dynatrace

The state of observability 2024

Overcoming complexity through AI-driven analytics and automation strategies

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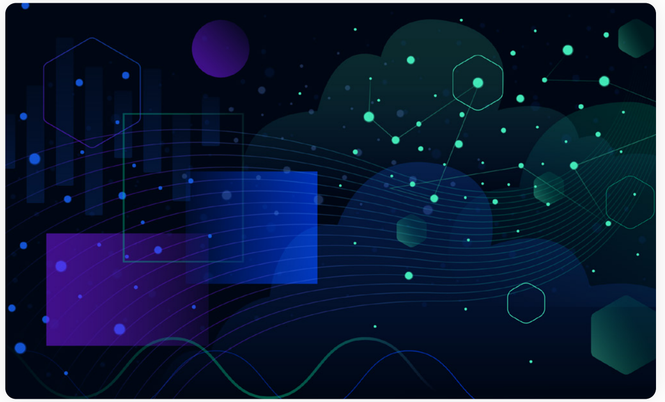
Introduction

In 2024, digital transformation continues to accelerate as organizations seek new ways to build competitive advantage. Against this backdrop, multicloud environments and Agile delivery practices have become mandatory for keeping up with the speed of the market, providing the scalability and agility that organizations need to drive innovation successfully.

However, the complexity introduced by these modern approaches has made it difficult for IT and security teams to manage their applications effectively. The dynamism of multicloud environments has created an explosion of data that is beyond humans' ability to capture, analyze, and act on. As a result, teams struggle to access the insights needed to drive faster, better, and more secure innovation, which hinders their efforts.

This report explores these challenges in greater depth and highlights how IT and security teams can overcome them with a mature AI, analytics, and automation strategy. It suggests that these teams need to move beyond traditional AIOps models to access the real-time insights that help drive lasting business value.



CHAPTER ONE

Multicloud environments are increasingly distributed

Organizations continue to embrace multicloud environments to achieve the necessary speed, scale, and agility to keep up with faster digital transformation and drive secure innovation. As this trend continues, technology stacks are growing in scale and complexity. An array of different cloud-native services and platforms—delivered by multiple providers—supports even the simplest digital transaction today. This makes it increasingly difficult for IT and security teams to monitor and manage their applications by optimizing user experience and improving resilience.

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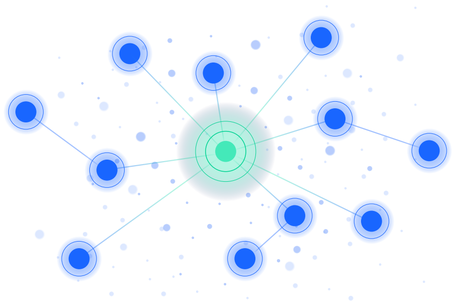
The number of different platforms and services spanning the average multicloud environment



On average, these environments span the following:

3

Hyperscale cloud service providers, such as Amazon Web Services, Microsoft Azure, and Google Cloud Platform

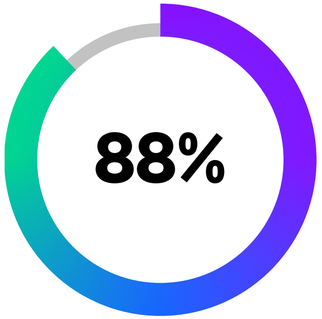
4

Local infrastructure-as-a-service (IaaS) providers

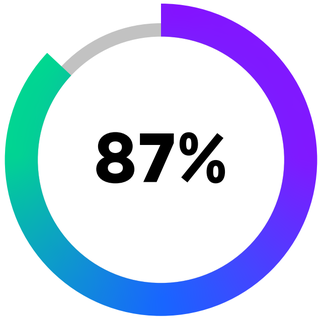
5

Private IaaS environments (hosted on premises or with traditional data center providers)

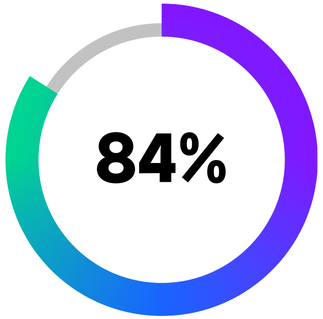
IT and security teams find it increasingly difficult to monitor and manage their applications



of technology leaders say the complexity of their tech stack has increased in the past 12 months, and 51% say it will continue to increase



of technology leaders say multicloud complexity makes it more difficult to deliver an outstanding customer experience



of technology leaders say multicloud complexity makes it more difficult to protect applications from security vulnerabilities and attacks

CHAPTER TWO

Fragmented monitoring and analytics can’t keep up

The continued reliance on fragmented cloud monitoring tools and manual analytics strategies creates a further challenge for IT and security teams.

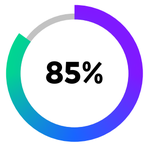
With no single source of truth or real-time insight, these teams increasingly struggle to access the answers needed to accelerate innovation and optimize digital services effectively.

They are forced to spend too much time piecing together different sources of information from various monitoring tools and then manually querying the data for insight. This is a complex and time-consuming process that distracts teams from driving innovation and creating new value for customers and the business.

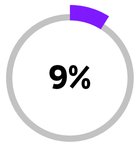
What’s more, the effort involved in managing all these tools, platforms, and dashboards means that teams often monitor only their mission-critical applications. This creates myriad blind spots across the technology stack, where teams are unable to access insights, making it easier for problems to arise.

10

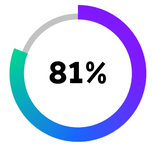
the number, on average, of observability or monitoring tools that organizations use to manage applications, infrastructure, and user experience



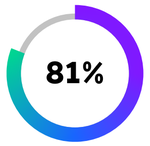
of technology leaders say increasing tool, platform, and application volume substantially augments multicloud complexity



of applications are fully instrumented for end-to-end observability



of technology leaders say the time their teams spend maintaining monitoring tools and preparing data for analysis detracts from innovation



of technology leaders are currently or will be prioritizing a reduction in the number of monitoring and observability tools they use in the next 12 months

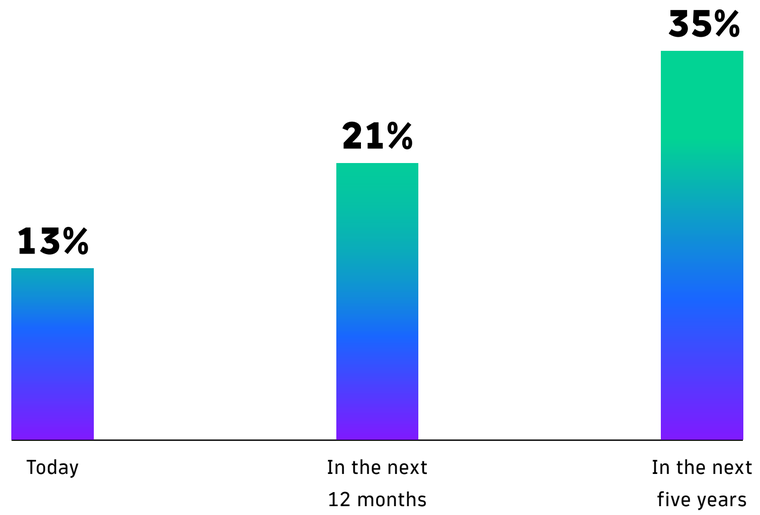
CHAPTER THREE

Kubernetes adds to the complexity of technology stacks

In the drive toward modern technology stacks, Kubernetes* has emerged as the platform of choice for organizations working to refactor their applications for the cloud-native world.

Kubernetes architectures make it easier to quickly scale services to new users and drive efficiency gains through dynamic resource provisioning. They also, however, make it difficult for IT and security teams to maintain visibility into their constantly changing cloud environments and the dependencies they contain. It is simply impossible for these teams to manually configure an array of traditional monitoring tools to provide observability into their Kubernetes environments. As a result, they are often unable to access the real-time insights they need to improve user experience, optimize costs, and strengthen security. This visibility challenge is a growing concern, and is delaying many organizations from migrating more of their mission-critical services, such as core banking applications and ERP systems, to Kubernetes.

The percentage of **mission-critical** applications running on Kubernetes

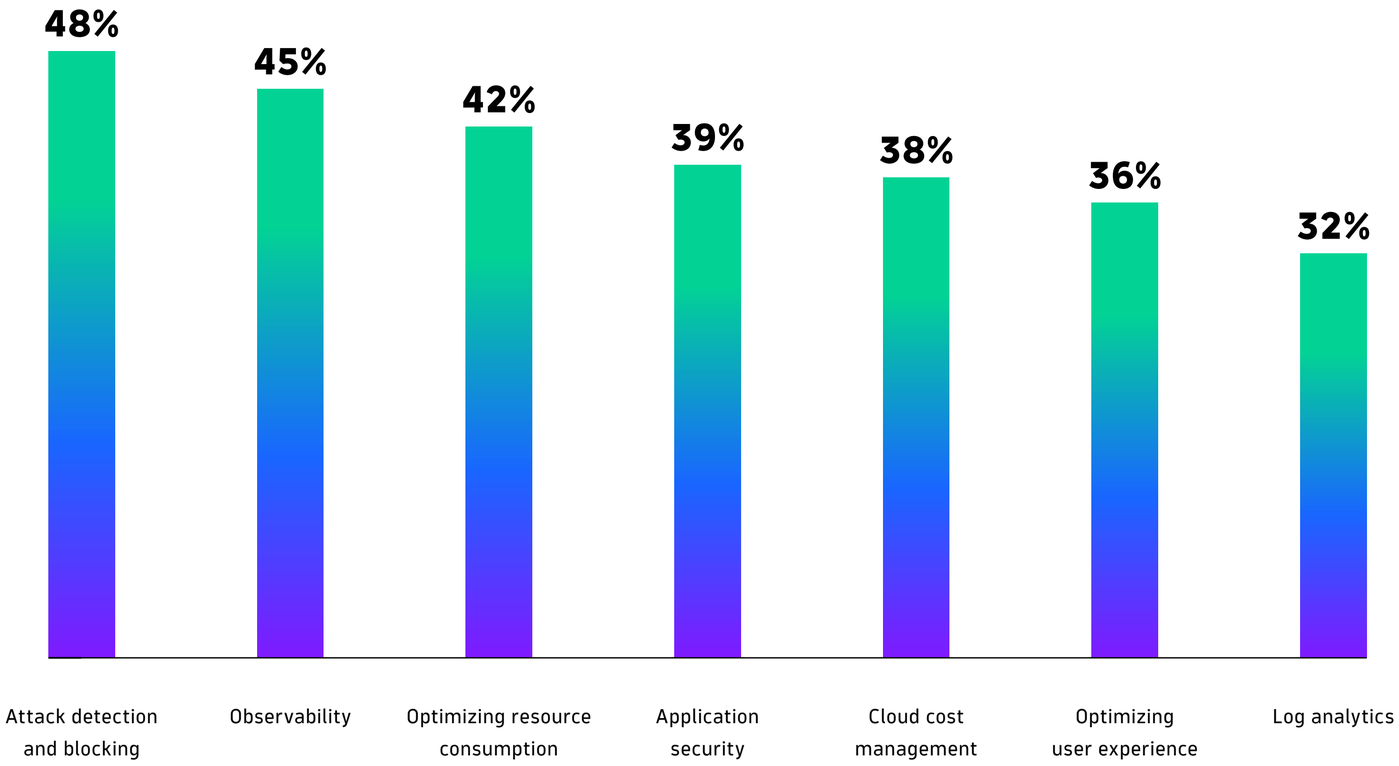


*Kubernetes is an open source container orchestration system for automating software deployment, scaling, and management.

76% of technology leaders say the dynamic nature of Kubernetes makes it more difficult to maintain visibility into this architecture compared with traditional technology stacks

83% of technology leaders say replacing manual tagging with automated dependency mapping is essential for handling multicloud and Kubernetes complexity

Organizations say the challenges of Kubernetes environments include the following:



CHAPTER FOUR

Organizations are drowning in data

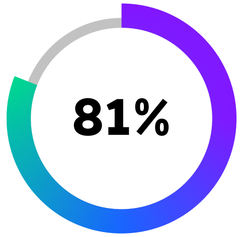
Data has become the lifeblood of modern digital enterprises, providing a treasure trove of potential insights that can drive smarter decision making and better business outcomes.

However, the rise of more dynamic and distributed cloud-native technology stacks has unleashed a firehose of data that IT and security teams struggle to contain. These modern environments generate data at a rate that is impossible for teams to cost-effectively capture and analyze using traditional practices and fragmented monitoring tools. Teams simply cannot manually query all data, from all sources, in context, to access precise insights in a timely manner.

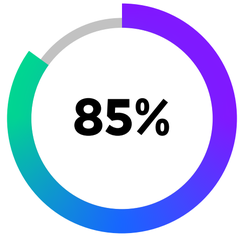
77% of technology leaders are involving more teams from outside of IT in making decisions using observability-driven insights to drive greater value

86% of technology leaders say cloud-native technology stacks produce an explosion of data that is beyond humans' ability to manage

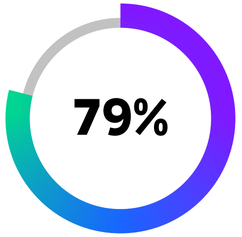
Log analytics* has become a particular challenge, as the costs of storing the increased volumes of this data over the long term have begun to overshadow the value organizations can unlock from querying it. As a result, teams are often forced to decide which logs to retain for real-time analytics and which to discard or archive in lower-cost, less-accessible storage. This hinders organizations' ability to drive more automation and smarter decision making.



of technology leaders say manual approaches to log management and analytics cannot keep up with the rate of change in their technology stack and the volumes of data created



of technology leaders say the costs of storing and analyzing logs are soaring and outweigh the benefits they provide



of technology leaders are currently using or planning to adopt a unified platform for observability and security data within the next 12 months

*Log analytics is the process of viewing, interpreting, and querying log data so developers and IT teams can quickly detect and resolve application and system issues.

CHAPTER FIVE

A mature AI, analytics, and automation strategy is essential

Organizations are increasingly turning to advanced AI, analytics, and automation capabilities to overcome the complexity of their modern technology stacks.

However, many organizations have seen limited value from their initial analytics and automation strategies due to a focus on traditional AIOps solutions powered by probabilistic and training-based learning models.

To keep pace with the speed of cloud-native delivery, organizations need more precise and predictive AI-driven analytics that enable them to automate multicloud infrastructures and Agile development practices at scale. This can best be achieved through a unified observability platform that combines multiple AI techniques—including causal, predictive, and generative AI—to enable more teams to unlock a wealth of insights from observability, security, and business data. By providing access to these insights through natural language queries, organizations can enable teams to power custom applications and analytics use cases to drive smarter decision making and more efficient ways of working.

93%

of organizations have or will adopt AIOps to reduce the complexity of managing their multicloud environment within the next 12 months

However, despite overwhelming AIOps adoption, organizations experience challenges

97%

of technology leaders say probabilistic machine learning approaches have limited the value that AIOps tools deliver due to the manual effort teams need to invest to gain reliable insights

79%

of technology leaders say the maturity of AI, analytics, and automation capabilities will play a more important role in how they choose vendors and partners

The Dynatrace difference

The world needs software to work perfectly. So, Dynatrace unifies observability, security, and business analytics using AI that combines causal, predictive, and generative techniques in a single platform. This approach gives teams the precise answers and intelligent automation they need to deliver exceptional digital experiences at scale. Our comprehensive approach to observability, security, and business analytics as well as automation—which we call cloud done right—empowers organizations across the globe to simplify cloud complexity, speed innovation, and do more with less in the modern cloud.

Methodology

This report is based on a global survey of 1,300 CIOs, CTOs, and other senior technology leaders involved in IT operations and DevOps management in large enterprises with more than 1,000 employees. It was conducted by Coleman Parkes and commissioned by Dynatrace.

The sample included 200 respondents in the U.S., 100 in Latin America, 600 in Europe, 150 in the Middle East, and 250 in Asia Pacific. For a detailed breakdown of findings by region, refer to the global data summary appendix.

Industries spotlight

Financial services

Caught in the crossroads of serving an older generation as well as a digitally savvy younger population, and facing increased competition from modern fintechs, financial institutions are looking at a hybrid model that integrates digital experiences into traditional physical branches.

Many organizations—particularly more established banks—are building these services on a technology stack spanning an average of 12 different cloud platforms, as well as legacy on-premises systems. These hybrid environments are highly complex, and more than half (54%) of financial services businesses predict they will become only more complex in the next 12 months.

As this complexity continues to grow, it is leading to an explosion of data, which 88% of financial sector technology leaders believe is too much for humans to manage. However, nearly all (99%) financial services organizations are already involving, or planning to involve, non-IT teams in making decisions using insights gleaned from observability data. Faced with this growing demand for data-driven insights, 75% of financial technology leaders are looking to AIOps to reduce multicloud complexity.

Retail

The rapid growth of ecommerce has created both opportunities and challenges for retailers. They must now appeal to a growing digital-native audience, customers who prefer to shop in physical stores, and those who use a combination of channels.

As they seek to meet these needs by creating seamless omnichannel experiences, 91% of retail technology leaders report that the complexity of their technology stack has increased in the past 12 months. Over half (56%) anticipate it will become even more complex. And 89% of retail respondents say this complexity is hampering their ability to provide an outstanding customer experience.

Part of this challenge is turning data into insights to help optimize customer experiences. The vast majority (87%) of respondents believe that manual approaches to log management and analytics cannot keep up with the rate of change in their technology stack and the volumes of data being created. As they search for a solution, 71% of retailers are turning to AIOps.

Government

Government agencies are focused on meeting the needs of their citizens as effectively and efficiently as possible, to ensure every tax dollar is invested for maximum effect. As part of this mission, there is a drive to digitize services across all areas of government, so citizens can meet their own needs faster and with greater convenience.

To deliver these services, government agencies are using an array of cloud platforms, spanning 12 environments on average. This is leading to an increase in complexity that is felt more acutely in the government sector than any other industry. Nearly all (97%) government technology leaders say the complexity of their technology stack has increased in the past 12 months.

Eighty-five percent also say the number of tools, platforms, dashboards, and applications they rely on only adds to the complexity. That's perhaps why 83% are turning to AIOps. Additionally, 80% of government agencies are looking to consolidate the tools they use and adopt a unified platform for observability and security.

Transportation

The transportation industry has rebounded strongly in the wake of the pandemic, but it faces the ongoing challenge of rebuilding consumer confidence. This is exacerbated by the difficulties of managing the complex technology stacks that underpin today's transportation services.

The vast majority (92%) of technology leaders in this sector believe that multicloud complexity makes it more difficult to deliver outstanding customer experiences. This problem is only worsened by the vast range of tools, platforms, and dashboards that organizations rely on to manage their multicloud environments—a challenge highlighted by 88% of respondents in the transportation sector.

Additionally, 92% say manual approaches to log management and analytics cannot keep up with the rate of change in their technology stack and the volumes of data being created. With 55% of transportation businesses believing their stack will become more complex in the next 12 months, they urgently need to find a solution. Nine in 10 are looking to adopt AIOps, while 85% are reducing the number of monitoring and observability tools on which they rely.

Software and digital services

The rapid growth of many software-as-a-service (SaaS) organizations in recent years has created a legacy of concern around their ability to scale quickly while maintaining high standards of quality and security. Eighty-five percent of software and technology respondents say it is more difficult to protect applications from security vulnerabilities and attacks due to the complexity of their multicloud environments. The same proportion say the number of tools, platforms, dashboards, and applications they rely on adds to the complexity. Software and technology companies rely on 12 different observability or monitoring tools on average—more than any other sector.

It is no surprise, then, that 84% of software and technology organizations are looking to reduce the number of observability and monitoring tools they use, while 83% are aiming to adopt a unified platform for observability and security. This will reduce the prevalence of blind spots across their multicloud technology stack, so they can continue to grow in a secure manner.

Global data summary

Regional highlights

U.S.

Sample base: 200 respondents

- The average multicloud environment spans **15** different platforms and services
- **74%** of organizations say the complexity of their technology stack has increased in the past 12 months, and **26%** say it will continue to increase
- **82%** of technology leaders say multicloud complexity makes it more difficult to deliver an outstanding customer experience
- **79%** of technology leaders say cloud-native technology stacks produce an explosion of data that is beyond humans' ability to manage
- On average, organizations use **9** different observability or monitoring tools to manage applications, infrastructure, and user experience
- **81%** of technology leaders say the time their teams spend maintaining monitoring tools and preparing data for analysis steals time from innovation
- **68%** of organizations are currently using or planning to adopt a unified platform for observability and security data within the next 12 months
- **52%** of organizations have already adopted AIOps to reduce the complexity of managing their multicloud environment and a further **28%** plan to adopt it in the next 12 months

Brazil

Sample base: 50 respondents

- The average multicloud environment spans **11** different platforms and services
- **100%** of organizations say the complexity of their technology stack has increased in the past 12 months, and **72%** say it will continue to increase
- **92%** of technology leaders say multicloud complexity makes it more difficult to deliver an outstanding customer experience
- **92%** of technology leaders say cloud-native technology stacks produce an explosion of data that is beyond humans' ability to manage
- On average, organizations use **11** different observability or monitoring tools to manage applications, infrastructure, and user experience
- **84%** of technology leaders say the time their teams spend maintaining monitoring tools and preparing data for analysis steals time from innovation
- **68%** of organizations are currently using or planning to adopt a unified platform for observability and security data within the next 12 months
- **82%** of organizations have already adopted AIOps to reduce the complexity of managing their multicloud environment and a further **18%** plan to adopt it in the next 12 months

Mexico

Sample base: 50 respondents

- The average multicloud environment spans **13** different platforms and services
- **98%** of organizations say the complexity of their technology stack has increased in the past 12 months, and **96%** say it will continue to increase
- **92%** of technology leaders say multicloud complexity makes it more difficult to deliver an outstanding customer experience
- **96%** of technology leaders say cloud-native technology stacks produce an explosion of data that is beyond humans' ability to manage
- On average, organizations use **12** different observability or monitoring tools to manage applications, infrastructure, and user experience
- **96%** of technology leaders say the time their teams spend maintaining monitoring tools and preparing data for analysis steals time from innovation
- **74%** of organizations are currently using or planning to adopt a unified platform for observability and security data within the next 12 months
- **80%** of organizations have already adopted AIOps to reduce the complexity of managing their multicloud environment and a further **16%** plan to adopt it in the next 12 months

U.K.

Sample base: 100 respondents

- The average multicloud environment spans **9** different platforms and services
- **93%** of organizations say the complexity of their technology stack has increased in the past 12 months, and **30%** say it will continue to increase
- **87%** of technology leaders say multicloud complexity makes it more difficult to deliver an outstanding customer experience
- **89%** of technology leaders say cloud-native technology stacks produce an explosion of data that is beyond humans' ability to manage
- On average, organizations use **8** different observability or monitoring tools to manage applications, infrastructure, and user experience
- **72%** of technology leaders say the time their teams spend maintaining monitoring tools and preparing data for analysis steals time from innovation
- **86%** of organizations are currently using or planning to adopt a unified platform for observability and security data within the next 12 months
- **64%** of organizations have already adopted AIOps to reduce the complexity of managing their multicloud environment and a further **35%** plan to adopt it in the next 12 months

France

Sample base: 100 respondents

- The average multicloud environment spans **12** different platforms and services
- **92%** of organizations say the complexity of their technology stack has increased in the past 12 months, and **53%** say it will continue to increase
- **92%** of technology leaders say multicloud complexity makes it more difficult to deliver an outstanding customer experience
- **88%** of technology leaders say cloud-native technology stacks produce an explosion of data that is beyond humans' ability to manage
- On average, organizations use **10** different observability or monitoring tools to manage applications, infrastructure, and user experience
- **81%** of technology leaders say the time their teams spend maintaining monitoring tools and preparing data for analysis steals time from innovation
- **86%** of organizations are currently using or planning to adopt a unified platform for observability and security data within the next 12 months
- **72%** of organizations have already adopted AIOps to reduce the complexity of managing their multicloud environment and a further **24%** plan to adopt it in the next 12 months

Germany

Sample base: 100 respondents

- The average multicloud environment spans **10** different platforms and services
- **99%** of organizations say the complexity of their technology stack has increased in the past 12 months, and **77%** say it will continue to increase
- **85%** of technology leaders say multicloud complexity makes it more difficult to deliver an outstanding customer experience
- **80%** of technology leaders say cloud-native technology stacks produce an explosion of data that is beyond humans' ability to manage
- On average, organizations use **12** different observability or monitoring tools to manage applications, infrastructure, and user experience
- **83%** of technology leaders say the time their teams spend maintaining monitoring tools and preparing data for analysis steals time from innovation
- **85%** of organizations are currently using or planning to adopt a unified platform for observability and security data within the next 12 months
- **84%** of organizations have already adopted AIOps to reduce the complexity of managing their multicloud environment and a further **14%** plan to adopt it in the next 12 months

Italy

Sample base: 100 respondents

- The average multicloud environment spans **10** different platforms and services
- **96%** of organizations say the complexity of their technology stack has increased in the past 12 months, and **48%** say it will continue to increase
- **88%** of technology leaders say multicloud complexity makes it more difficult to deliver an outstanding customer experience
- **83%** of technology leaders say cloud-native technology stacks produce an explosion of data that is beyond humans' ability to manage
- On average, organizations use **9** different observability or monitoring tools to manage applications, infrastructure, and user experience
- **84%** of technology leaders say the time their teams spend maintaining monitoring tools and preparing data for analysis steals time from innovation
- **83%** of organizations are currently using or planning to adopt a unified platform for observability and security data within the next 12 months
- **77%** of organizations have already adopted AIOps to reduce the complexity of managing their multicloud environment and a further **21%** plan to adopt it in the next 12 months

Spain

Sample base: 100 respondents

- The average multicloud environment spans **11** different platforms and services
- **86%** of organizations say the complexity of their technology stack has increased in the past 12 months, and **51%** say it will continue to increase
- **82%** of technology leaders say multicloud complexity makes it more difficult to deliver an outstanding customer experience
- **84%** of technology leaders say cloud-native technology stacks produce an explosion of data that is beyond humans' ability to manage
- On average, organizations use **12** different observability or monitoring tools to manage applications, infrastructure, and user experience
- **85%** of technology leaders say the time their teams spend maintaining monitoring tools and preparing data for analysis steals time from innovation
- **81%** of organizations are currently using or planning to adopt a unified platform for observability and security data within the next 12 months
- **76%** of organizations have already adopted AIOps to reduce the complexity of managing their multicloud environment and a further **21%** plan to adopt it in the next 12 months

Sweden

Sample base: 50 respondents

- The average multicloud environment spans **11** different platforms and services
- **98%** of organizations say the complexity of their technology stack has increased in the past 12 months, and **80%** say it will continue to increase
- **88%** of technology leaders say multicloud complexity makes it more difficult to deliver an outstanding customer experience
- **92%** of technology leaders say cloud-native technology stacks produce an explosion of data that is beyond humans' ability to manage
- On average, organizations use **10** different observability or monitoring tools to manage applications, infrastructure, and user experience
- **80%** of technology leaders say the time their teams spend maintaining monitoring tools and preparing data for analysis steals time from innovation
- **80%** of organizations are currently using or planning to adopt a unified platform for observability and security data within the next 12 months
- **80%** of organizations have already adopted AIOps to reduce the complexity of managing their multicloud environment and a further **18%** plan to adopt it in the next 12 months

Benelux

Sample base: 50 respondents (32 Netherlands, 10 Belgium, 8 Luxembourg)

- The average multicloud environment spans **11** different platforms and services
- **98%** of organizations say the complexity of their technology stack has increased in the past 12 months, and **72%** say it will continue to increase
- **78%** of technology leaders say multicloud complexity makes it more difficult to deliver an outstanding customer experience
- **82%** of technology leaders say cloud-native technology stacks produce an explosion of data that is beyond humans' ability to manage
- On average, organizations use **11** different observability or monitoring tools to manage applications, infrastructure, and user experience
- **80%** of technology leaders say the time their teams spend maintaining monitoring tools and preparing data for analysis steals time from innovation
- **80%** of organizations are currently using or planning to adopt a unified platform for observability and security data within the next 12 months
- **84%** of organizations have already adopted AIOps to reduce the complexity of managing their multicloud environment and a further **14%** plan to adopt it in the next 12 months

Middle East

Sample base: 150 respondents (65 UAE, 46 Saudi Arabia, 20 Kuwait, 19 Qatar)

- The average multicloud environment spans **12** different platforms and services
- **96%** of organizations say the complexity of their technology stack has increased in the past 12 months, and **77%** say it will continue to increase
- **92%** of technology leaders say multicloud complexity makes it more difficult to deliver an outstanding customer experience
- **95%** of technology leaders say cloud-native technology stacks produce an explosion of data that is beyond humans' ability to manage
- On average, organizations use **12** different observability or monitoring tools to manage applications, infrastructure, and user experience
- **87%** of technology leaders say the time their teams spend maintaining monitoring tools and preparing data for analysis steals time from innovation
- **80%** of organizations are currently using or planning to adopt a unified platform for observability and security data within the next 12 months
- **80%** of organizations have already adopted AIOps to reduce the complexity of managing their multicloud environment and a further **15%** plan to adopt it in the next 12 months

Australia

Sample base: 100 respondents

- The average multicloud environment spans **14** different platforms and services
- **76%** of organizations say the complexity of their technology stack has increased in the past 12 months, and **36%** say it will continue to increase
- **94%** of technology leaders say multicloud complexity makes it more difficult to deliver an outstanding customer experience
- **87%** of technology leaders say cloud-native technology stacks produce an explosion of data that is beyond humans' ability to manage
- On average, organizations use **9** different observability or monitoring tools to manage applications, infrastructure, and user experience
- **77%** of technology leaders say the time their teams spend maintaining monitoring tools and preparing data for analysis steals time from innovation
- **80%** of organizations are currently using or planning to adopt a unified platform for observability and security data within the next 12 months
- **68%** of organizations have already adopted AIOps to reduce the complexity of managing their multicloud environment and a further **18%** plan to adopt it in the next 12 months

Japan

Sample base: 100 respondents

- The average multicloud environment spans **17** different platforms and services
- **77%** of organizations say the complexity of their technology stack has increased in the past 12 months, and **26%** say it will continue to increase
- **84%** of technology leaders say multicloud complexity makes it more difficult to deliver an outstanding customer experience
- **87%** of technology leaders say cloud-native technology stacks produce an explosion of data that is beyond humans' ability to manage
- On average, organizations use **13** different observability or monitoring tools to manage applications, infrastructure, and user experience
- **69%** of technology leaders say the time their teams spend maintaining monitoring tools and preparing data for analysis steals time from innovation
- **87%** of organizations are currently using or planning to adopt a unified platform for observability and security data within the next 12 months
- **71%** of organizations have already adopted AIOps to reduce the complexity of managing their multicloud environment and a further **21%** plan to adopt it in the next 12 months

India

Sample base: 50 respondents

- The average multicloud environment spans **13** different platforms and services
- **88%** of organizations say the complexity of their technology stack has increased in the past 12 months, and **38%** say it will continue to increase
- **88%** of technology leaders say multicloud complexity makes it more difficult to deliver an outstanding customer experience
- **90%** of technology leaders say cloud-native technology stacks produce an explosion of data that is beyond humans' ability to manage
- On average, organizations use **10** different observability or monitoring tools to manage applications, infrastructure, and user experience
- **70%** of technology leaders say the time their teams spend maintaining monitoring tools and preparing data for analysis steals time from innovation
- **64%** of organizations are currently using or planning to adopt a unified platform for observability and security data within the next 12 months
- **70%** of organizations have already adopted AIOps to reduce the complexity of managing their multicloud environment and a further **22%** plan to adopt it in the next 12 months

Automatic and intelligent observability for hybrid multiclouds

We hope this ebook has inspired you to take the next step in your digital journey. Dynatrace is committed to providing enterprises the data and intelligence they need to be successful with their enterprise cloud and digital transformation initiatives, no matter how complex.

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Dynatrace (NYSE: DT) exists to make the world's software work perfectly. Our unified platform combines broad and deep observability and continuous runtime application security with the most advanced AIOps to provide answers and intelligent automation from data at enormous scale. This enables innovators to modernize and automate cloud operations, deliver software faster and more securely, and ensure flawless digital experiences. That's why the world's largest organizations trust the Dynatrace® platform to accelerate digital transformation.

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