Dell Technologies

Innovation Index

Research Findings & Methodology

February 2023

VansonBourne

DELL Technologies

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In these tumultuous times, it's never been more important to innovate—to keep up with non-stop change and battle headwinds coming from a global recession, supply chain challenges and more. Innovation isn't a fun side-project. Resilient, focused, scalable, cultural innovation drives growth and protects companies from challenges that might otherwise defeat them.

The Dell Technologies Innovation Index is a **global benchmark assessing organizations' innovation maturity across the globe**. This inaugural study is a powerful, point-in-time snapshot of how businesses are innovating despite unprecedented uncertainty after a global pandemic and amidst rampant inflation.

The study was conducted by independent researcher, Vanson Bourne, on behalf of Dell Technologies, in September and October 2022.

RESEARCH SCOPE

Innovation influencer:
6,600 business and IT leaders driving or influencing innovation in their organization, mid- to enterprise-sized organizations

Global perspective:
45+ locations

Cross-industry:
14 industries

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Research Methodology

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Methodology

Dell Technologies commissioned independent market research specialist Vanson Bourne to conduct this research. The study surveyed 6,600 IT decision makers and business decision makers across the following regions: North America, LATAM, EMEA, APJ and Greater China.

Respondents are drawn from public and private sector organizations with 100 or more employees. We screened for people who are either driving or influencing innovation in their org.

The interviews were conducted online and via telephone in September and October 2022. Unless otherwise indicated, the results discussed are based on the total sample.

Like the Digital Transformation Index before it, which focused on what businesses were doing to progress their digital transformation journeys and categorized them from the most mature "Leaders" to the least mature "Laggards", the Innovation Index categorizes organizations based on how accomplished they are as innovators. We're exploring the Innovation state of the nation, so to speak, because we believe that in uncertain times, just as many organizations pare back their innovation, innovation becomes more necessary and sustaining. Both bold moves and incremental changes can start a ripple effect resulting in greater productivity, efficiency and profitability.

To capture and communicate how organizations are faring, we've scored organizations' people, process and technology approach to edge, multicloud, cybersecurity, hybrid work and modern data infrastructure—resulting in an innovation leader-laggard spectrum for each.

Scoring informed by respondents' organizations:

1. Ability and readiness to innovate
2. Attitude to innovation
3. Consideration of people, process and technology when innovating
4. Success in using edge, multicloud, cybersecurity, hybrid work and modern data infrastructure

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Research Scope

QUANTITATIVE

6,600 Respondents from mid- to enterprise-sized companies

IT decision makers & business decision makers (non-IT) (50/50 split, min. 20% C-level) driving or influencing innovation in their org/dept

Owner/ Executive, Finance, Sales, IT/Tech, Customer services, Marketing, Production & Manufacturing, HR, R&D, Digital, Customer Experience, Logistics & Supply Chain

INDUSTRIES

Financial services

Insurance

Retail & consumer products

Telecommunications

Media & entertainment

Oil & Gas (Energy)

Manufacturing

Automotive

IT/Technology

Public Healthcare

Private Healthcare

Life Sciences

Government

Education

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GLOBAL REACH

45+ Locations

NA

Canada

United States

LATAM

Argentina

Brazil

Chile

Colombia

Mexico

NOLA (Panama, Costa Rica, Guatemala, Honduras, Puerto Rico, El Salvador)

APJ

Australia/New Zealand

Japan

India

Malaysia

Singapore

S. Korea

Thailand

GC

China Mainland

Hong Kong

Taiwan

EUROPE

Austria

Belgium

Czech Republic

Denmark

Finland

France

Germany

Greece

Hungary

Ireland

Israel

Italy

Luxembourg

Netherlands

Norway

Poland

Portugal

Romania

Saudi Arabia

Spain

South Africa

Sweden

Switzerland

Turkey

United Arab Emirates

United Kingdom

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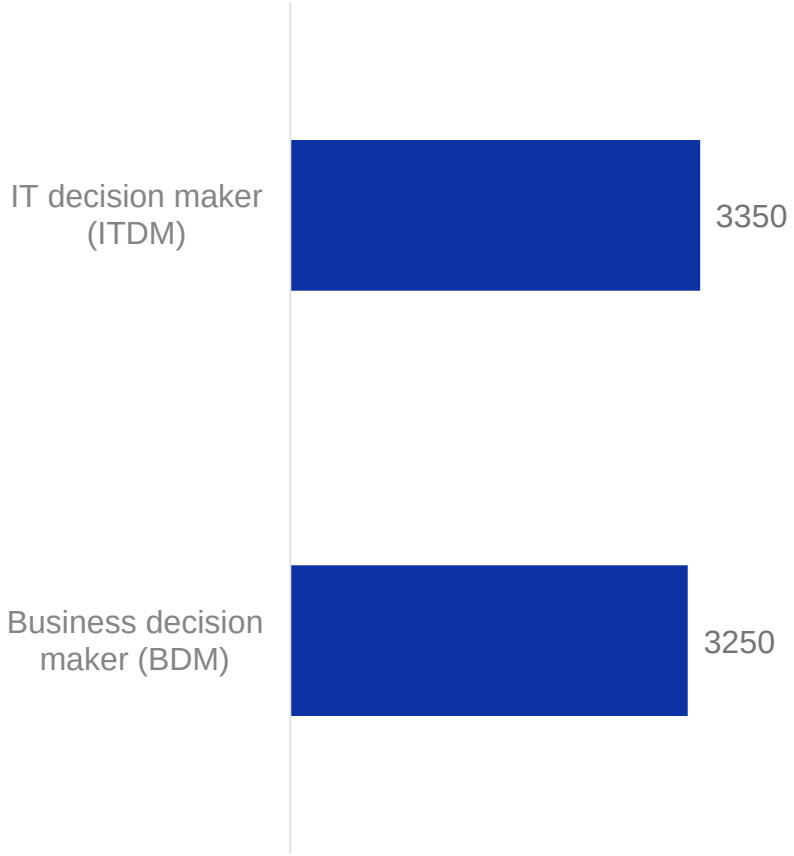
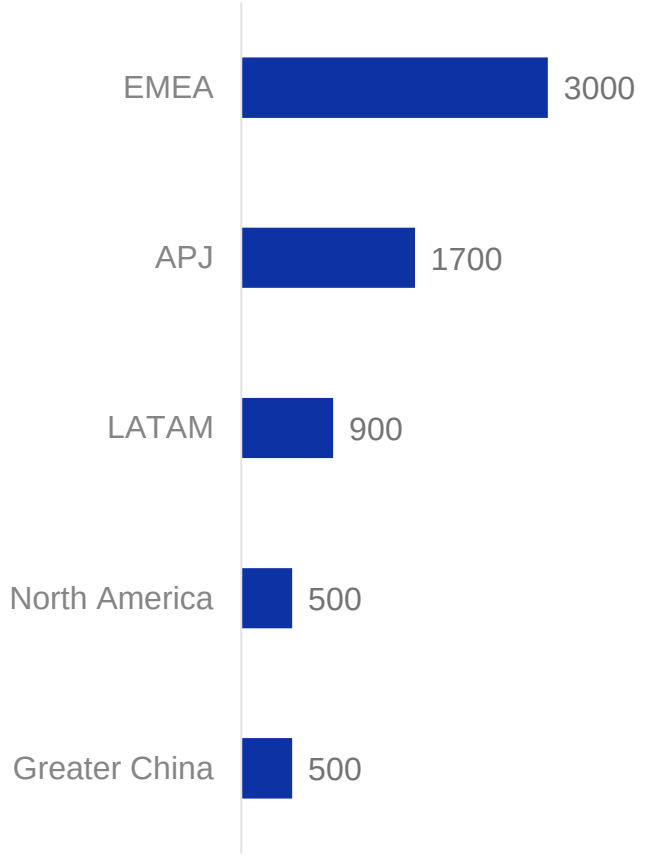
Respondent type and region



Showing respondent type. Base: all respondents (6,600)



Showing respondent region. Base: all respondents (6,600)

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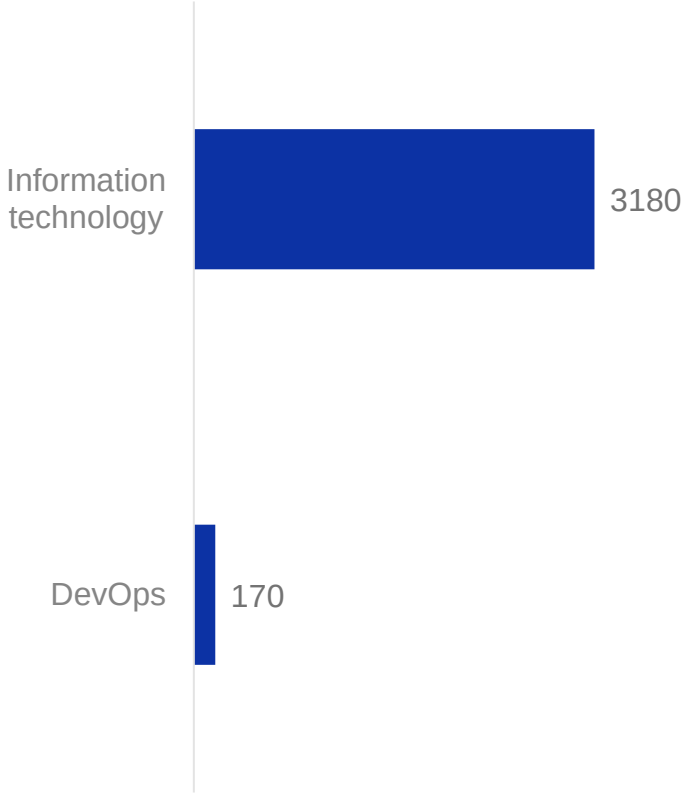
Respondent department

Breakdown of ITDM respondents (3,350):



Breakdown of BDM respondents (3,250):

"Which of the following best describes your primary job function?" Base: all respondents (6,600)

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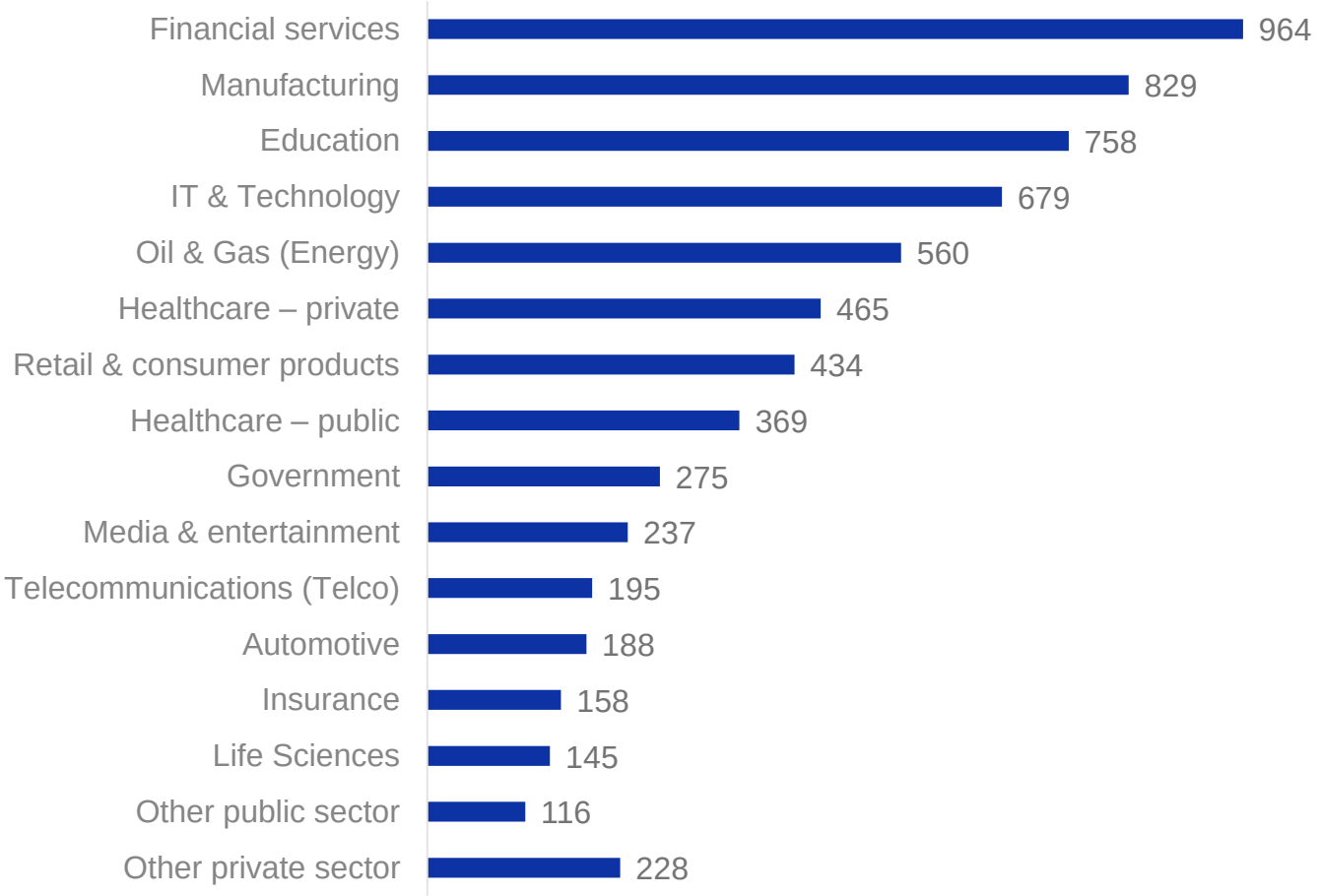
Organization industry



"In which sector is your organization?" Base: all respondents (6,600)

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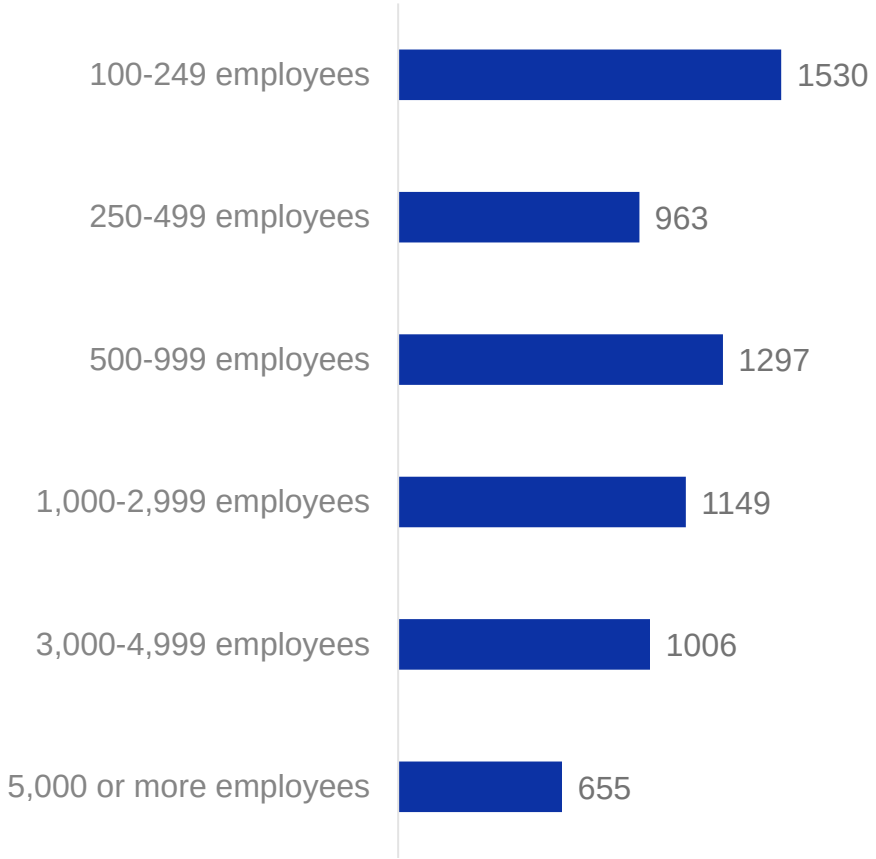
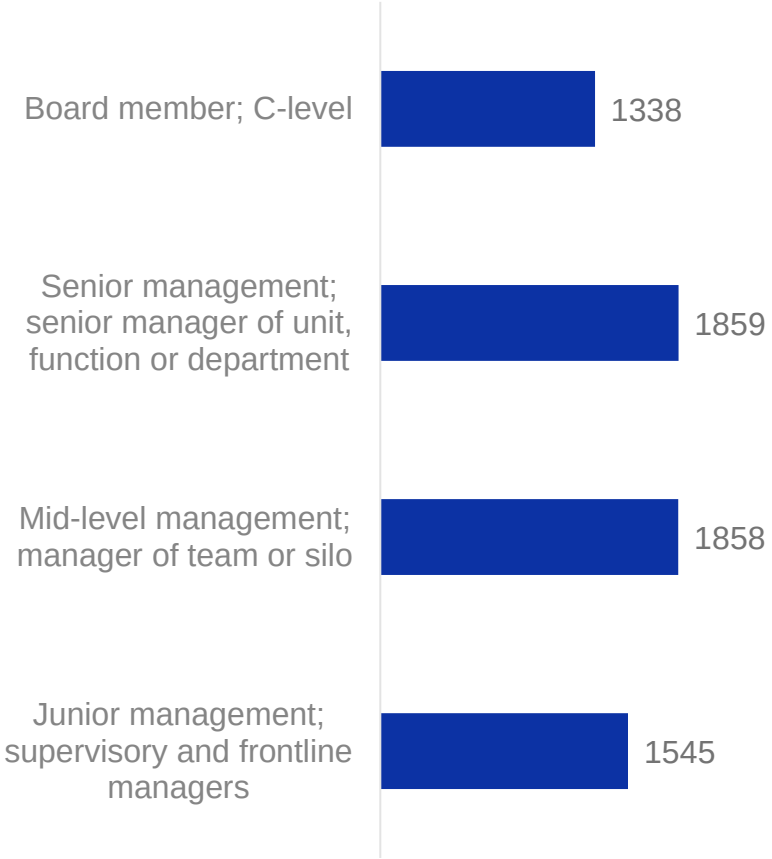
Size of organization and respondent seniority



“How many employees does your organization have globally?” Base: all respondents (6,600)



“Which of these best describes your position in the organization?” Base: all respondents (6,600)

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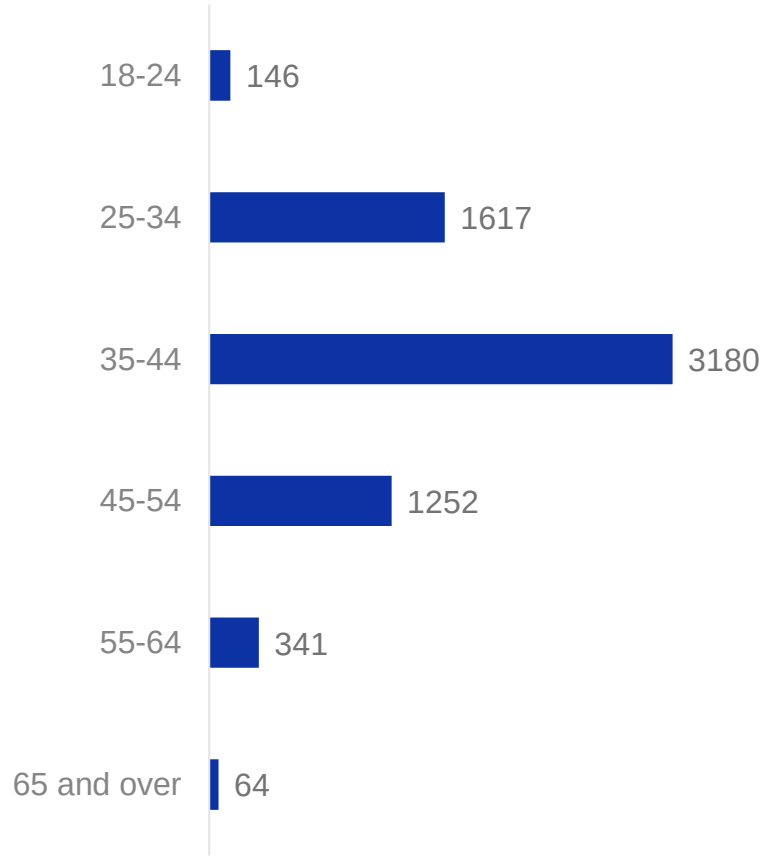
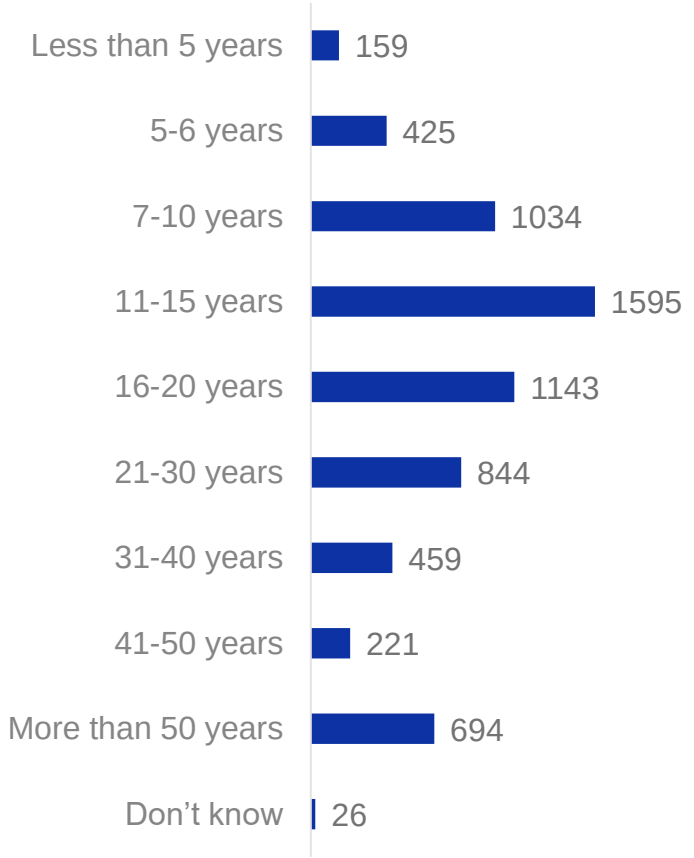
Respondent age and organization age



“What is your age?” Base: all respondents (6,600)



“How many years has your organization been operating for?” Base: all respondents (6,600)

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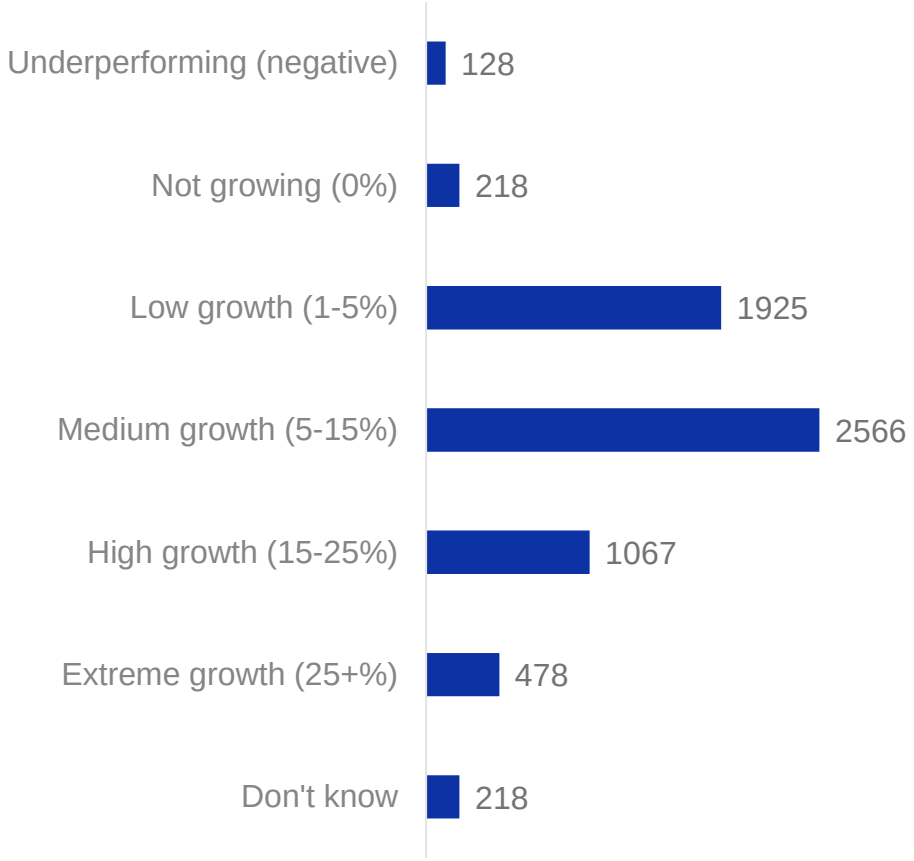
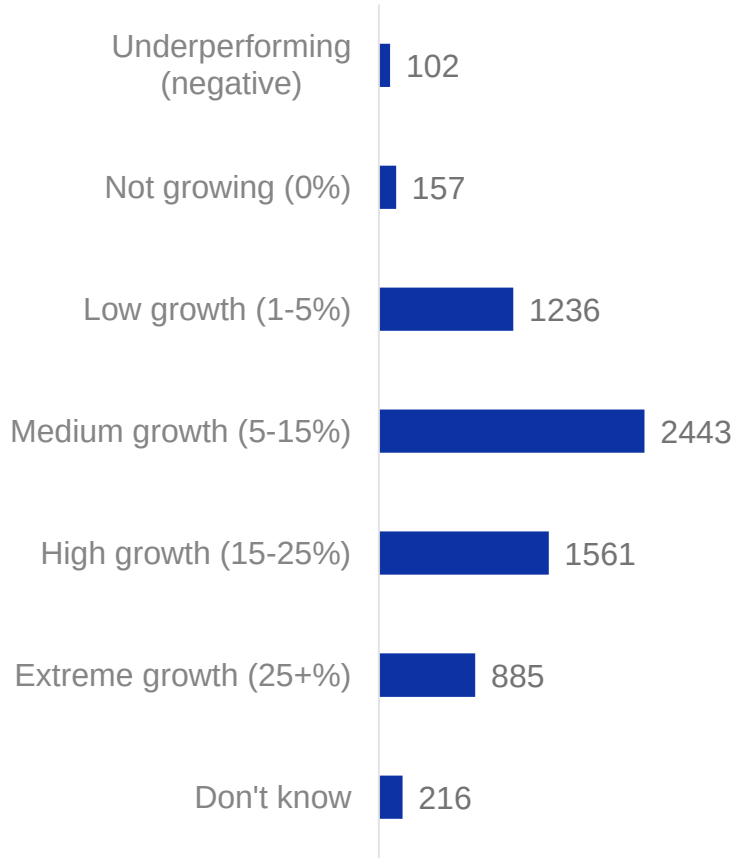
Organization revenue growth in 2021 and 2022





"What was your organization's annual revenue growth in 2021?" Base: all respondents (6,600)

"What do you expect will be your organization's annual level of growth in terms of revenue for 2022?" Base: all respondents (6,600)

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Maturity Model

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Innovation Maturity Curve group descriptions

Innovation Laggards perform poorly across a range of innovation markers, with considerable improvements needed across the board. They almost never have processes in place to facilitate innovation and do not work with partners to improve innovation success. Leaders do not model or encourage innovation from across the organization.

Innovation Followers underperform across a range of innovation markers, with improvements needed. They are unlikely to have processes in place to facilitate innovation, but they may work with partners, in a limited capacity, to improve innovation efforts. Leadership is unlikely to encourage innovation across the organization.

Innovation Evaluators innovate in some areas but are mostly stuck in evaluation stage. They lack a clear and holistic strategy and means to move forward. They have processes in place to facilitate innovation and will partner with organizations to advance these efforts. Leadership need to be coached to encourage innovation from across the organization.

Innovation Adopters are largely successful in their innovation efforts, but small improvements are needed. They're likely to have processes in place to facilitate innovation and often work with multiple partners to improve innovation efforts. Leaders encourage innovation from across the organization.

Innovation Leaders are successfully advancing innovation across the business. They have end-to-end processes in place to facilitate innovation and typically work with multiple partners to progress innovation efforts. Leaders actively encourage innovation from across the organization—their workforce is empowered to innovate.

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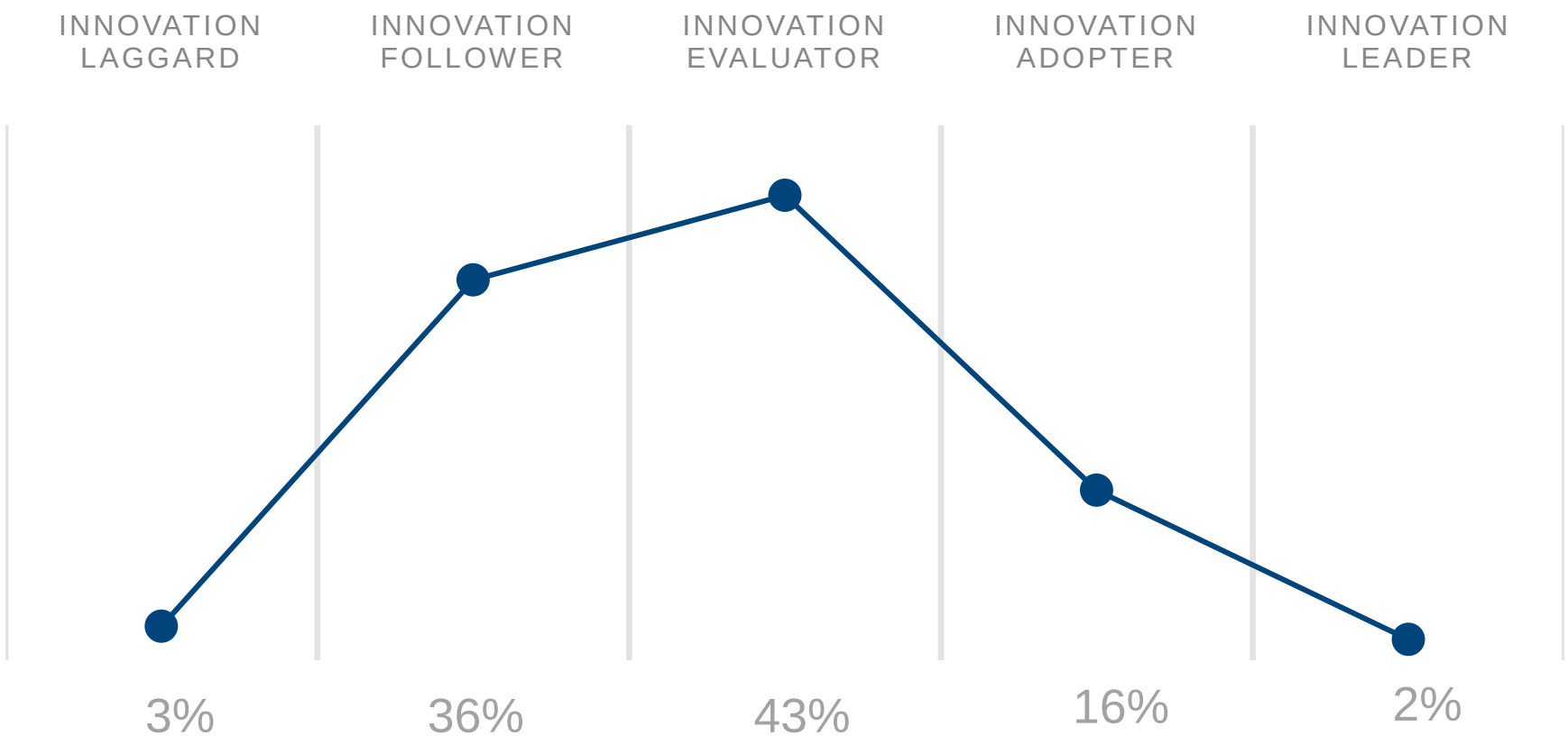
Innovation maturity model



Only 2% of respondents' organizations fall into the most mature "Innovation Leader" group, with 16% in the second most mature group. For the rest, there is still a relatively large amount of room for improvement.

When looking at 2022 revenue growth: Innovation Leaders and Adopters are almost twice as likely to experience high levels of growth, compared to Innovation Laggards and Followers.

Innovation maturity model. Base: all respondents (6,600)

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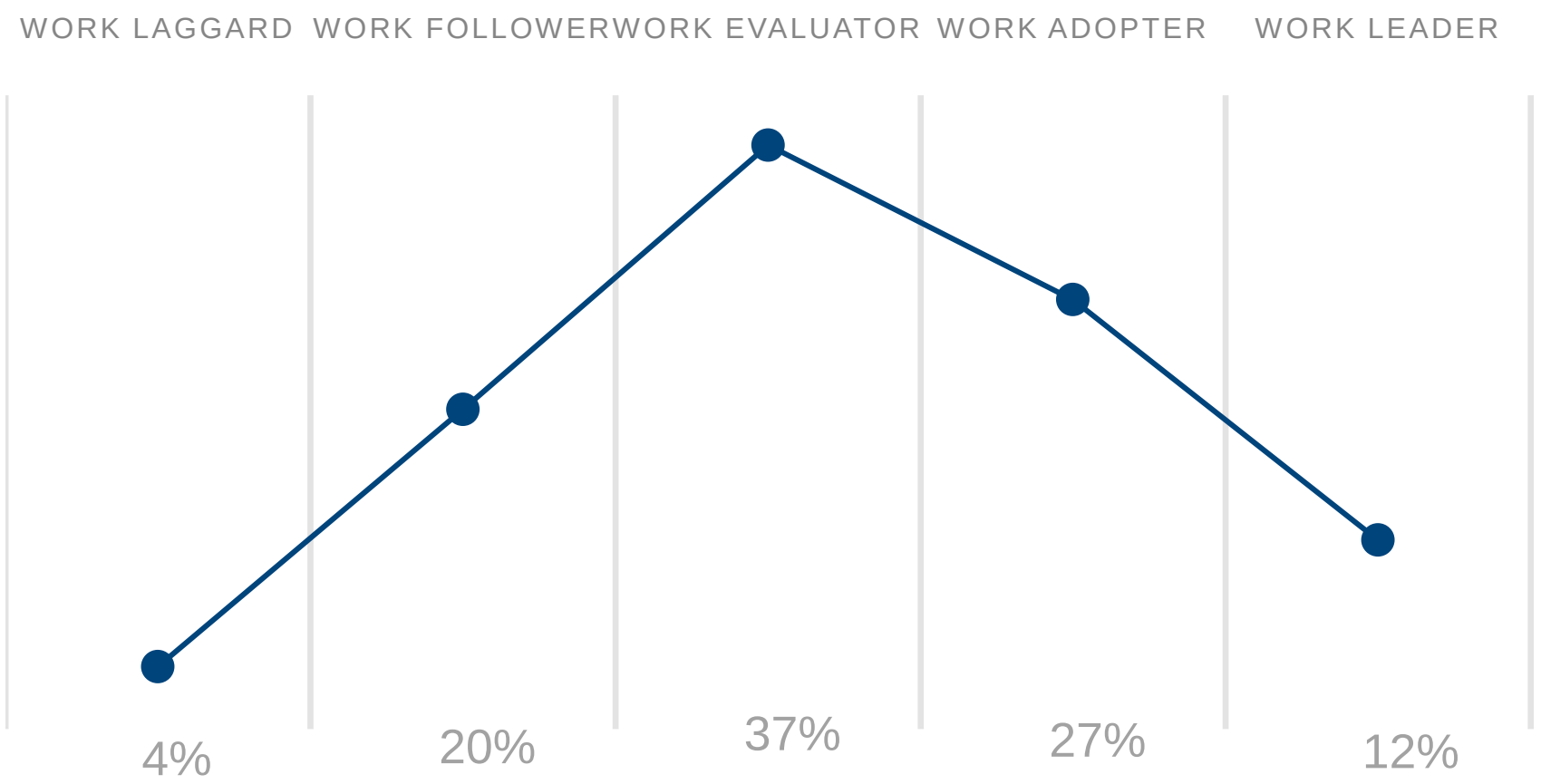
Work maturity model



12% of respondents' organizations fall into the most mature "Work Leader" group, although 27% are in the second most mature "Work Adopter" group. For the rest, there is still a relatively large amount of room for improvement.

Hybrid work maturity model. Base: ITDM respondents (3,350)

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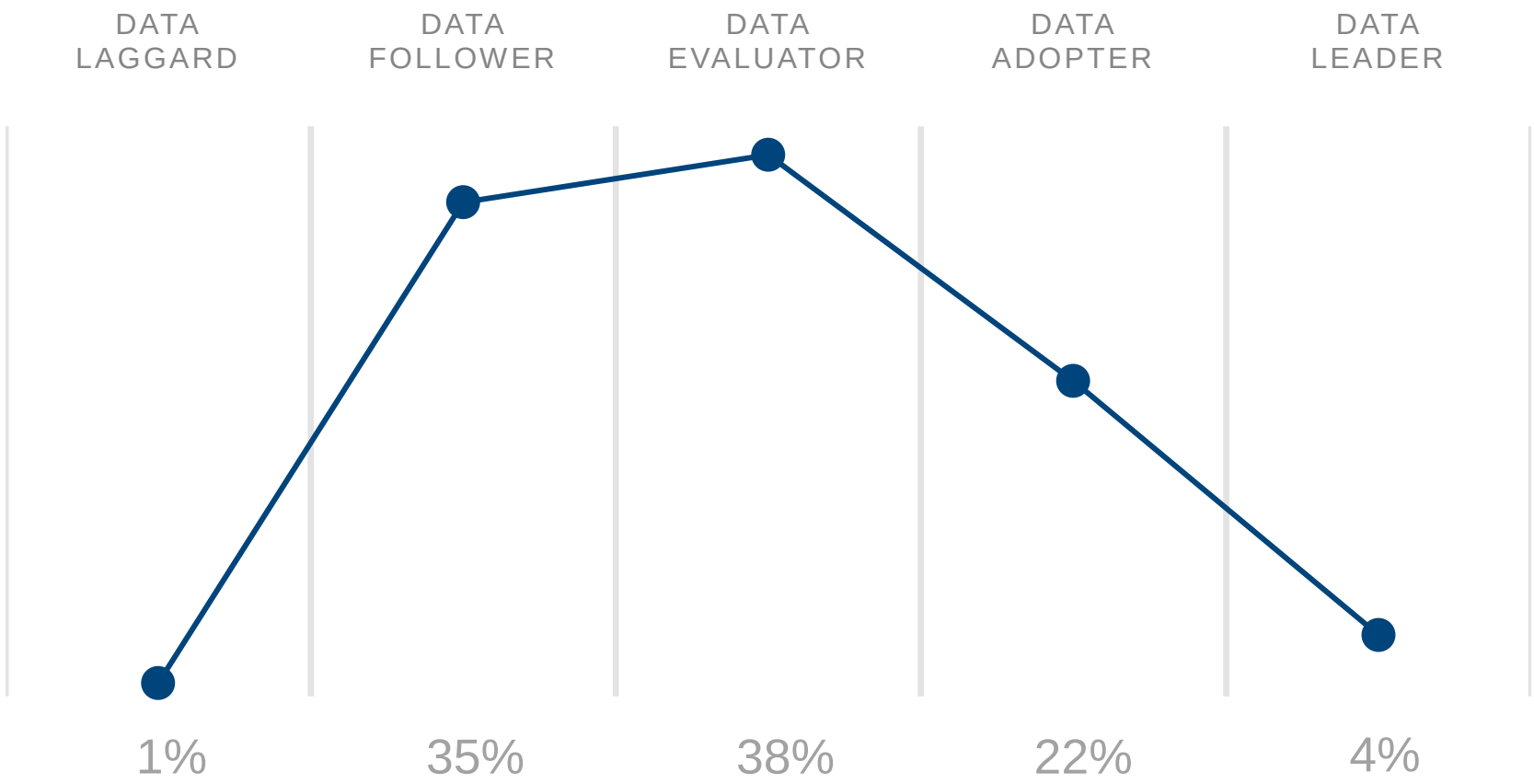
Data maturity model



Only 4% of respondents' organizations fall into the most mature "Data Leader" group, with 22% in the second most mature group. For the rest, there is still a relatively large amount of room for improvement.

Data maturity model. Base: ITDM respondents (3,350)

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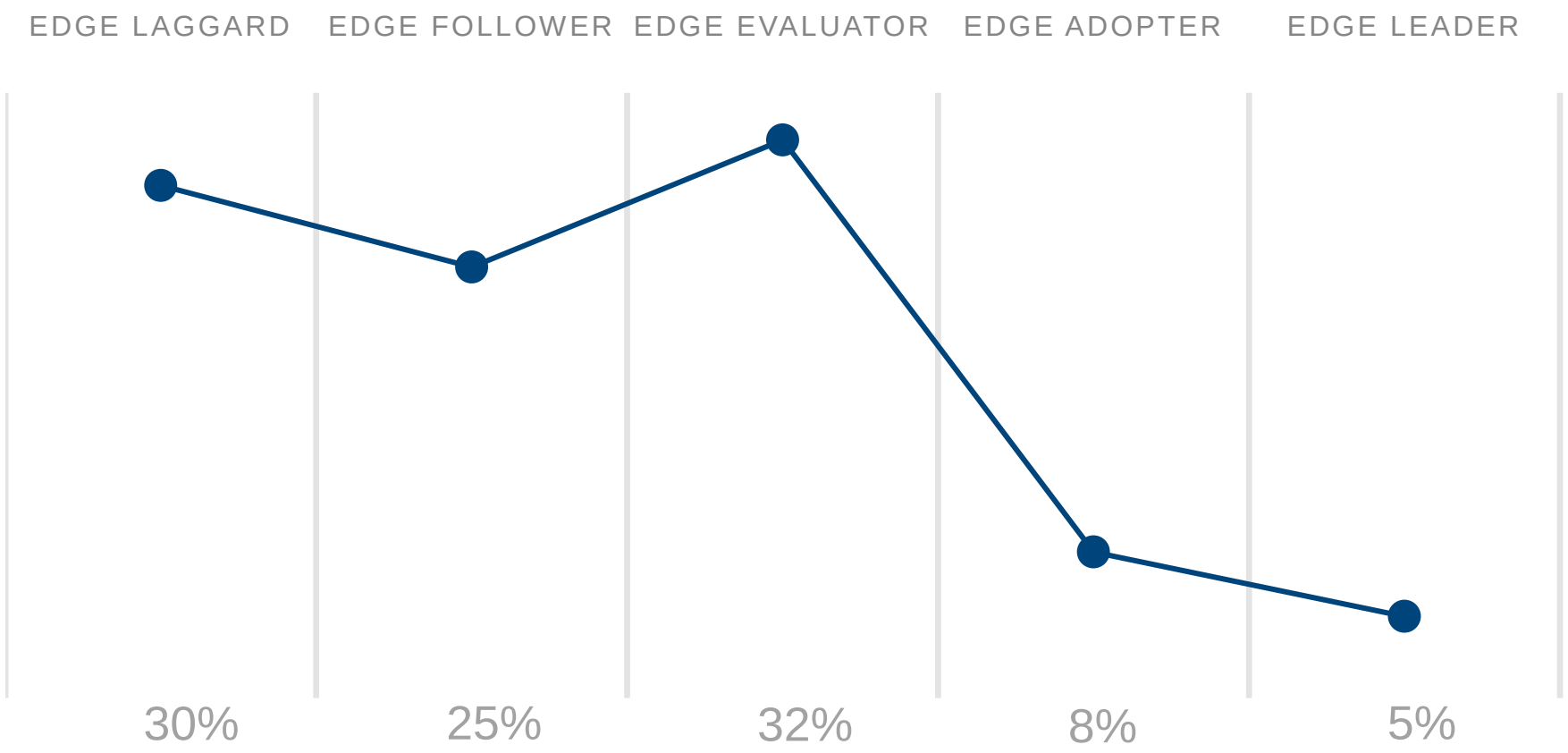
Edge maturity model



Only 5% of respondents' organizations fall into the most mature "Edge Leader" group and only 8% fall into the second most mature group. Organizations are much more likely to fall into the lower maturity groups in relation to edge technology.

Edge maturity model. Base: ITDM respondents (3,350)

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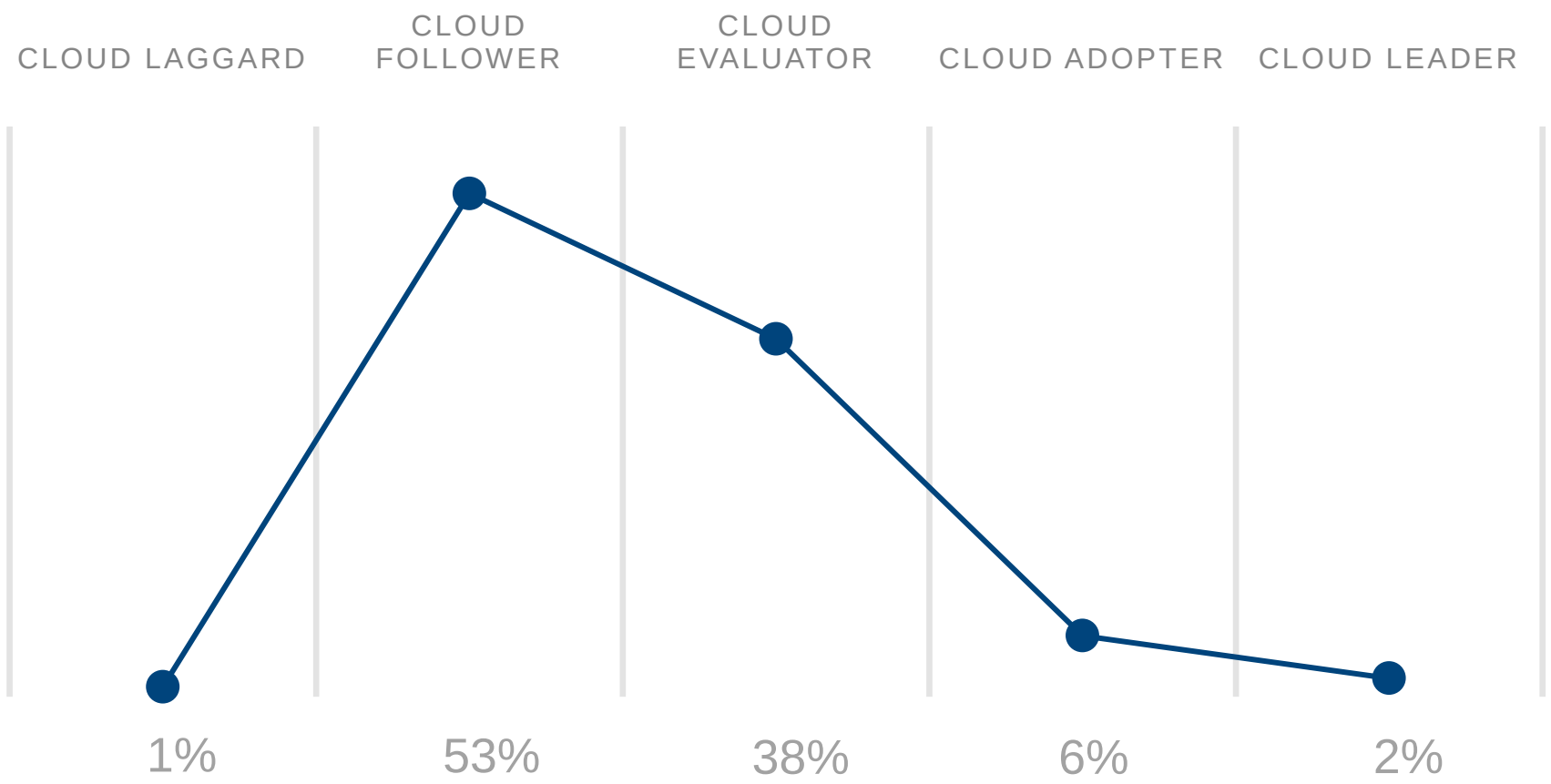
Cloud maturity model



Only 2% of respondents' organizations fall into the most mature "Cloud Leader" group, with only 6% in the second most mature "Cloud Adopter" group. Over half fall into the two least mature groups.

Cloud maturity model. Base: ITDM respondents (3,350)

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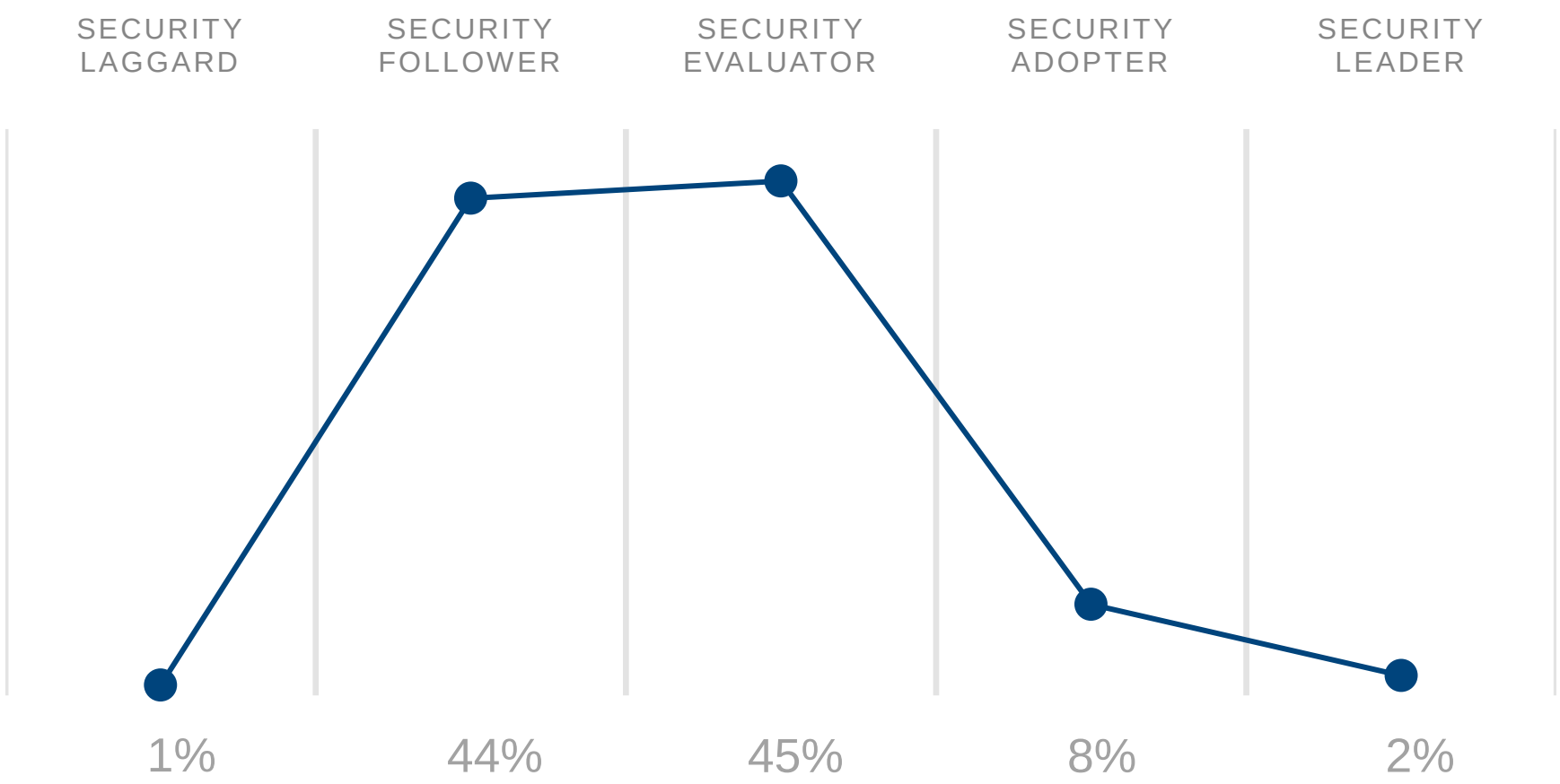
Security maturity model



Only 2% of respondents' organizations fall into the most mature "Security Leader" group, with 8% in the second most mature group. For the rest, there is still a relatively large amount of room for improvement.

Security maturity model. Base: ITDM respondents (3,350)

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Innovation

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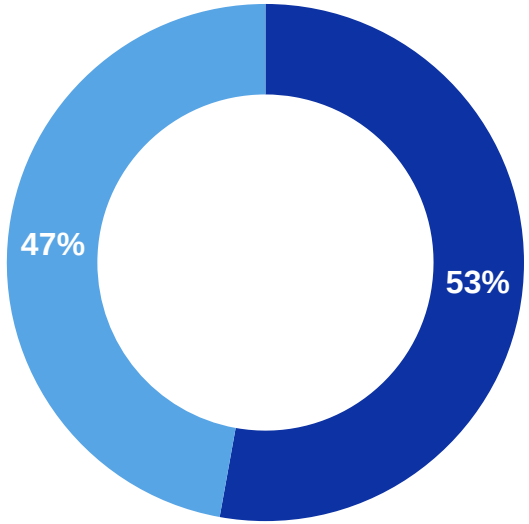
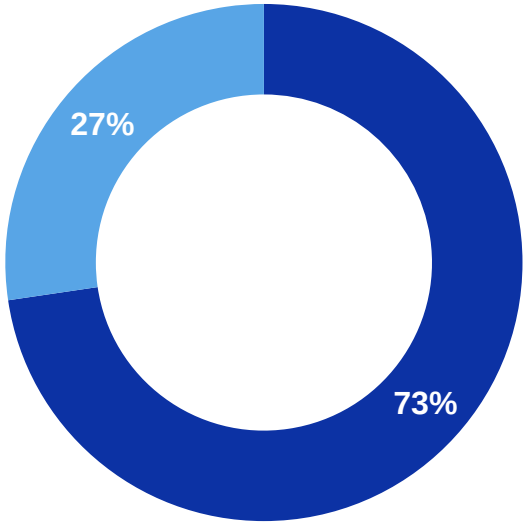
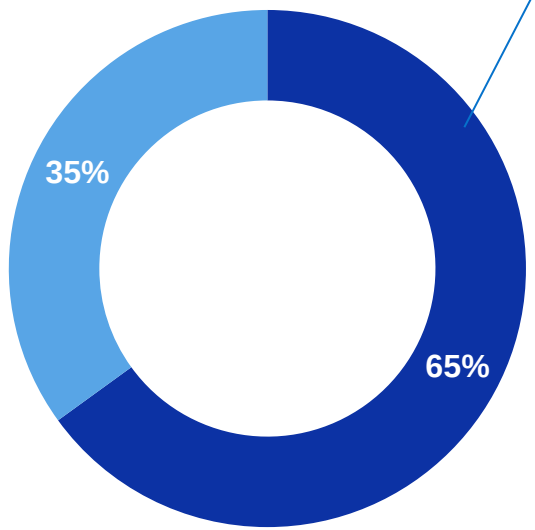
New ideas fuel innovation



- Our innovation is game changing/creates new customer value
- Our innovation is mainly incremental change/efficiency improvements



- Our innovation is based on new ideas
- Our innovation comes from old ideas in a new context



- Our innovation comes from a formalized business practice
- Our innovation is not formalized and comes from anywhere in a business

73% of Innovation Leaders & Adopters are doing this. They have a more organized approach to innovation.

"Based on your perception, which of the following **most aligns** with your organization's innovation approach?" Base: all respondents (6,600)

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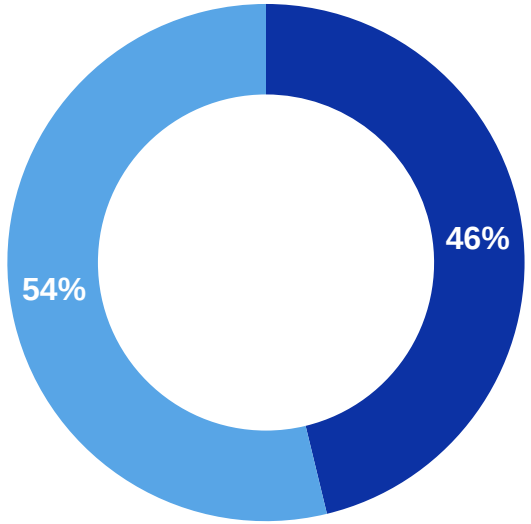
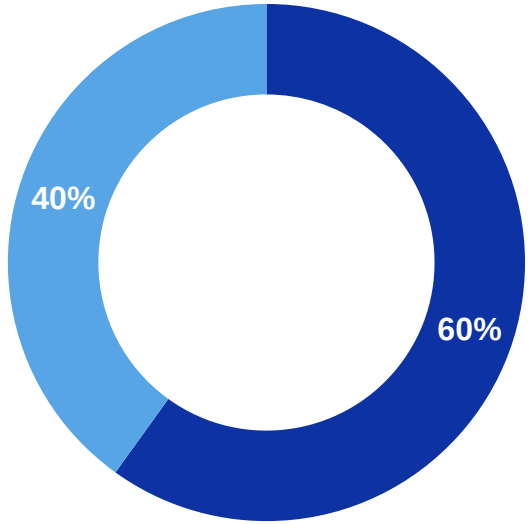
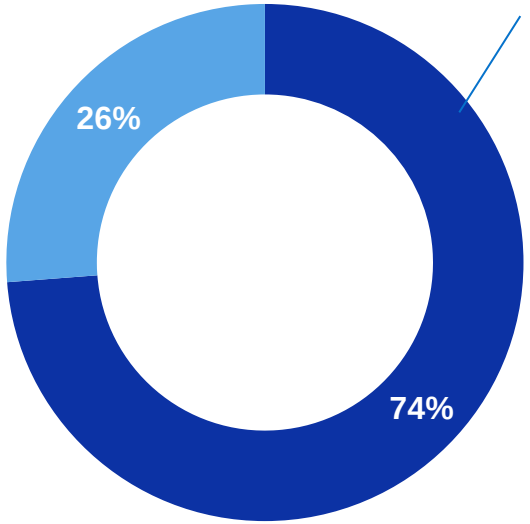
Innovation drives change



- Our innovation comes from a select few people with a natural aptitude for innovation
- Our innovation comes from anyone in the organization



- Our innovation is driven by special projects
- Our innovation is a byproduct of day-to-day activities



- Our innovation drives measurable change and tangible improvement
- Our innovation relates to exploration and often doesn't yield tangible results

81% of Leaders & Adopters are strategically implementing innovation that drives measurable change.

"Based on your perception, which of the following **most aligns** with your organization's innovation approach?" Base: all respondents (6,600)

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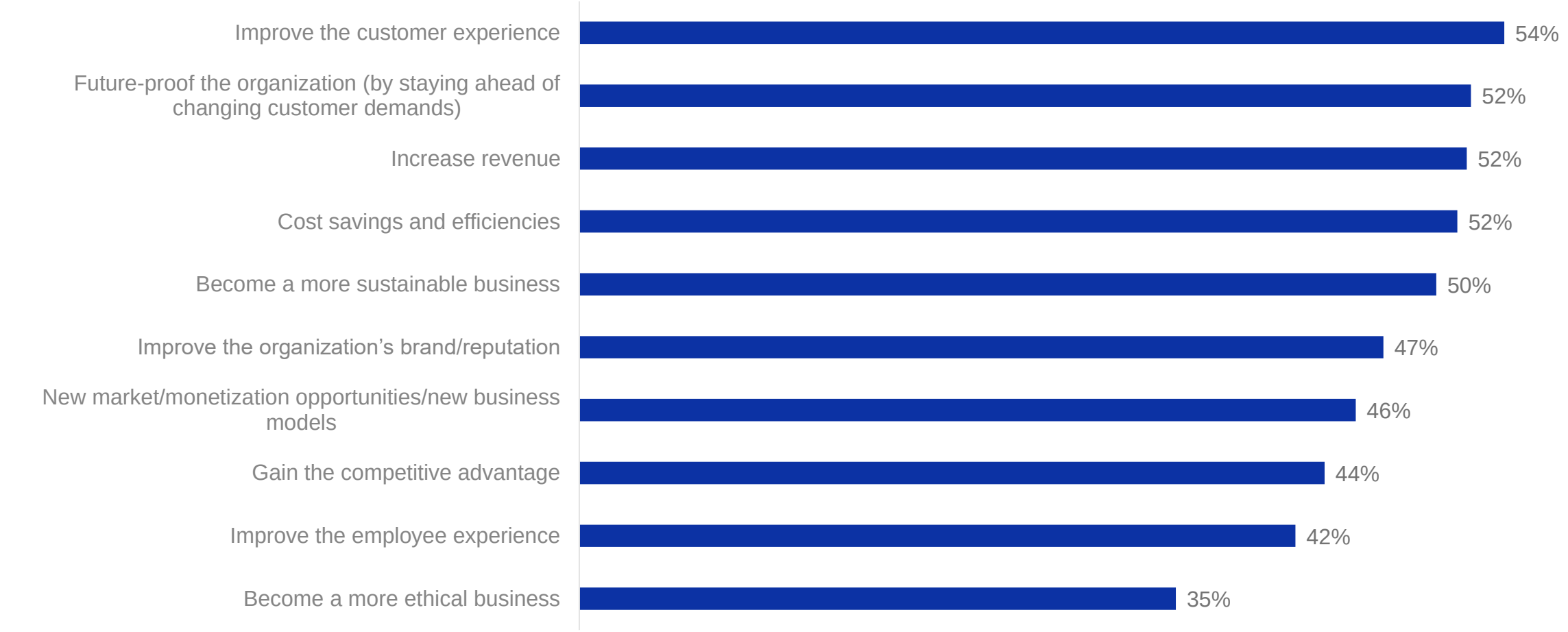
Most important innovation goals (top five ranked)



"What are your organization's **most** important innovation goals?" Combination of responses ranked first, second, third, fourth and fifth. Base: all respondents (6,600)

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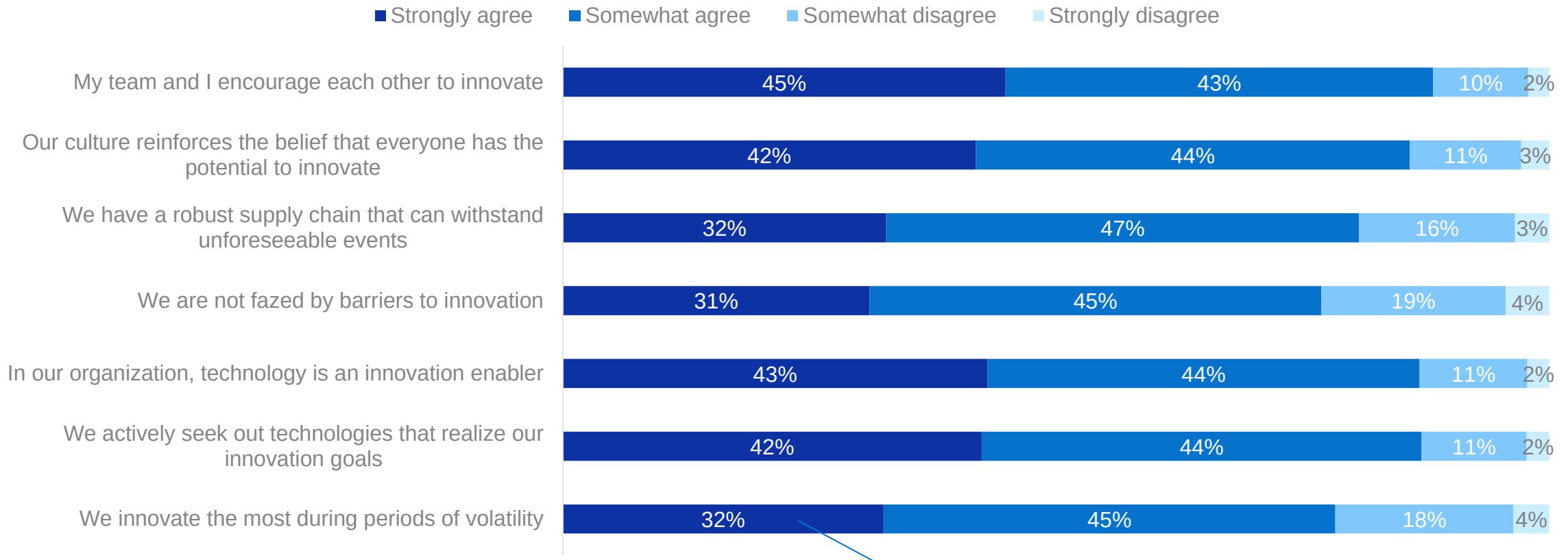
Innovation approach



52% of Innovation Leaders & Adopters strongly agree that their organization innovates most during periods of volatility.

"To what extent do you agree or disagree with the following statements?" Base: all respondents (6,600)

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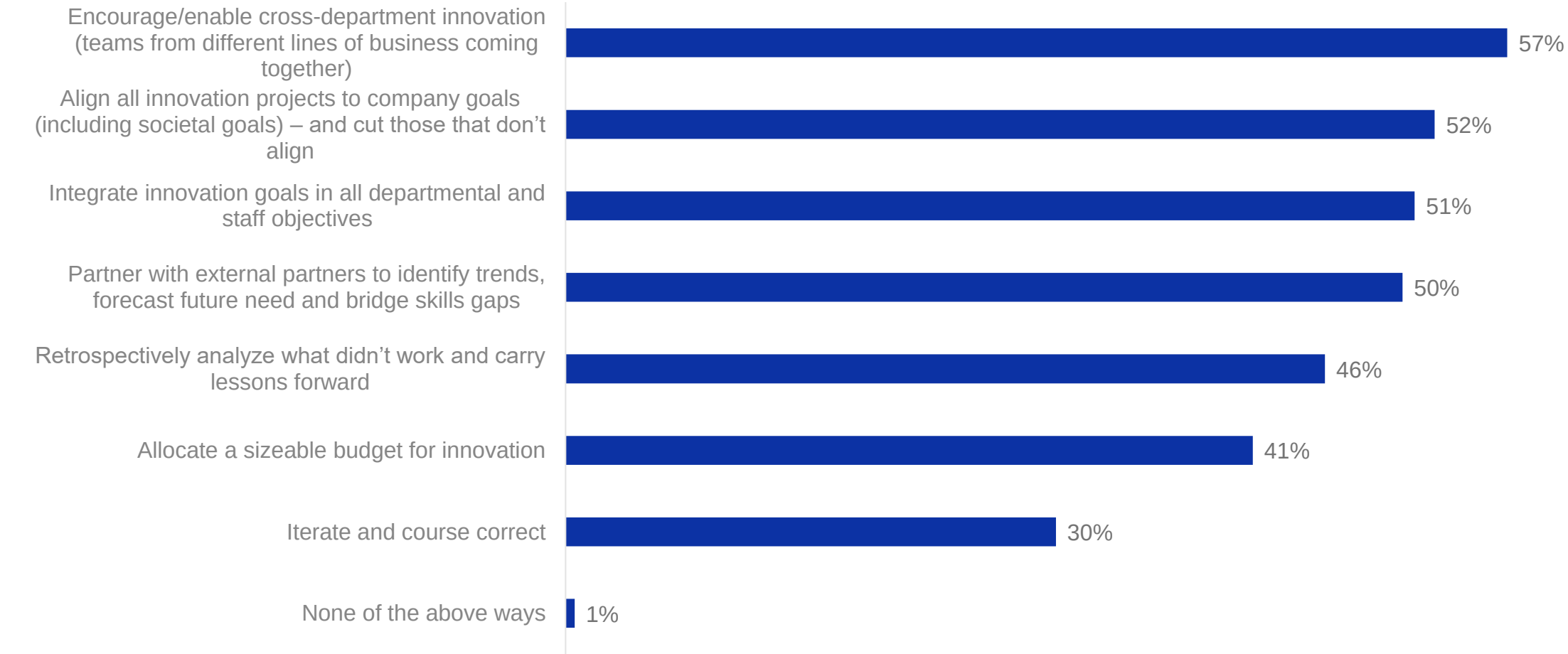
Innovation processes



"How does your organization **intentionally and successfully** approach innovation?" Base: all respondents (6,600)

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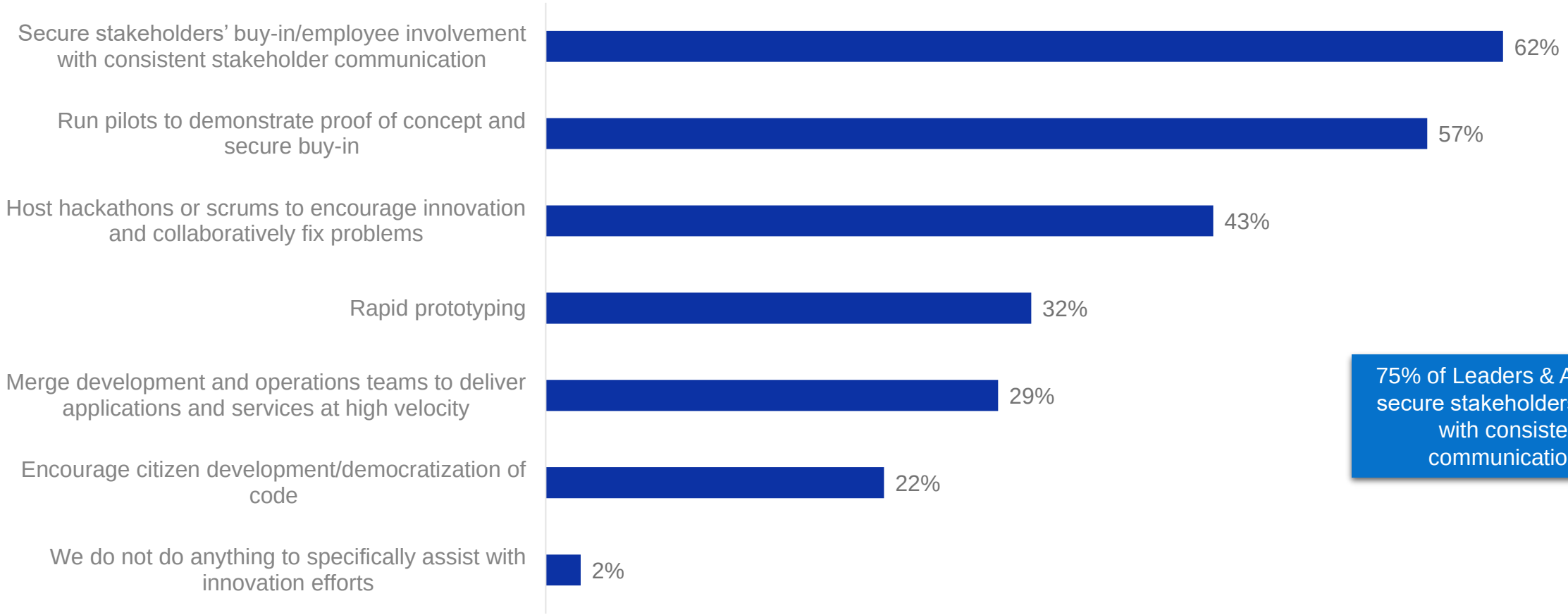
Innovation processes



75% of Leaders & Adopters secure stakeholders' buy-in with consistent communications.

"Tactically, which of the following does your organization do/practice **extensively** in relation to its innovation efforts?" Base: all respondents (6,600)

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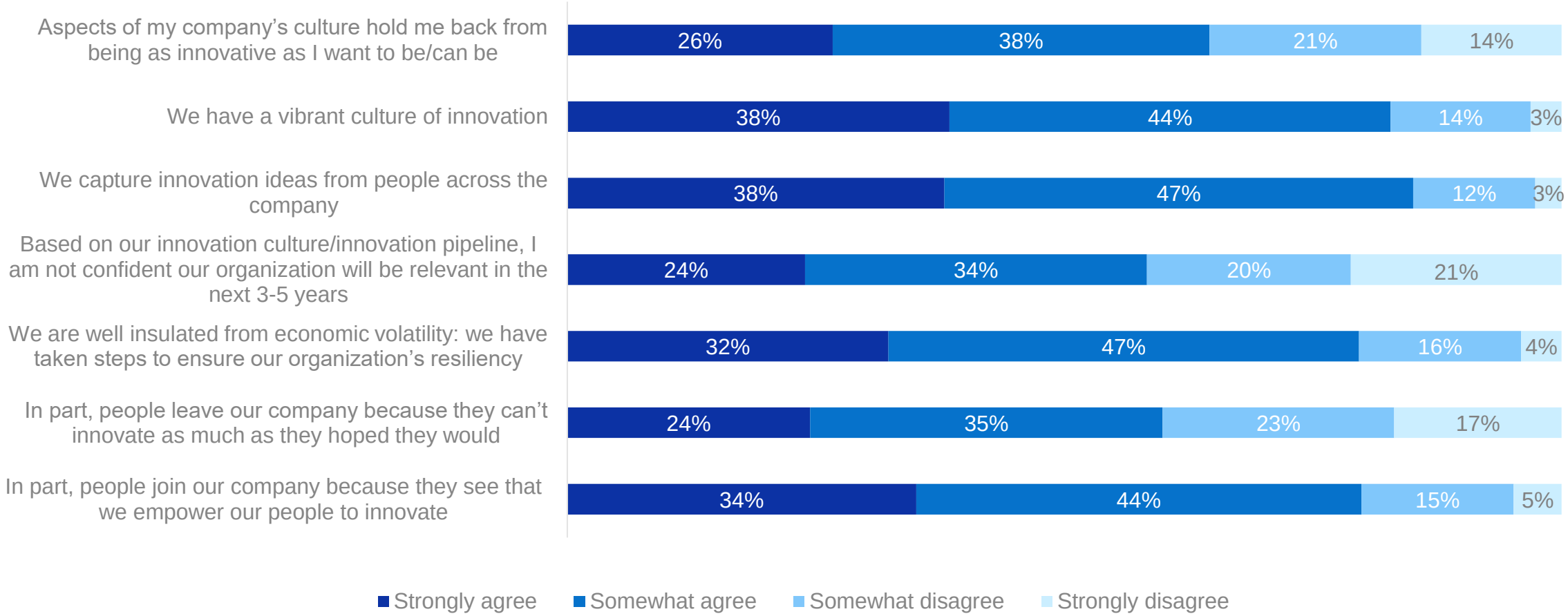
Innovation culture



"To what extent do you agree or disagree with the following statements?" Base: all respondents (6,600)

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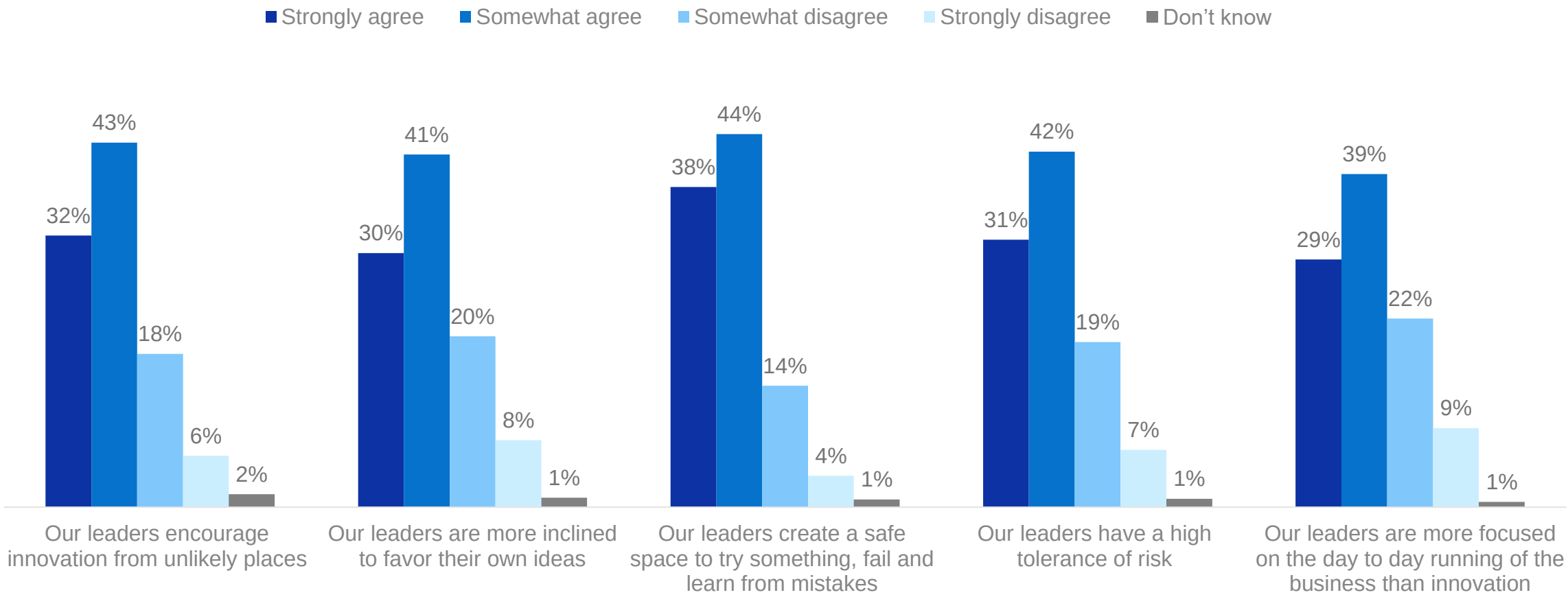
Business leaders' innovation approach



"Thinking about how your organization's leaders **encourage** a culture of innovation, to what extent do you agree with the following statements?" Base: all respondents (6,600)

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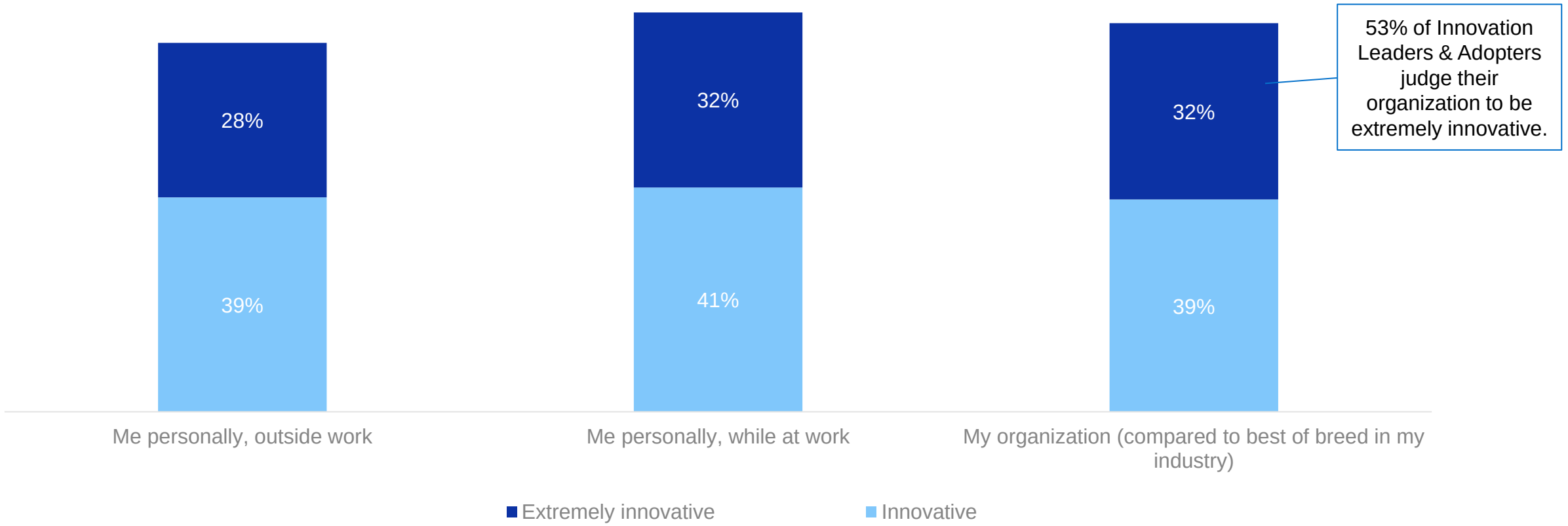
How people rate their innovation



"Which of the following best describes how you would categorize yourself and your organization in terms of innovation?" Base: all respondents (6,600)

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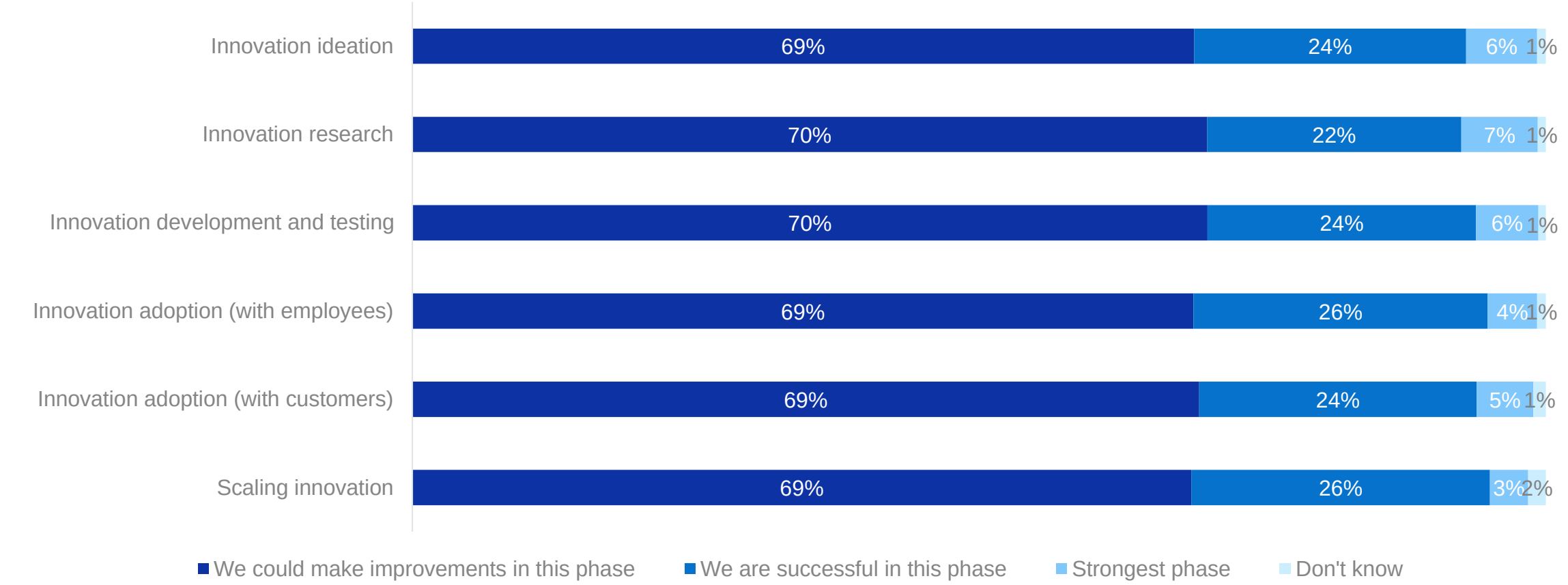
Where organizations can make improvements



"An innovation goes through various phases. To the best of your knowledge, in which phase is your organization **strongest**, and where could improvements be made?" Base: all respondents (6,600)

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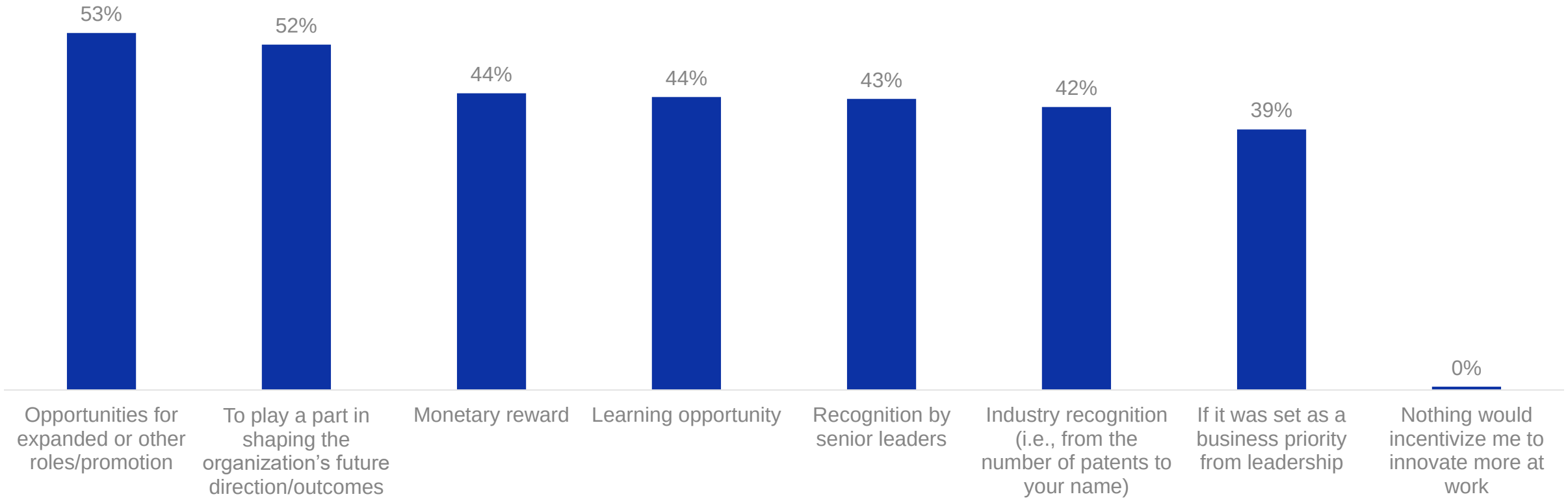
What would incentivize employees to innovate more



"What would incentivize you to innovate more at work?" Base: all respondents (6,600)

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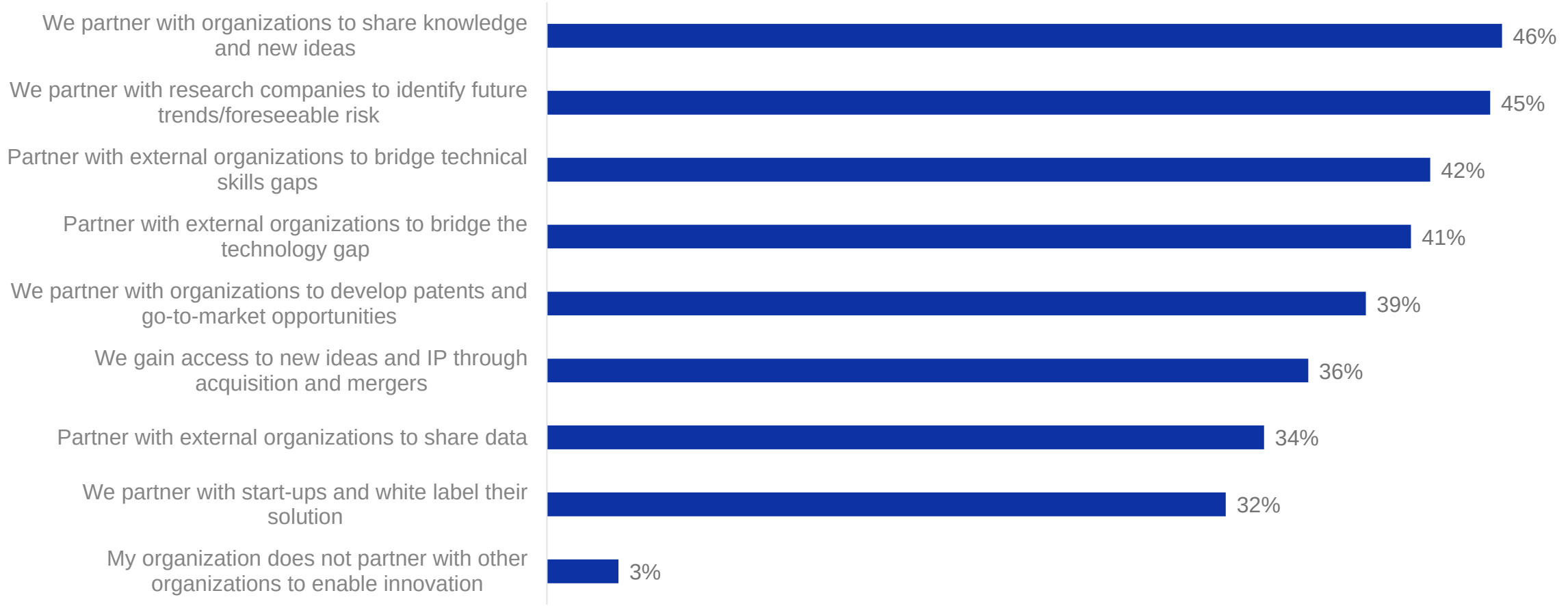
Partnerships enabling innovation



"What partnerships does your organization take part in to enable innovation?" Base: all respondents (6,600)

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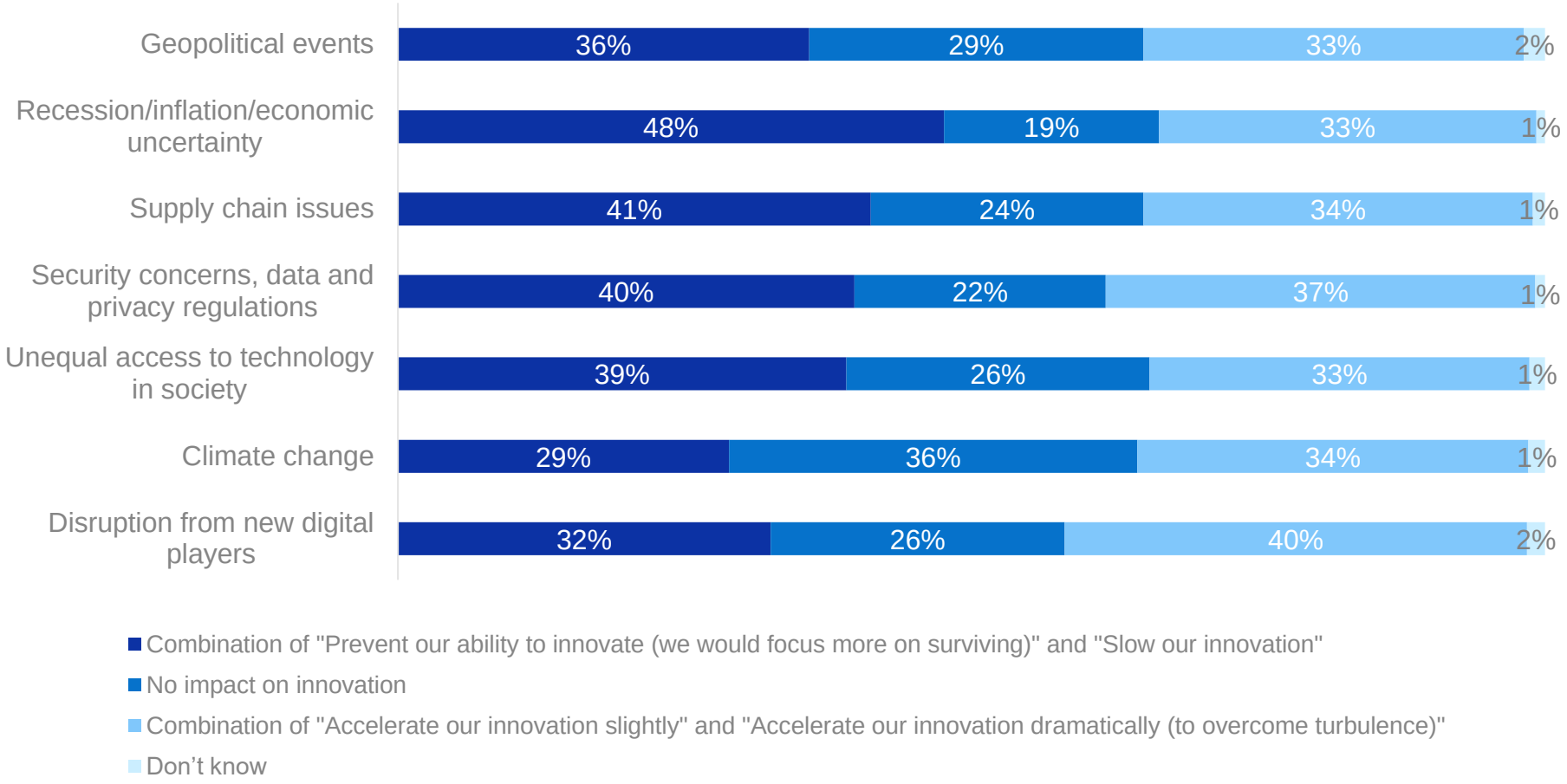
Innovation during uncertain times



Organizations need to develop innovation resilience: the practice and determination to innovate during uncertain times.

Innovation Leaders and Adopters are 2.2x more likely to accelerate during recession/ inflation/economic uncertainty, compared to Innovation Followers and Laggards.

"What impact would the following external forces have on your organization's ability to innovate?" Base: all respondents (6,600)

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Organizations' barriers to innovation

Top 5 barriers hindering innovation for respondents' organizations	
#1	Skills gap / struggling to attract and hire talent
#2	Overwhelming workload leaving no time to innovate
#3	Lack of budget for innovation / reduced budget
#4	Red tape or complex approval processes
#5	Lack of established innovation vision and strategy
	Lack of well-defined, practical execution process
	Struggling to prioritize innovation projects

95% of respondents highlight at least one barrier that is hindering innovation in their organization

"What do you perceive to be the main barriers, hindering your organization's ability to innovate?" Base: all respondents (6,600)

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Individual and team barriers to innovation

Top 5 barriers hindering respondents' own ability to innovate	
#1	Lack of time outside of core day-to-day tasks
#2	Personal fear of failure / fear of repercussions if ideas fail
#3	Lack of technology / digital fluency
#4	Not always confident to share ideas with leaders / sponsors
#5	No natural aptitude to innovate

87% of respondents highlight at least one barrier that is hindering their own ability to innovate

"What do you believe is hindering your own ability to innovate?" Base: all respondents (6,600)

Top 5 barriers hindering respondents' teams or peers from innovating	
#1	Lack of time to innovate due to workload
#2	Lack technology/digital fluency
#3	Lack an aptitude to innovate
#4	Fear failure / fear repercussions if ideas fail
#5	Lack of self-belief in their innovation potential / defer to other people to innovate

94% of respondents highlight at least one barrier that is hindering their teams' or peers' ability to innovate

"What do you perceive to be the main barriers, hindering your peers'/team's ability to innovate?" Base: all respondents (6,600)

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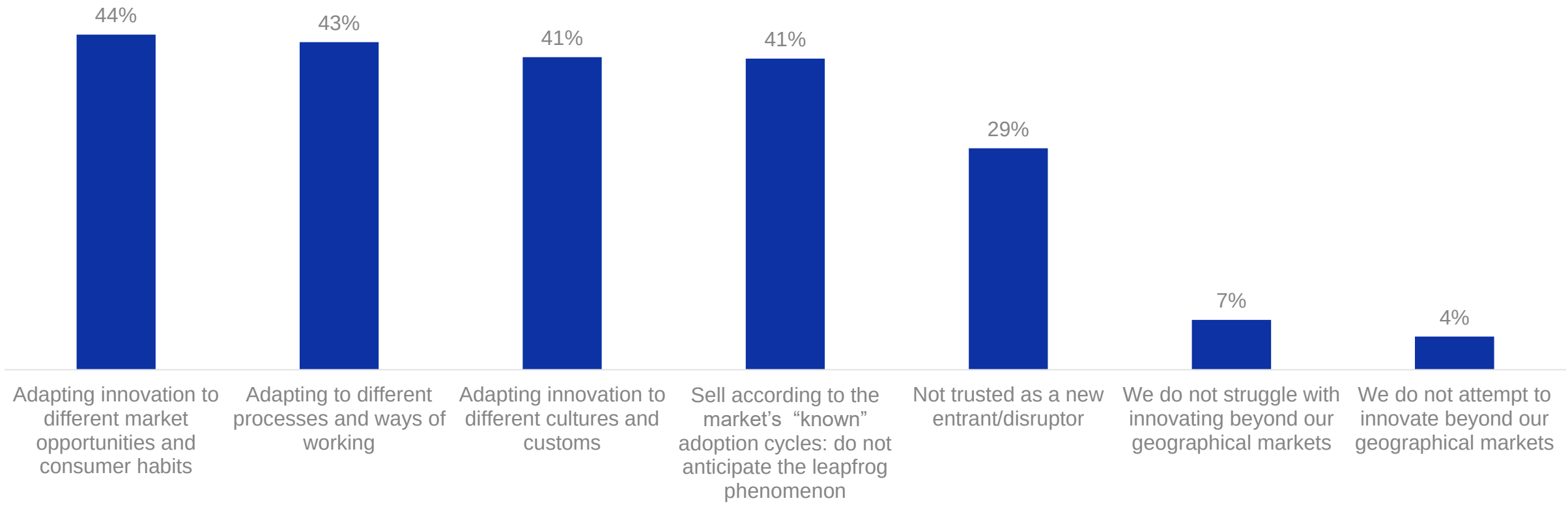
Struggles with innovation beyond borders



"When your organization looks to innovate beyond current geographical markets, where do you commonly struggle?" Base: all respondents (6,600)

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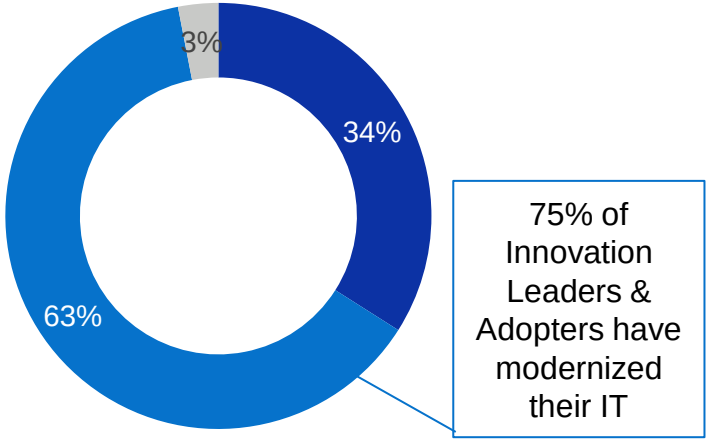
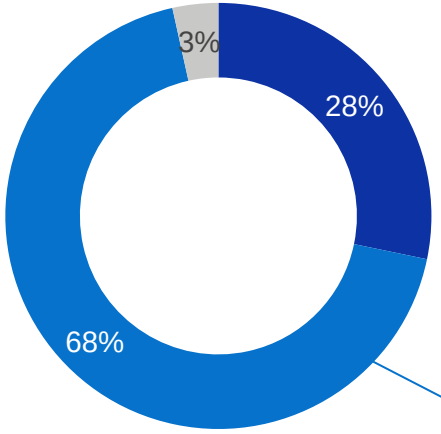
Current status of IT



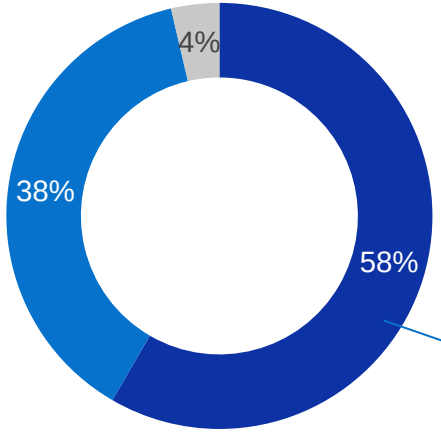
75% of Innovation Leaders & Adopters have modernized their IT

- We spend a lot of time managing end-of-life technology (no longer supported) in our environment
- We've modernized and are running current/fully supported technology
- Don't know



81% of Innovation Leaders & Adopters are well prepared for most threats

- We have poor visibility into our environment and it's a security concern
- We're well prepared for most threats and prioritize security
- Don't know



66% of Innovation Leaders & Adopters engage security early on

- Security teams are engaged early in an asset's full lifecycle/included in the design process
- Security teams only get involved in an asset's full lifecycle if a security flaw is identified
- Don't know

"Which of the following opposing statements most accurately describes the current status of your organization's IT" Base: all respondents (6,600)

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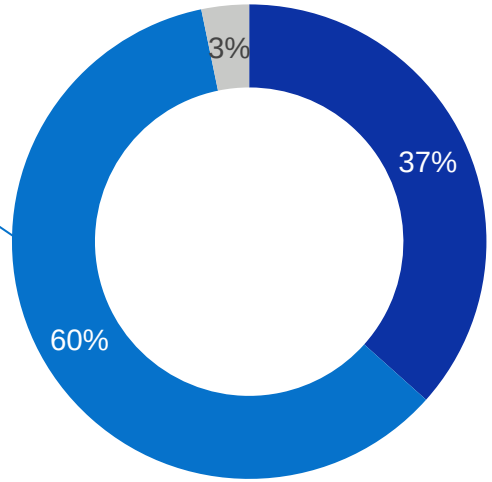
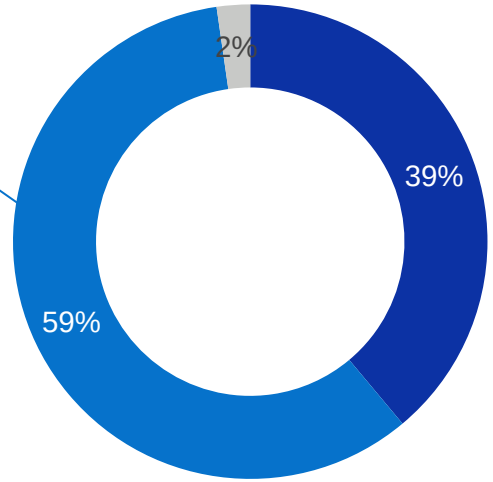
Current status of IT

75% of Innovation Leaders & Adopters have fully embraced automation.



72% of Innovation Leaders & Adopters are well resourced to innovate



- Our IT processes are manual and time consuming
- We've fully embraced automation
- Don't know

- We face a skilled IT labor shortage
- We're well-resourced to accomplish our mission
- Don't know

"Which of the following opposing statements **most accurately** describes the current status of your organization's IT" Base: all respondents (6,600)

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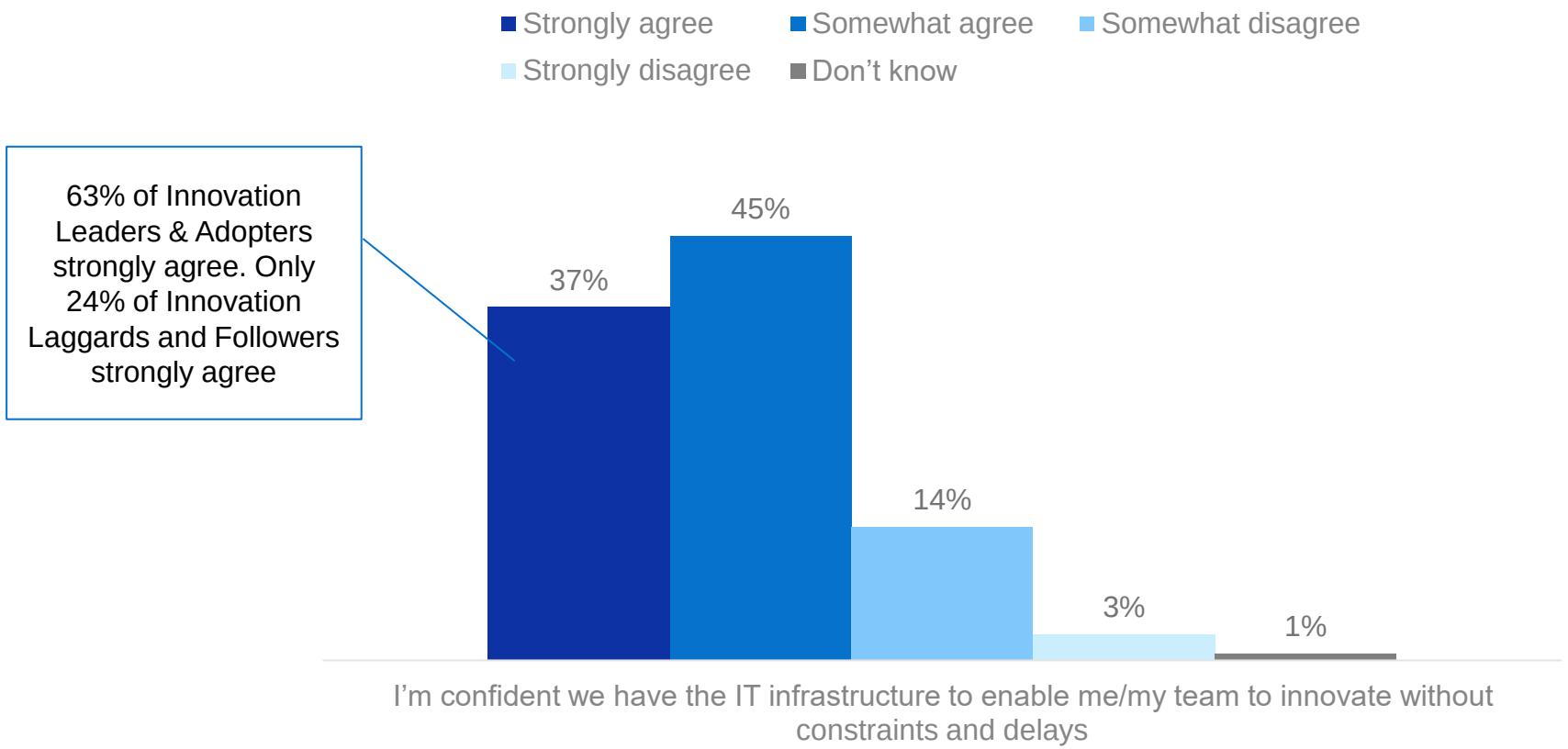
Current status of IT supporting innovation



"To what extent do you agree or disagree that your IT department/IT provider is supporting innovation in your organization by enabling the following?" Base: all respondents (6,600)

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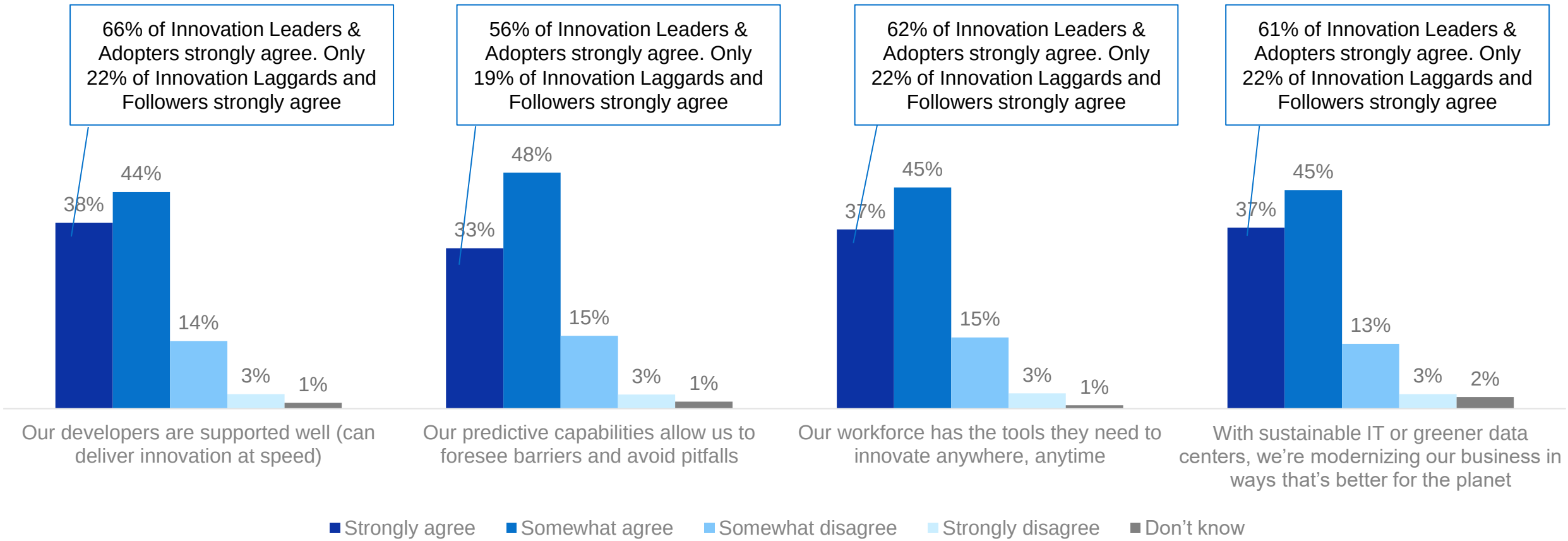
Current status of IT supporting innovation



"To what extent do you agree or disagree that your IT department/IT provider is supporting innovation in your organization by enabling the following?" Base: all respondents (6,600)

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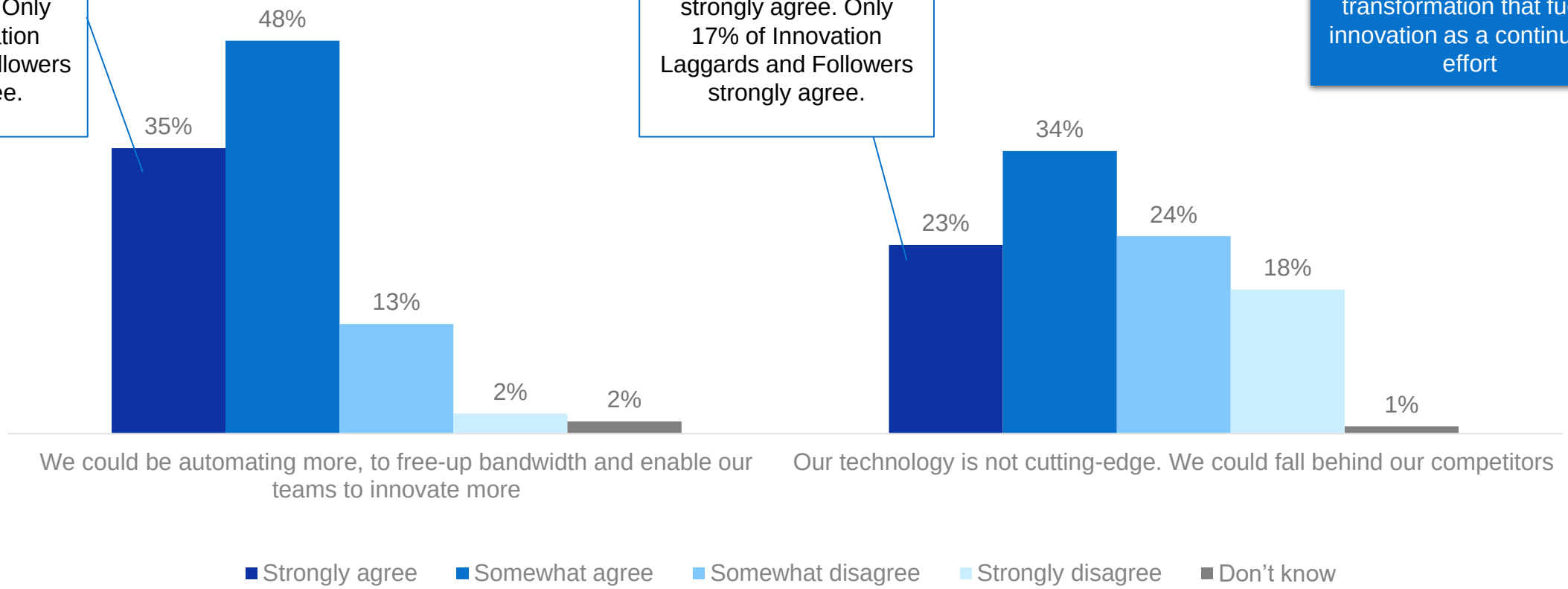
Current status of IT: continuous effort needed

51% of Innovation Leaders & Adopters strongly agree. Only 26% of Innovation Laggards and Followers strongly agree.

30% of Innovation Leaders & Adopters strongly agree. Only 17% of Innovation Laggards and Followers strongly agree.

Innovators see IT transformation that fuels innovation as a continuous effort



"To what extent do you agree or disagree that your IT department/IT provider is supporting innovation in your organization by enabling the following?" Base: all respondents (6,600)

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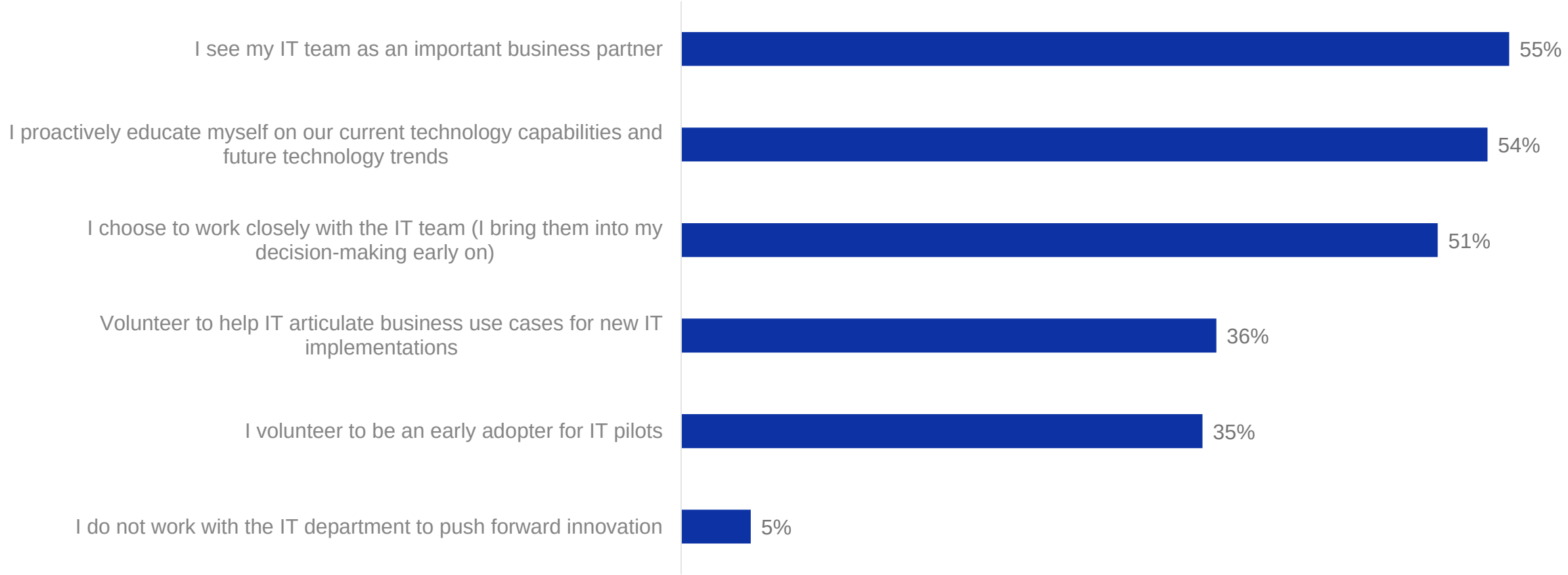
How people partner with IT



"How do you work with your organization's IT department/IT provider to push innovation forward?" Base: BDM respondents (3,250)

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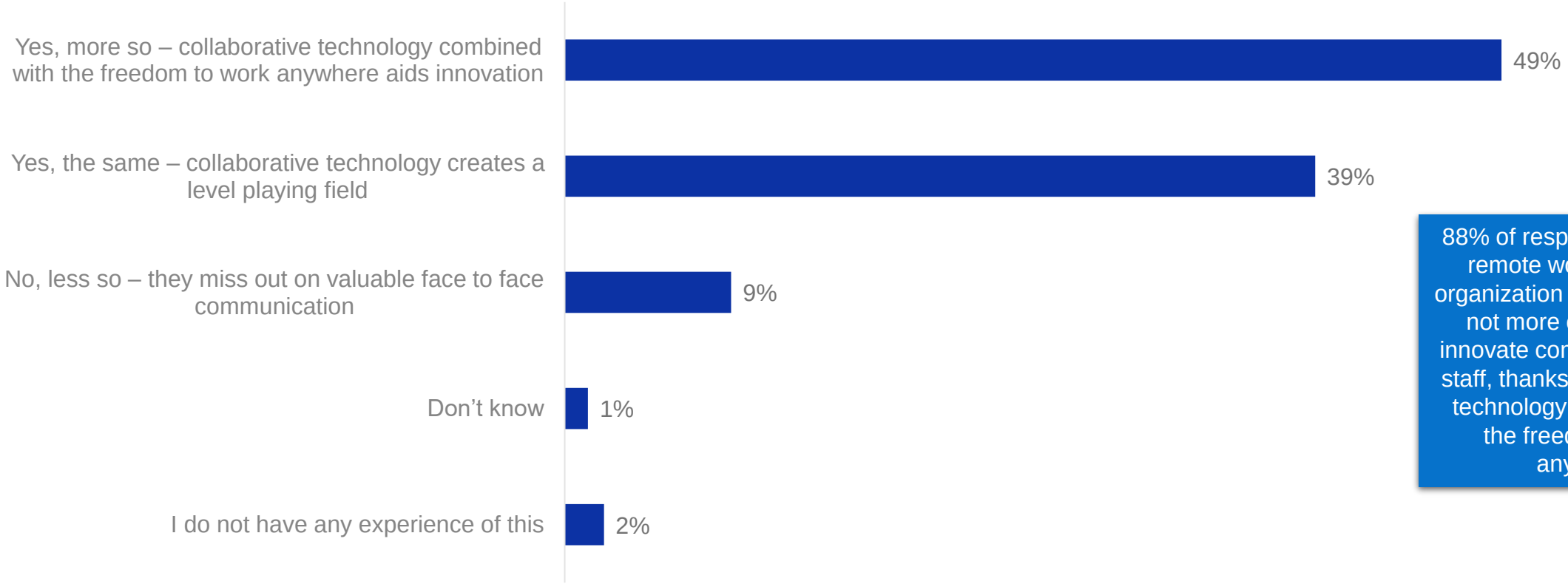
Anywhere-work aids innovation

Do remote/hybrid workers have as much opportunity to innovate/bring innovation forward?



88% of respondents believe remote workers in their organization have as much, if not more opportunity to innovate compared to onsite staff, thanks to collaborative technology combined with the freedom to work anywhere

"In your organization, do remote/hybrid workers have as much opportunity to innovate/bring innovative ideas forward as onsite staff do?" Base: all respondents (6,600)

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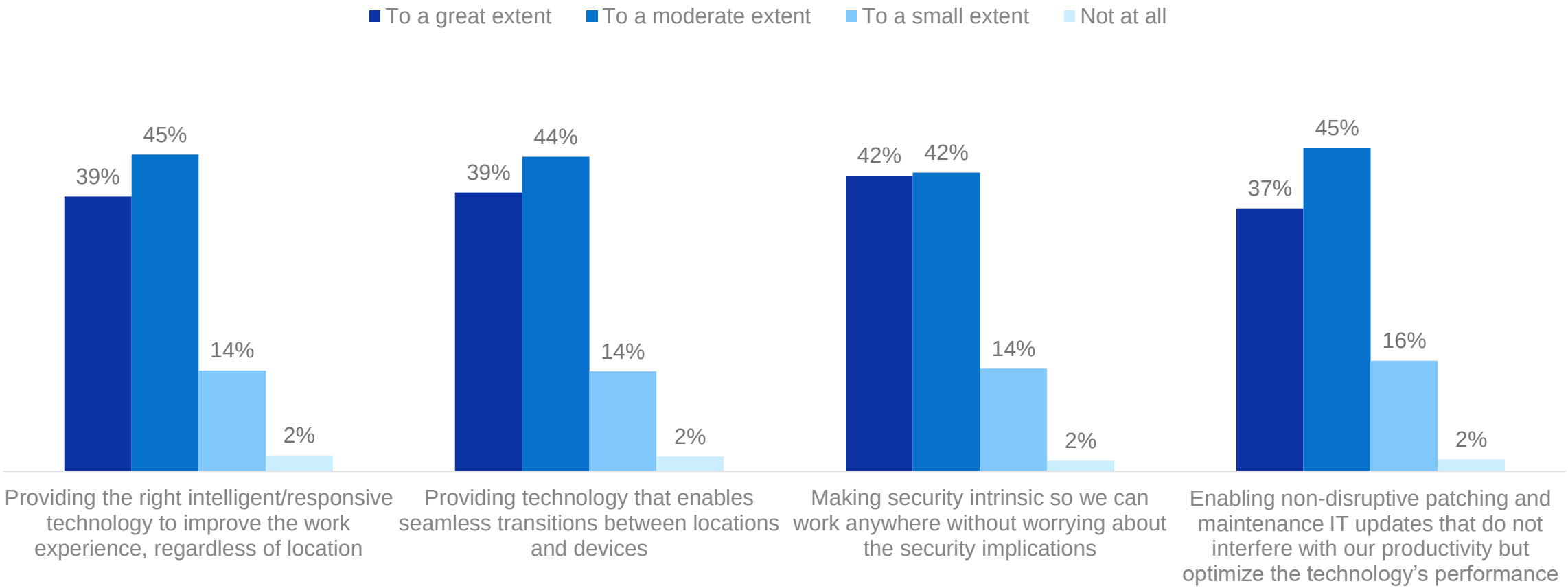
Enabling anywhere work (1/2)



"In terms of everyone's technology set-up, to what extent is your organization enabling the workforce to maintain productivity and innovate from anywhere in the below areas?" Base: ITDM respondents (3,350)

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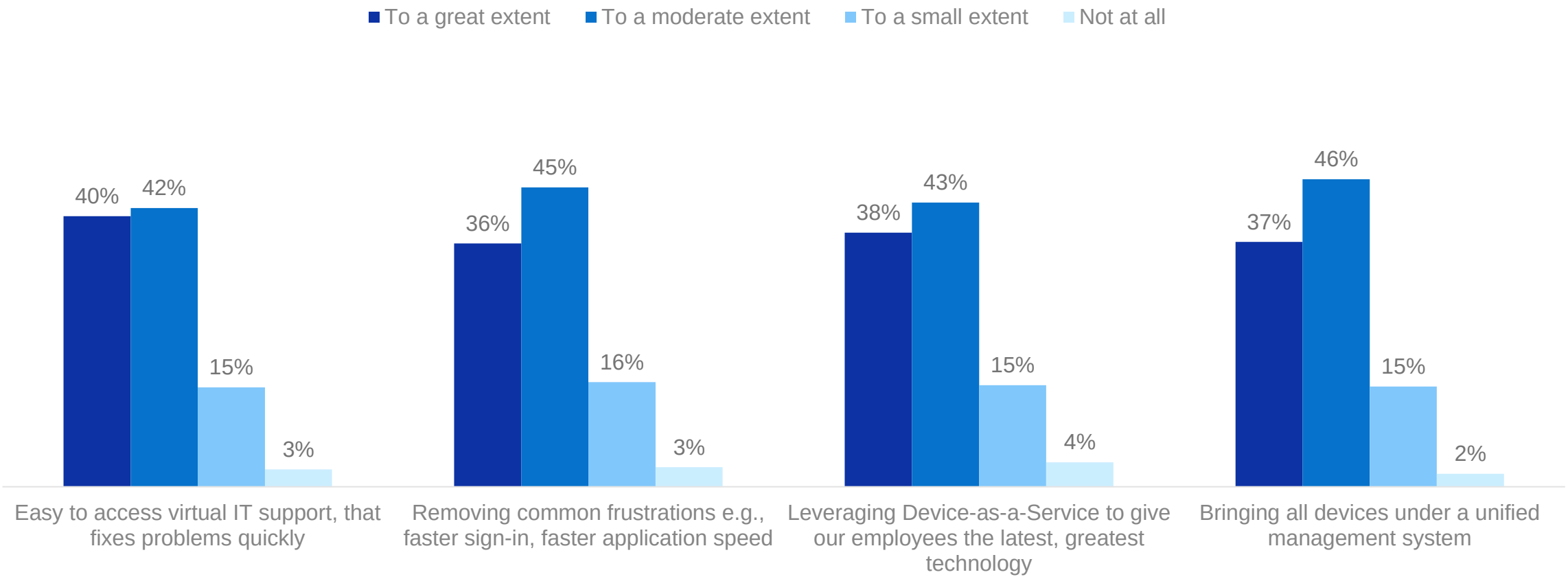
Enabling anywhere work (2/2)



"In terms of everyone's technology set-up, to what extent is your organization enabling the workforce to maintain productivity and innovate from anywhere in the below areas?" Base: ITDM respondents (3,350)

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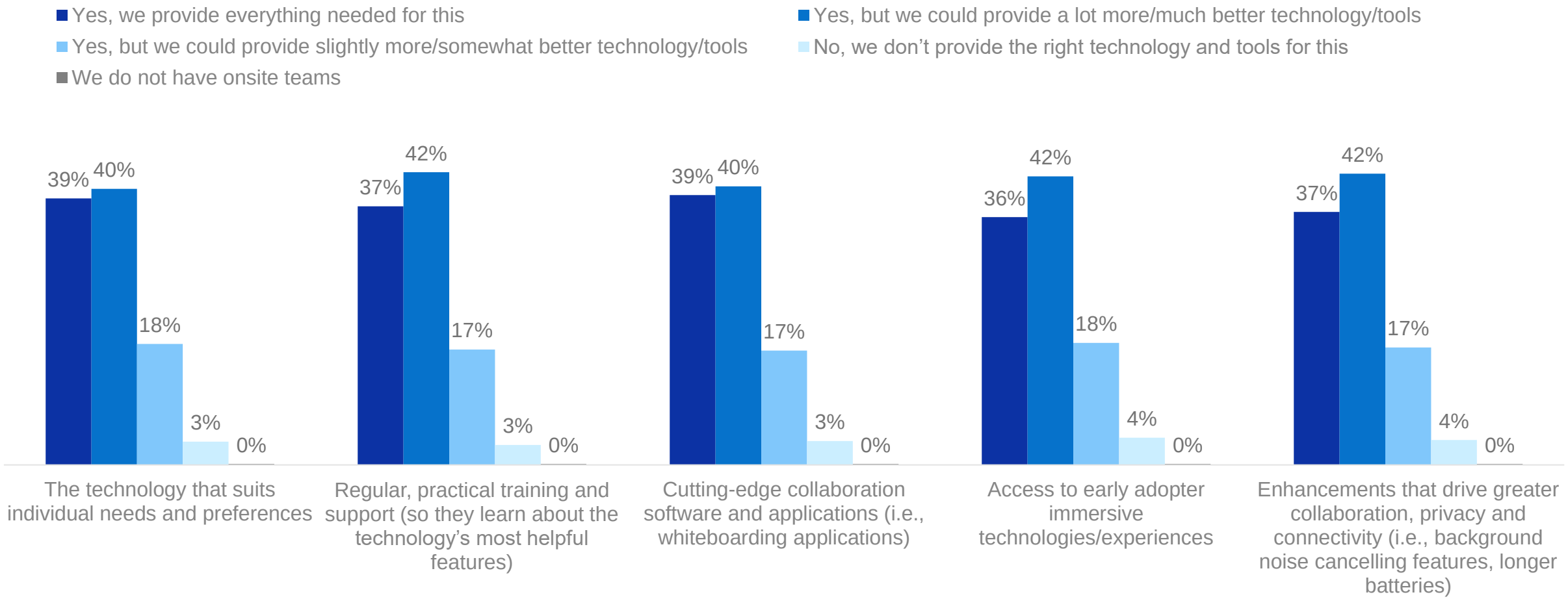
Onsite teams' technology and tools



"Do your onsite teams have the technology and tools they need to be productive in relation to the following?" Base: ITDM respondents (3,350)

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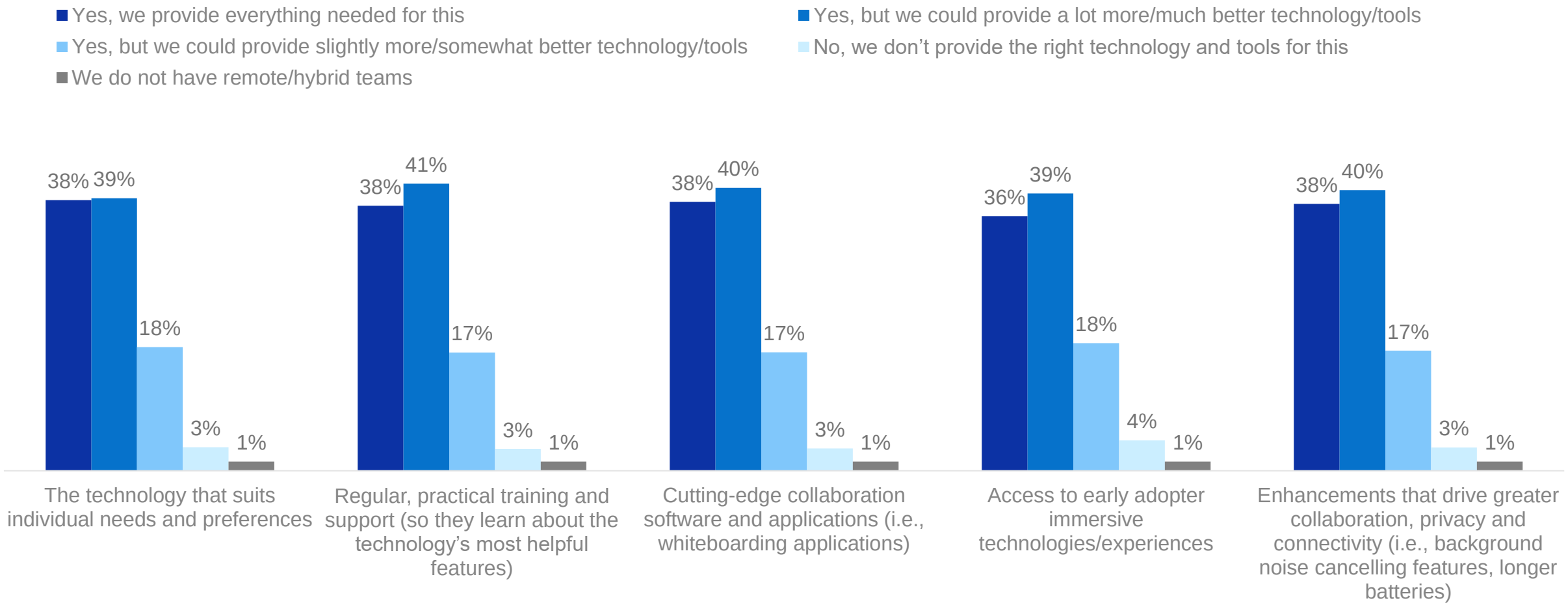
Remote/hybrid teams' technology and tools



"Do your remote/hybrid teams have the technology and tools they need to be productive in relation to the following?" Base: ITDM respondents (3,350)

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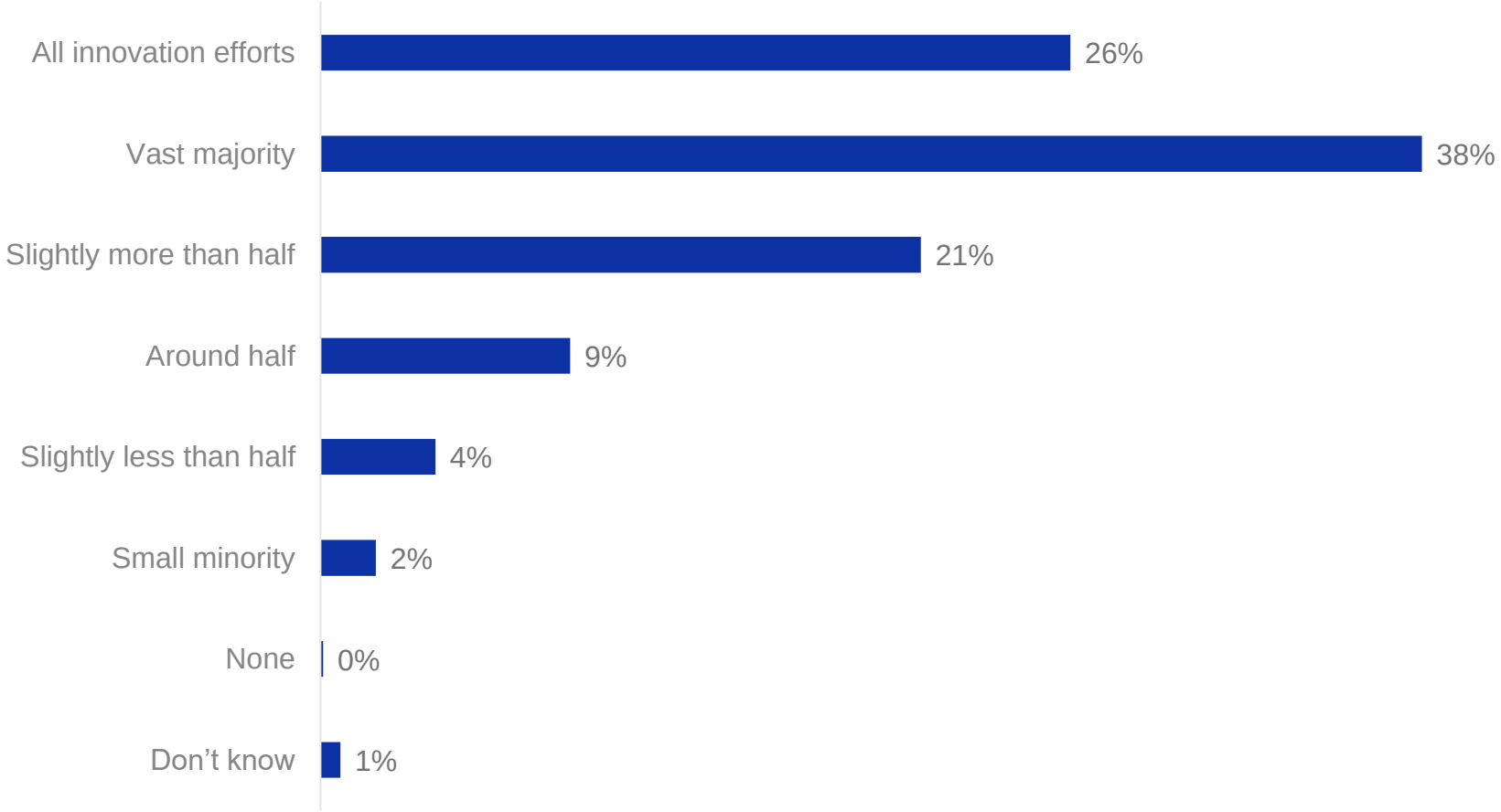
Data-driven innovation



“To the best of your ability, estimate what proportion of innovation efforts in your organization derive/are driven from data insights?” Base: ITDM respondents (3,350)

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Data capabilities

"What capabilities and practices do you have in place to enable your organization to innovate with data?" Base: ITDM respondents from organizations that use data insights for at least a small minority of their innovation efforts (3,324)

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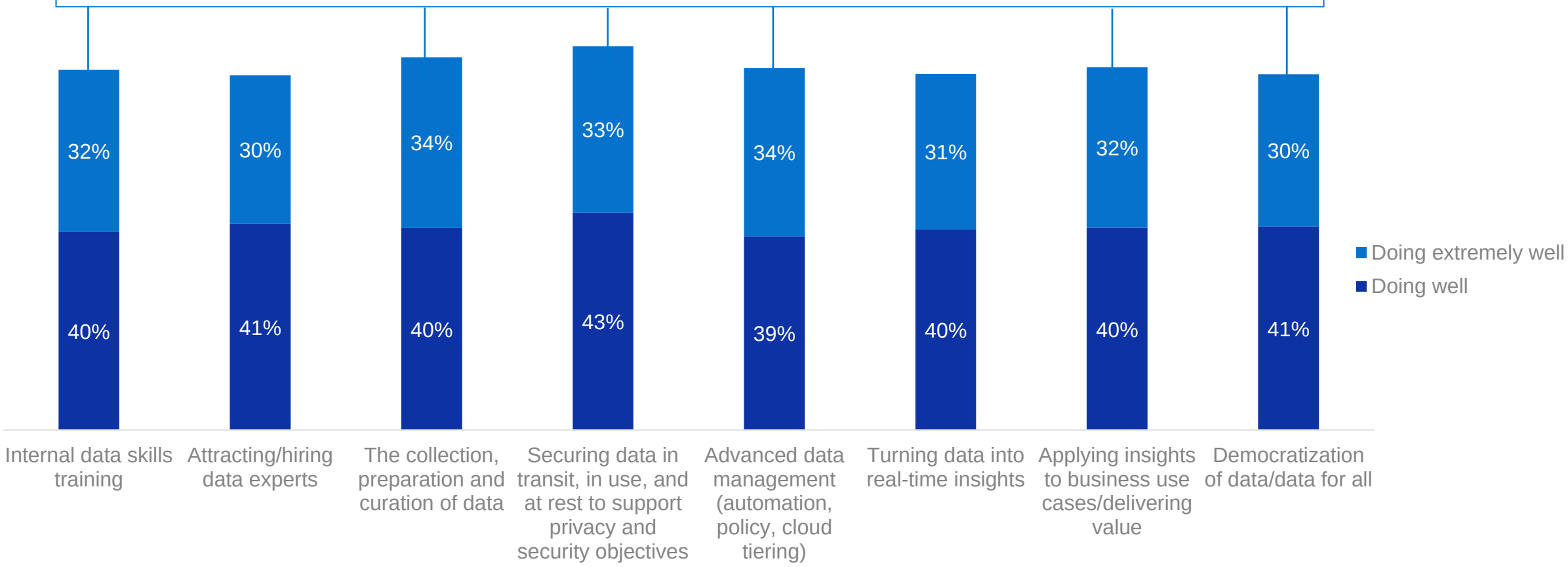
Data capabilities

There are marked disparities depending on innovation maturity groups: Innovation Leaders and Adopters tend to be much more likely to do these things extremely well (45%-57%) compared to Innovation Laggards and Followers (18%-23%).



"How well is your organization doing the following?" Base: ITDM respondents (3,350)

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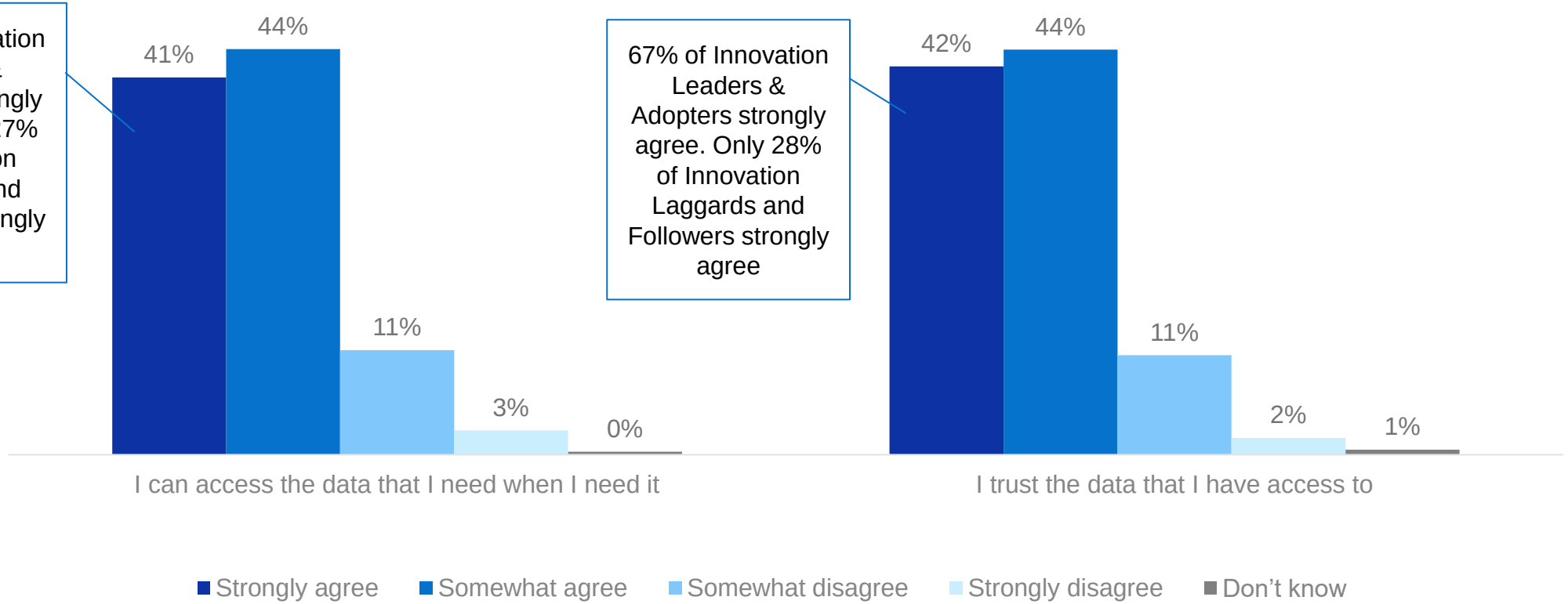
IT supporting innovation

65% of Innovation Leaders & Adopters strongly agree. Only 27% of Innovation Laggards and Followers strongly agree

67% of Innovation Leaders & Adopters strongly agree. Only 28% of Innovation Laggards and Followers strongly agree



"To what extent do you agree or disagree that your IT department/IT provider is supporting innovation in your organization by enabling the following?" Base: all respondents (6,600)

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Challenges when innovating with data

Top 5 challenges stopping organizations from innovating with data	
#1	Cybersecurity threats (on their data)
#2	Lack of IT infrastructure to meet and process data at the edge
#3	People continuing to follow their instinct rather than study data first
#4	Explosive growth in complexity and diversity of data
#5	Regulatory and compliance data requirements
-	Limited processes and tools to derive insights from data
-	Data silos: lack of visibility/can't bring data together

94% of respondents highlight at least one challenge that is stopping their organization from innovating with data

"Which, if any, of the following challenges are compromising your organization's ability to innovate with data?" Base: ITDM respondents (3,350)

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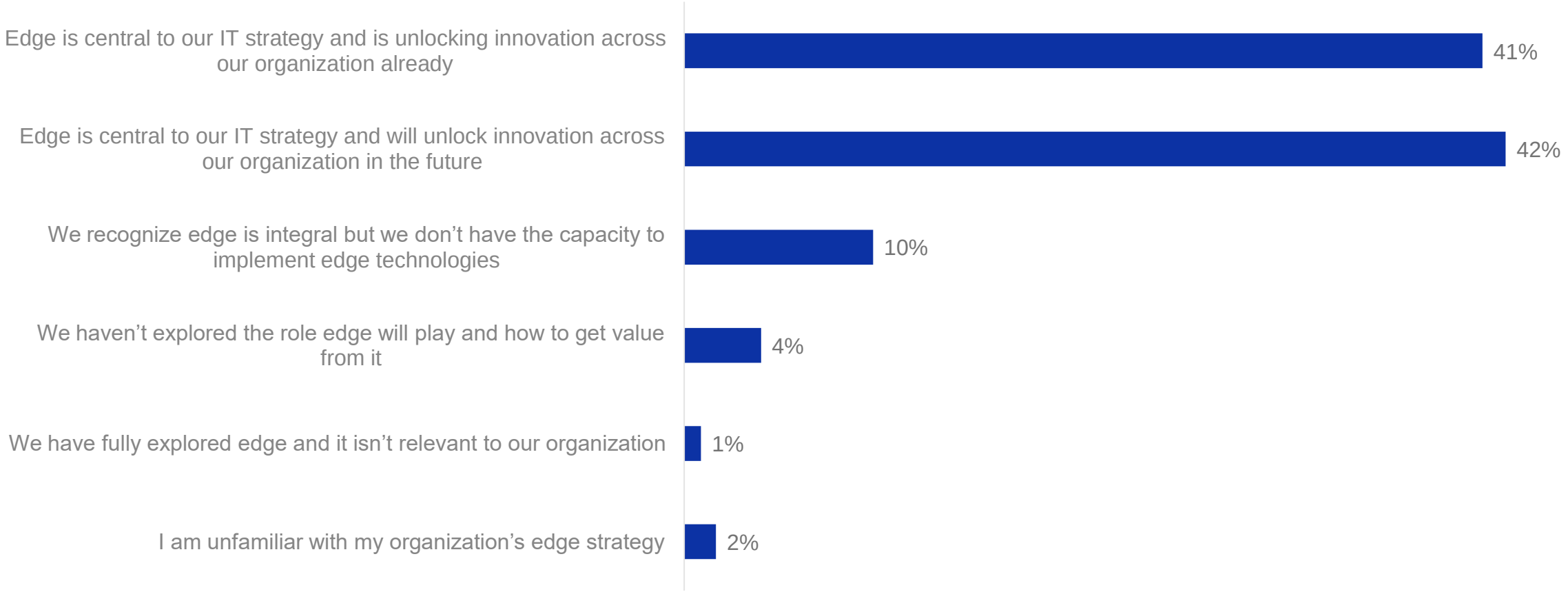
Unlocking innovation with the edge



"Which statement most aligns to your organization's edge strategy?" Base: ITDM respondents (3,350)

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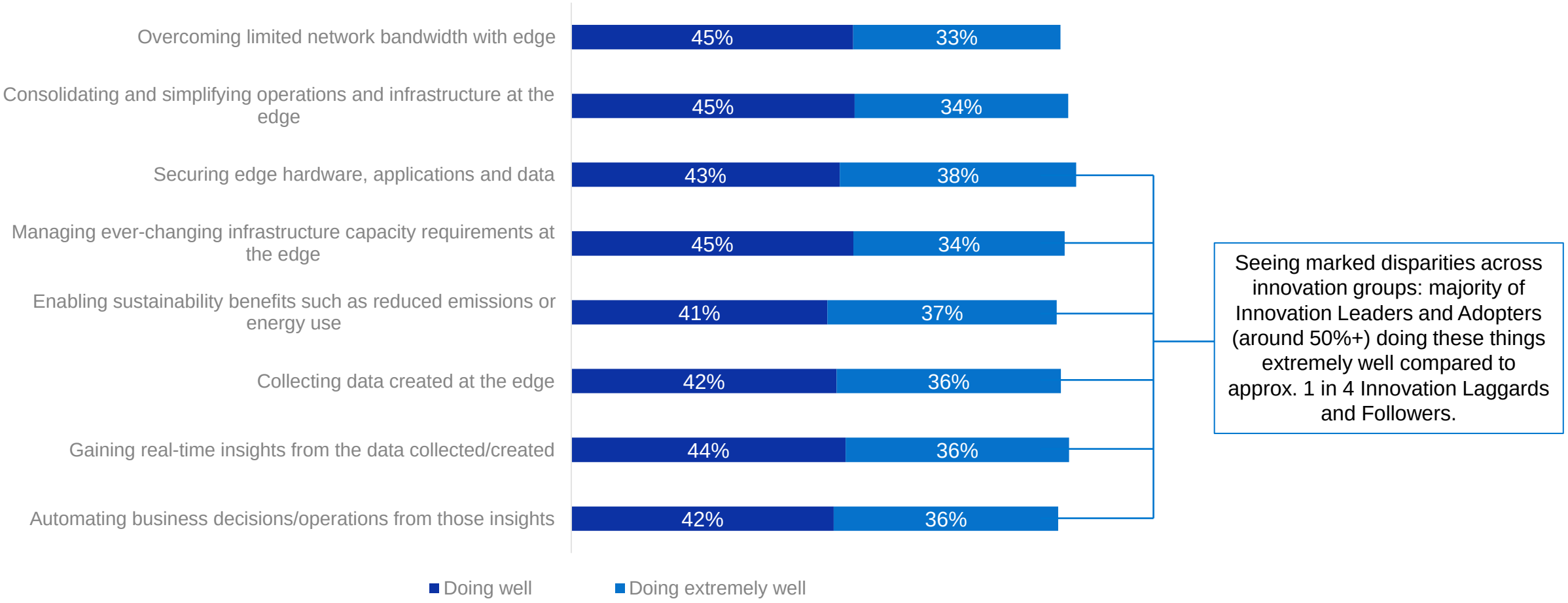
Succeeding with the edge



Seeing marked disparities across innovation groups: majority of Innovation Leaders and Adopters (around 50%+) doing these things extremely well compared to approx. 1 in 4 Innovation Laggards and Followers.

"How would you rate your organization's performance in the following areas?" Base: ITDM respondents from organizations that have edge as a central part of their IT strategy (2,806)

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Barriers to acting on data at the edge

Top 5 barriers limiting organizations' potential to act on data at the edge	
#1	Integration difficulties: integrating the overall business architecture with the IT/OT infrastructure architecture
#2	Lack of people skilled in deploying AI and/or automation at the edge
#3	Security concerns regarding edge devices not designed with security in mind
#4	Governance, security and/or privacy concerns for data at the edge
#5	Limitations created by IT/OT relationship issues (i.e., competing goals)

94% of respondents highlight at least one barrier that is limiting how their organization can act on data at the edge

"What barriers are limiting your organization's potential to act on data at the edge?" Base: ITDM respondents from organizations that have edge as a central part of their IT strategy or that recognize edge as integral but don't have the capacity to implement edge technologies (3,133)

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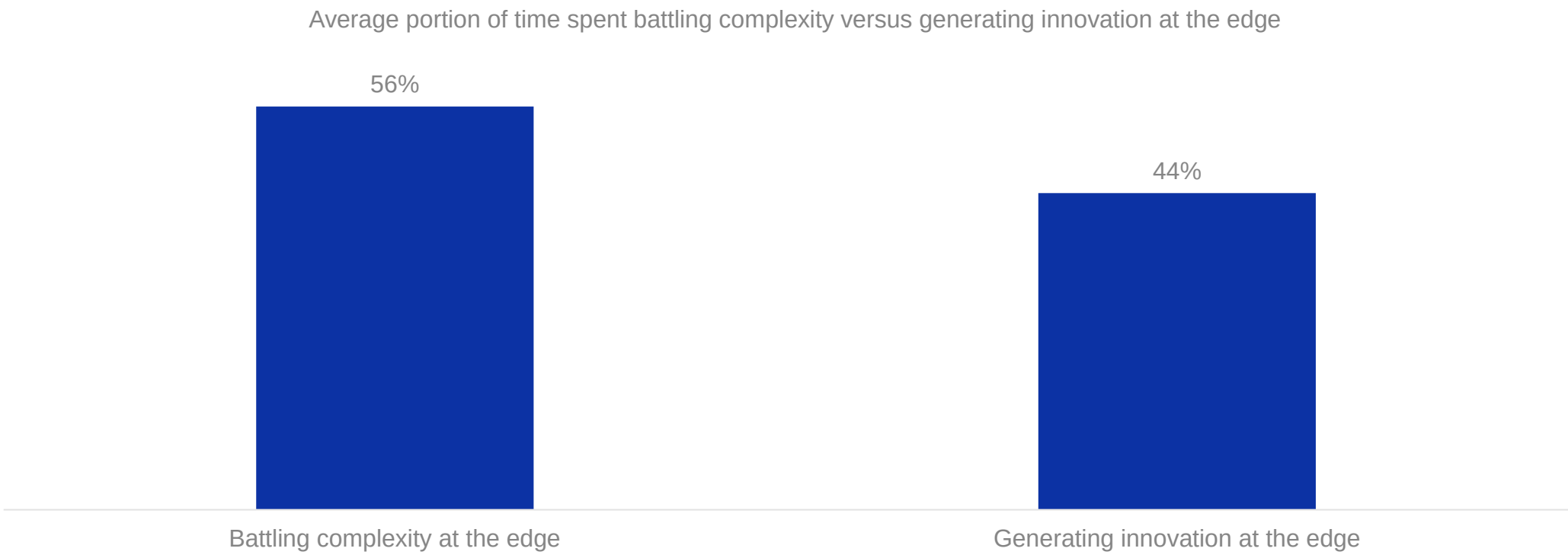
Time spent battling complexity vs. innovating at the edge



"Which of the following best describes the proportion of your time spent battling complexity at the edge (data silos and a sprawling IT footprint) versus generating innovation at the edge?" Base: ITDM respondents from organizations that have edge as a central part of their IT strategy (2,806)

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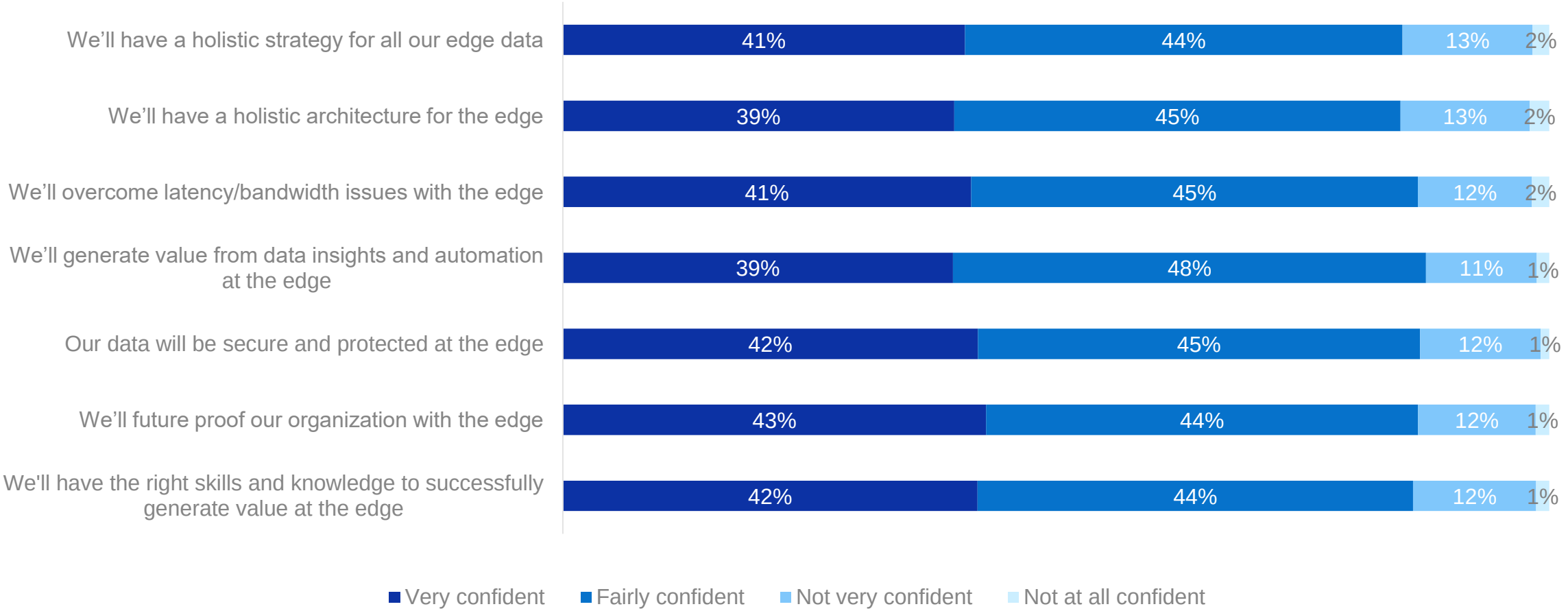
Hope for the future (1-2 years)



"How confident are you that your organization will achieve the following with edge within the next 1-2 years?" Base: ITDM respondents from organizations that have edge as a central part of their IT strategy or that recognize edge as integral but don't have the capacity to implement edge technologies (3,133)

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Cloud

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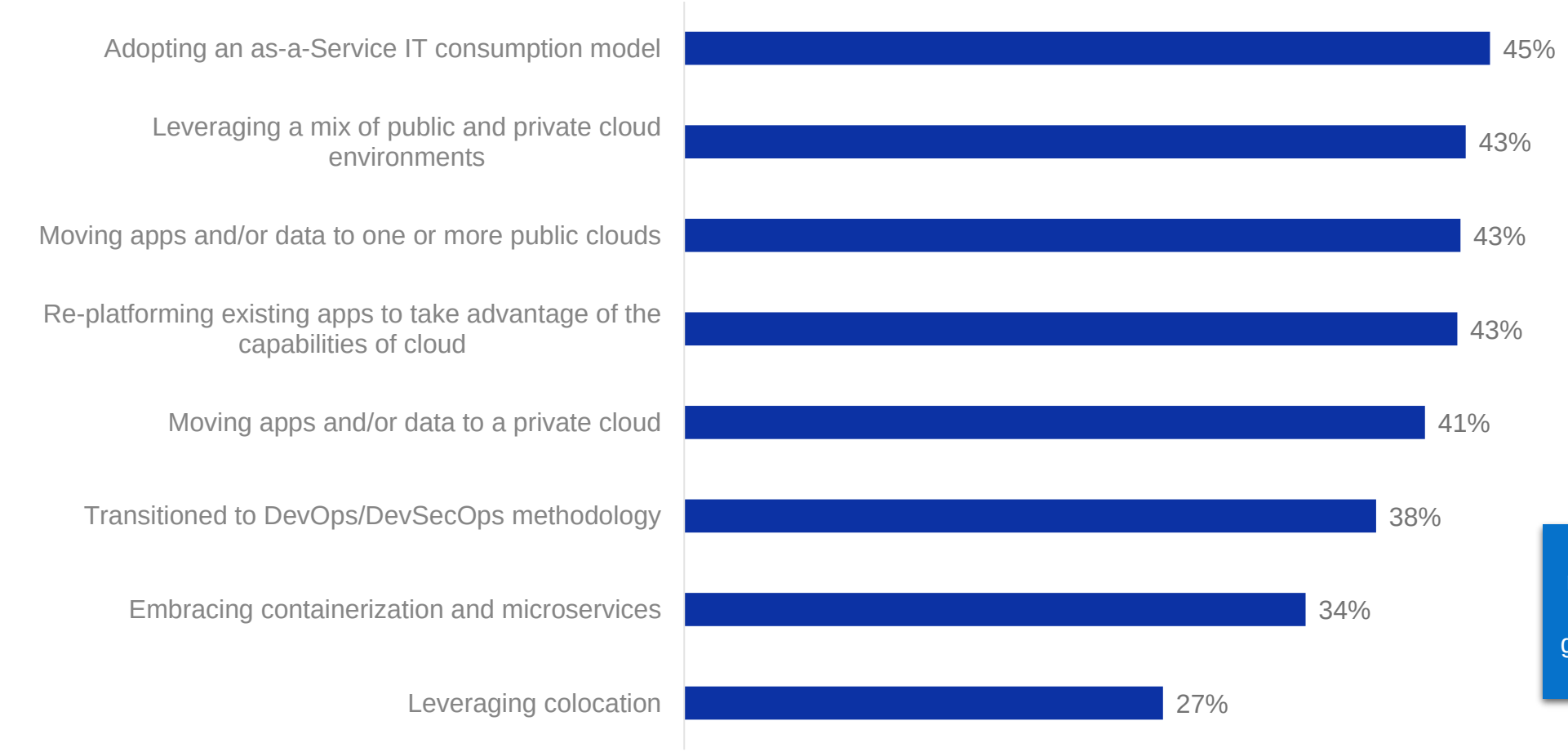
Methods used to gain IT agility and flexibility



Nearly all (99%) ITDMs report that their organization is doing at least one thing to gain IT agility and flexibility to support innovation

"What is your organization doing to gain IT agility and flexibility to support innovation?" Base: ITDM respondents (3,350)

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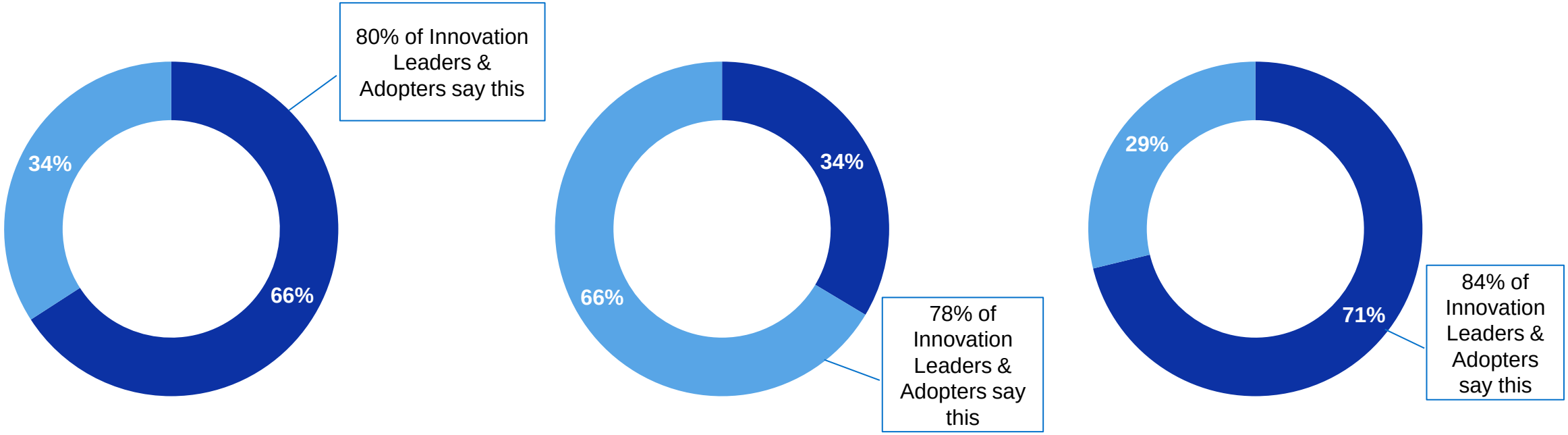
Organizations' cloud experience



- Moving data and apps between clouds has been easy
- Moving data and apps between clouds has been time consuming and difficult
- Operating in multiple clouds has limited our data's value
- Operating in multiple clouds has protected our data's value and enables us to innovate faster
- Our cloud strategy has largely delivered consistently without mistakes
- Implementing our cloud strategy has been difficult and frustrating

"Which most accurately describes your organization's cloud experience?" Base: ITDM respondents (3,350)

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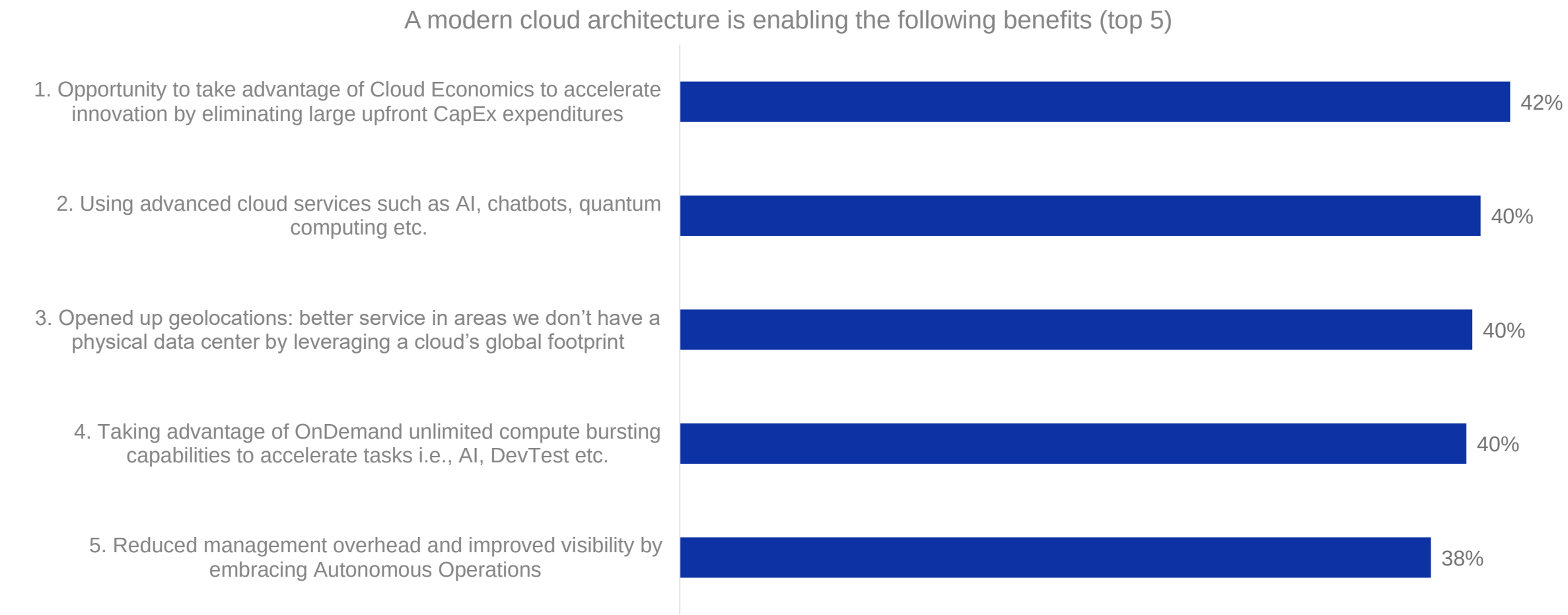
Benefits of modern cloud architecture



"What benefits has a modern cloud architecture enabled for your organization?" Base: ITDM respondents (3,350)

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Current and future cloud strategy challenges

Top 5 challenges being experienced in relation to cloud strategies *today*	
#1	Growing cloud costs (storage, networking egress, access fees etc.)
#2	Data Sovereignty and other compliance requirements hard to comply with
#3	Time and money spent to migrate apps to new cloud environment
#4	Limited visibility and control create additional security challenges
#5	Siloed cloud experiences and disparate management across disparate vendors

92% of respondents highlight at least one challenge in relation to their cloud strategy today

"What challenges is your organization experiencing with its cloud strategy today?" Base: ITDM respondents (3,350)

Top 5 barriers likely to impact organizations' *future* cloud strategy	
#1	Inability to add additional capacity without a major infrastructure investment
#2	Our IT team aren't bought into the long-term benefits of cloud
#3	Lack of cloud control; no singular experience
#4	Our current strategy is too short term
#5	It's not a preference at board level

86% of respondents highlight at least one barrier that will likely impact future cloud strategy in their organization

"What are the likely barriers to your organization's future cloud strategy?" Base: ITDM respondents (3,350)

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Security

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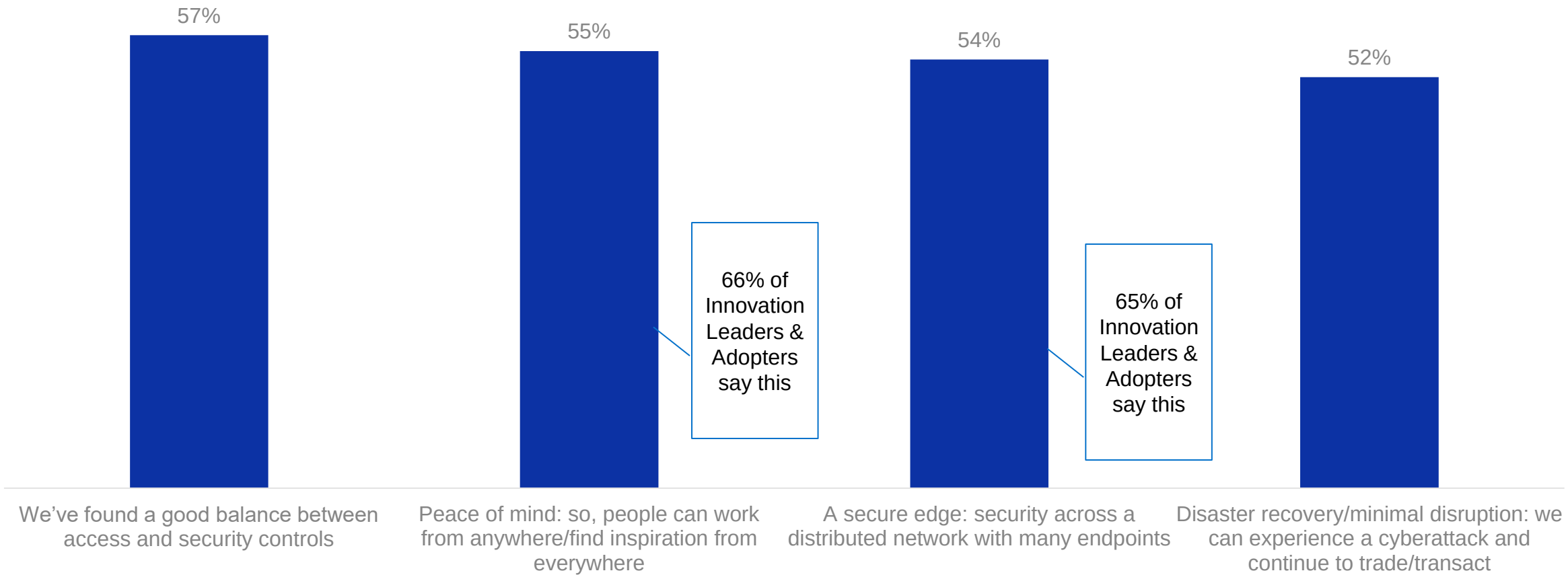
Cybersecurity achievements



"What has your organization (and its strategic IT partner) achieved so far in relation to cybersecurity?" Base: ITDM respondents (3,350)

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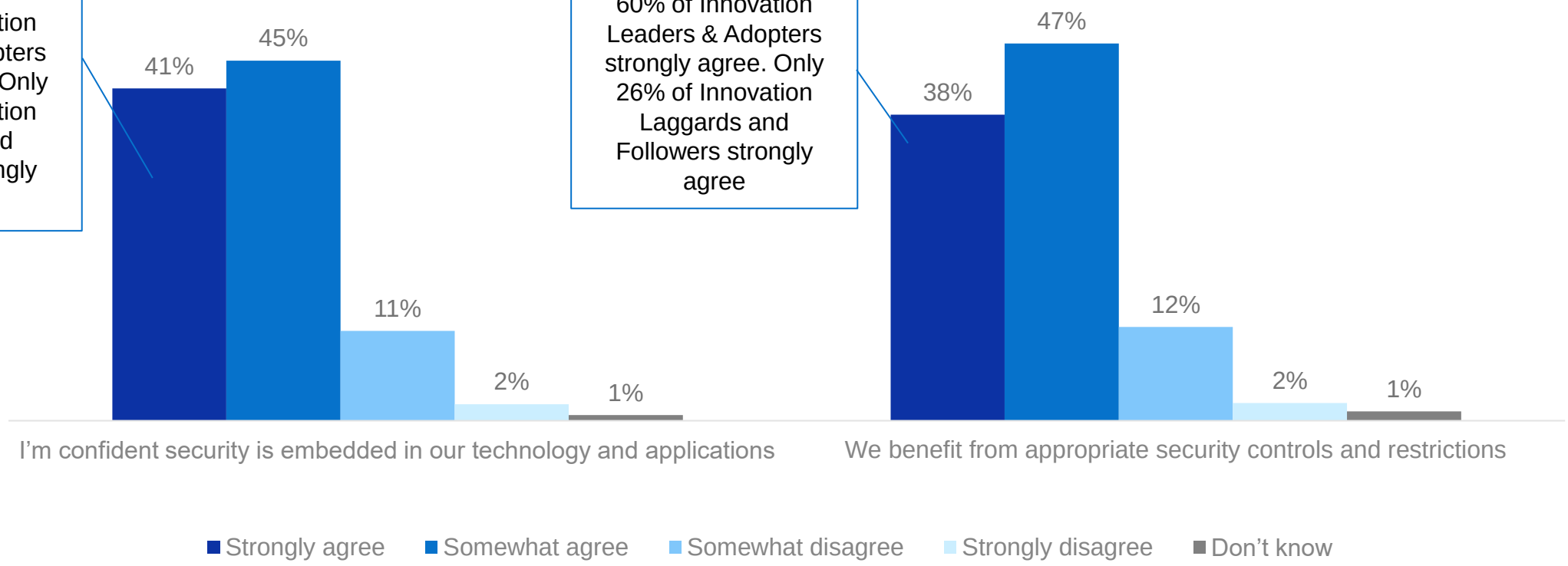
Cybersecurity achievements

67% of Innovation Leaders & Adopters strongly agree. Only 27% of Innovation Laggards and Followers strongly agree

60% of Innovation Leaders & Adopters strongly agree. Only 26% of Innovation Laggards and Followers strongly agree



"To what extent do you agree or disagree that your IT department/IT provider is supporting innovation in your organization by enabling the following?" Base: all respondents (6,600)

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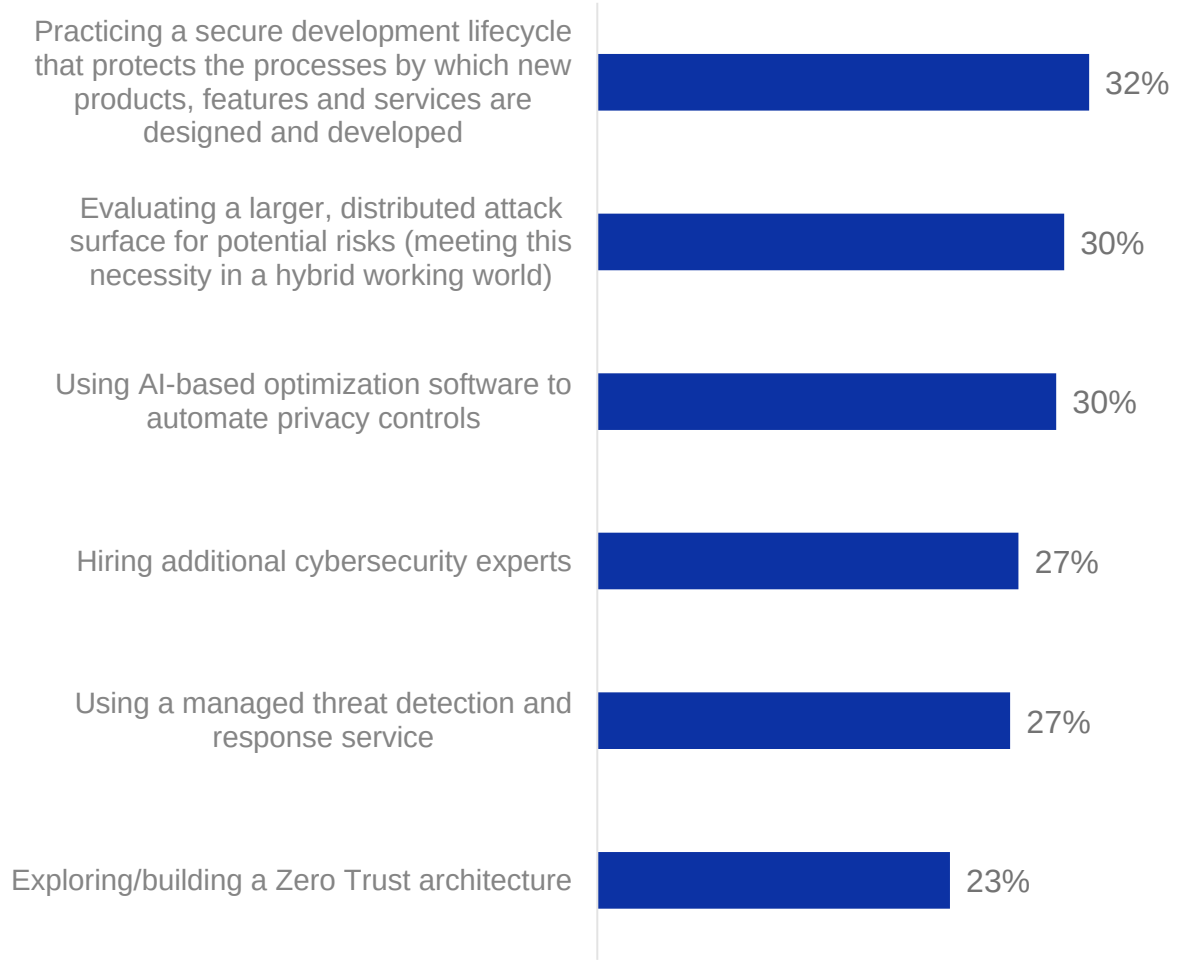
Actions to improve cybersecurity



"Which, if any, of the following is your organization doing to improve its cybersecurity?" Base: ITDM respondents (3,350)

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Cybersecurity challenges

Top 5 elements compromising cybersecurity in respondents' organizations	
#1	Overall complexity of the modern computing environment (making it difficult to manage)
#2	Evolving threat landscape (struggling to stay ahead of threats)
#3	Employees don't take cybersecurity threats seriously/naïve
#4	Too many discrete IT security solutions to manage
#5	Security teams not working hand in hand with business stakeholders to define priorities

94% of respondents highlight at least one element that is compromising cybersecurity in their organization

"Which of the following is very likely to be compromising your organization's cybersecurity?" Base: ITDM respondents (3,350)

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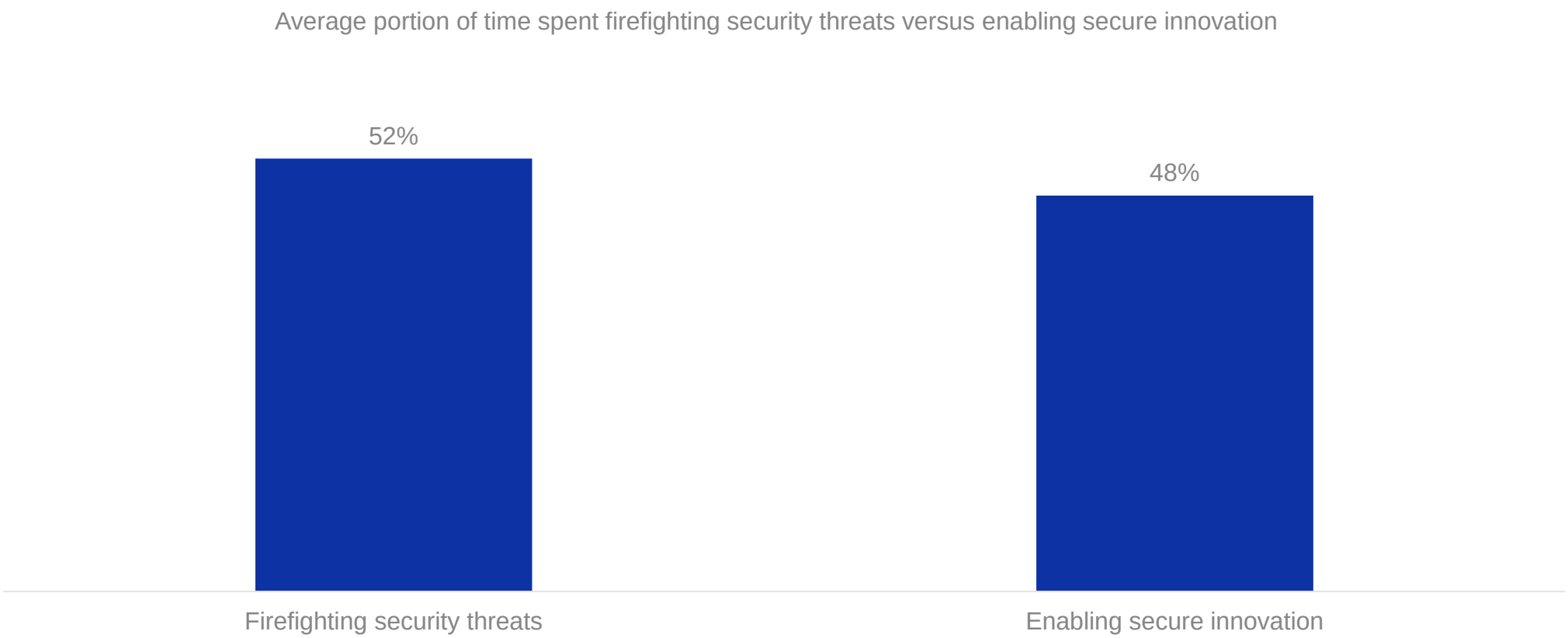
Time spent firefighting threats vs. securing innovation



"Which of the following best describes the proportion of your time spent firefighting security threats versus enabling secure innovation?" Base: ITDM respondents (3,350)

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How innovation is accelerating the need for Zero Trust

Just 23% are exploring/building a Zero Trust Architecture

"How is innovation accelerating the need for Zero Trust adoption in your organization?" Base: ITDM respondents (3,350)

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Sustainability

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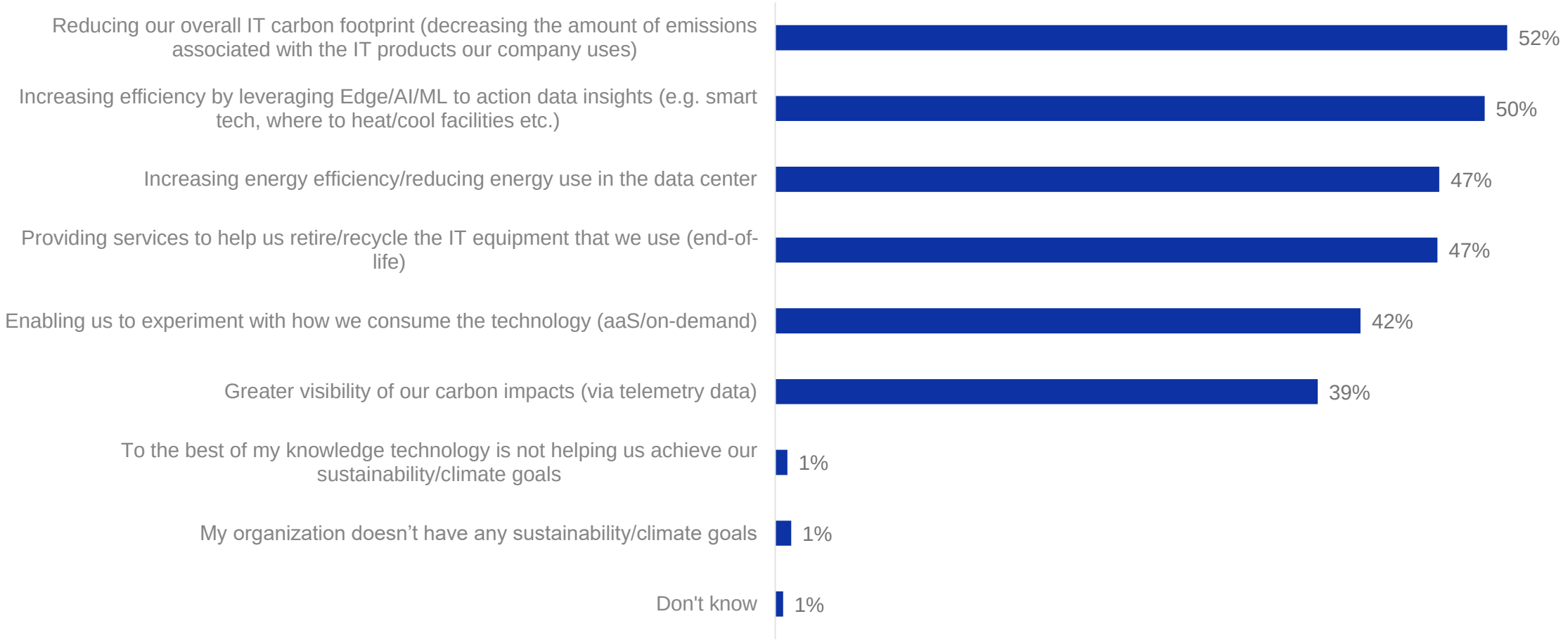
How technology is making them more sustainable



"How is technology helping your organization achieve its sustainability/climate goals?" Base: ITDM respondents (3,350)

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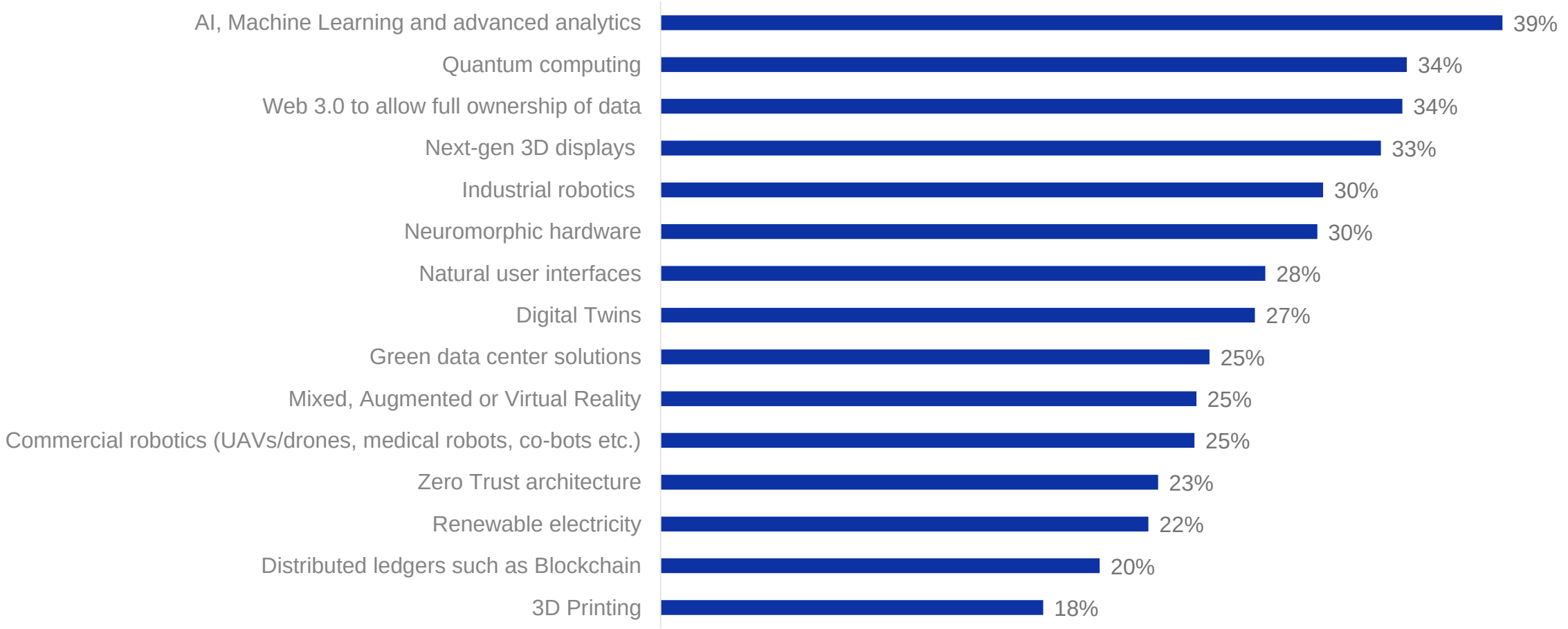
Technology investment areas to advance innovation



"Which of the following technologies is your organization actively investing in or exploring the feasibility of investing in to advance innovation?" Base: ITDM respondents (3,350)

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