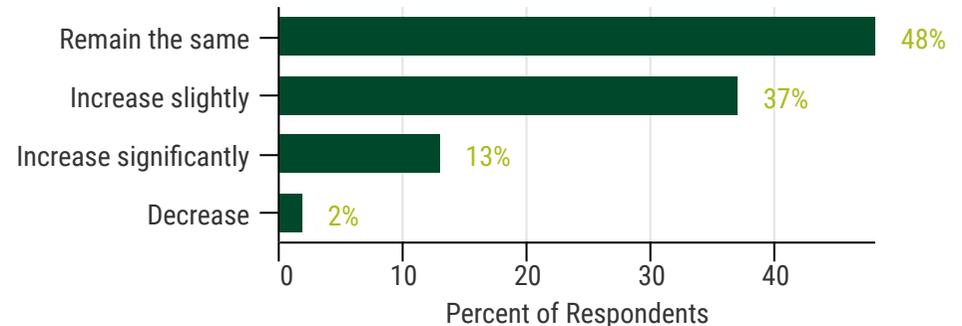
A frictionless User Experience requires a network that is always on and available with maximum uptime and performance. Key to this is providing the right amount of bandwidth to remote locations. Respondents deliver an average of approximately **325MB** to their remote locations with **21%** over **1Gbps**.

In 2022, the need for speed is clear. **50%** of respondents indicate that they are **planning to increase bandwidth slightly or significantly** with only 2% indicating that they are decreasing the amount of bandwidth they deliver to remote locations.

What is the average bandwidth that you deliver to your remote locations?



What are your plans for bandwidth to remote locations in 2022?



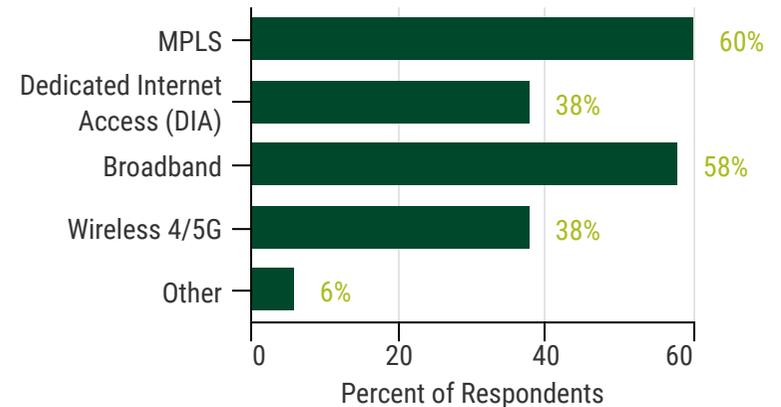
Augmenting MPLS with internet based transport

Since the emergence and widespread availability of SD-WAN over the last decade, the popular thinking has been that it will quickly lead to a precipitous drop in MPLS as the primary WAN transport of choice.

But MPLS has declined far slower than expected as evidenced by the strong showing in our 2022 Connected Enterprise Survey. That's due in part to its high reliability as well as the significant time and effort it requires to replace last mile technologies.

So instead of "ripping and replacing", the better choice is to augment MPLS with internet bandwidth that is far more budget friendly while delivering higher throughput to support today's bandwidth intensive applications.

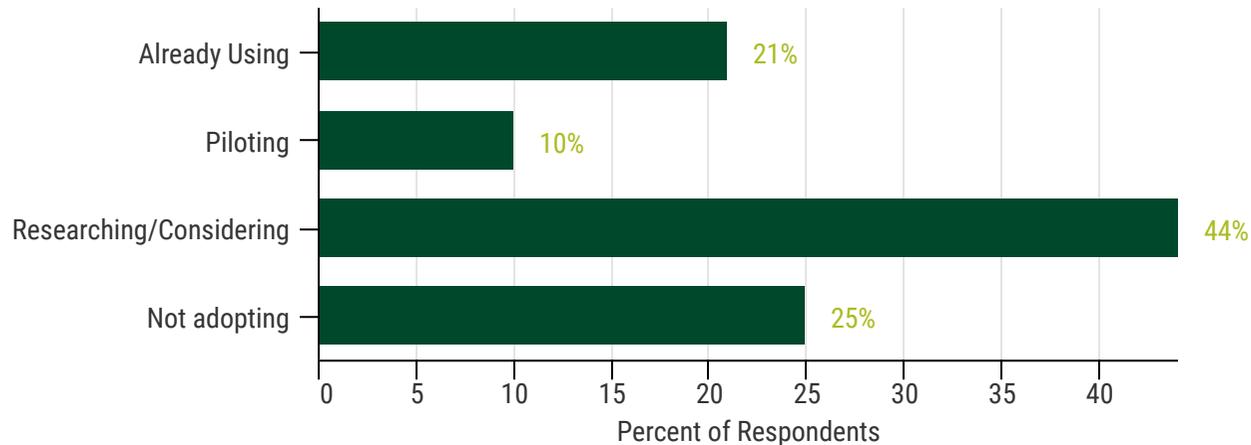
What WAN transport technologies do you use today? (choose all that apply)



Application Performance Management is a key enabler of frictionless design

The goal of a frictionless architecture is to deliver the best possible user experience regardless of where applications are served up, whether that is the cloud or a corporate data center. With application performance management (APM) monitoring tools, organizations have better visibility and control over all the elements that impact application performance. However only 21% of survey respondents responded that they are actively using an APM solution indicating a slower adoption of this important technology.

Are you considering using an application performance management (APM) solution for your data center and/or cloud applications in 2022?



...always available,
always connected
and secure

Delivering a **Seamless** Network Experience

At Pomeroy, we deliver **enterprise connectivity from the cloud to the digital edge**, a seamless network experience that is always available, always connected and secure.



Edge Security Services Delivered With SLAs and 24/7 Support



SD-WAN/SASE Deployment, 290+ ISPs Aggregated On Single Bill



Support Beyond the Edge For Remote Locations, Branches & Retail Stores

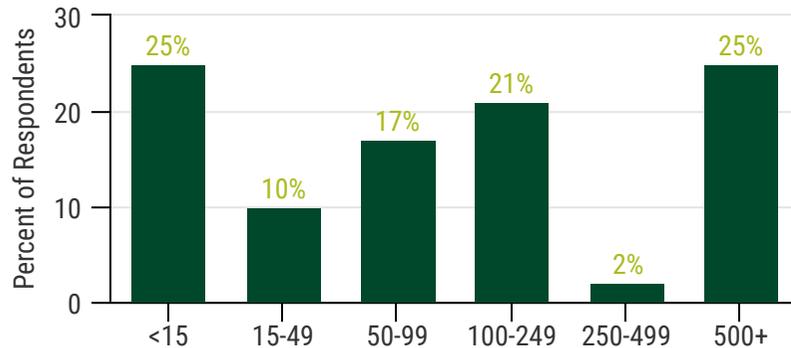


WFH Broadband aaS with Business Class Connectivity and SLAs

Let's discuss where you are on your journey to seamless connectivity across your network and a secure, frictionless user experience. Contact us at **859.689.3526** or set a time to chat via the "Let's Talk" button on www.pomeroy.com.

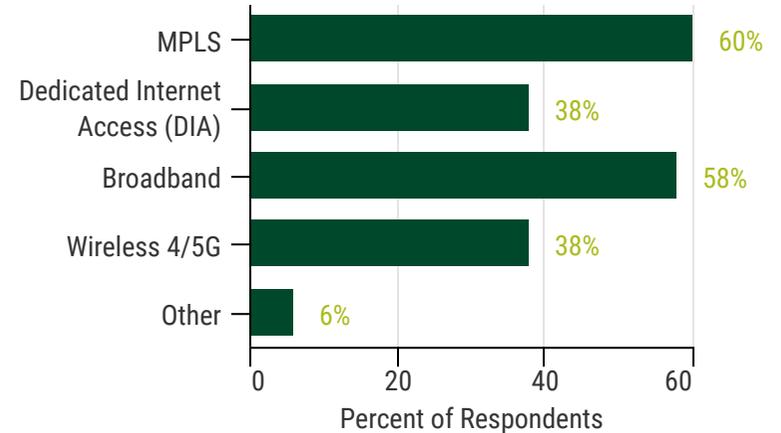
> Detailed Findings

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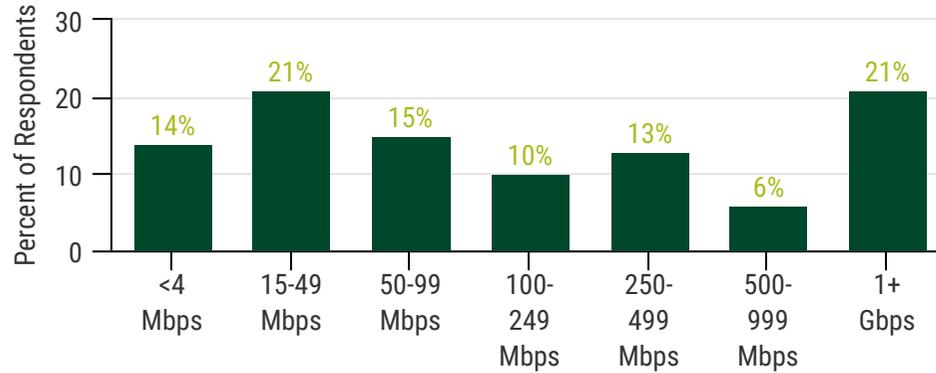
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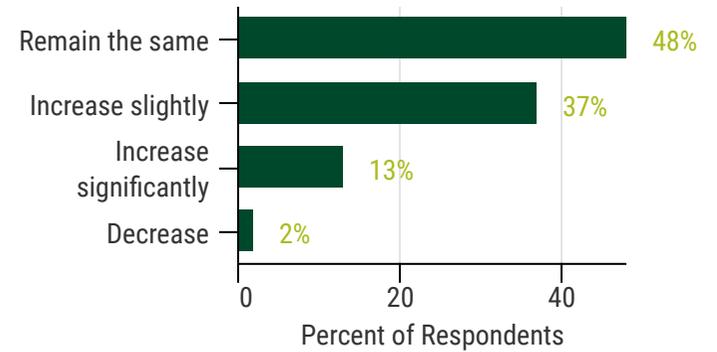
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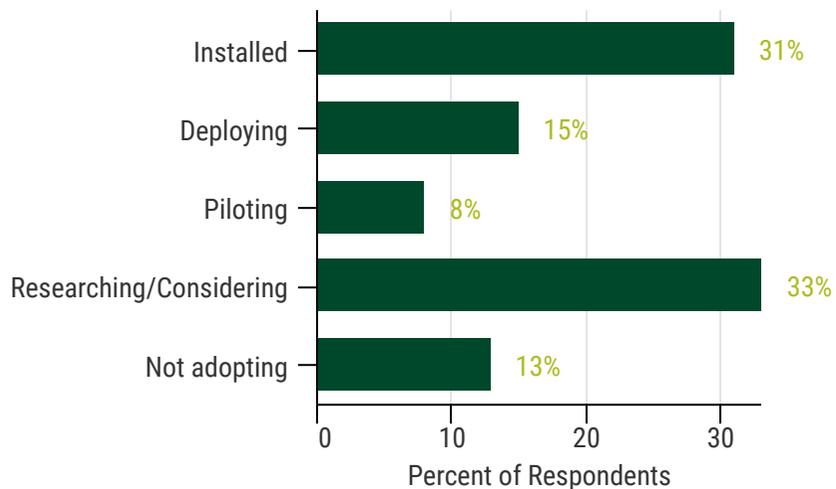
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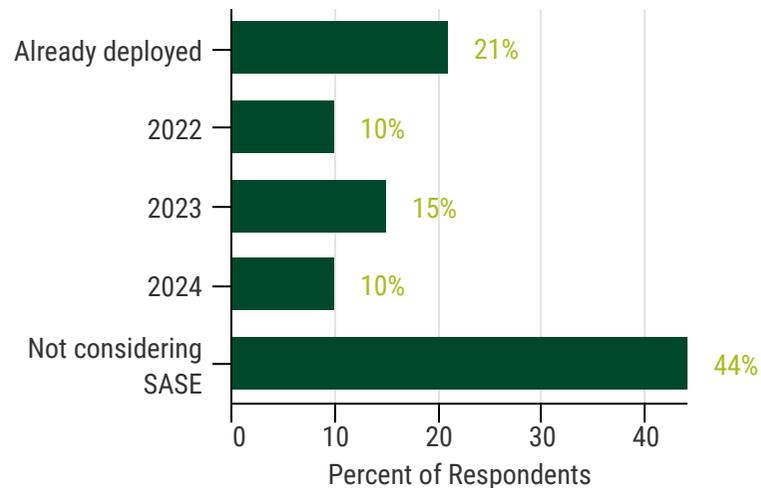
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Where are you in your adoption of SD-WAN?



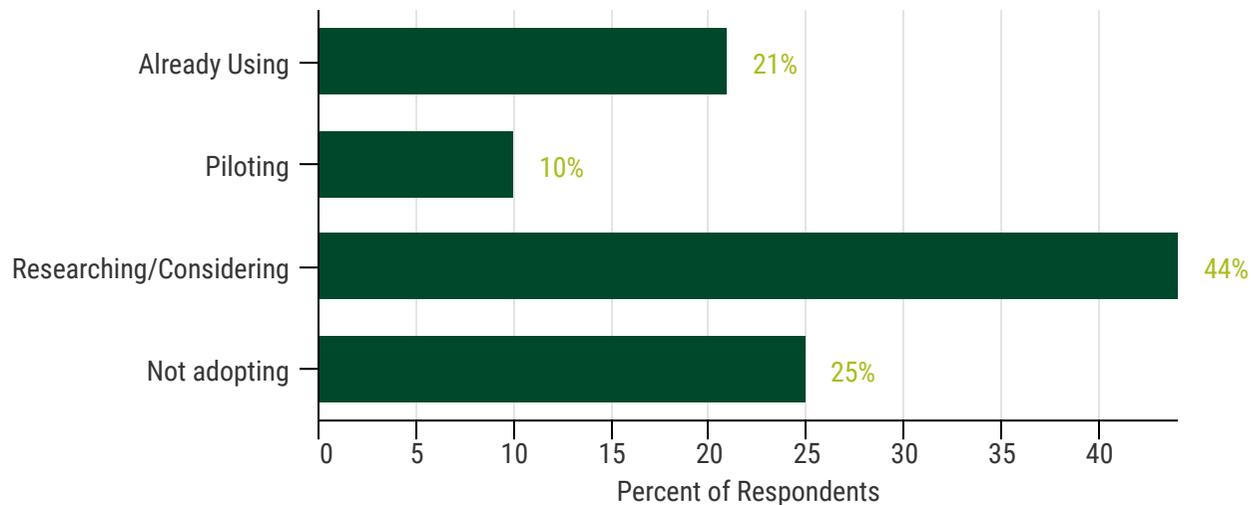
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If planning to implement SASE, when?



> Detailed Findings

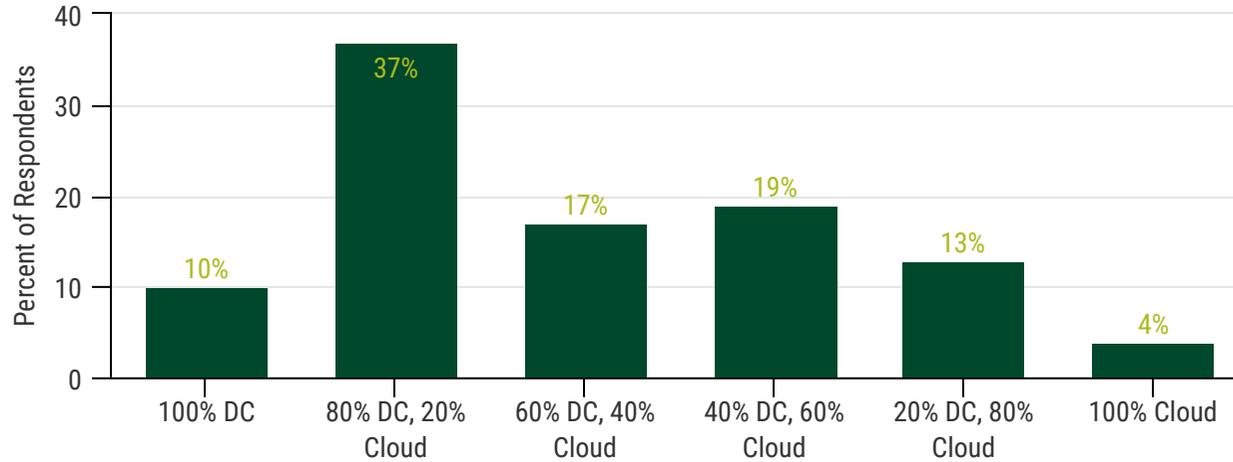
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Source: Pomeroy

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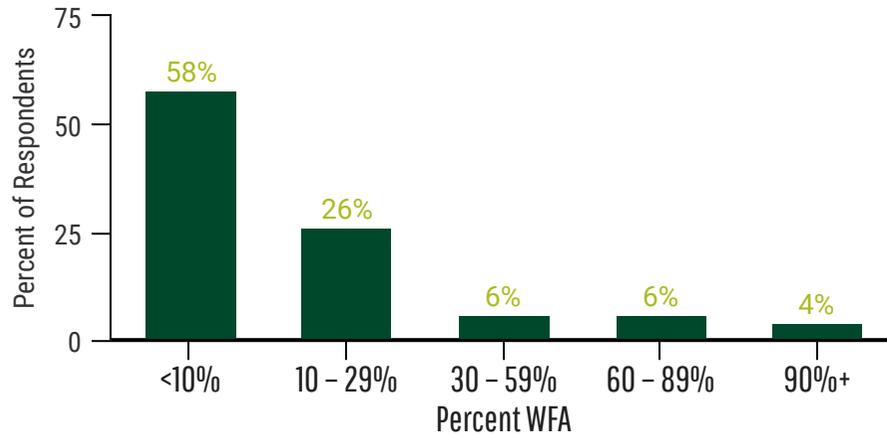
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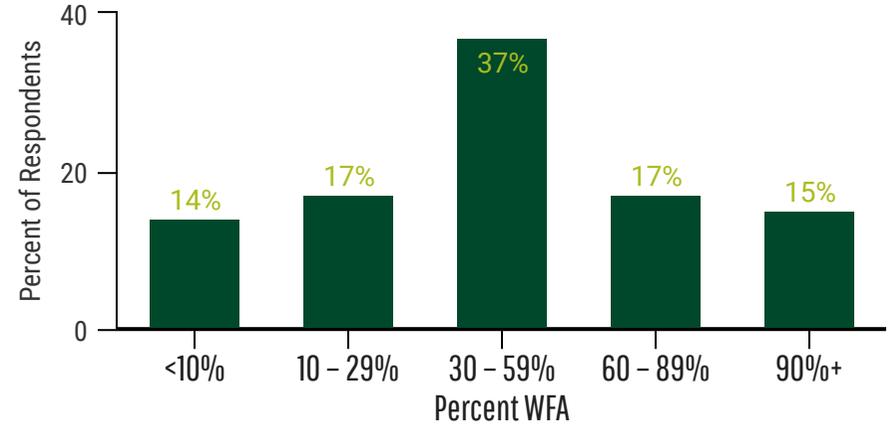
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Pre COVID, what percentage of your workforce worked from anywhere?



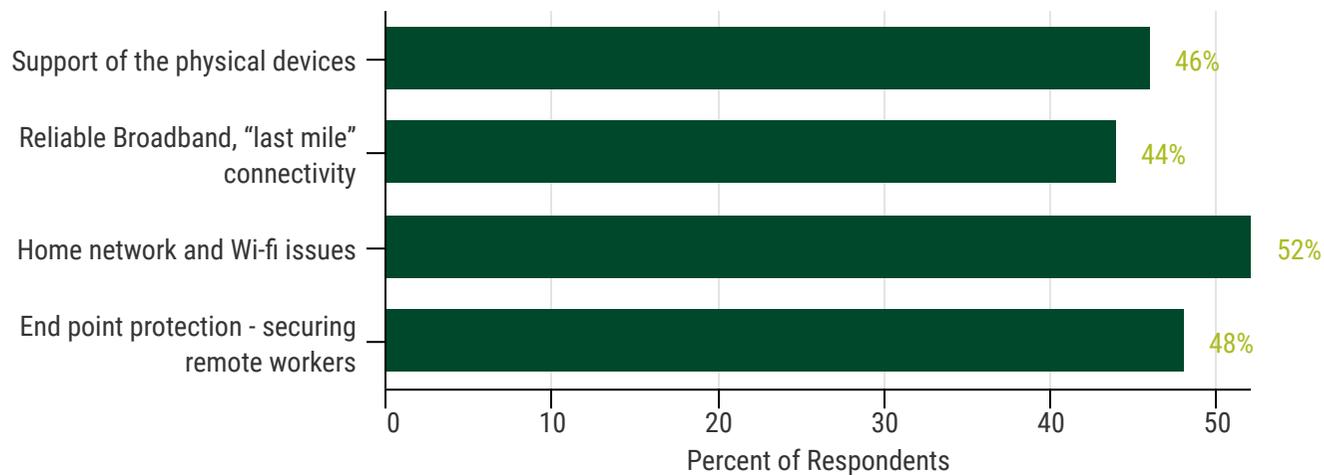
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In 2022, what percentage of your workforce will be working from anywhere?



> Detailed Findings

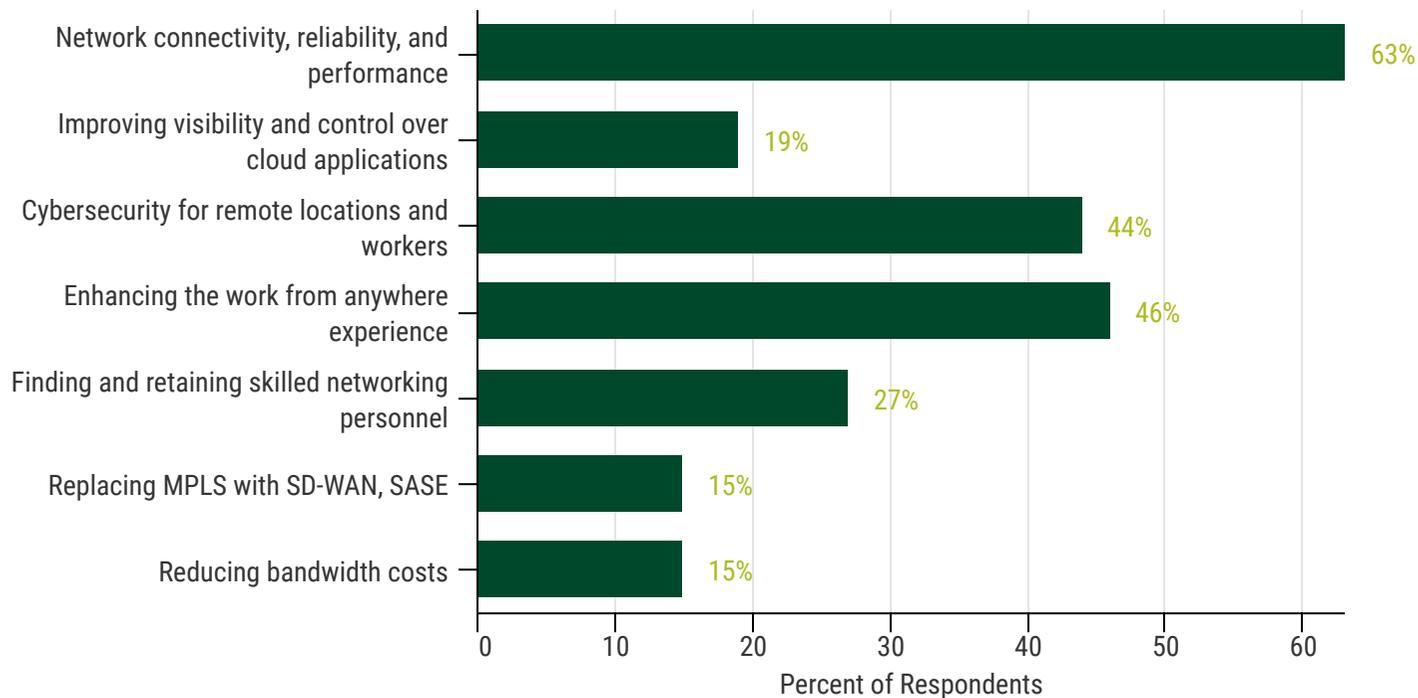
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Source: Pomeroy

> Detailed Findings

For your remote connectivity in 2022, what are your primary areas of focus?
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Source: Pomeroy