



2022 REPORT

Global Data Insights Survey

Ascenty
A Digital Realty and Brookfield Infrastructure JV

 **BAM DIGITAL REALTY**
A Brookfield Asset Management and Digital Realty JV

icolo.io

interxion
A DIGITAL REALTY COMPANY

 **LAMDA HELLIX**
A DIGITAL REALTY COMPANY

 **MC DIGITAL REALTY**
A Digital Realty and Mitsubishi Corporation JV

MEDALLION
A Digital Realty and Pembani Remgro JV

Contents

- 3** About
- 4** Foreword
- 5** Highlights
- 11** Insights
Global | Regional
- 37** Survey Methodology



About the Global Data Insights Survey

The Global Data Insights Survey, presented by Digital Realty Trust, Inc. (“Digital Realty”), is an annual report designed to provide insights on how data is becoming the critical agenda topic for all businesses, identify implications driving the need to rethink data strategies and establish the importance of addressing Data Gravity.* The report shares insights collected by a third party from 7,295 C-level executives, business and technology leaders from 23 countries and nine industries globally who responded to 13 questions designed to facilitate industry dialogue around the business needs of data.

Recently, we have witnessed the emergence of a new megatrend occurring on our platform: the explosion of enterprise data growth globally. All industries are becoming information industries via the need to create, consume, analyze, store and exchange ever-growing amounts of data. This drove us to understand more.

We conducted research, cracked the code and built a global database, and published the [Data Gravity Index™](#) to share our findings and assist our Enterprise and Service Provider Customers as they shift their strategies to address Data Gravity. Today, we are continuing this mission with the Global Data Insights Survey.

As the largest global provider of multi-tenant data center capacity,¹ Digital Realty has a unique vantage point on how technology infrastructure is built, deployed, and operated. Our 4,000+ customers² continue to solve the most complex Hybrid IT infrastructure, connectivity and workload use cases on our platform globally. This includes use cases across network peering, hyperscale, low-latency, high-performance computing, big data and artificial intelligence. This report presents data we are uniquely qualified to collect and share with our customers, partners, and peers.

*Data Gravity may affect an enterprise's ability to innovate, secure customer experiences, and even deliver financial results on a global scale.

¹451 Research, *Market Forecast: Leased Datacenter Global Providers*, 2020. Capacity measured in terms of operational square footage.

²Digital Realty, *3Q21 Financial Results*, October 2021

Unlocking Trapped Value Starts With Data

Data is exploding in volume, velocity and value. It's the common factor across every industry where business, regulatory, and operational challenges exist.

Today's business and technology leaders must address converging physical and digital worlds, where siloed data is the challenge. At the same time, Data Gravity* creates physics barriers that impede efficient data exchange.

Unlocking the trapped value that data represents starts with:

- Rethinking data strategies at a global, regional & local level
- Understanding where and how data accumulates
- Transforming data into insights and intelligence

The best proxy of the new digitized world is data. By thinking data-first and understanding where data accumulates, you can understand where to support your business digitally.

This report provides insights into how business and technology leaders can rethink how they integrate their business platforms, identify hidden opportunities and cost, and unlock their data's trapped value in a digitized world.

*Data Gravity may affect an enterprise's ability to innovate, secure customer experiences, and even deliver financial results on a global scale.

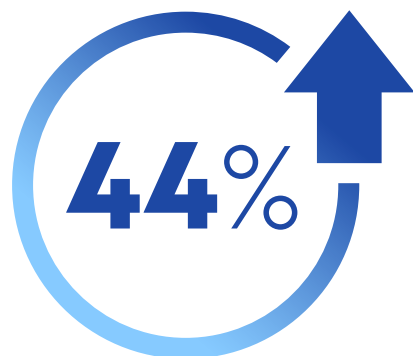
Highlights

These are the five most prevalent themes we learned from the Global Data Insights Survey.

- 1 | Data is pervasive.
- 2 | Data is becoming the business agenda.
- 3 | Data requires aggregation and control.
- 4 | Data is localizing.
- 5 | Data-first strategies win.

1. Data is Pervasive

Data creation is multiplying at all points of business presence – **1.5GB/second by 2024¹** – and nearly half of companies with \$1B+ revenues have decentralized their data architecture.² By 2023, 70% of security products will integrate IT-OT-IoT systems.³ The implementation of hybrid business & corresponding Hybrid IT models are proliferating data creation and aggregation needs. Data and insights are trapped across business and data silos, which creates both hidden opportunities and costs for businesses.



of companies with \$1B+ revenues now keep **data decentralized**, citing

- Faster processing
- Proximity of data to users & devices
- Reduced budgets for processing

IMPLICATION:

Data sprawl is happening at the edge. Businesses are implementing hybrid IT models [physical-digital] to address data performance, cost and security as data sovereignty & regulations exacerbate the requirements for data localization. Understanding the data is required to meet the business goals.

¹International Data Corporation, *Worldwide Global DataSphere Forecast*, 2021–2025, March 2021

²Digital Realty, *Global Data Insights Survey*, March 2022

³Gartner, *Emerging Technology Analysis: Cyber-Physical Systems Security Is an Opportunity for Security Product Managers*, November 2019

⁴Digital Realty, *Global Data Insights Survey*, March 2022

2. Data is Becoming the Business Agenda

Strategy and value outcomes rely on data-driven insights to attract and retain customers, as well as to drive business growth and develop new digital products. Over 80% of CEOs expect to increase investments in digital technologies and **70% bet on digital data products to grow.**¹ Business leaders identify the top three value drivers for data-driven insights to be customer experience, data location strategy, and new digital products or services.² Business leaders are either starting to increase or expecting to slightly increase IT budgets to grapple with the growing need to address data challenges and strategy.³

IT budgets **will slightly increase** to address...⁴

- Analyzing data
- Using data to improve customer experience (CX)
- Expanding IT investment at new business points of presence



IMPLICATION:

To improve customer experience, geographic expansion placing Hybrid IT infrastructure closest to the customers is required. IT budgets only increasing slightly may not be sufficient to address growing demand for data location and customer experience needs.

¹Gartner, 2021 Gartner CEO Survey: The Year of Rebuilding, May 2021

²Digital Realty, Global Data Insights Survey, March 2022

³Ibid.

⁴Ibid.

3. Data Requires Aggregation & Control

Regulations, privacy constraints, reluctant customers & lack of investment in data systems are impeding the data-driven business agenda. According to business leaders, the top three lowest performing areas for companies are sharing data with partner ecosystems, collecting customer data, and dealing with local data-related regulations concerning security, compliance, and sovereignty.¹ While current company locations support connectivity, integration & performance, only some support secure data exchange.² By 2024, **over 70% of organizations will deploy multiple data hubs** to drive mission-critical data analytics, sharing & governance.³

The **top 3 obstacles for data-driven insights** cited by companies with \$1B+ revenues are:⁴

- Data privacy & regulation
- Customer reluctance to share data
- Lack of investment in data/systems

IMPLICATION:

Gaining insight from localized data in a compliant and time-effective manner requires investment and a distributed data architecture. Users and data are growing exponentially, and integration of the data to garner insights requires a secure ecosystem of providers and business partners.

¹Digital Realty, *Global Data Insights Survey*, March 2022

²Ibid.

³Gartner, *Predicts 2021: Data Management Solutions — Operational Efficiency Rises to the Top*, December 2020

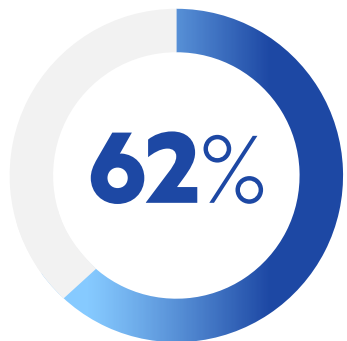
⁴Digital Realty, *Global Data Insights Survey*, March 2022

4. Data is Localizing

Enterprise workflows typically use **400+ data sources**¹ exchanged **across 27 cloud products**.² Data Gravity emerges as an ever-growing number of locations, users, and devices create more data and exchange with other users, devices, and locations. It creates physics barriers that impede the efficient exchange of data and must be addressed in the design of a business strategy that drives successful outcomes. By 2022, almost 90% of IT leaders will maintain local copies of customer and transaction data for compliance.³ Growth, compliance, and regulations exacerbate the requirement for data localization.

IMPLICATION:

Data creation is multiplying at all business points of presence, and the way it drives value is through secure data exchange in the most efficient manner.



62% of companies with \$1B+ revenues have **50+ locations** and/or **colocation sites**⁴



- 97%** have at least 21 locations
- 93%** will add new business points of presence in the next 2 years
- 71%** will add 6+ points of presence
- 21%** will add more than 10 business points of presence⁵

¹IDG, Marketpulse, and Matillion, *Optimizing Business Analytics by Transforming Data in the Cloud*, November 2019

²Intricate, *2019 Intricate Cloud Market Share Report*, April 2019

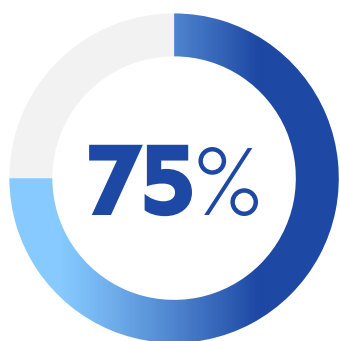
³451 Research, *The Infrastructure Imperative: Optimizing Data Exchange to Ensure Global Digital Transformation*, November 2019

⁴Digital Realty, *Global Data Insights Survey*, March 2022

⁵*ibid.*

5. Data-First Strategies Win

Business leaders identified **their top considerations** to unlock value from data by 2024 as **improving data infrastructure, upskilling data capabilities**, and **investing in Artificial Intelligence/Machine Learning tech**, with companies that have more than \$1B+ revenues adding “educating their C-Suite”. They identified their top data center requirements to support data strategy: global coverage, capacity & direct connectivity needs, enabling secure data exchange, and providing a meeting place for companies to connect. Where global businesses place and connect their data matters, and a distinct need has emerged for a data meeting place for hybrid business models. Leading companies will integrate data, security, and controls in multi-tenant data centers, and unlock new intelligent workflows at the centers of data exchange between employees, customers, partners, and ecosystems.



75% of companies with **\$1B+ revenues** have a formal data strategy, compared to **63%** of companies overall.^{1,2}

IMPLICATION:

Strategies to move and store data are not enough. Companies must plan to action and garner insights with analytics. Many organizations appear to still view data as a cost to be managed. However, leading organizations treat data instead as a strategic lever, and are pursuing ways to unlock their data’s value.

¹Companies with revenues of 100M to 1B+
²Digital Realty, *Global Data Insights Survey*, March 2022

Global Insights

A rich & diverse set of survey respondents in terms of size, scale and complexity.

Data is Exploding

Global Insights

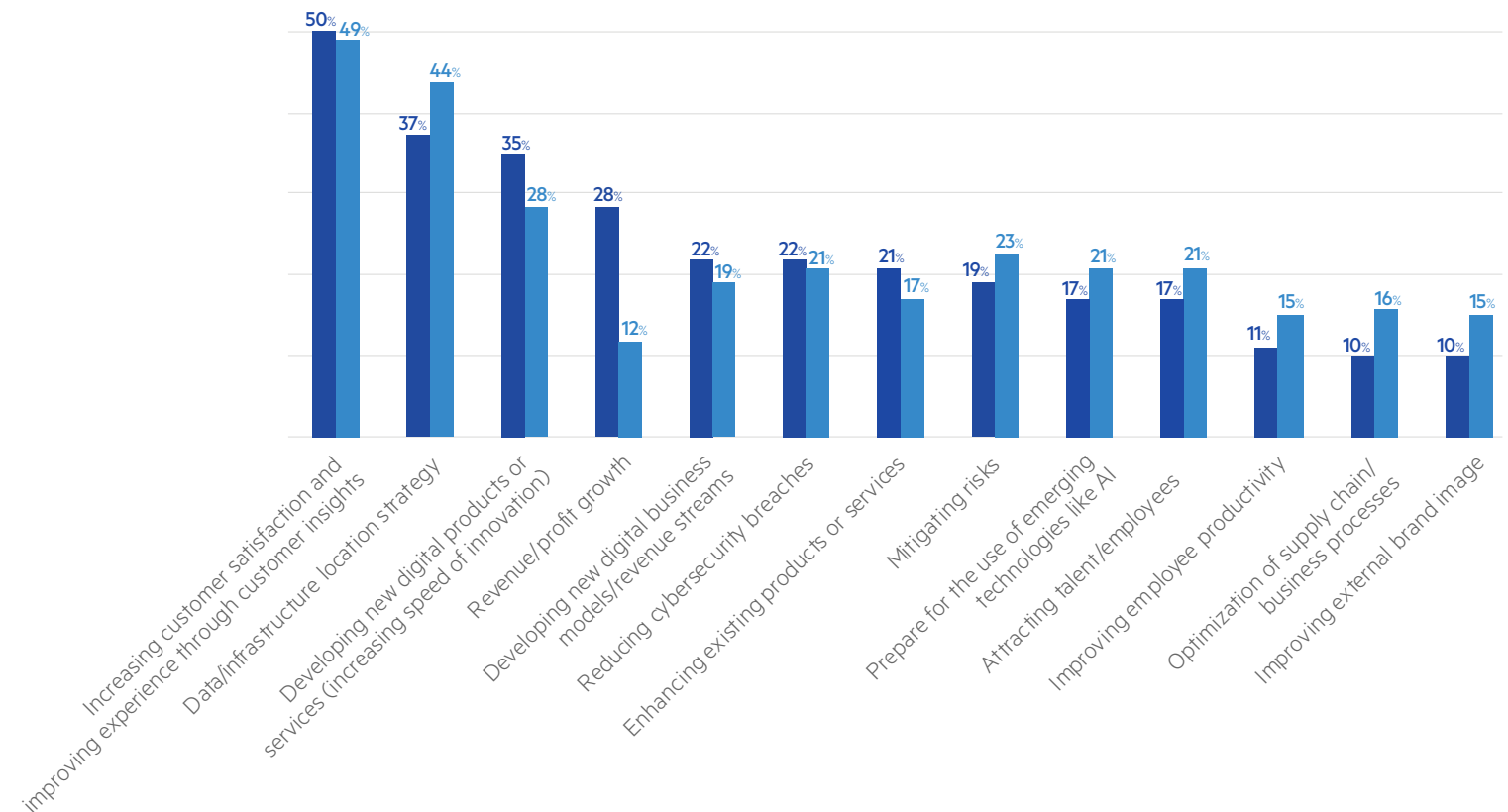
Data is exploding in volume, velocity and value.

It's the common factor across every industry where business, regulatory, and operational challenges exist.

Insight Highlights

- Most companies will turn to data-driven insights to increase customer satisfaction and improve experiences.
- Data location strategy is a top priority for large companies¹ with multi-national presences.
- Most companies rely on garnering unique insights from the right data sets to drive growth and increase the speed of innovation.

Q1: Which strategic value/outcome do you expect for your organization from data-driven insights? (Top 3)



■ Global \$100M - \$1B+
■ Global \$1B+

Fig. 1. Global Data Insights Survey, March 2022

¹Companies with revenues of \$1B+

Siloed Data is the Challenge

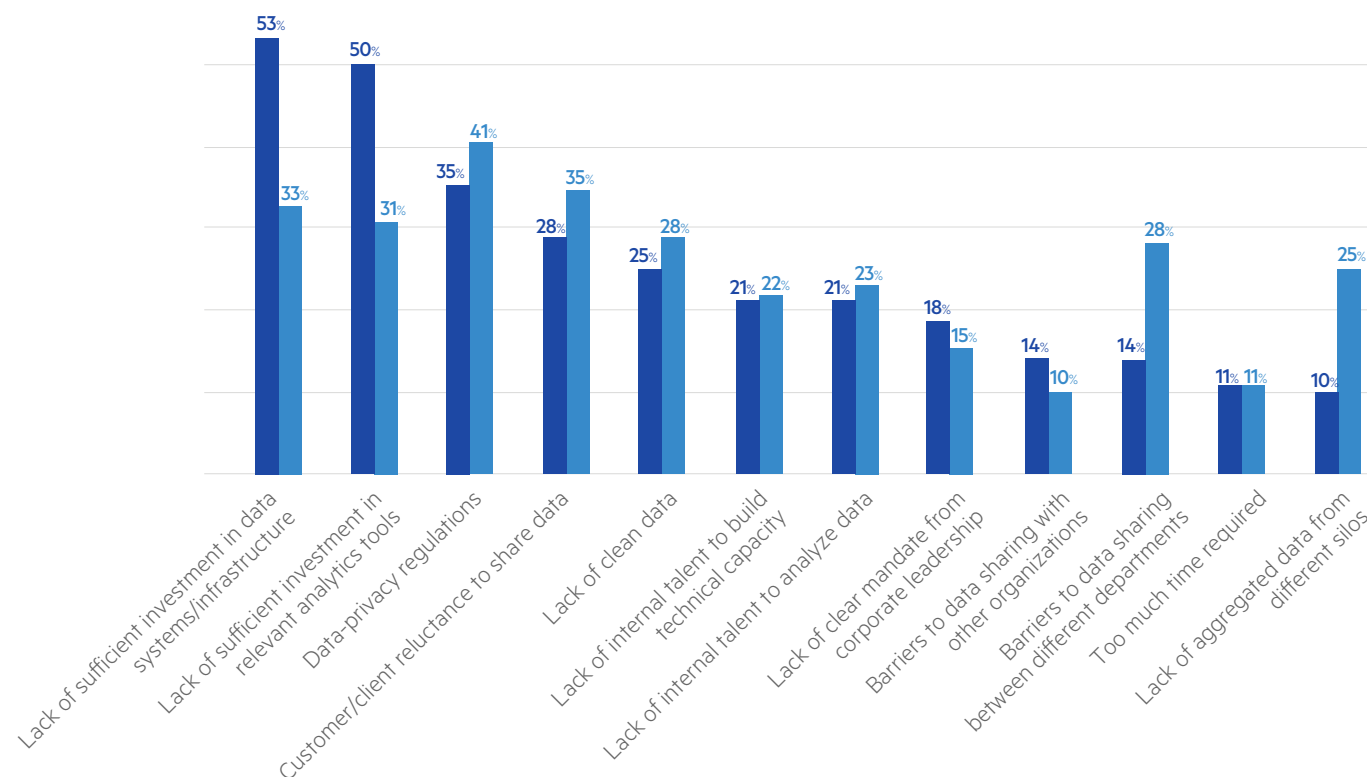
Global Insights

Data and insights are trapped across business and data silos. Gaining insights from data in a time-effective, performant and compliant manner requires investment.

Insight Highlights

- Most companies believe more investment is needed to unlock data-driven insights.
- Regulatory challenges affect larger organizations¹ with multi-regional presences.
- Data aggregation and exchange across business siloes is a priority for all companies.

Q2: What are the top 3 obstacles your organization faces when drawing insights from data?



■ Global \$100M - \$1B+
■ Global \$1B+

Fig. 2. *Global Data Insights Survey*, March 2022

¹Companies with revenues of \$1B+

Siloed Data Creates Trapped Value

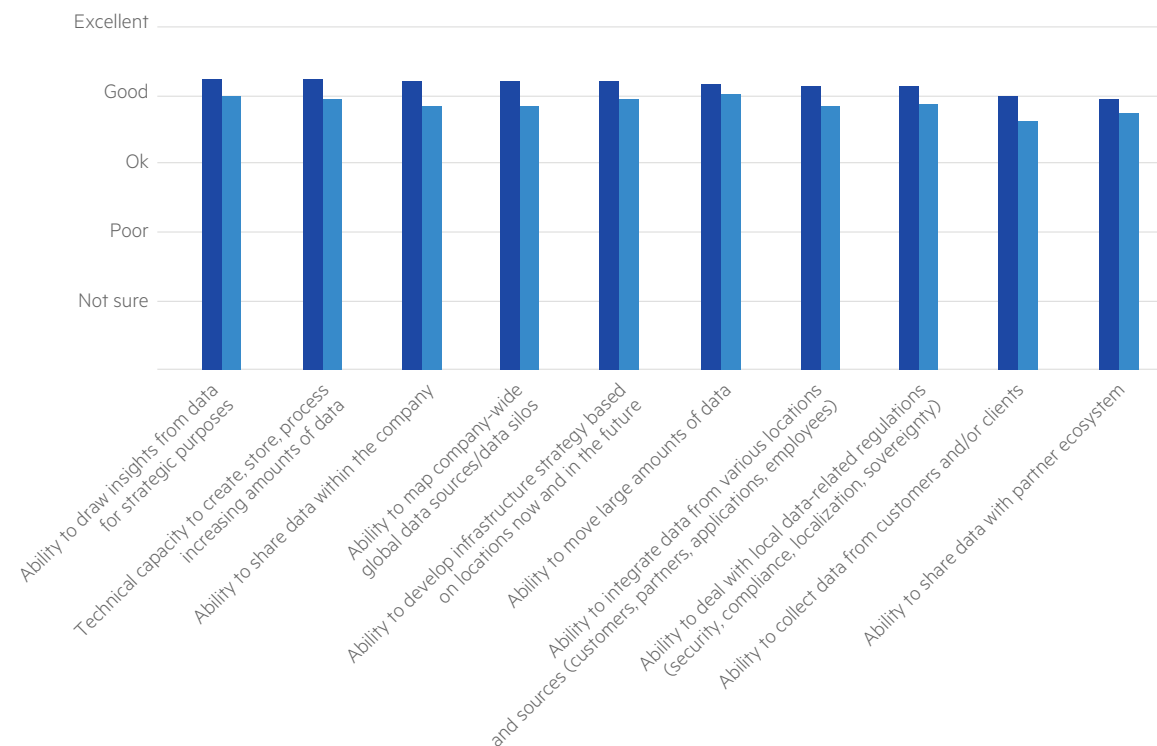
Global Insights

Current capabilities must integrate siloed data. For all companies, data strategies need to address garnering and actioning insights, in addition to aggregating and exchanging large amounts of data.

Insight Highlights

- All companies require drawing insights from the data for strategic purposes.
- Data capabilities limit ability to derive insights for larger companies.¹
- Integrating data is the next frontier for companies pursuing success and differentiation.

Q3: How well does your company perform in the following areas?



¹Companies with revenues of \$1B+

²"Global 1B+" reflects the average of the Global 1B-5B and Global 5B+ datasets

Data Distribution is Increasing

Global Insights

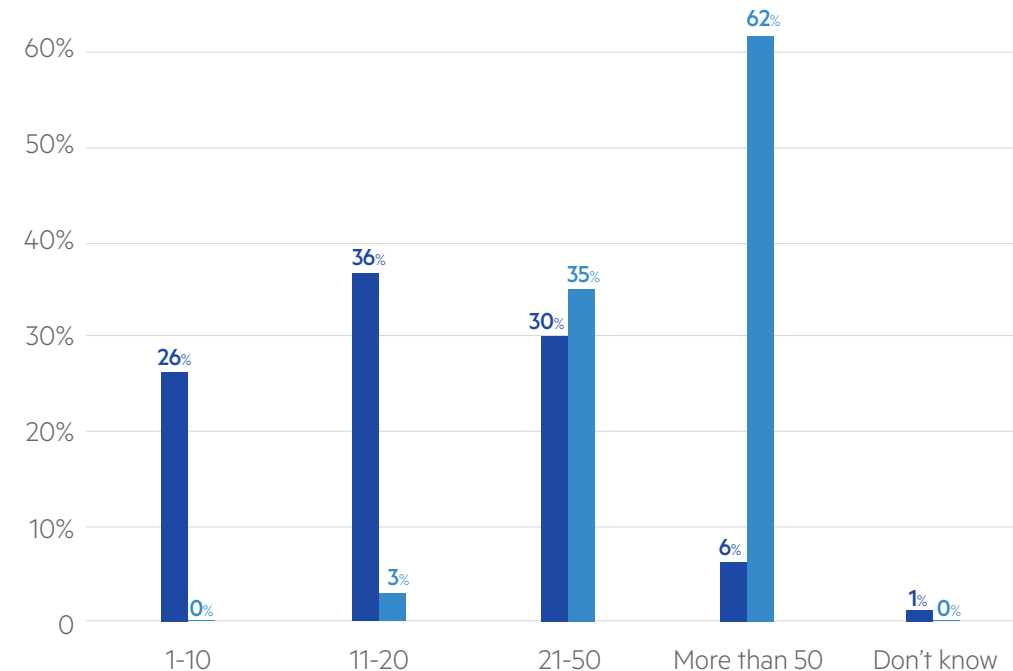
Data creation is multiplying at all points of business presence.

In turn, most companies are increasing the number of locations where data will be aggregated, stored and maintained.

Insight Highlights

- Companies with over \$1B in revenue must accommodate pervasive data sets with more than 50 locations on average.
- Smaller companies are not immune to data distribution — one third of respondents need to support 11 or more locations.
- 99% of companies are addressing the challenge of distributed data infrastructure deployed across many business locations.

Q4: At how many company locations and/or colocation sites globally does your organization currently deploy IT infrastructure (server and/or data center)?



■ Global \$100M - \$1B+
■ Global \$1B+

Fig. 4. Global Data Insights Survey, March 2022

Distributed Data Growth Will Continue

Global Insights

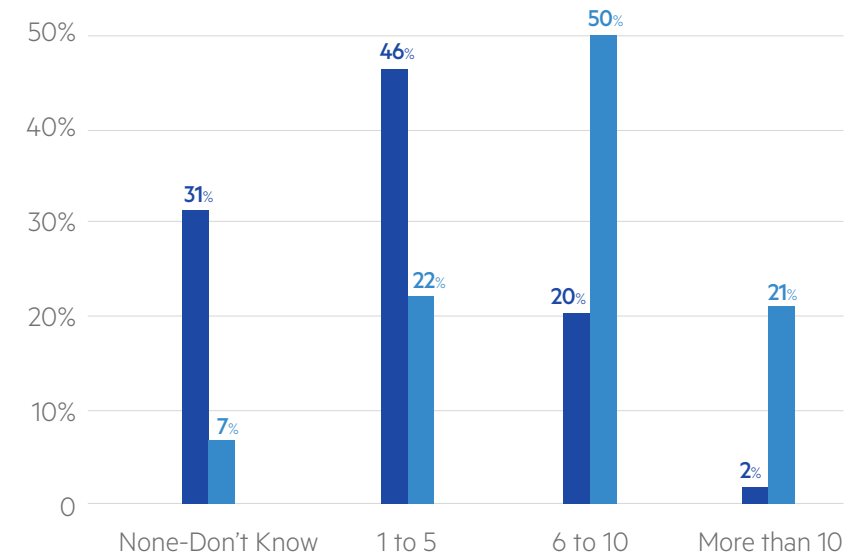
Data pervasiveness will become a business reality.

Most companies will add new users and locations in the next two years to enable new business capabilities by driving data-first outcomes.

Insight Highlights

- Data distribution growth will continue at least through the next two years.
- Over 70% of larger companies¹ are planning to add at least six to 10 new data locations in the next two years.
- Most smaller companies are adding at least one to five new data locations in the next two years.

Q5: At how many additional points of presence will your organization most likely deploy IT infrastructure in the next two years?



¹Companies with revenues of \$1B+

Integrating Data Requires Controlled Aggregation

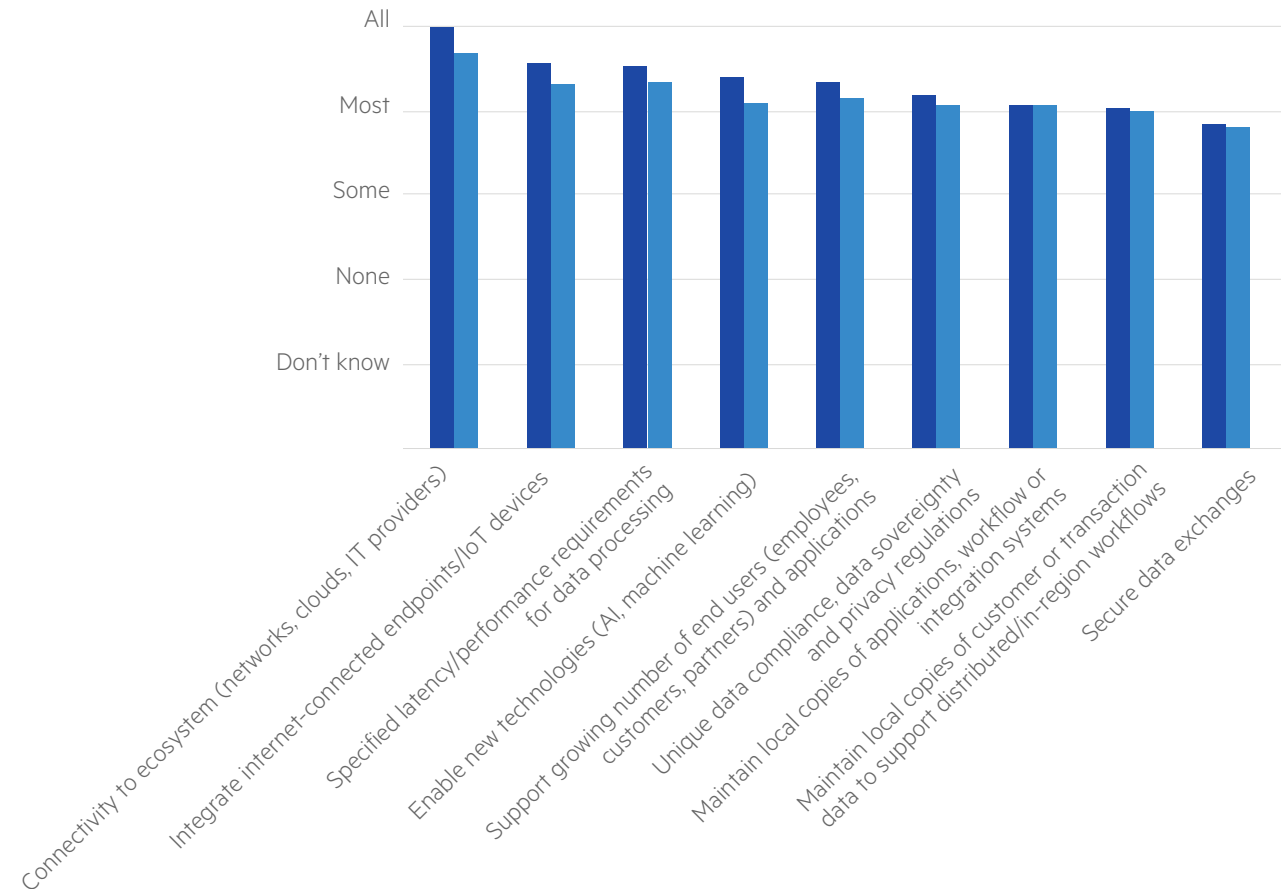
Global Insights

Companies must rethink data strategies to address hybrid business models. Integrating physical and digital environments requires the need for local data, analytics and software controls to ensure secure and compliant business operations.

Insight Highlights

- All companies identified the business need to support secure data exchange with ecosystem partners.
- A majority of companies identified the need to maintain local copies of data and applications to serve a growing number of end users and connected devices.
- Hybrid business is creating a physics and proximity design challenge that all companies must address.

Q6: How many of your current or planned IT locations need to support the following requirements?



■ Global \$100M - \$1B+
■ Global \$1B+¹

Fig. 6. Global Data Insights Survey, March 2022

¹"Global 1B+" reflects the average of the Global 1B-5B and Global 5B+ datasets

Data Strategies Need to Adjust

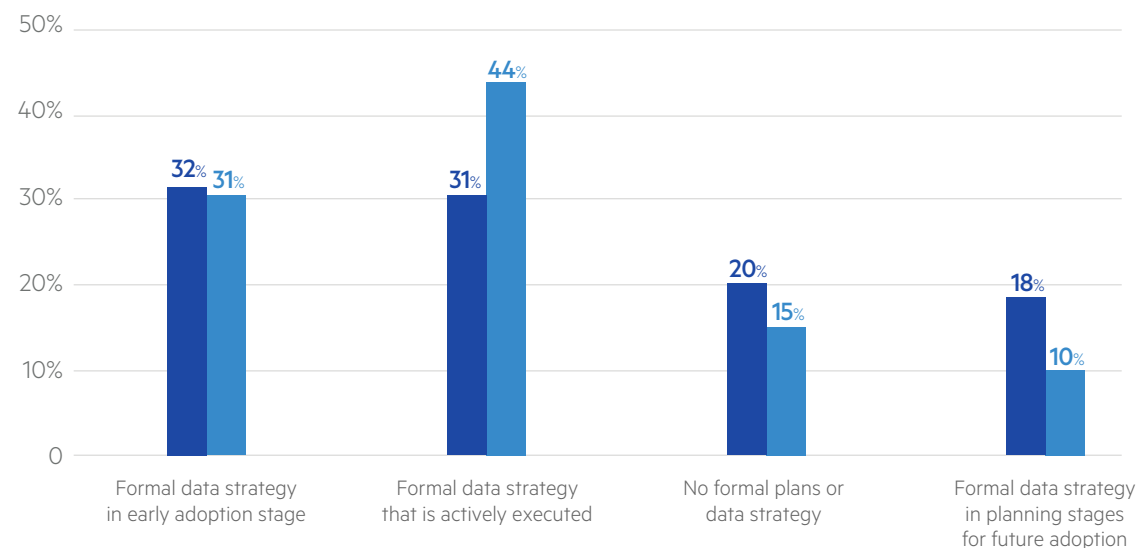
Global Insights

Companies are at various stages of data strategy, maturity and adoption. Larger companies lead the way in terms of maturity and activation. A number of companies lag in terms of formal strategy design and execution.

Insight Highlights

- Most large multi-national companies¹ either have started to adopt or are actively executing their data strategy.
- More than a third of companies surveyed do not have a formal data strategy or are in early days of the planning process.
- Companies that lag in terms of formal strategy design and execution risk falling behind.

Q7: Does your company have/plan a formal data strategy specifying these requirements?



■ Global \$100M – \$1B+
■ Global \$1B+

Fig. 7. *Global Data Insights Survey*, March 2022

¹Companies with revenues of \$1B+

Data Organization Can Increase Data Gravity (Part 1)

Global Insights

Strategies differ on how to organize and manage data.

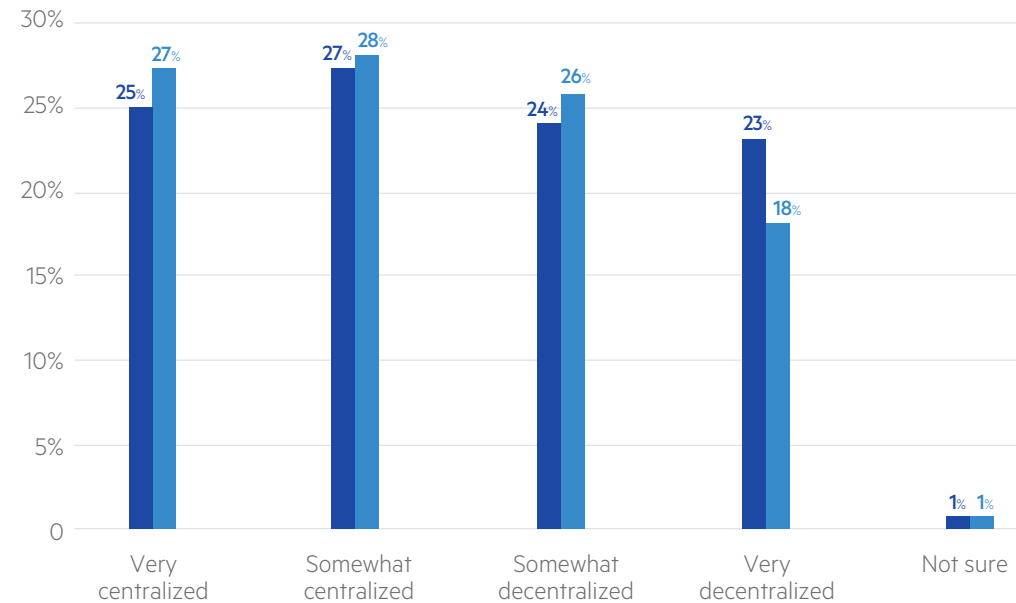
From centralized to decentralized, companies of all sizes vary in their approach. This can have a direct consequence on a company's ability to drive value and outcomes with data.

Insight Highlights

- 25% of companies surveyed organize their data in a very centralized manner, in contrast to data distribution growth.
- 23% of companies surveyed organized their data on a very decentralized basis, consistent with data distribution growth.
- Expanding data distribution creates a need to localize data management or Data Gravity¹ will increase.

¹Data Gravity can create bottlenecks that impede the efficient exchange of data

Q8: Do you aggregate your organization's data at one point of presence (centralized approach) or keep your data decentralized across all geographic locations?



■ Global \$100M - \$1B+
■ Global \$1B+

Fig. 8. Global Data Insights Survey, March 2022

Data Organization Can Increase Data Gravity (Part 2)

Global Insights

Strategies differ on how to organize and manage data.

From centralized to decentralized, companies of all sizes vary in their approach. This can have a direct consequence on a company's ability to drive value and outcomes with data.

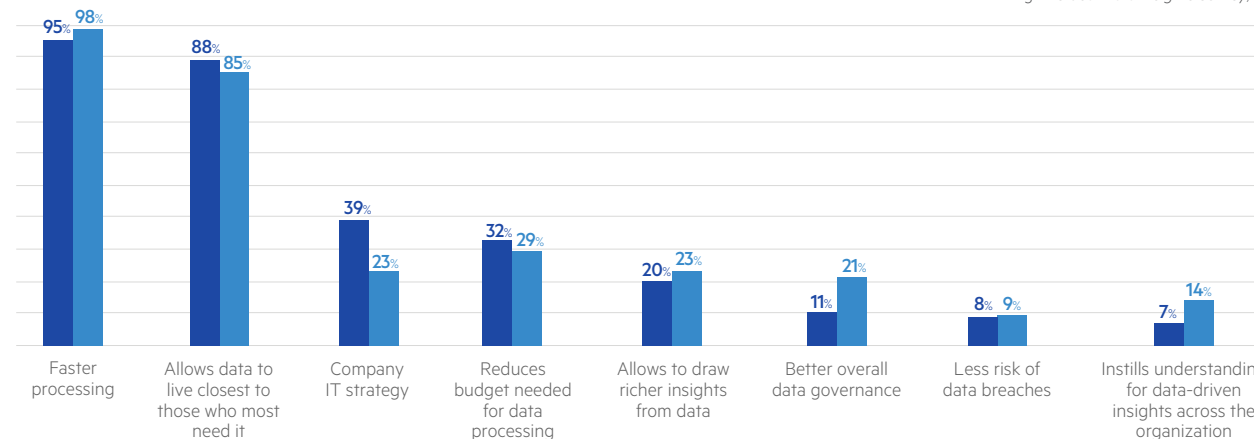
Insight Highlights

- A decentralized approach organizes around data and business capability, to drive performance and insights.
- A centralized approach organizes around cost and IT standards, to comply with legacy IT designs.
- Expanding data distribution creates a need to localize data management or Data Gravity¹ will increase.

¹Data Gravity can create bottlenecks that impede the efficient exchange of data

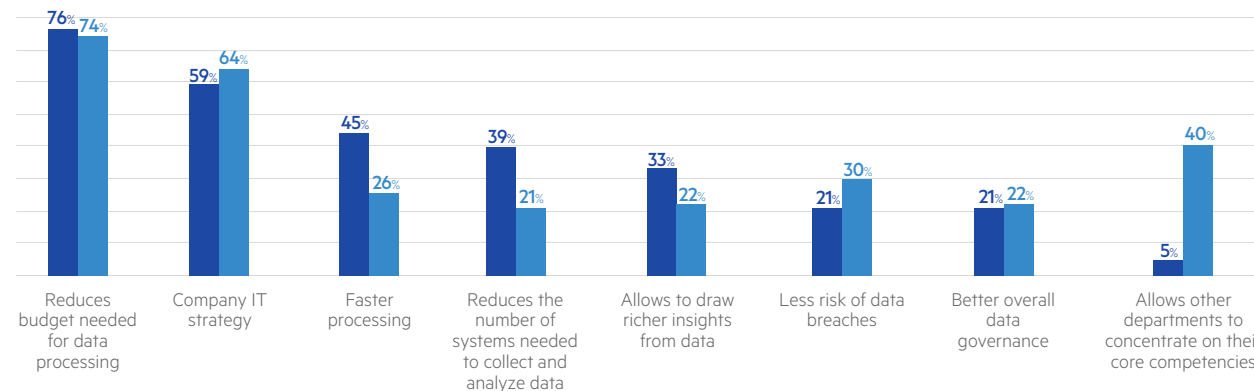
Q9a: What are the top 3 reasons for your company to follow a decentralized approach?

Fig. 9. Global Data Insights Survey, March 2022



Q9b: What are the top 3 reasons for your company to follow a centralized approach?

Fig. 10. Global Data Insights Survey, March 2022



■ Global \$100M - \$1B+
■ Global \$1B+

Data is Driving IT Investment

Global Insights

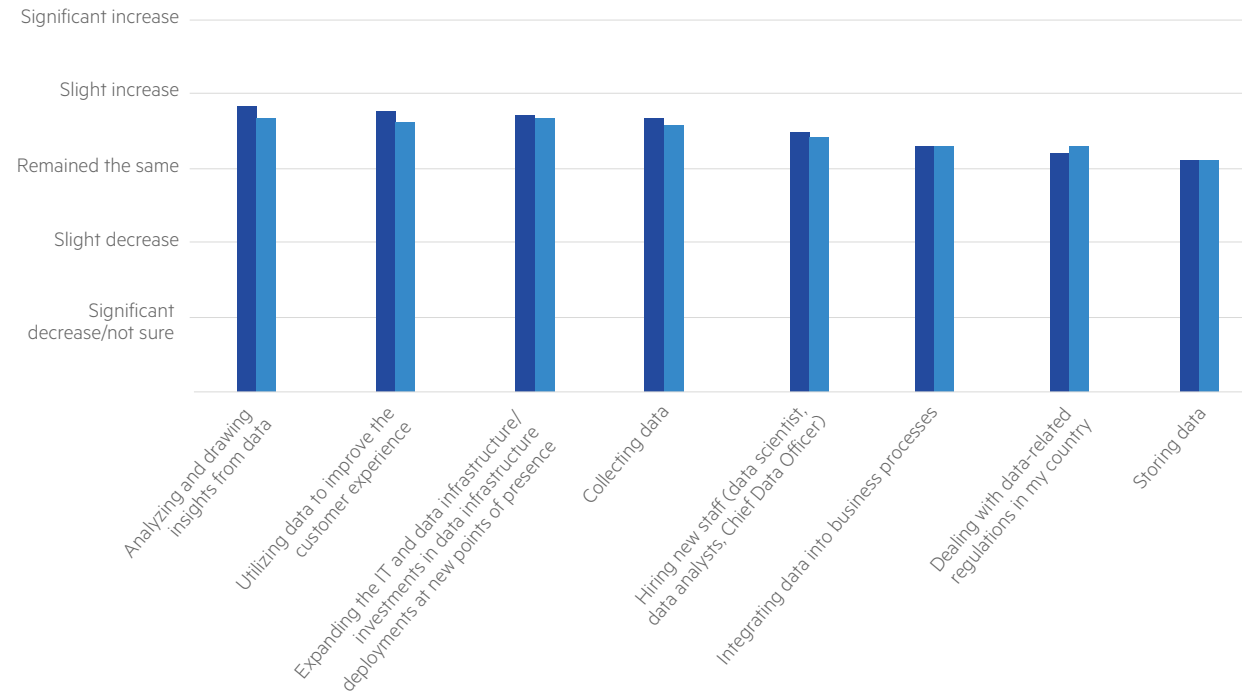
Data projects are driving the IT investment agenda.

Companies are increasing data-related investments to drive insights, improve customer experience, enable new business processes and enter new markets.

Insight Highlights

- Analyzing and garnering insights from data is a top priority.
- Companies are increasing budgets to aggregate data at different distribution points.
- Increasing investments in data-related IT projects reflect the growing importance of data in the business agenda.

Q10: Are you expecting an increase or decrease in budget for the following topics over the next two years?



¹"Global 1B+" reflects the average of the Global 1B-5B and Global 5B+ datasets

Data-First Strategies Win

Global Insights

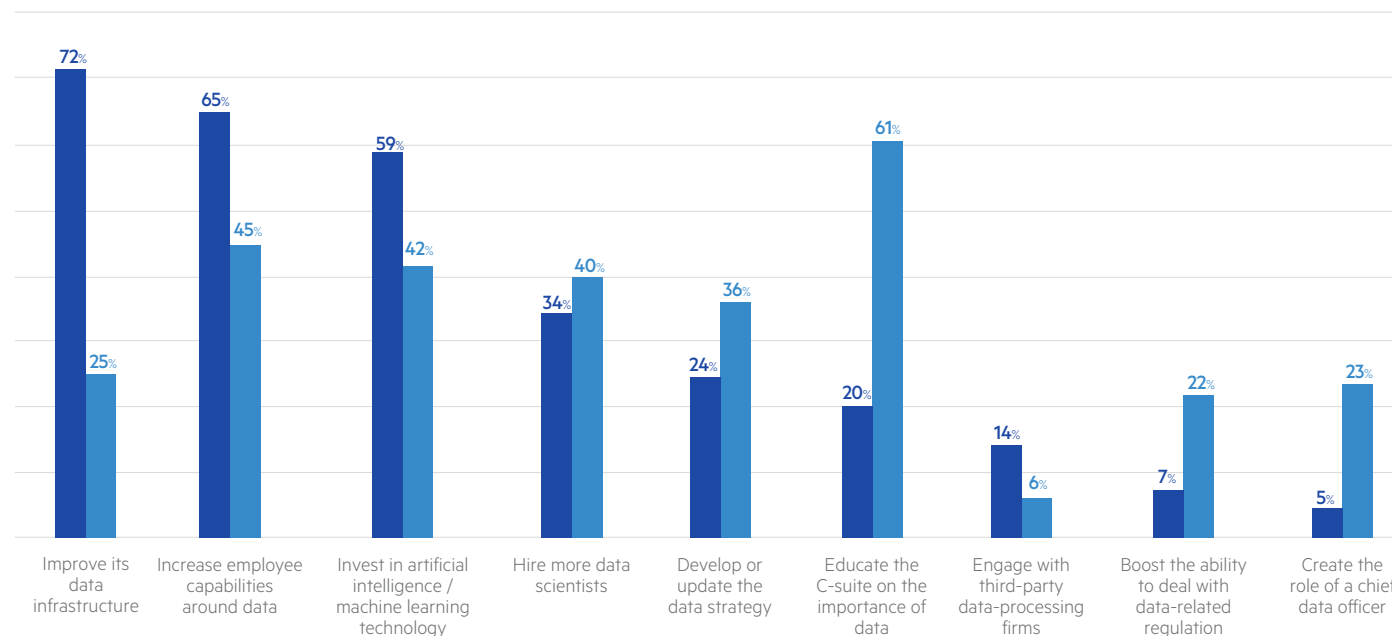
Unlocking trapped value starts by thinking data-first.

Most companies are prioritizing data-first thinking across a multitude of initiatives including infrastructure, analytics, skill sets development and executive awareness.

Insight Highlights

- Almost two-thirds of all companies consider investing in advanced analytics capabilities a top priority.
- Over 70% of all companies plan to improve data infrastructure to enable secure exchange, aggregation & control.
- Almost two-thirds of larger companies¹ with multi-national presences will prioritize educating executives on the implications of siloed data.

Q11: What do you consider critical for your company in the next two years to enable more data-driven insights? (Top 3)



■ Global \$00M - \$1B+
■ Global \$1B+

Fig. 12. Global Data Insights Survey, March 2022

¹Companies with revenues of \$1B+

Data Needs Global Meeting Place

Global Insights

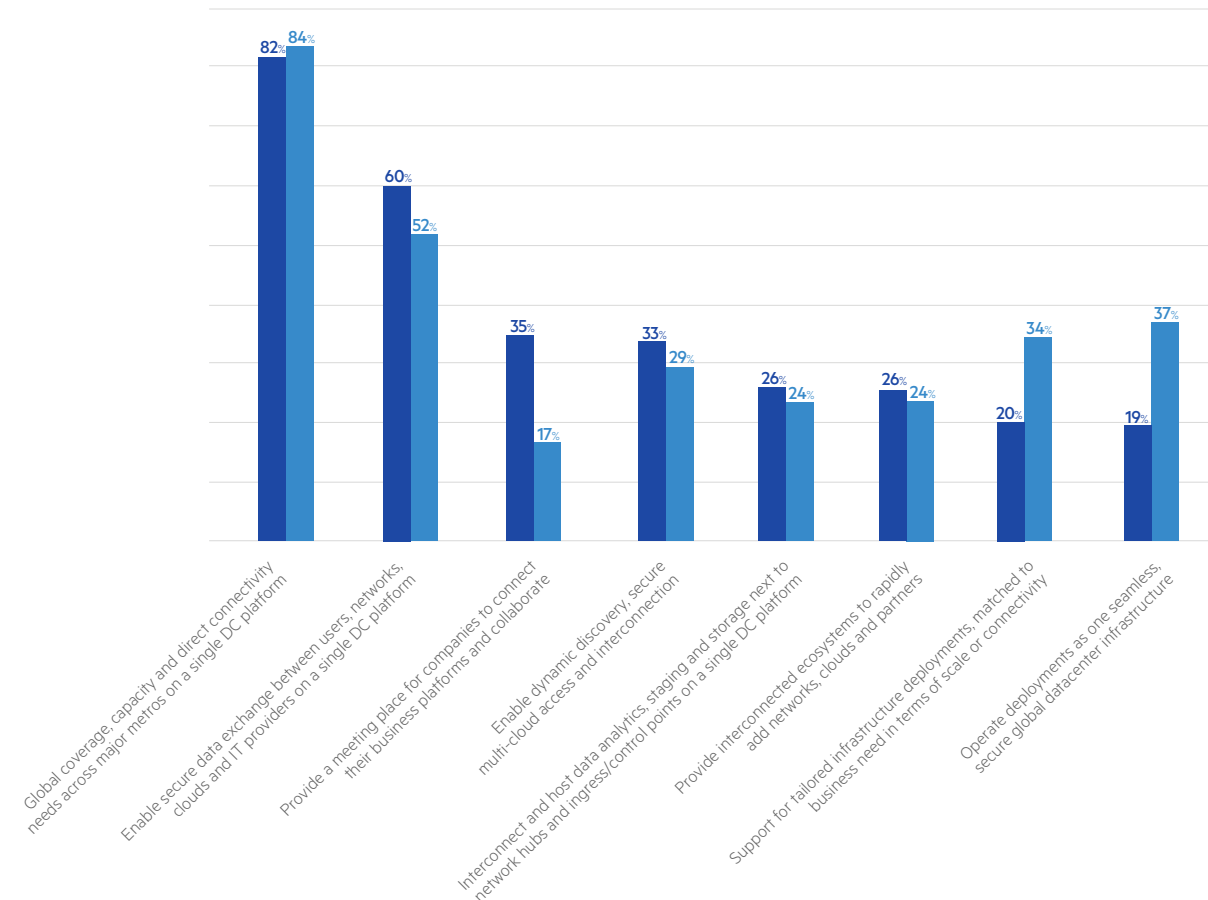
Where global companies place and connect their data matters. Companies need a secure data “meeting place” to support physical-virtual business models and mission-critical Hybrid IT architecture.

Insight Highlights

- More than 80% of all companies identified the need for a global data center platform provider.
- More than 50% of all companies prioritize secure data exchange to and from their global data center platform provider.
- 76% of large multi-national companies¹ define the ideal combination of capabilities to include global coverage, secure data exchange, tailored infrastructure support, and operating as one platform.

¹Companies with revenues of \$1B+

Q12: Which requirements do your data center providers need to fulfill to support your data strategy? (Top 3)



■ Global \$100M - \$1B+
■ Global \$1B+

Fig. 13. *Global Data Insights Survey*, March 2022

Regional Insights

Key findings for APAC, EMEA, LATAM
and North America.

Data is Exploding

Regional Insights

Data is exploding in volume, velocity and value.

While it's the common factor across every industry, regions are pursuing data-driven insights to achieve a diverse set of outcomes.

Insight Highlights

- APAC, EMEA and North America regions and large multi-national companies¹ are turning to data-driven insights primarily to improve customer satisfaction and experience.
- More than a third of companies in all regions prioritize data driven insights to enable data location strategy and increase the speed of innovation.
- LATAM differs significantly from other regions, prioritizing the use of data-driven insights to drive growth.

Q1: Which strategic value/outcome do you expect for your organization from data-driven insights? (Top 3)²

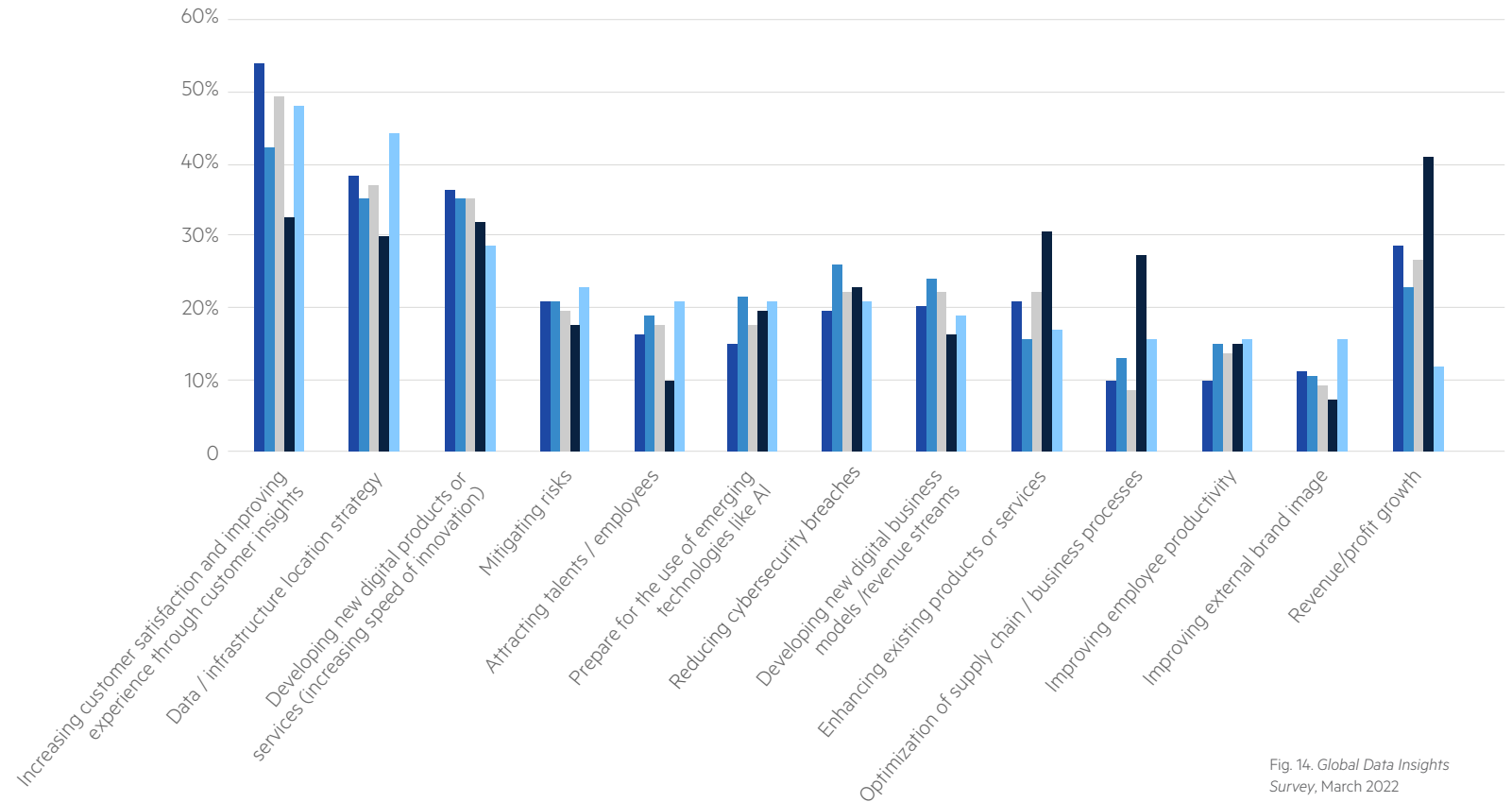


Fig. 14. Global Data Insights Survey, March 2022

¹Companies with revenues of \$1B+

²Respondents selected their "top 3" prelisted responses

Siloed Data is the Challenge

Regional Insights

Data and insights are trapped across business and data silos. Companies from all regions agree that analyzing and drawing insights from siloed data requires investment.

Insight Highlights

- The global consensus is that more investment is needed to unlock data-driven insights.
- EMEA companies also identified data sovereignty and regulation as a major obstacle, and North American companies identified a lack of clean data as a particular challenge.
- All regions agree that time required is not an issue, indicating they see the value of drawing insights from data.

Q2: What are the top 3 obstacles your organization faces when drawing insights from data?¹

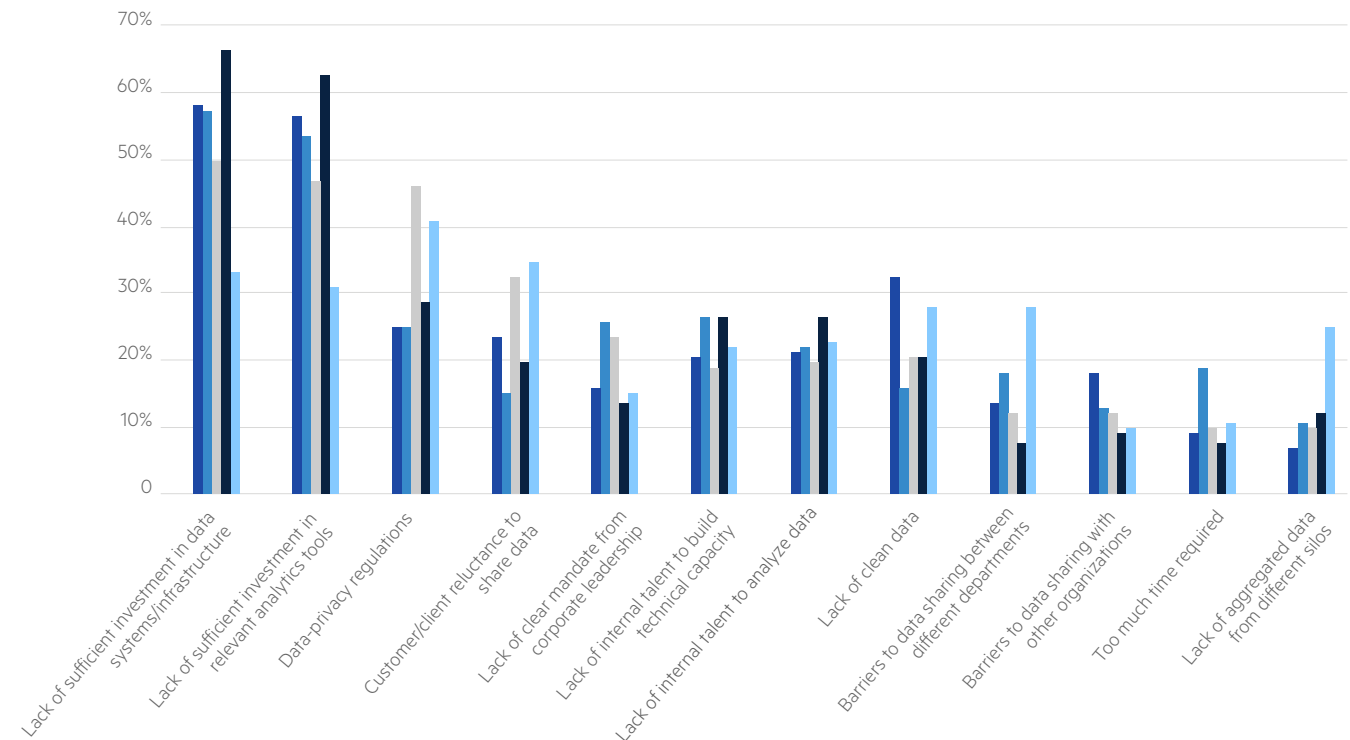


Fig. 15. Global Data Insights Survey, March 2022

¹Respondents selected their "top 3" prelisted responses

Siloed Data Creates Trapped Value

Regional Insights

Current capabilities must integrate siloed data. All regions need to aggregate and exchange large amounts of data to drive growth, and in turn must meet data compliance standards to satisfy customers.

Insight Highlights

- North American companies lead with the most advanced data maturity, while EMEA and large multi-national companies¹ lag in dealing with data sovereignty.
- LATAM companies are limited the most by their data capabilities compared to the other regions.
- North America, APAC, and EMEA all identified data-sharing with partner ecosystems as an area in need of investment.

Q3: How well does your company perform in the following areas?

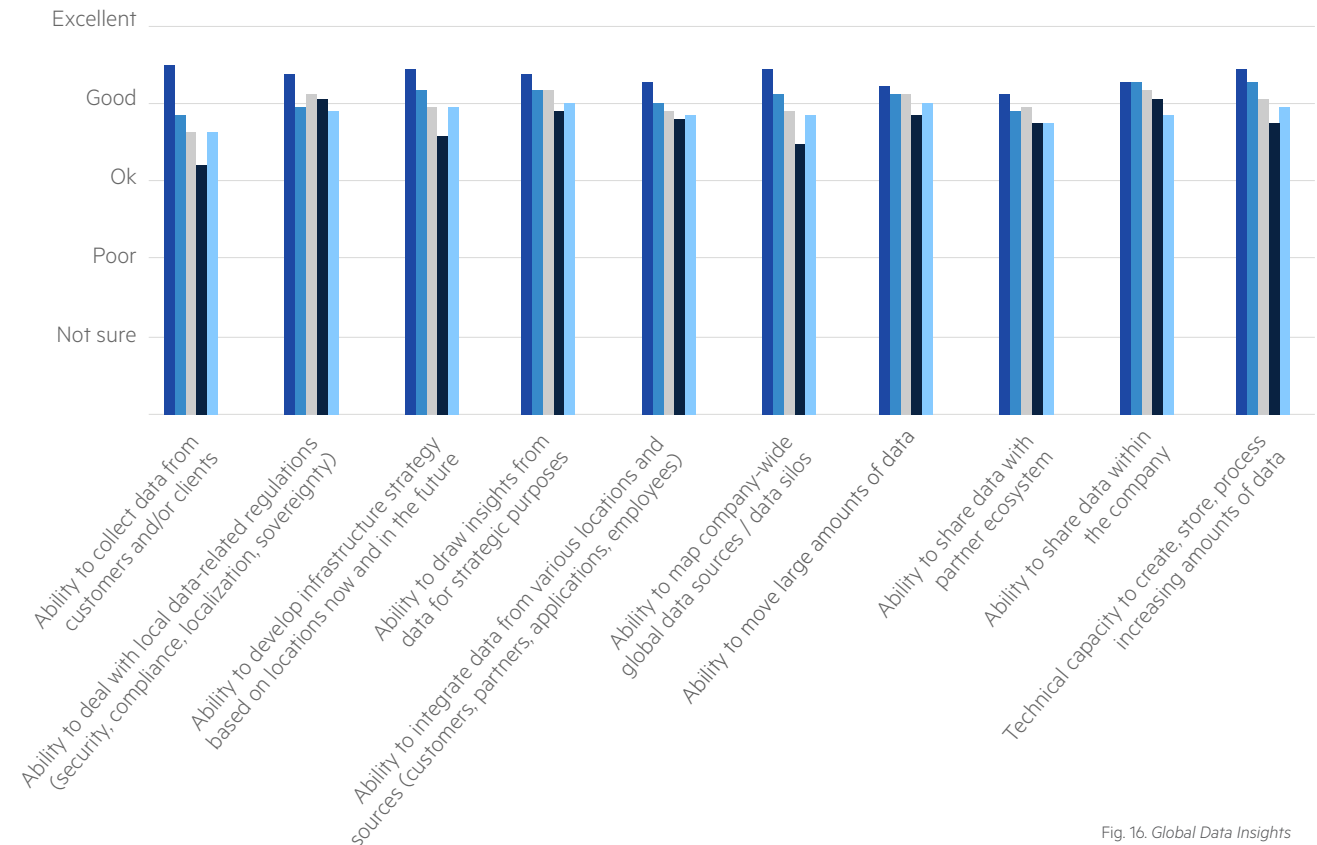


Fig. 16. Global Data Insights Survey, March 2022

¹Companies with revenues of \$1B+

Data Distribution is Increasing

Regional Insights

Data creation is multiplying at all points of business presence.

Globally, companies are increasing the number of locations where data will be aggregated, stored and maintained.

Insight Highlights

- Data distribution is occurring globally – over 60% of companies in all regions have more than 10 IT infrastructure locations.
- APAC and North America are the most distributed, with nearly 40% of companies having more than 21 locations.
- EMEA lags behind other regions in accommodating pervasive data sets due to data sovereignty regulations.

Q4: At how many company locations and/or colocation sites globally does your organization currently deploy IT infrastructure (server and/or data center)?

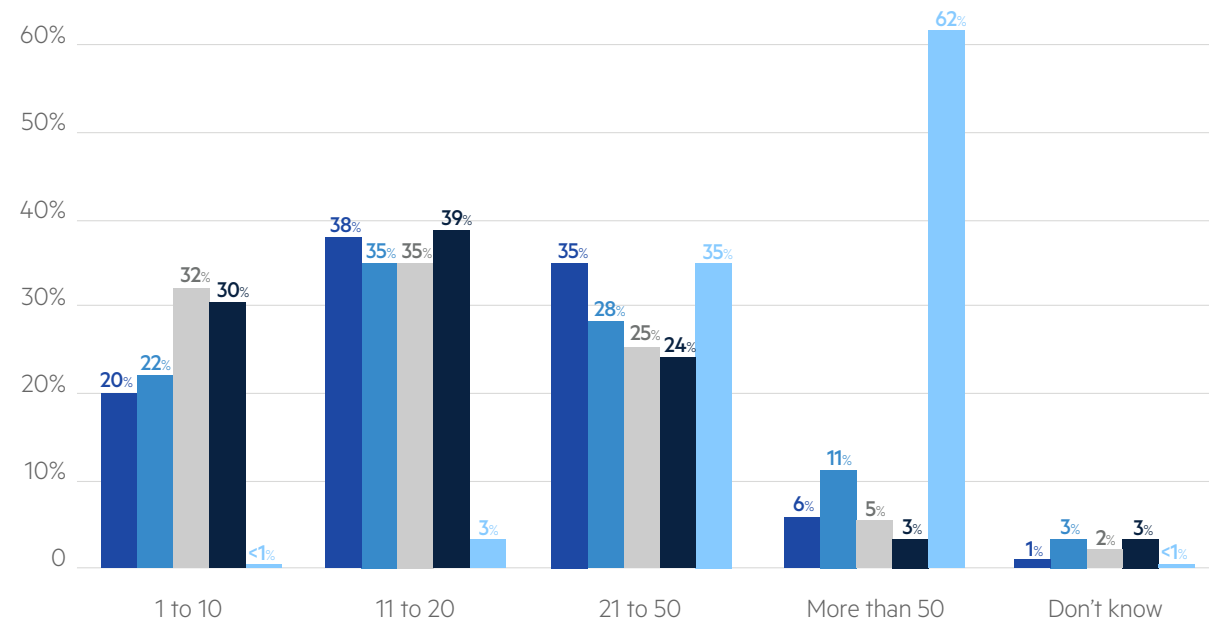


Fig. 17. Global Data Insights Survey, March 2022

Distributed Data Growth Will Continue

Regional Insights

Data pervasiveness will become a business reality.

Companies in all regions will add new users and locations in the next two years to accelerate revenue/profit growth by driving data-first outcomes.

Insight Highlights

- More than half of companies in all regions are planning to increase their business points of presence in the next two years.
- North America is pursuing localization and tackling Data Gravity¹ challenges most aggressively, with a third of companies planning to add six or more locations in the next two years.
- Large multi-national companies² are moving fast to address Data Gravity, while regions lag, as less than 5% plan to add more than 10 locations.

Q5: At how many additional points of presence will your organization most likely deploy IT infrastructure in the next two years?

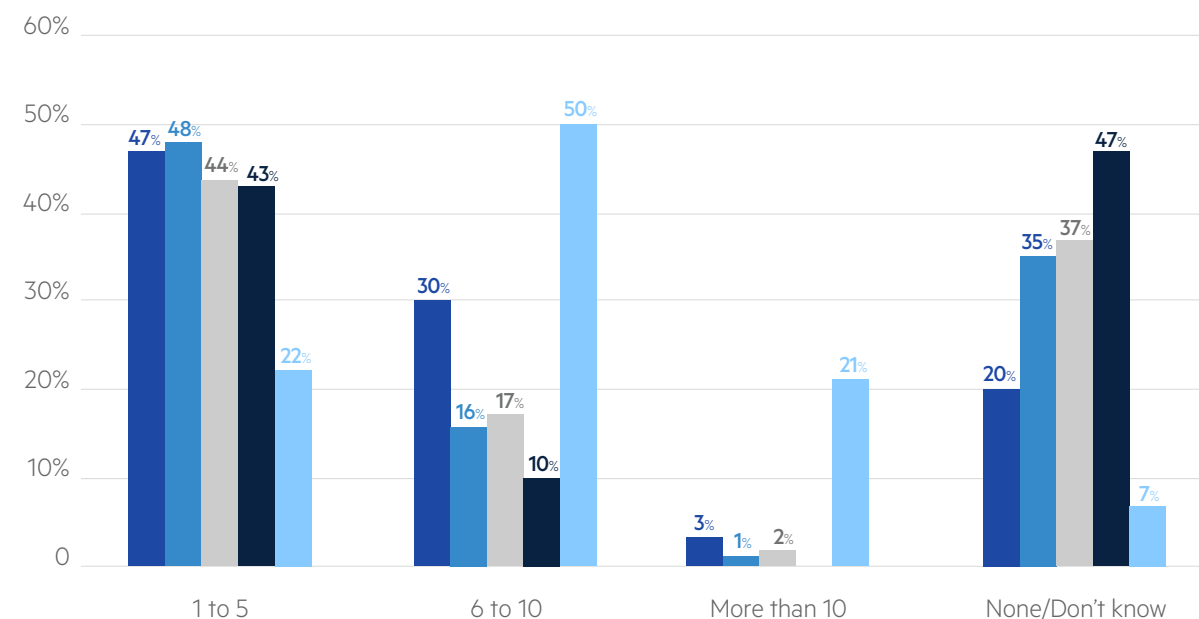


Fig. 18. Global Data Insights Survey, March 2022

¹Data Gravity can create bottlenecks that impede the efficient exchange of data
²Companies with revenues of \$1B+

Integrating Data Requires Controlled Aggregation

Regional Insights

Companies must rethink data strategies to address hybrid business models. Companies across the various regions must support performant, secure and compliant integrated physical and digital environments.

Insight Highlights

- All regions require connectivity to networks, cloud, and IT providers, but only some support secure data exchange and compliance with data regulations.
- More EMEA companies are currently supporting local copies of data than their geographical peers due to data sovereignty regulations.
- LATAM is solving for a growing user base and bringing more data to aggregate and analyze, exacerbating compliance requirements.

Q6: How many of your current or planned IT locations need to support the following requirements?

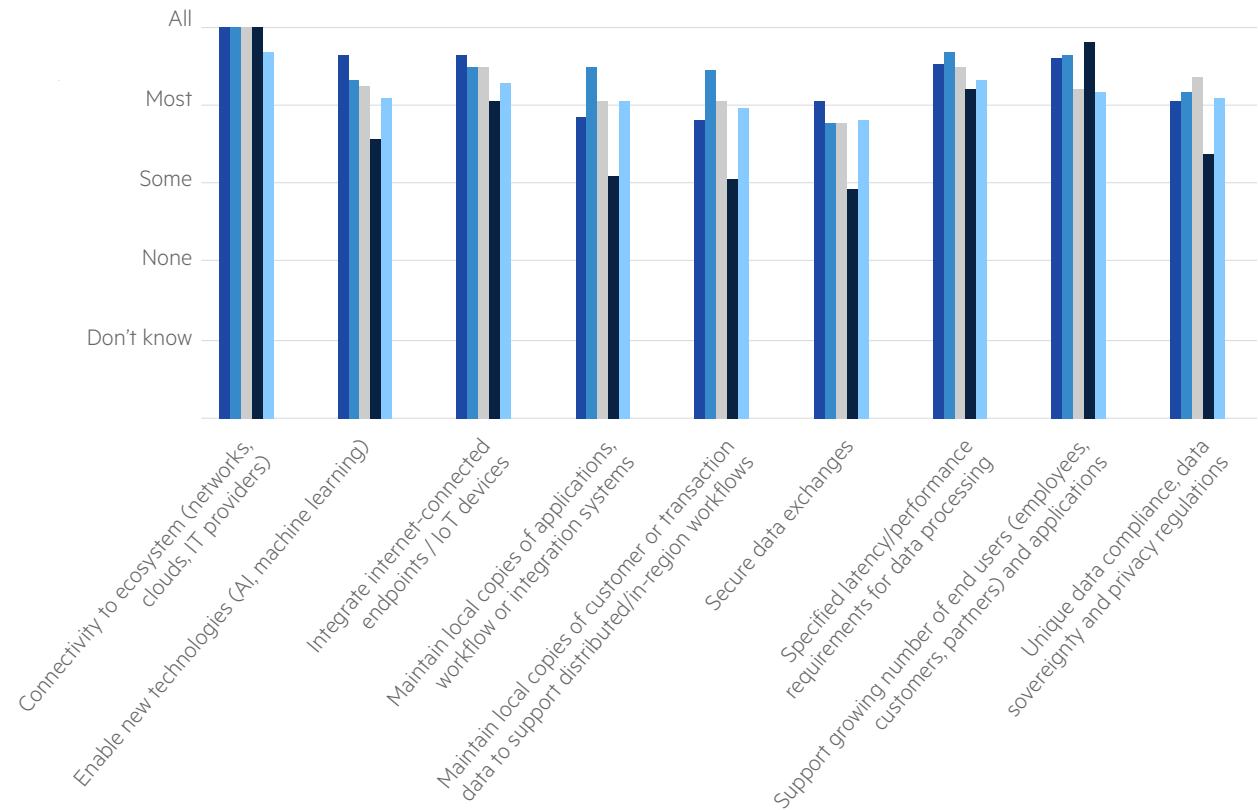


Fig. 19. Global Data Insights Survey, March 2022

Data Strategies Need to Adjust

Regional Insights

Companies are at various stages of data strategy, maturity and adoption. APAC leads the way in terms of maturity and activation, with EMEA and North America close behind. Latin America lags in terms of formal strategy design and execution.

Insight Highlights

- Large multi-national companies¹ are most prepared with a formal data strategy that is actively executed; APAC is the regional leader in data strategy.
- EMEA and North America are close behind, with more than half of companies in planning or active execution stages.
- Over a third of companies in LATAM have no formal plans or data strategy, indicating a gap that may leave them unprepared to support growth and compliance needs.

Q7: Does your company have/plan a formal data strategy specifying these requirements?

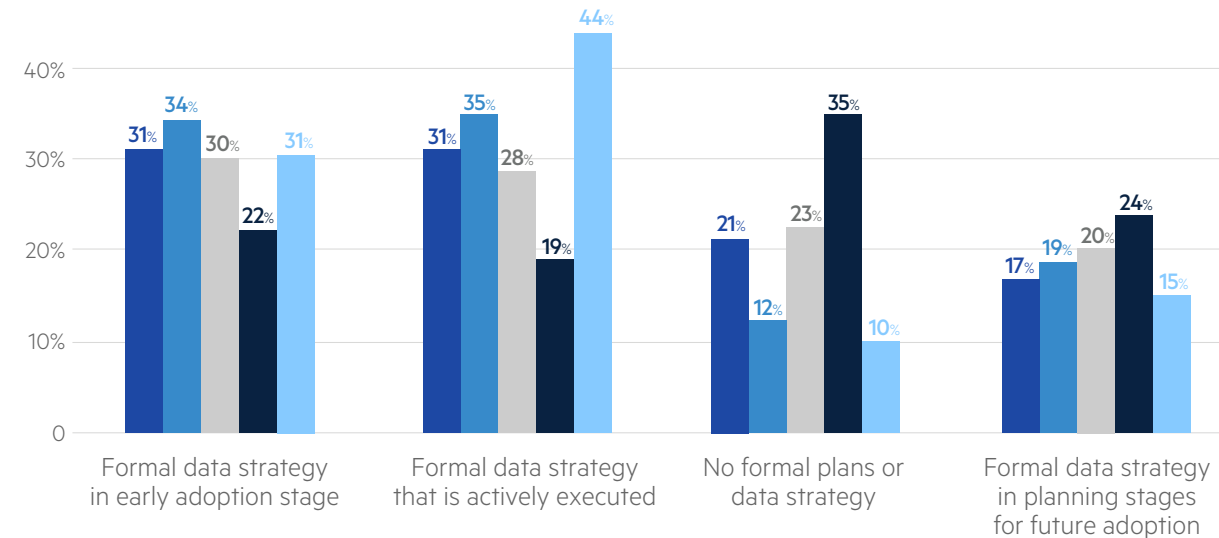


Fig. 20. Global Data Insights Survey, March 2022

¹Companies with revenues of \$1B+

Data Organization Can Increase Data Gravity (Part 1)

Regional Insights

Strategies differ on how to organize and manage data.

North America is the most distributed, while other regions remain centralized. These infrastructure differences can have a direct consequence on a company's ability to drive growth and be data-compliant.

Insight Highlights

- 57% of North American companies are either very or somewhat decentralized, consistent with data distribution growth.
- Over 30% of companies in APAC and EMEA are “very centralized”, in contrast to data distribution growth.
- Data distribution grows globally while regions differ in data localization strategies, leaving some more susceptible to Data Gravity.¹

Q8: Do you aggregate your organization's data at one point of presence (centralized approach) or keep your data decentralized across all geographic locations?

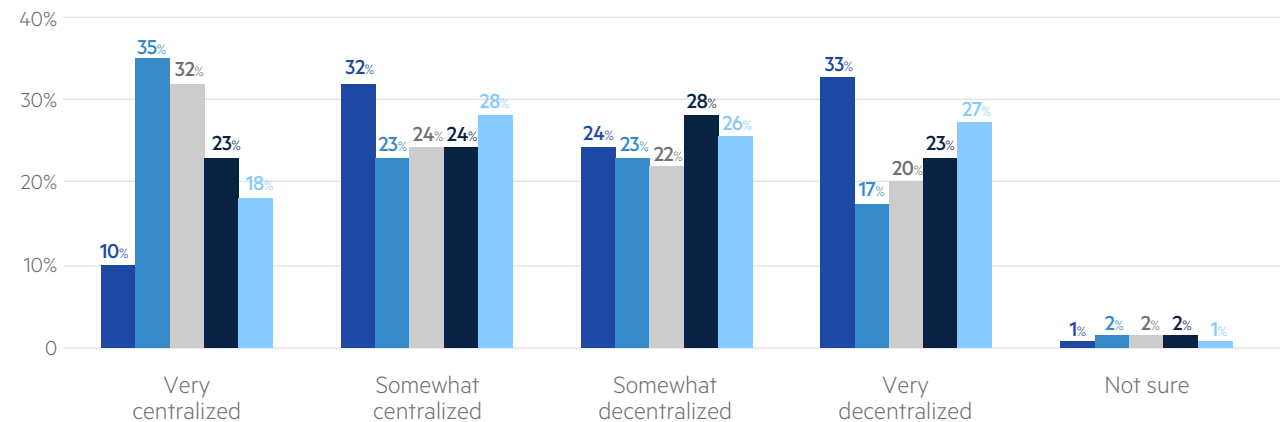


Fig. 21. Global Data Insights Survey, March 2022

¹Data Gravity can create bottlenecks that impede the efficient exchange of data

Data Organization Can Increase Data Gravity (Part 2)

Regional Insights

Strategies differ on how to organize and manage data.

North America is the most distributed, while other regions remain centralized. These infrastructure differences can have a direct consequence on a company's ability to drive growth and be data-compliant.

Insight Highlights

- Regions that adopt a decentralized approach prioritize speed and proximity to data and insights.
- Regions that adopt a centralized approach prioritize short term budget savings and legacy IT designs.
- As Data Gravity¹ challenges increase, countries will see greater data aggregation alongside diminishing access unless they solve with decentralization.

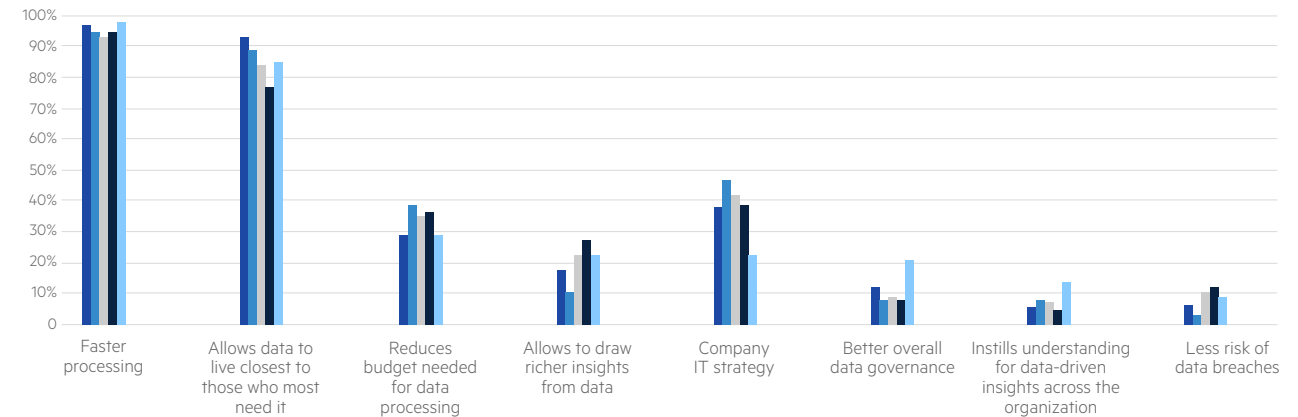
¹Data Gravity can create bottlenecks that impede the efficient exchange of data

²Respondents selected their "top 3" prelisted responses

³Ibid

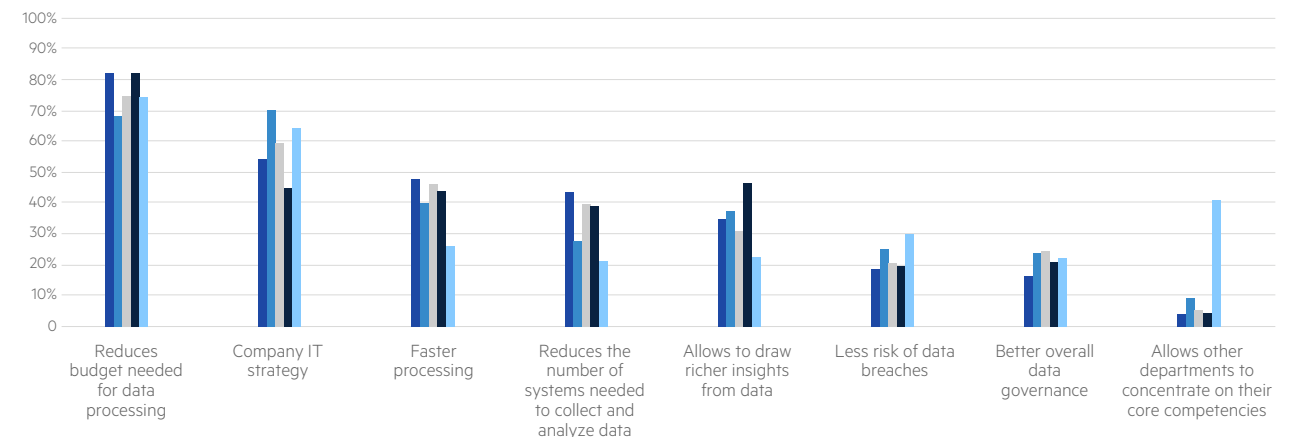
Q9a: What are the top 3 reasons for your company to follow a decentralized approach?²

Fig. 22. Global Data Insights Survey, March 2022



Q9b: What are the top 3 reasons for your company to follow a centralized approach?³

Fig. 23. Global Data Insights Survey, March 2022



Data is Driving IT Investment

Regional Insights

Data projects are driving the IT investment agenda.

All regions are increasing data-related investments, including improving customer experience, enabling new business processes and entering new markets.

Insight Highlights

- Data-first strategies are major priorities, with all regions planning budget increases in multiple data-related projects.
- Companies in North America and APAC are investing the most in data-first strategy, with special focus on garnering insights and expanding infrastructure.
- LATAM companies are prioritizing investment in data to improve customer experience, while slightly decreasing their budget for data storage.

Q10: Are you expecting an increase or decrease in budget for the following topics over the next two years?

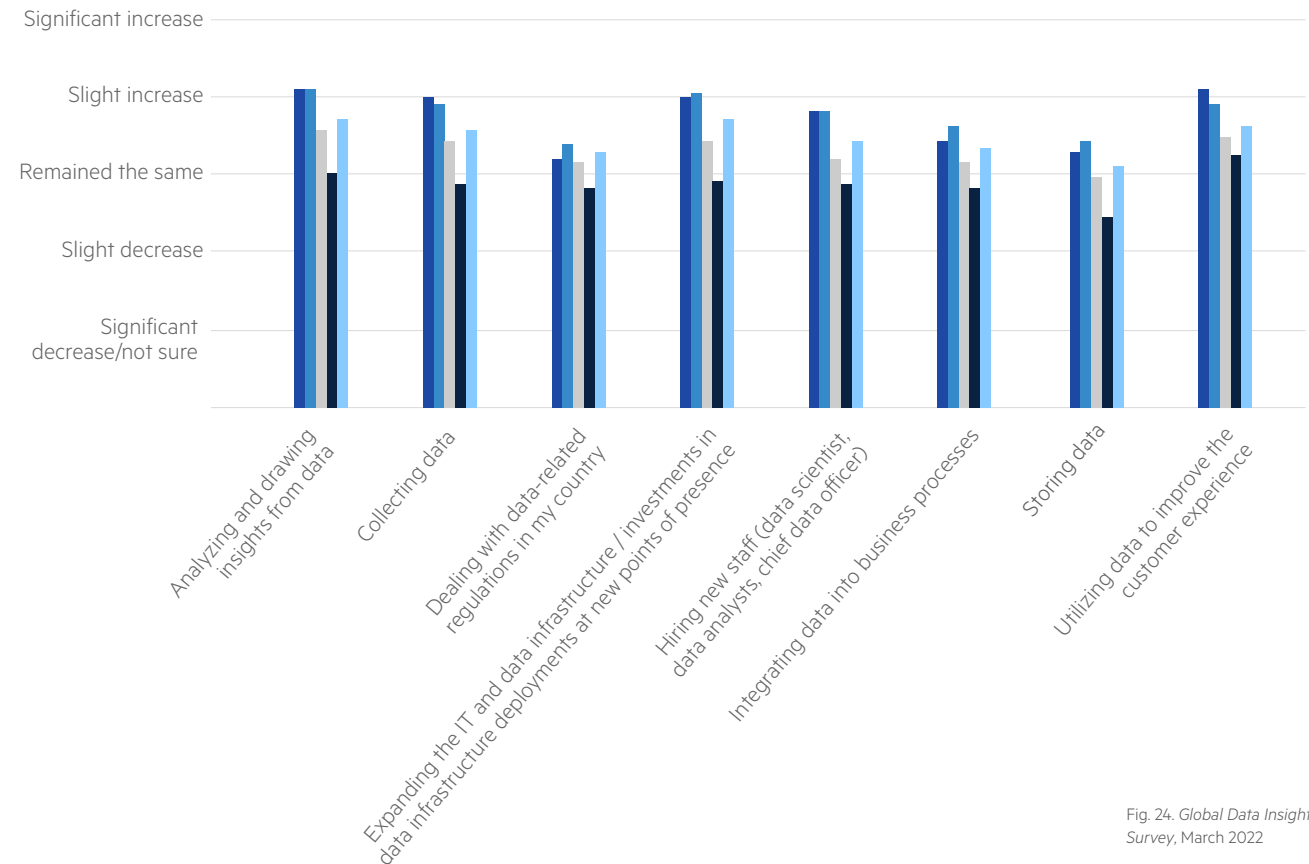


Fig. 24. Global Data Insights Survey, March 2022

Data-First Strategies Win

Regional Insights

Unlocking trapped value starts by thinking data-first.

Companies across the world are prioritizing data-first thinking across a multitude of initiatives including infrastructure, talent investment, strategy development, and innovative technology.

Insight Highlights

- Improving infrastructure and employee tools to enable data-driven insights is a priority across all regions.
- 78% of North American companies are prioritizing talent investment to improve employees' data capabilities.
- LATAM companies are most eager to overhaul their data strategies, with over 40% identifying it as a top 3 critical priority for the next two years.

Q11: What do you consider critical for your company in the next two years to enable more data-driven insights? (Top 3)¹

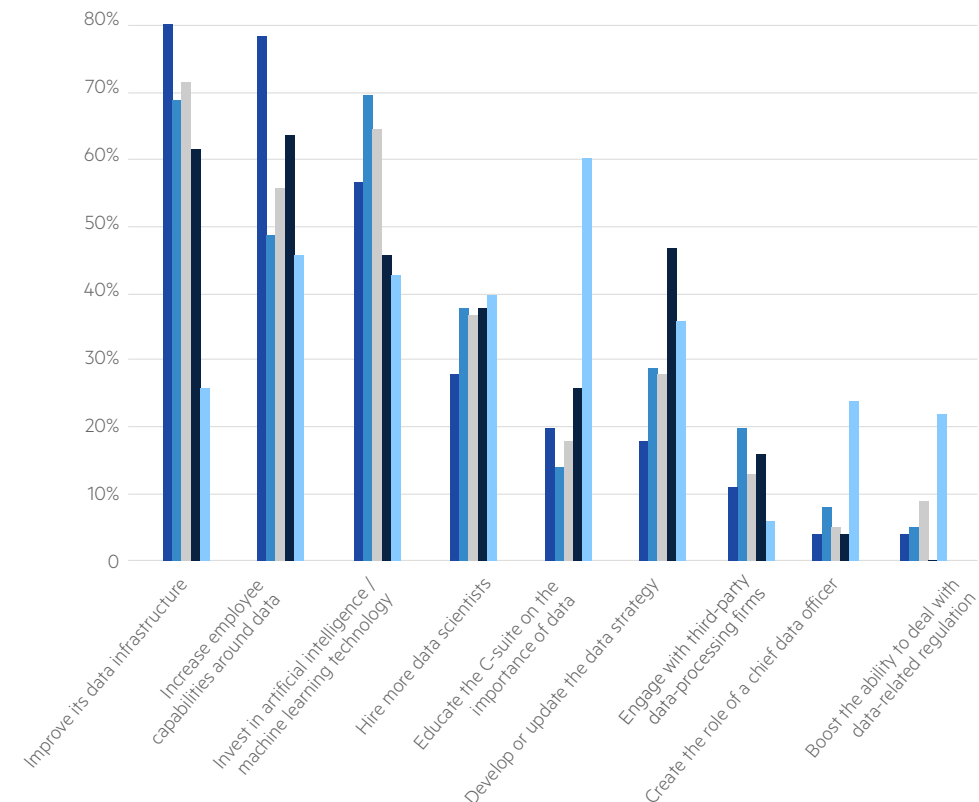


Fig. 25. Global Data Insights Survey, March 2022

¹Respondents selected their "top 3" prelisted responses

Data Needs Global Meeting Place

Regional Insights

Where global companies place and connect their data matters. Companies in all regions need a secure data “meeting place” to support physical-virtual business models and mission critical Hybrid IT architecture, while other needs vary.

Insight Highlights

- All regions prioritize the need for a global data center platform provider to support their data strategy.
- Over 60% of companies in EMEA, APAC, and LATAM require secure data exchange as a top priority for their data center providers.
- 42% of LATAM companies identified dynamic discovery capabilities and multi-cloud access as a top priority, which is inconsistent with their peers.

Q12: Which requirements do your data center providers need to fulfill to support your data strategy? (Top 3)¹

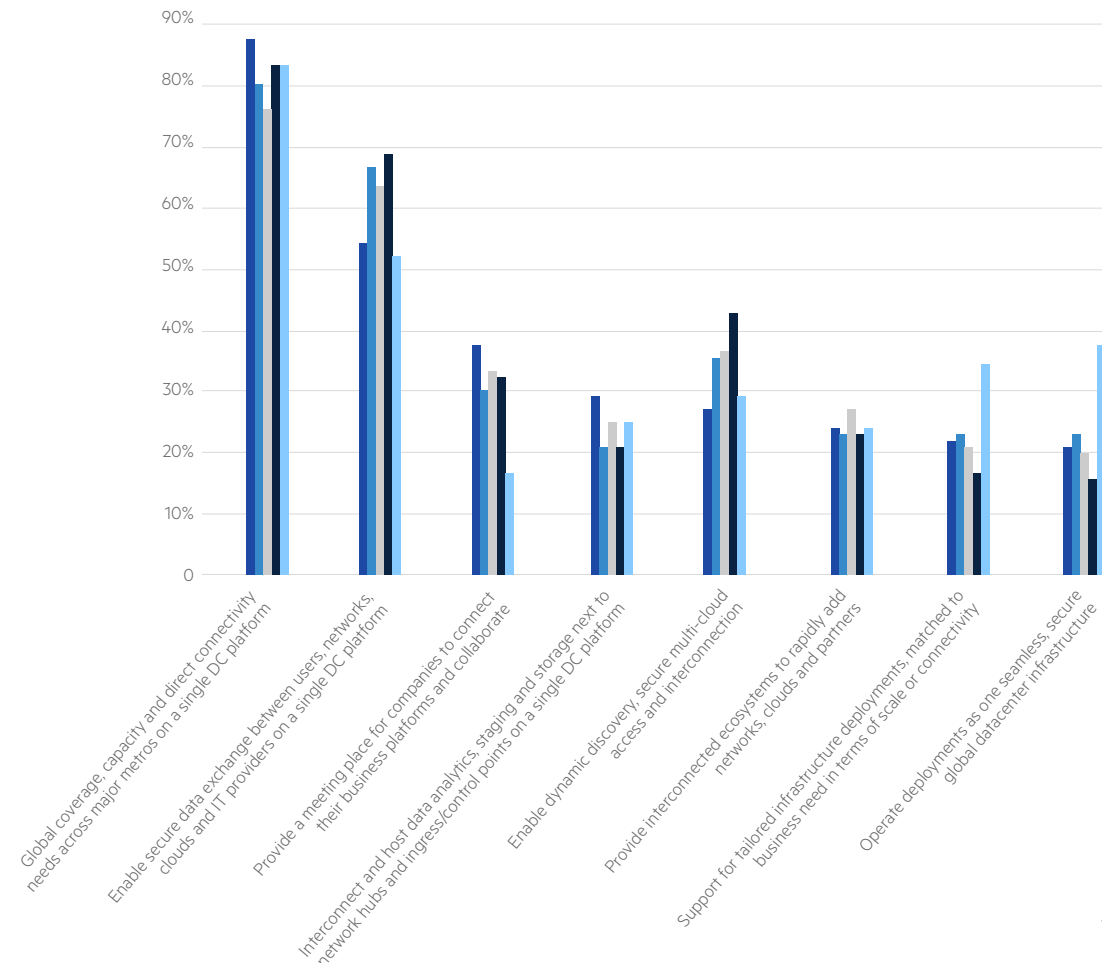


Fig. 26. Global Data Insights Survey, March 2022

¹Respondents selected their “top 3” prelisted responses

Survey Methodology

Purpose

This survey was designed to:

1. Provide insights on how data is becoming the critical agenda topic for all businesses
2. Identify implications driving the need to rethink data strategies on a global, regional, local and industry level
3. Establish the importance of addressing Data Gravity¹

Survey Design

The Global Data Insights Survey consisted of 13 questions covering data strategy, obstacles, and planning. Digital Realty contracted a third party to conduct research in the field from May through June 2021.

The survey garnered responses from 7,295 C-level executives & business and technology leaders, representing large multi-national enterprises across 23 countries and nine industries, with revenues ranging from \$100 million to more than \$1 billion.



13 Questions



7,295 Participants



23 Countries



9 Industries



Company Size
by Revenue
\$100M - \$1B+

¹Data Gravity can create bottlenecks that impede the efficient exchange of data

Learn More

Transform data strategies and unlock trapped value.

In an information and data centric world, knowledge is power. As business and technology leaders transform their data strategies in order to address converging physical and digital worlds, the Global Data Insights Survey can function as a resource for companies as they rethink how to integrate their business platforms and unlock their data's trapped value.

The Global Data Insights Survey Global and Regional Insights are only the beginning. The Global Data Insights Survey also contains insights broken down in to nine industries, for even more detailed information and implications to understand where to support your business digitally.

Sign Up to Receive the Industry Insights

digitalrealty.com/global-data-insights-industry

Contact Us

US & SA: +1 877 378 3282

APAC: +65 65053900

EU | London: +44 (0)207 954 9100

EU | Amsterdam: +31 (0)88 678 90 90

EU | Frankfurt: +49 (0) 69 6640 8040

sales@digitalrealty.com

INDUSTRY INSIGHTS:

- Banking & Financial Services
- Healthcare & Social Assistance
- Insurance
- Manufacturing
- Media & Entertainment
- Pharmaceuticals & Chemicals
- Professional Services
- Retail
- Travel, Transportation & Logistics



About Digital Realty

Digital Realty supports the world's leading enterprises and service providers by delivering the full spectrum of data center, colocation and interconnection solutions. PlatformDIGITAL®, the company's global data center platform, provides customers a trusted foundation and proven Pervasive Datacenter Architecture (PDx™) solution methodology for scaling digital business and efficiently managing data gravity challenges. Digital Realty's global data center footprint gives customers access to the connected communities that matter to them with 285+ facilities in 50 metros across 26 countries on 6 continents. To learn more about Digital Realty, please visit digitalrealty.com or follow us on **LinkedIn** and **Twitter**.

Digital Realty Trust, Inc. owns or licenses all copyright rights in all content, including, without limitation, all text, images, videos, and graphics in this document, to the full extent provided under the copyright laws of the United States and other countries. This copyright prohibits any act of copying, reproducing, modifying, distributing, displaying, performing or transmitting any of the content in this document for any purpose.

DISCLAIMER

The content herein and services by Digital Realty are provided to you on an "As Is" and "As Available" basis, except as set forth in a definitive agreement between you and Digital Realty. Except as expressly provided, to the full extent permissible by law, Digital Realty disclaims all representations and warranties of any kind, express or implied, including, without limitation, any implied warranties of merchantability and fitness for a particular purpose. To the full extent permissible by law, Digital Realty will not be liable for any damages of any kind, including, any loss of profits, loss of use, business interruption, or indirect, special, incidental, consequential, or punitive damages of any kind in connection with services, content, products or any other information provided or otherwise made available to you by Digital Realty. The content herein may include forward-looking statements which are based on current expectations, forecasts and assumptions that involve risks and uncertainties that could cause actual outcomes and results to differ materially, including statements related to Pervasive Datacenter Architecture (PDx™), Data Gravity, Data Gravity Index DGx™, and PlatformDIGITAL®. For a list and description of such risks and uncertainties, see Digital Realty's reports and other filings with the U.S. Securities and Exchange Commission. Digital Realty disclaims any intention or obligation to update or revise any forward-looking statements, whether as a result of new information, future events or otherwise.

©2022 Digital Realty Trust, Inc

