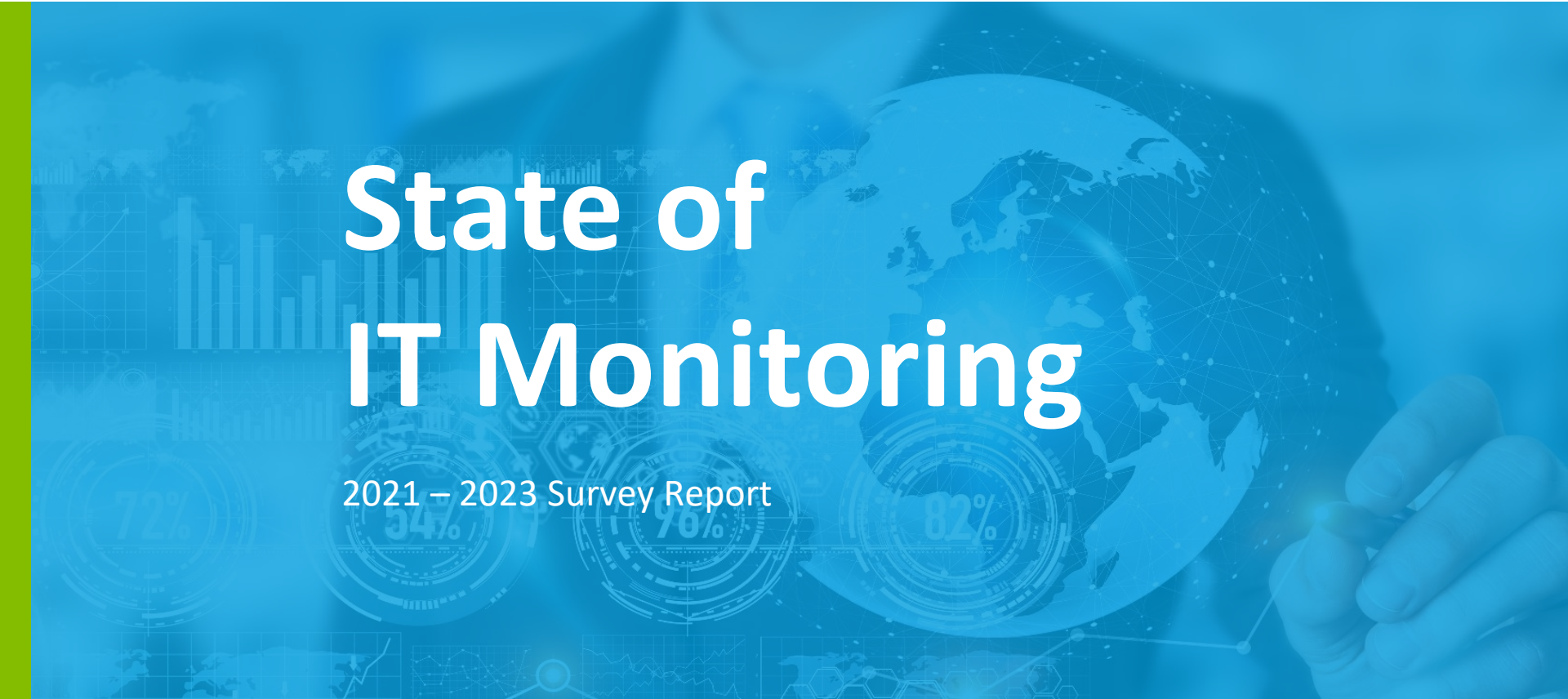
centreon

State of IT Monitoring

2021 – 2023 Survey Report



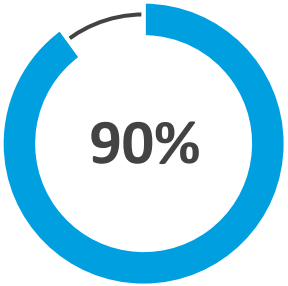
SUMMARY

There is much **room for improvement** in organizations' current IT monitoring capabilities. However the **importance of effective IT monitoring** is **well recognized.**

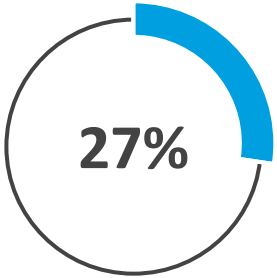
This year, **IT monitoring budgets have tended to rise**, suggesting organizations recognize the importance of developing their monitoring capabilities as they grow and develop their wider IT offerings.

With IT monitoring expected to grow in importance further in the future, **KPI monitoring** and extending IT monitoring to the **Cloud and IoT/Edge** will be priorities.

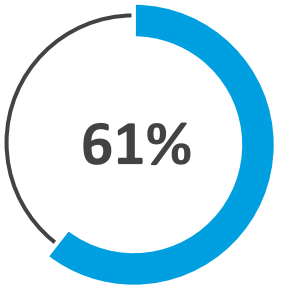
KEY FINDINGS



Of respondents believe that it is very or quite important that their IT team provides and shares business-oriented KPIs going forwards



Of respondents rate the visibility over performance levels in their organization as excellent



Of the IT estate in organizations is currently monitored, on average

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The State of IT Monitoring

01

OVERVIEW

Satisfaction could be much improved with IT monitoring and the visibility that is held over IT estates, particularly among respondents working in technology/ops roles.

However, **IT monitoring is held in high regard** by organizations, with most respondents saying it is a high or top priority to their organization, and that its importance will grow even further in the future.

The importance of IT monitoring is **particularly well recognized in North America,** meaning that organizations in the region may be looking to invest in solutions which improve their IT monitoring capabilities in the near future.

There is much room for improvement when it comes to monitoring and visibility over IT estates

With 39% of the IT estate on average not being currently monitored, IT teams may be missing out on crucial information on their system performance. Respondents seem to want to improve this figure within their organizations.

61%

Of the IT estate in organizations is currently monitored, on average

What percentage of your current IT estate is monitored in your organization?

Only 27%

Of respondents rate visibility over performance levels in their organization as excellent

How do you rate the visibility you have on IT performance and service levels in your organization?

Technology/ops respondents are slightly less likely to rate their organization's visibility over IT performance and service levels as excellent

These respondents, who are likely doing more of the day-to-day monitoring work, seem to be more sceptical about the visibility they have. This suggests a slight disconnect between the opinions of these staff and IT management over IT monitoring issues.

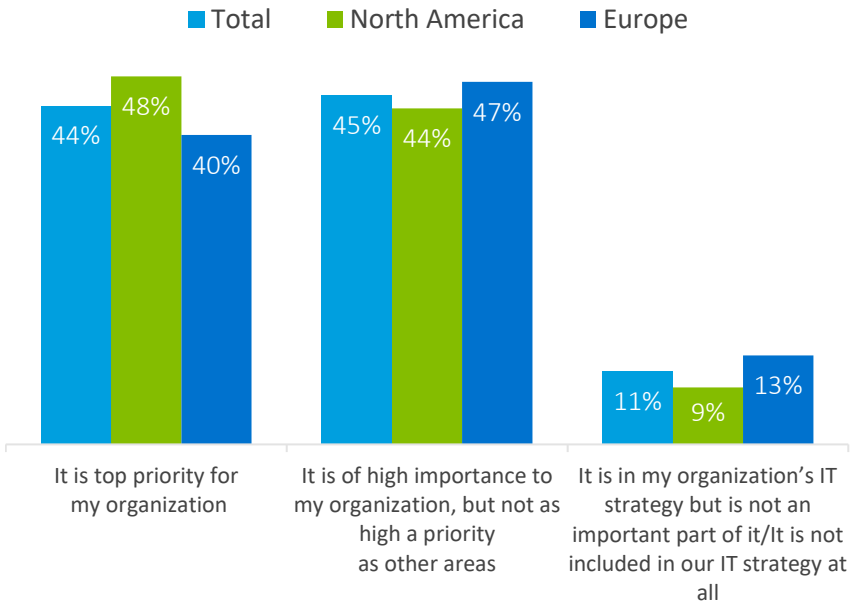
29%

IT management

25%

Technology/ops

Proportion of respondents who rate the visibility they have on IT performance and service levels in their organization as excellent.

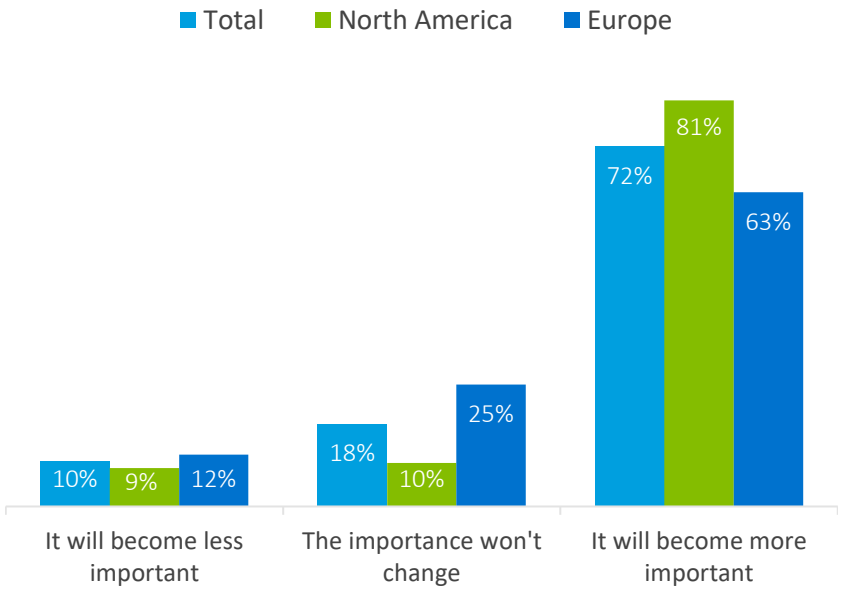


How important is IT monitoring to your organization's IT strategy? Split by respondent region.

Nonetheless, IT monitoring is of high importance to most organizations

While IT monitoring may not currently be as extensive as organizations would like, it is promising that they recognize its importance. This is particularly the case in North America, where it is more likely to be a top priority than in Europe.

Given its inclusion in so many organizations' IT strategies, it is likely that they will be looking to expand their IT monitoring in the near future.



How do you expect the importance of IT monitoring to your organization to change in the future? Split by respondent region.

And this importance is only expected to grow in the future, particularly in North America

With IT monitoring already of high importance in so many organizations' IT strategies [page 9], it is promising that it is expected to grow in importance even further in the future.

With its importance growing, organizations may be able to justify spending increasing amounts on tools which can help them improve their monitoring capabilities.

IT Monitoring Budgets and Resources

02

OVERVIEW

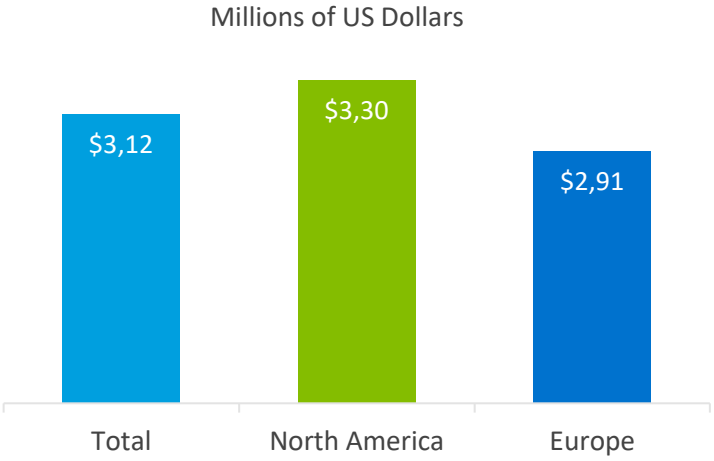
IT budgets have risen in over half of organizations this year, likely as organizations seek to develop their remote and digital services in response to the COVID-19 pandemic. **IT monitoring budgets have risen in almost as many organizations**, suggesting that it is recognized that as IT services are developed and expanded, IT monitoring capabilities need to be expanded in tandem with them.

Indeed, **IT monitoring is a key budgetary priority**, particularly in organizations in North America, reflecting the importance that organizations there place upon IT monitoring going forwards.

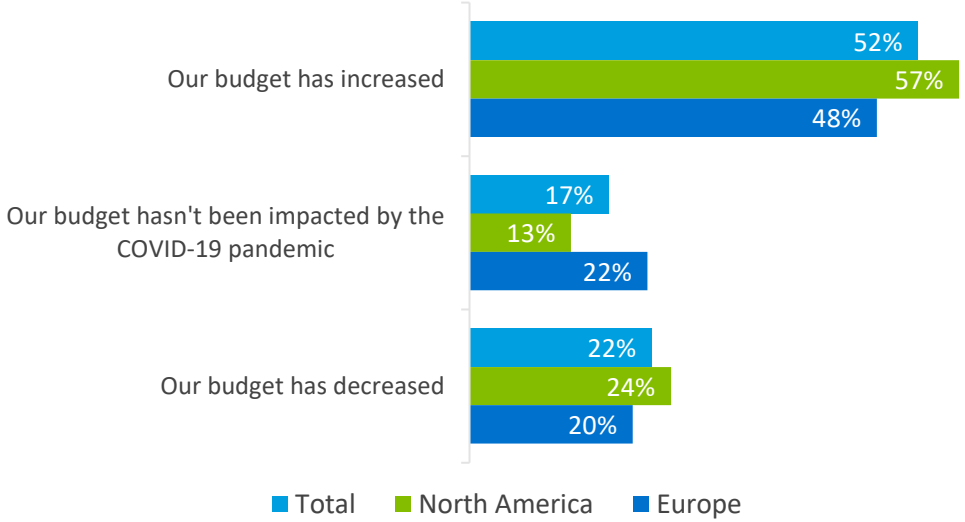
As well as increasing IT monitoring budgets, many organizations are recruiting into their Infrastructure and Operations teams, **IT monitoring roles are the most likely to be recruited.**

IT budgets are more likely to have been impacted by the pandemic in North America than in Europe

As a result of the COVID-19 pandemic, many organizations saw a sudden transition to remote working. Organizations have recognized that investment was required to support this transition so that employees have the digital tools they need to work effectively and securely. Conversely, others have experienced the detrimental impacts of COVID-19 on IT budget, having to tighten their belts to ensure business survival.



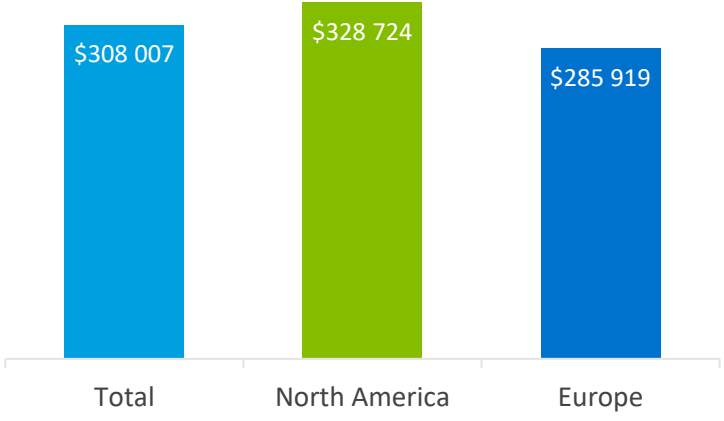
Average annual budget for IT (including IT staff salary) at the start of 2020. Split by respondent region



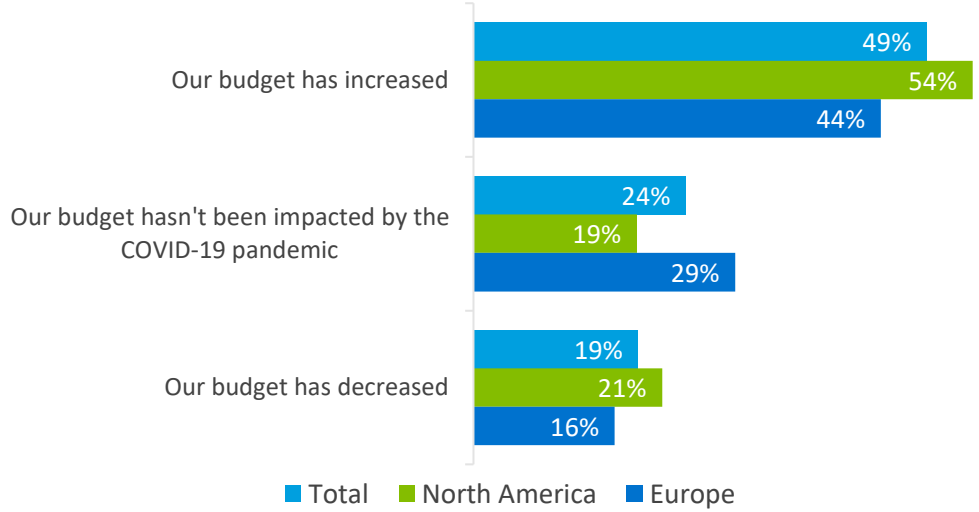
How has your organization's budget for IT been impacted by the COVID-19 pandemic? Split by respondent region.

IT monitoring budgets have been similarly impacted

As IT budgets have risen [page 13], IT monitoring budgets specifically have been impacted by the COVID-19 pandemic. While there may be other business areas such as adapting digital services, increasing collaboration tools and security to protect remote devices that organizations are focusing on, it is clear that IT monitoring is just as top of mind and important. It is imperative that businesses ensure IT monitoring capabilities are adapted to new, remote working practices.



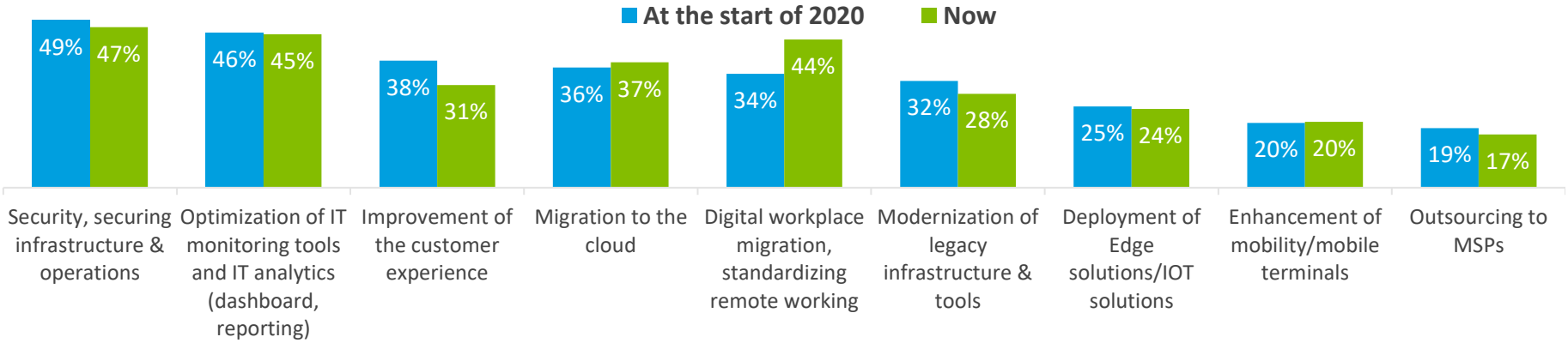
Average annual budget for IT monitoring. Split by respondent region.



How has your organization's budget for IT Monitoring been impacted by the COVID-19 pandemic? Split by respondent region. Not showing all answer options

Optimizing IT monitoring tools remains a top budget priority

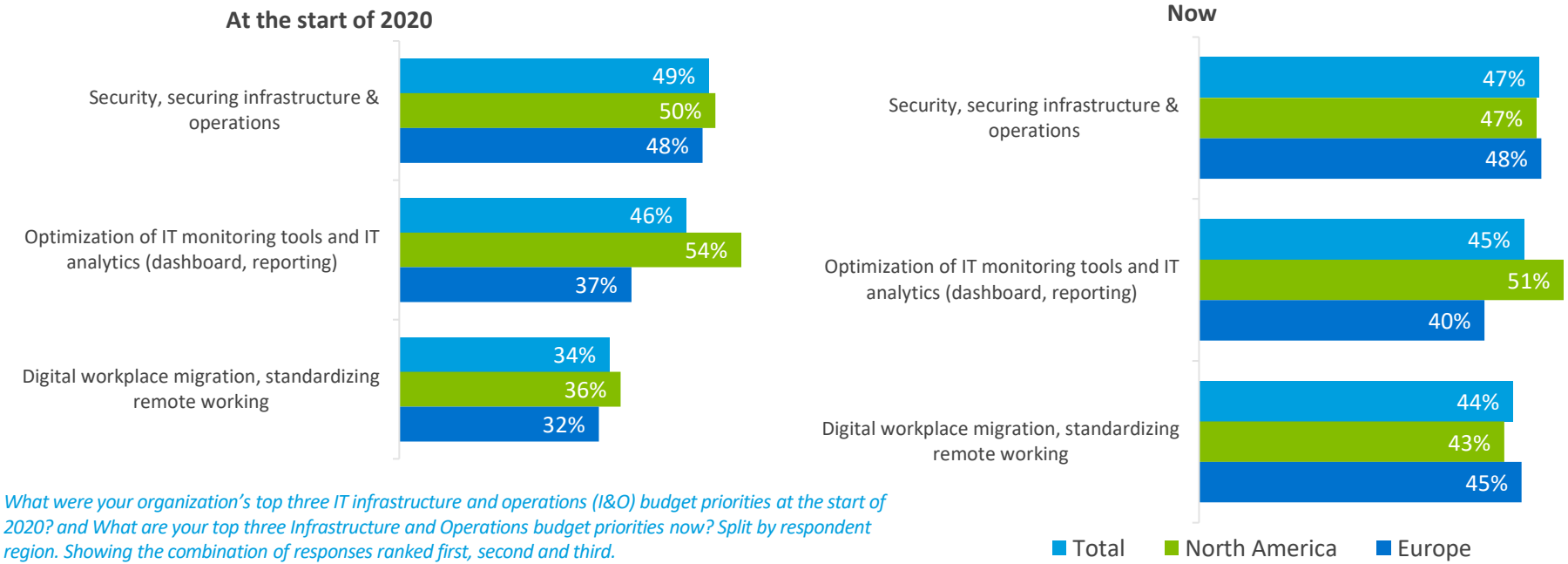
When exploring the changes to budget priorities this year, organizations' commitment to digital workplace migration and standardizing remote working has grown. While areas such as improving the customer experience and modernizing legacy infrastructure and tools have been becoming less prioritized, the optimization of IT monitoring tools is as much of a priority now as it was at the beginning of the year, showing that their importance to maintaining a more digital workplace is recognized.



What were your organization's top three IT infrastructure and operations (I&O) budget priorities at the start of 2020? And What are your top three Infrastructure and Operations budget priorities now? Showing the combination of responses ranked first, second and third.

While optimizing IT monitoring is more likely to be a budget priority in North America, in Europe it has grown in importance more this year

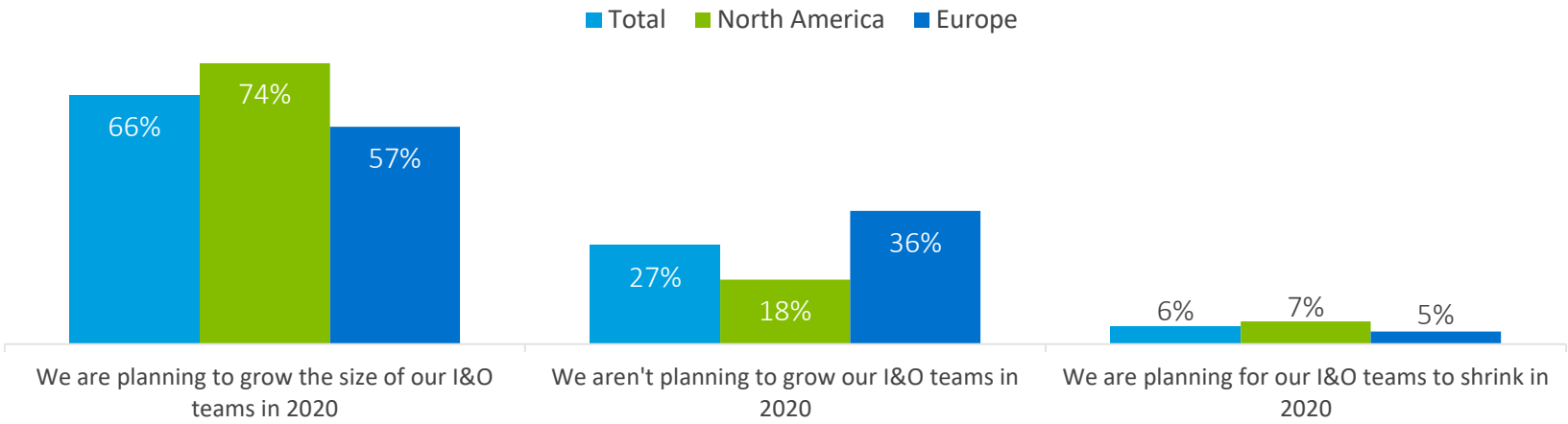
Unlike securing infrastructure and operations and digital workplace migration, which are priorities to similar proportions of organizations in Europe and North America, there is a gap between them when it comes to prioritizing IT monitoring. However, this gap may be closing, as the proportion who are prioritizsing IT monitoring in Europe has risen this year, while in North America it has fallen.



What were your organization's top three IT infrastructure and operations (I&O) budget priorities at the start of 2020? and What are your top three Infrastructure and Operations budget priorities now? Split by respondent region. Showing the combination of responses ranked first, second and third.

Most organizations are expecting to grow their I&O teams in 2020

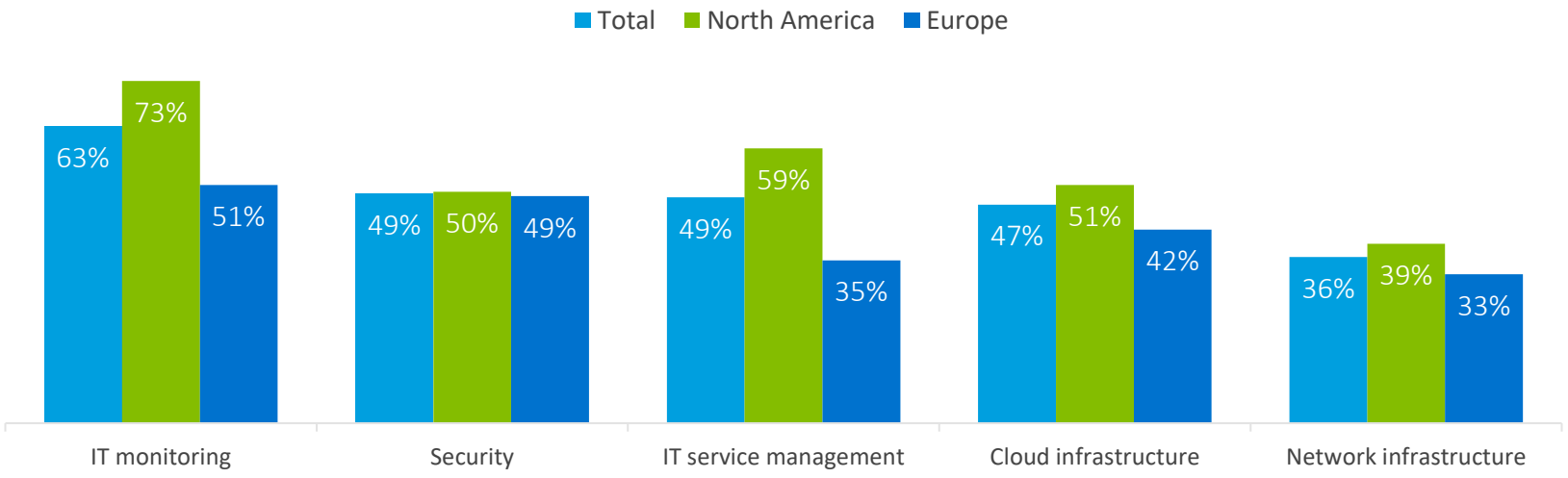
During a time where businesses may be uncertain about their future, it is promising to see that organizations plan to grow their infrastructure and operations teams in 2020. Indeed, more organizations are planning to grow their I&O teams this year than to increase their IT budgets [page 13], suggesting that while budgets might have been tightened in some organizations in response to the COVID-19 pandemic, it is still imperative to organizations to grow and develop their I&O teams.



Given the COVID-19 pandemic, does your organization currently have plans to grow its IT infrastructure and operations (I&O) teams in 2020? Split by respondent region.

Globally, IT monitoring is the area of Infrastructure and Operations most likely to be recruited into

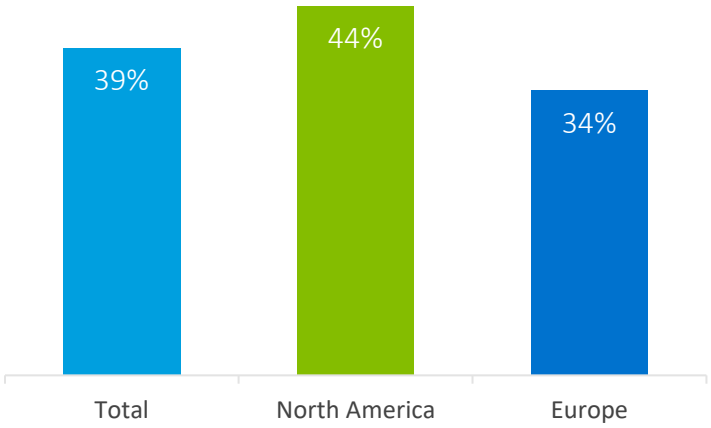
Of those who are planning to expand their team, IT monitoring is a clear area of focus for organizations. Exploring regional differences, organizations in North America are perhaps recognizing more immediately the need to develop their IT monitoring offerings while those in Europe are at risk of falling behind.



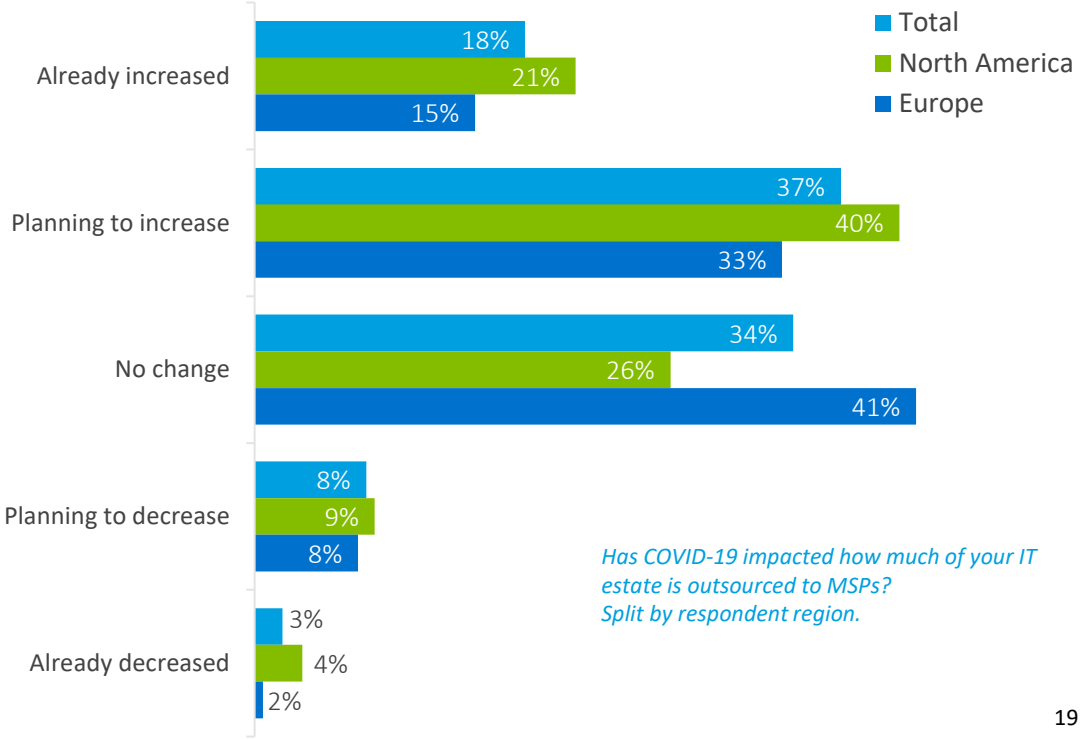
Which areas of its IT infrastructure and operations (I&O) teams is your organization planning to recruit into? Respondents from organizations which are planning to grow their I&O teams in 2020.

As a result of COVID-19, many organizations have or will increase usage of Managed Service Providers

The global pandemic is clearly impacting a variety of business areas, as many organizations are showing current or future commitment to outsourcing. With a worrying proportion of organizations' IT estates currently going unmonitored [page 7], it's crucial for organizations to make sure that the MSPs they're choosing to partner with have the ability to support them with this.



Average proportion of organizations' IT estate that is outsourced to Managed Service Providers (MSPs)
Split by respondent region.



Has COVID-19 impacted how much of your IT estate is outsourced to MSPs?
Split by respondent region.

IT Monitoring Tool Usage

03

OVERVIEW

There is **much room for improvement** when it comes to respondents' **satisfaction with their IT monitoring tools.** One of the most common reasons for this dissatisfaction is the **inability to provide unified, holistic visibility**. Poor integration with other tools is another common reason. The number of IT monitoring tools in use in organizations is another common concern.

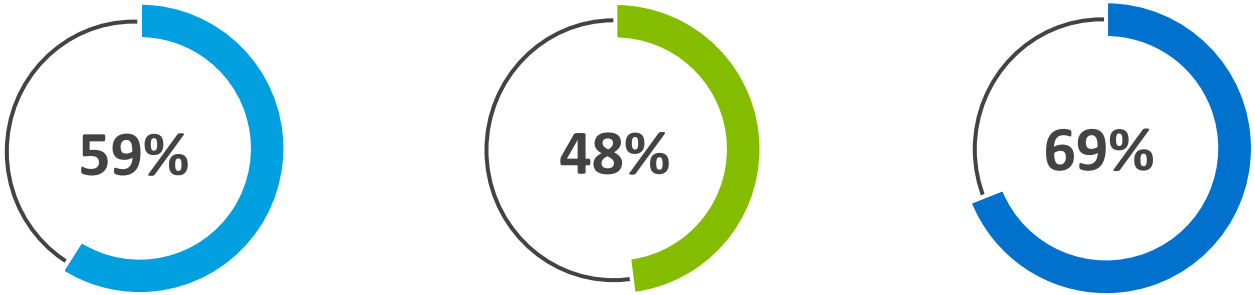
Nonetheless, the **potential benefits** that can be gained from using an IT monitoring tool are **well recognized**, and as such organizations may be looking to invest in new tools in the future which help them reap these benefits.

One of these benefits is the ability to provide business-oriented KPI monitoring, something which **most respondents believe it will be important for their IT team to provide.**

Where IT monitoring tools are in use, many aren't completely satisfied with the service they provide

Given that IT monitoring is expected to grow in importance in organizations in the future [page 10], organizations are likely to be looking to replace the tools with which they are dissatisfied, with ones which are able to better meet their needs and expectations. Respondents in Europe are even less likely to be satisfied with their tools, suggesting that organizations in the region should prioritize IT monitoring more than they are currently [page 9], to ensure they are able to invest in the tools they need to compete on a global scale.

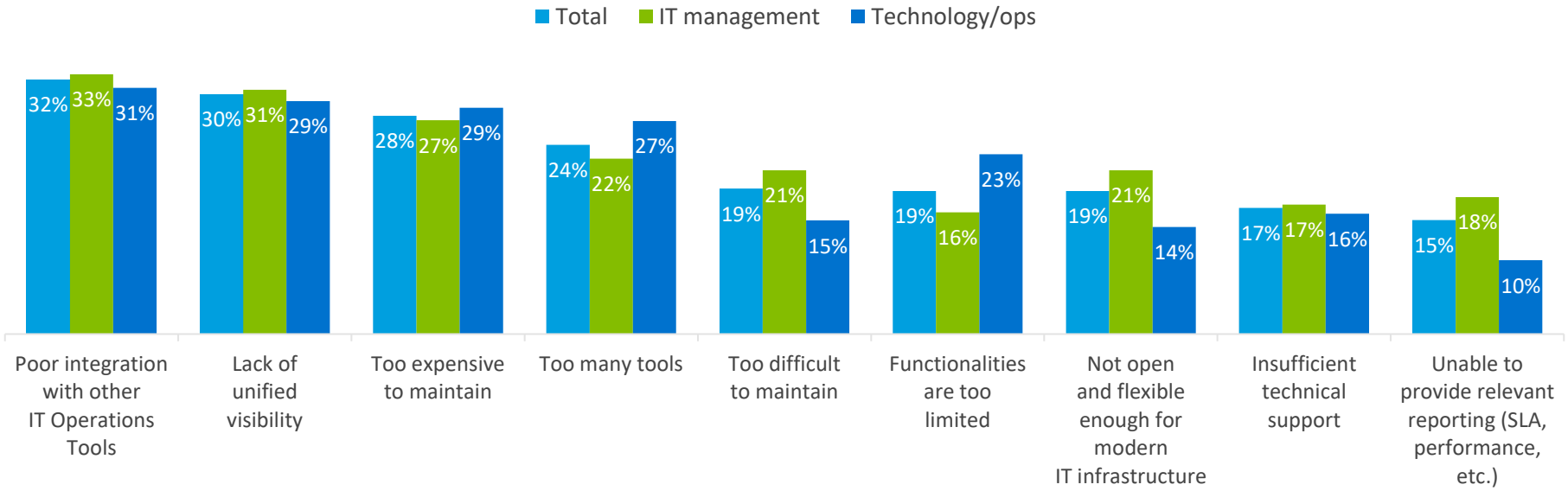
Proportion who aren't completely satisfied with their current monitoring tools



How satisfied are you with the service provided by your current monitoring tools? Respondents who have a monitoring tool in use in their organization. Showing the proportion of respondents who reported that they were "somewhat satisfied", "somewhat dissatisfied" or "completely dissatisfied" with their current monitoring tools

Poor integration and inability to provide unified, holistic visibility are among the reasons for this dissatisfaction

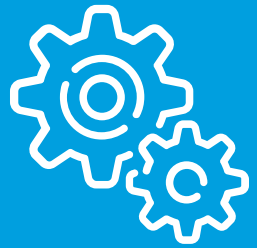
The inability of their tools to provide a unified visibility may be a reason why organizations only have visibility over 61% of their infrastructure on average [page 7]. Technology/ops respondents have particular concerns over the number of tools in use, and their functionality, suggesting that effectively using and integrating tools is a struggle they are regularly facing.



What are the reasons you aren't completely satisfied with your current IT monitoring tools? Respondents who aren't completely satisfied with the monitoring tool in use in their organization. Split by respondent type.

The number of IT monitoring tools in use in organizations may be cause for alarm

With so many tools in use, it is essential that organizations ensure that they are able to integrate them so that they have visibility over their whole infrastructure, especially given that 24% say that having too many tools is a cause of dissatisfaction [page 23]. Perhaps IT management should be more concerned about this issue, as technology/ops respondents are.



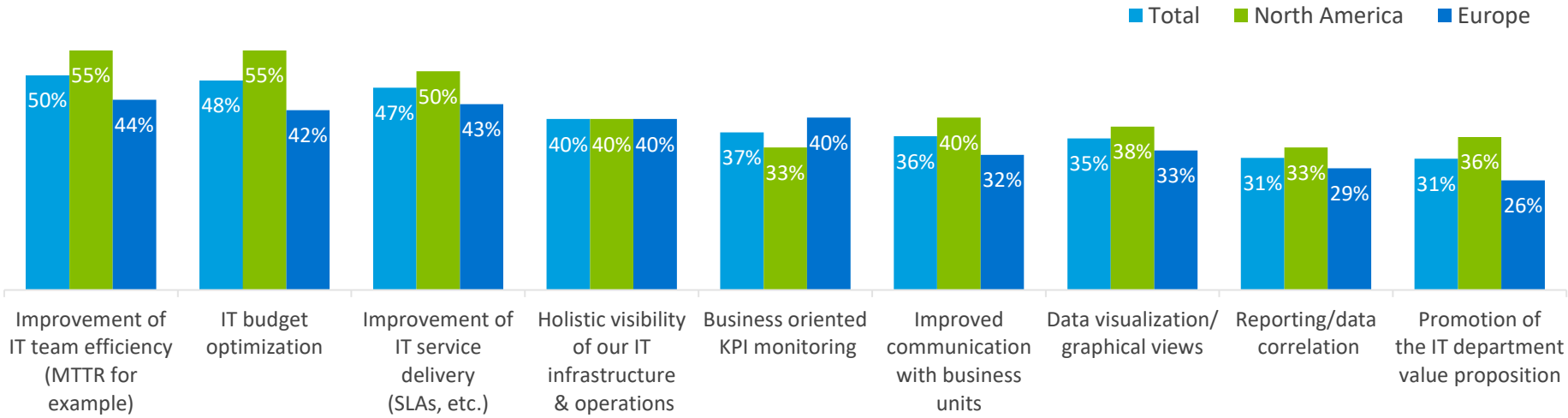
14

IT monitoring tools on average are currently in use in organizations

How many IT Monitoring tools are in use in your organization?

Nevertheless, the benefits that can be gained from an IT monitoring tool are well recognized

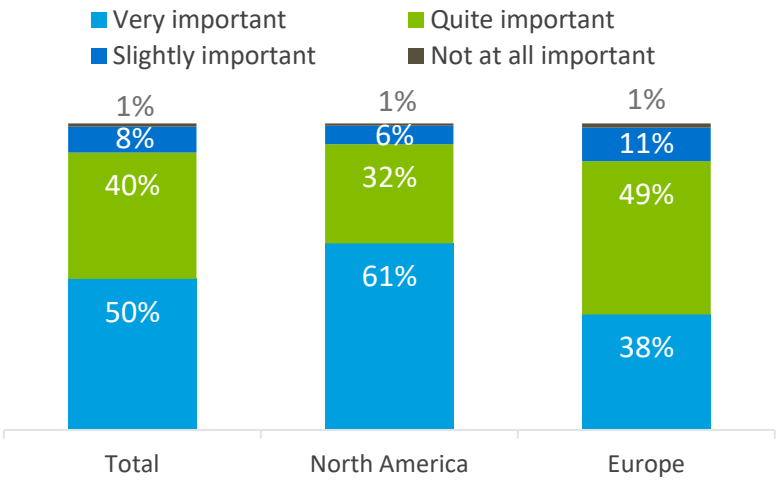
As a result, organizations, particularly those dissatisfied with their tools at present [page 22], may be looking to find new tools which are able to provide these benefits. The benefits that can be gained include improvements for the IT team, such as team efficiency and IT service delivery, but also to the wider organization, through business oriented KPI monitoring and improved communication with business units.



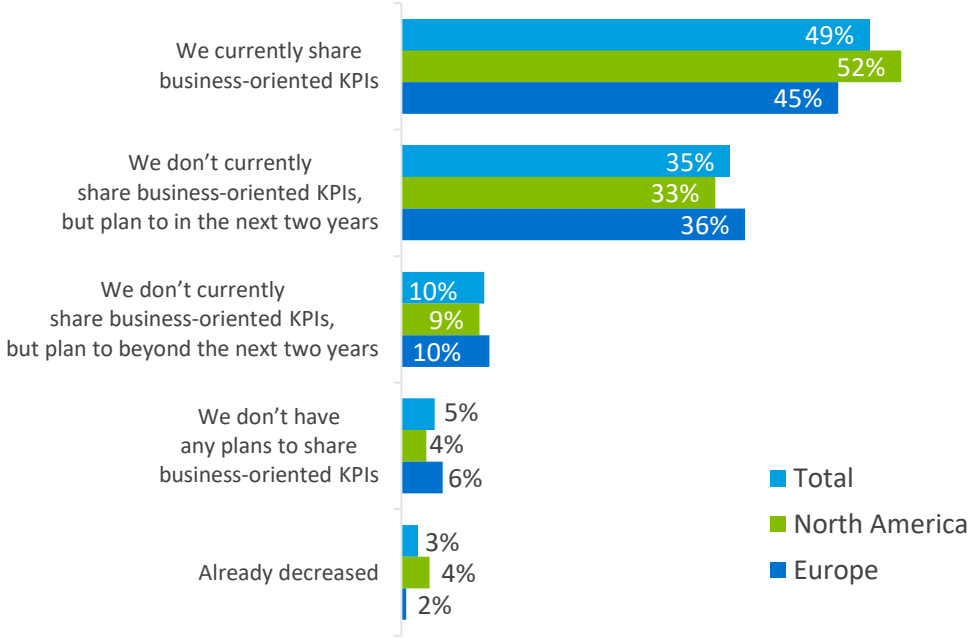
What do you see as the greatest benefits to be gained from an IT monitoring tool? Split by respondent region.

It is important for IT teams to provide and share business-oriented KPIs

The importance of sharing these KPIs is reflected in the high number who plan to do so in the next two years and beyond. These organizations may be on the lookout for IT monitoring tools to help them achieve this, as may those who already do so, if they are currently using more manual methods.



How important do you believe it will be going forwards for your IT team to provide and share business-oriented KPIs, as opposed to just technical KPIs across your organization? Split by respondent region.



Does your IT team currently, or plan to in the future, provide and share business-oriented KPIs with the rest of your organization? Split by respondent region.

IT Monitoring Trends

04

OVERVIEW

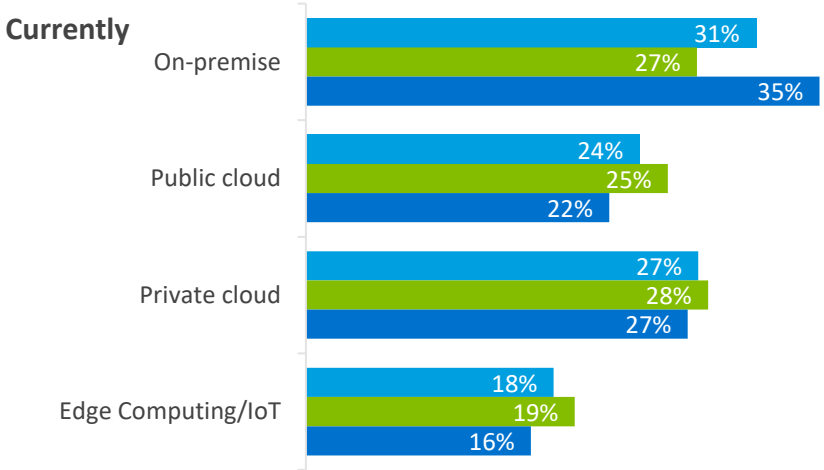
IT infrastructures are expected to change over the next three years, with **the proportion based in the Cloud and the Edge/IoT expected to grow**, particularly in Europe.

Many respondents and their organizations recognize that this will impact upon their IT monitoring methods and practices. However, organizations in Europe are slightly less likely than those in North America to be planning to extend their IT monitoring to the Cloud, despite expecting to see a larger growth of IT infrastructure based there in the next three years.

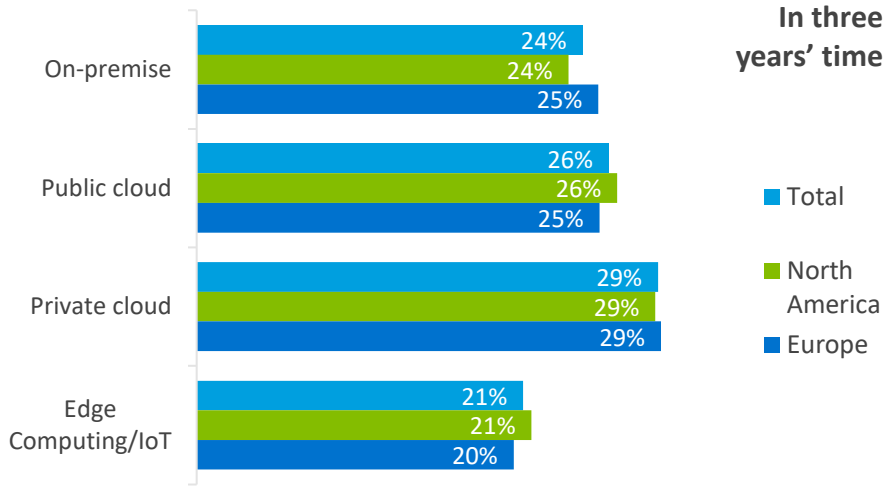
As well as extending IT monitoring to new infrastructures, another goal that many organizations have for the years 2021-2023 is to **extend IT monitoring from technical to business-oriented KPIs.**

The proportion of IT infrastructure based at the Edge and in the Cloud is expected to grow in the next three years

As deployments change, organizations will need to ensure they are able to monitor IT infrastructure wherever it is based. organizations in Europe currently have a larger percentage of IT infrastructure on-premise, and less in public and private cloud, and in Edge computing/IoT. However, that is set to change in the next three years. The proportion of each environment is similar regardless of region. organizations in Europe may therefore have more to do to ensure their IT monitoring is able to cope with the greater changes their infrastructure will undergo.



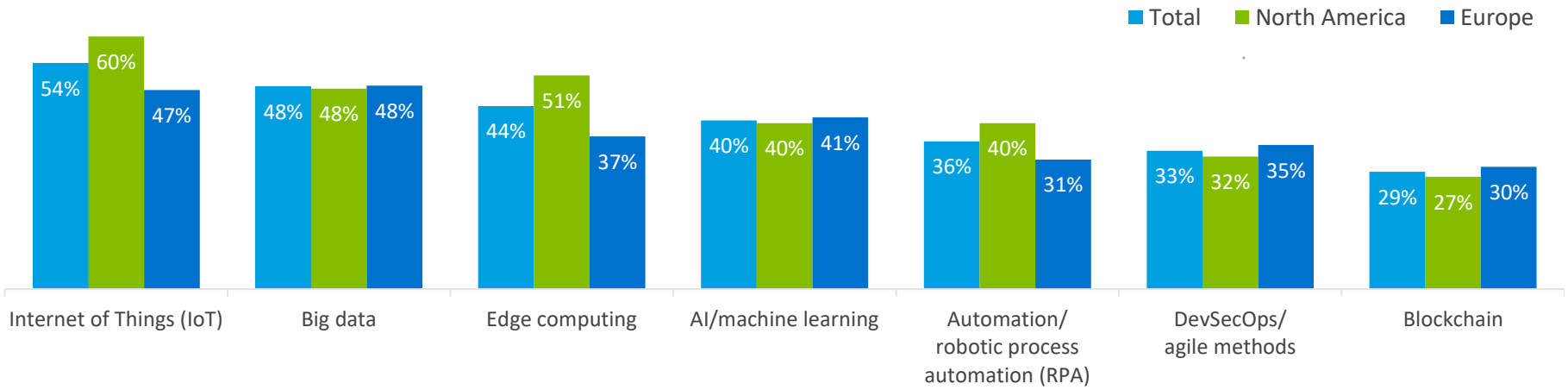
Average percentage of IT infrastructure which is currently based on-premise, in the public cloud, in the private cloud, and at the Edge? Split by respondent region



Average percentage of IT infrastructure which will be based on-premise, in the public cloud, in the private cloud, and at the Edge in three years' time? Split by respondent region

Respondents, particularly in North America, expect that IoT and/or Edge Computing will impact upon IT monitoring

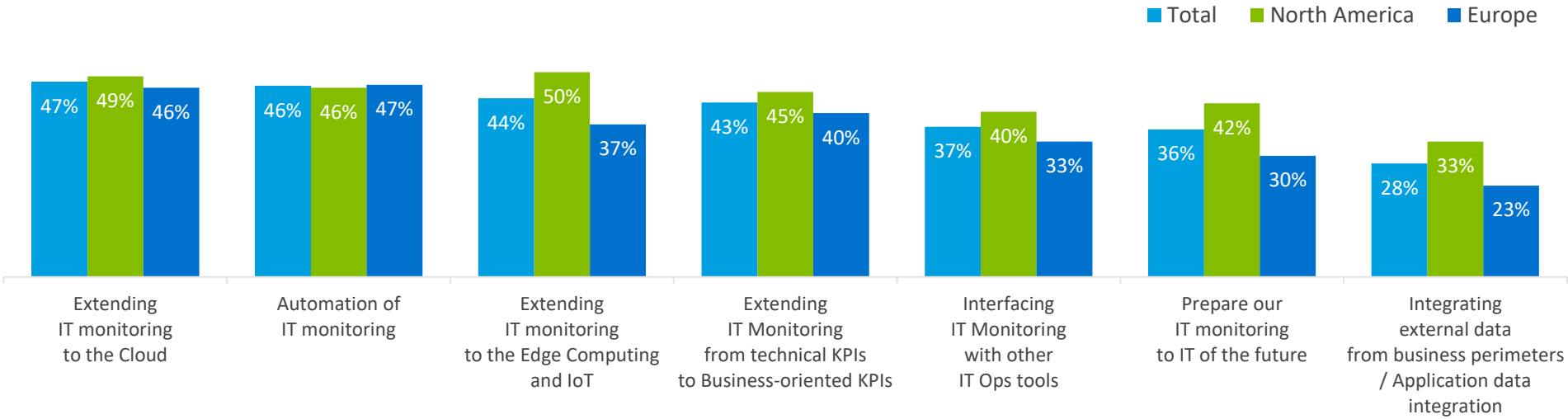
The impact of these technologies could help to improve IT monitoring methods or practices, but they can also bring challenges. The adoption of these trends can also result in more data being created, which means more to monitor; this strengthens the argument for robust IT monitoring methods. There may be cause for concern in Europe, where respondents expect to see the greatest changes to IT infrastructure [page 29] but are less likely to believe that they will impact IT monitoring.



Which of the following technologies/trends do you think will impact your IT Monitoring methods or practices in the next two years? Split by respondent region.

Adapting to altering IT infrastructure is a common goal

We've seen that respondents believe that the Edge and IoT will impact IT monitoring [page 30], but organizations are also recognizing that extending IT monitoring to the Cloud will be a priority for the years 2021-2023. Those in North America are slightly more likely to prioritize extending IT monitoring to the Edge and IoT, even though organizations in Europe are expecting to see greater growth in the proportion of their infrastructure based there.



What are the IT monitoring priorities in your organization for the years 2021-2023? Split by respondent region.

The desire to improve KPI sharing is likely to influence IT monitoring decisions

Business-oriented KPI monitoring is a more commonly recognized benefit of implementing an IT monitoring tool than data visualisation, and data reporting and correlation. Meanwhile, extending IT monitoring from technical to business-oriented KPIs is the fourth most common IT monitoring priority that organizations will face in the years 2021-2023.

37%

See business-oriented KPI monitoring as a benefit that can be provided by an IT monitoring tool

What do you see as the greatest benefits to be gained from an IT monitoring tool?

43%

Consider extending IT monitoring from technical KPIs to business-oriented KPIs a priority for 2021-2023

What are the IT monitoring priorities in your organization for the years 2021-2023?

Research Methodology

05

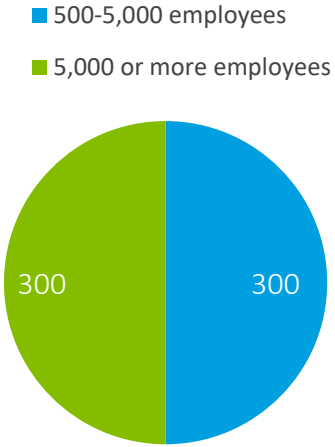
Research Methodology

Centreon commissioned independent market research agency Vanson Bourne to conduct the State of IT Monitoring research. The study surveyed 600 IT management and technology/ops respondents in August and September 2020, from the US, Canada, France, the UK, Germany, Spain and Italy.

All interviews were conducted using a rigorous multi-level screening process to ensure that only suitable candidates were given the opportunity to participate.

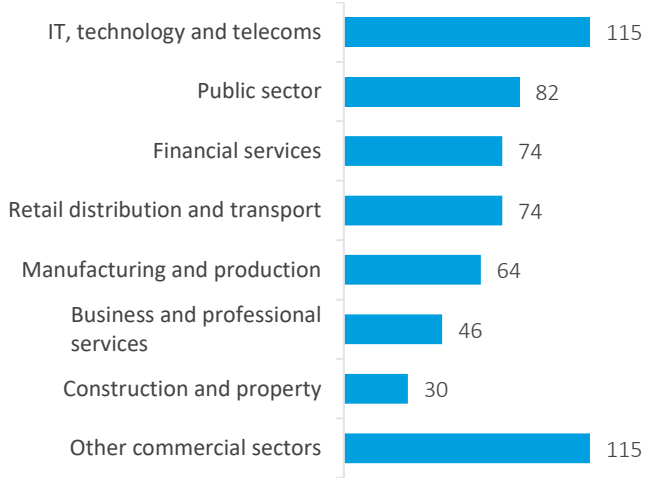
Vanson Bourne is an independent specialist in market research for the technology sector. Its reputation for robust and credible research-based analysis is founded upon rigorous research principles and our ability to seek the opinions of senior decision makers across technical and business functions, in all business sectors and major markets.

For more information, visit vansonbourne.com



By organization size…

How many employees does your organization have globally?

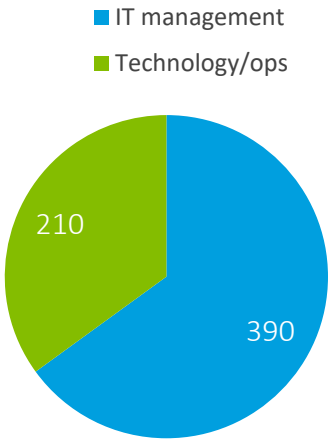


By organization sector…

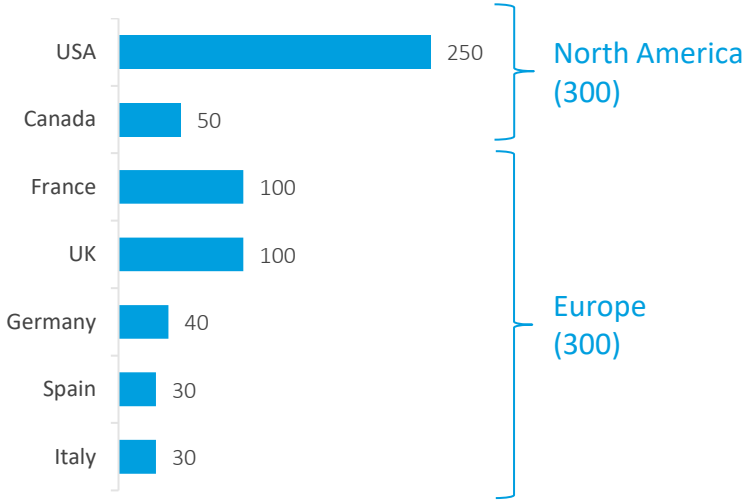
Within which sector is your organization?

600 respondents were interviewed in August and September 2020, split in these ways

Demographics continued



By job role…



By respondent country…

How can Centreon help?

Centreon is a trusted global provider of business-aware IT monitoring that provides distributed digital organizations with intuitive, mission-critical insights and unified views into on-premise, cloud and edge technologies. Customers around the globe entrust Centreon with their most crucial assets, and the assurance of excellence IT operations and performance excellence.

Centreon's holistic monitoring platform comprehensively covers the performance needs of IT operations providing end-to-end visibility and contextual business insights from across the IT infrastructure. AIOps-ready, Centreon's IT monitoring platform provides IT teams with confidence that their infrastructure is prepared for innovation and can support whatever advanced technologies the future brings.

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