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Search-Powered Technologies: A Mission-Critical Enabler For The Digital Future Of Business

How IT And Cybersecurity Leaders Are Leveraging Search-Powered Technologies To Drive Speed, Productivity, And Digital Transformation

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Search-Powered Technologies Are Critical Business Enablers

Informed decisions that impact digital transformation, scale, and customer experiences rely on technologies that turn data into action. Among these critical enabling solutions, search-powered technologies stand out as helping organizations drive faster, more effective decision-making.

Search-powered technologies (i.e., tools that enable searching data across multiple sources like websites, applications, databases, hybrid cloud environments, and other enterprise-type sources) accomplish this by delivering data and insights to stakeholders in the moment they're needed, regardless of where data is located. This study of 832 data leaders across eight countries and three industries found that IT and cybersecurity leaders must focus on and invest in search-powered technologies if they want to meet their goals of better supporting key business roles and enabling their organizations' digital futures.

Key Findings

Search-powered technologies drive the future of business. Data leaders rely on them to improve cybersecurity, drive digital transformation initiatives, and help with cloud migration and usage.

Firms will respond to unstructured data and interoperability challenges with fully featured, integrated search platforms that comprise critical point-solution capabilities.
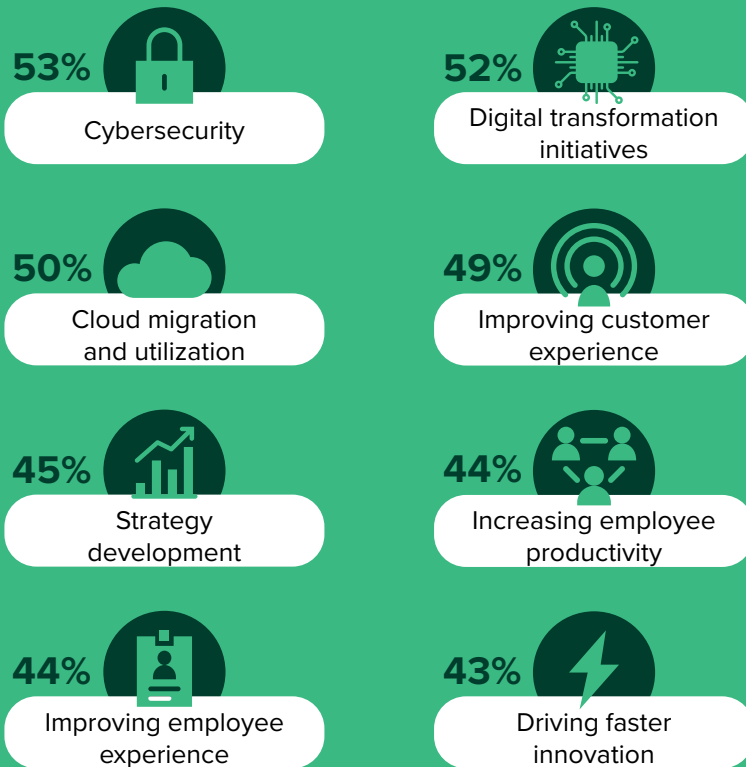
Data leaders turn to search-powered technologies to drive digital transformation initiatives through improvements in data quality, access, and usability.

All Data Leaders Use Search-Powered Technologies To Drive At Least One Business Priority

Search-powered technologies drive critical initiatives that make organizations faster and safer. More and more, organizations are learning to harness their critical information to drive tangible business outcomes, a state Forrester refers to as an insights-driven business.[1] However, in order to optimize decision-making, data leaders must first be able to find and use these insights, making search-powered technologies a critical enabler of advanced data strategies.

Survey respondents said their organizations are focusing search-powered technologies on digital business initiatives this year, led by cybersecurity, accelerating digital transformation projects, and cloud migration/utilization strategies. In this way, search-powered technology is a powerful enabler of organizations' key digital strategies.

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"Which of the following business priorities does your organization use search-powered technologies for today?"

53% Cybersecurity

52% Digital transformation initiatives

50% Cloud migration and utilization

49% Improving customer experience

45% Strategy development

44% Increasing employee productivity

44% Improving employee experience

43% Driving faster innovation

Base: 832 data architecture strategy decision-makers at global companies
Source: A commissioned study conducted by Forrester Consulting on behalf of Elastic, April 2022

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Data Leaders Will Adopt Fewer Point Solutions In Favor Of A Single Platform

Businesses thrive when they can activate their collective knowledge to inform strategy and decisions. However, much of that knowledge is locked up tight as a drum in data silos ad infinitum. Leaders require platforms that help ingest, organize, protect, and analyze data from enterprise data sources to provide employees with timely information and answers to important business questions.[2]

Leaders who will rely on search-powered technologies to drive these critical business outcomes expect to shift focus more toward an integrated platform rather than toward isolated point solutions over the next three years. While use of individual point solutions is expected to drop considerably over this period, integrated search platform adoption is set to more or less hold steady, and with only 2% of respondents unsure about an integrated approach.

"Which of the following search-powered technologies does your organization use today, and which do you expect to be in use three years from now?"

● In use three years from now   ● In use today   ● Don't know/does not apply
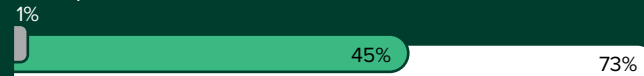
Security solution
39%
79%

Data visualization and analytics solution
44%
75%

Enterprise search solution
1%
45%
73%

Observability solution
2%
45%
68%

An integrated search platform comprising more than one of the above
2%
56%
58%

Base: 832 data architecture strategy decision-makers at global companies
Note: Total percentages may not equal separate values due to rounding.
Source: A commissioned study conducted by Forrester Consulting on behalf of Elastic, April 2022
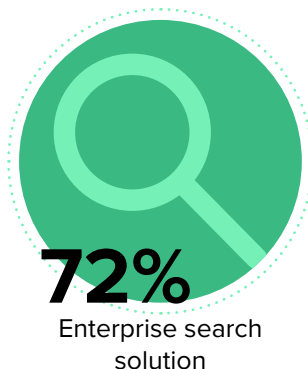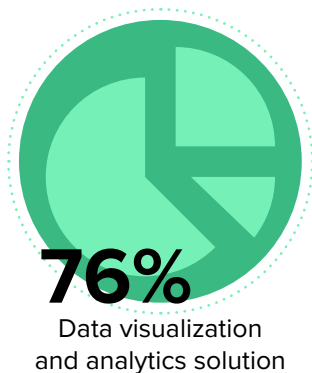
Integrated Platforms Will Consolidate Multiple Point Solutions

Leaders who are considering an integrated suite of search-powered technologies over point solutions expect those integrated platforms to fulfill much of the functionality individual tools would offer. For example, 76% of respondents would include data visualization and analytics and security solutions in a search platform, while 72% would expect a consolidated platform to include enterprise search functionality, and just over two-thirds would expect it to include observability solutions.

Respondents expect integrated platforms to incorporate a wide range of point solution functionality.

"Which of the following are or would be included in your integrated search platform?"

76%
Data visualization and analytics solution

76%
Security solution

72%
Enterprise search solution

67%
Observability solution

Base: 832 data architecture strategy decision-makers at global companies
Source: A commissioned study conducted by Forrester Consulting on behalf of Elastic, April 2022

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Respondents Want Search-Powered Technologies To Address Key Challenges

Enterprises must make information accessible and useful to workers, customers, prospects, partners, and the public. However, as massive volumes of data flow across multiple distributed environments, many organizations find themselves struggling to access the data they need when they need it.

Nearly every respondent (97%) in this study said their organization experiences at least one challenge with search-powered technologies today, headlined by difficulties managing increasing volumes of unstructured data. Additionally, enterprises struggle with organizational silos that keep data away from stakeholders who need it, as well as clunky processes and fixes that exacerbate data management issues.

"Which of the following challenges does your organization experience today with search-powered technologies?"

Difficulty managing unstructured data
42%

Stakeholders can't access useful data siloed to a different part of the organization
34%

Manual processes and temporary fixes that hamper digital transformation
33%

Maintaining data and information governance
33%

Difficulty finding information across multiple clouds and on-premises locations
32%

Persistent information silos that impede alignment and decision-making for leadership
31%

Managing security permissions
31%

We don't experience any challenges.
3%

Almost All Respondents Say Data Challenges Hold Back Their Digital Futures

We know that organizations turn to search-powered technologies to deliver information that will guide their most pressing digital business initiatives and decisions. Therefore, it's not surprising that respondents are fully aware that failing to address their organizations' data challenges can harm their businesses' ability to evolve and thrive in an increasingly digital business environment.

Respondents said when their firms aren't able to access and deploy critical data, they face rising security risk, cost overruns arising from inefficient data processes, lack of access to critical insights that guide strategic decision-making and, ultimately, hindered digital-transformation initiatives. Left unresolved, these firms will be left behind a rising tide of digital maturity that arose from the COVID-19 pandemic.[3]

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"Which of the following issues has your organization experienced as a result of its challenges with finding, sharing, or visualizing data?"

Data security issues or other risk exposures
32%

Higher costs
30%

Lack of insight when needed for critical business decisions
30%

Difficulty finding data
30%

Difficulty finding information in multicloud environments
29%

Hampered digital transformation initiatives
29%

Poor data quality
28%

There would be no issues.
1%

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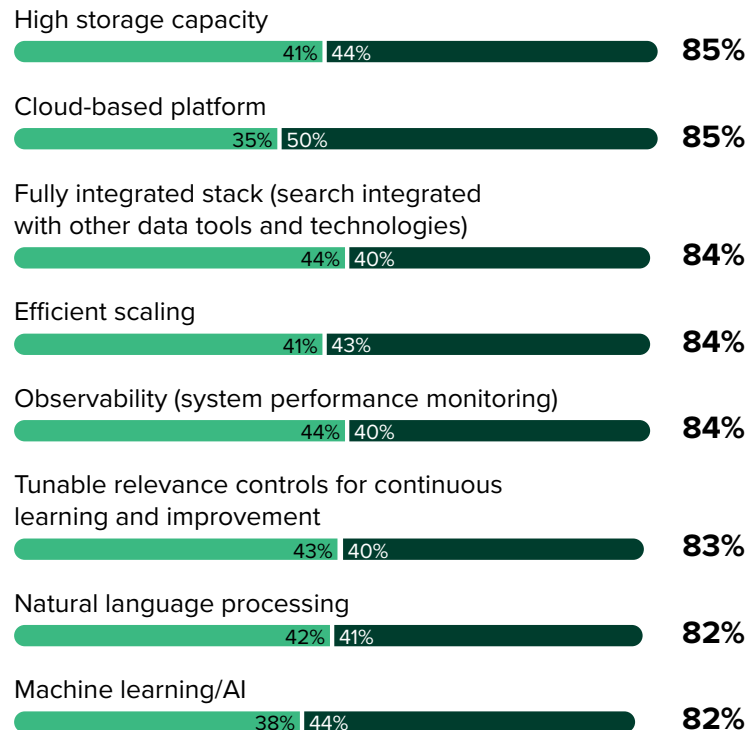
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Flexible, Integrated Search-Powered Platforms Will Become Business-Critical

As they continue their digital transformation journeys, leaders will require more power from search-powered technologies than ever. To remain competitive, they will need expansive, flexible, and integrated search solutions that are cloud-based and enable scale. It's no wonder that 83% of respondents agree the success of digital transformation initiatives relies on search-powered technologies.

Respondents' requirements of their organizations' next search-powered platform include high storage capacity, flexibility of cloud-based solutions, and full integration of search with existing data tools and technologies. More than eight out of 10 respondents are looking at cognitive search functionality like natural language processing (NLP) and ML/AI that help boost the enterprise's IQ, optimize digital shopping experiences, and power personalized and tailored search experiences for stakeholders, partners, and customers.

"How important are the following features to the success of your next search-powered technology solution?"

● Important   ● Very important

High storage capacity
41% 44%   **85%**

Cloud-based platform
35% 50%   **85%**

Fully integrated stack (search integrated with other data tools and technologies)
44% 40%   **84%**

Efficient scaling
41% 43%   **84%**

Observability (system performance monitoring)
44% 40%   **84%**

Tunable relevance controls for continuous learning and improvement
43% 40%   **83%**

Natural language processing
42% 41%   **82%**

Machine learning/AI
38% 44%   **82%**

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Data Leaders Are Driving Eight Key Outcomes With Search-Powered Technologies

Highly effective data organizations have built data-management processes to source, clean, prepare, integrate, and provide access to data at the scale and speed they need to fuel critical decision-making.[4] Survey respondents revealed that search-powered technologies play a critical role in their organizations' abilities to create these high-functioning engines of insight.

Respondents were most likely to tie their organization's search-technology initiatives to drive improvements in data quality, to deliver faster and more efficient digital transformation outcomes, and to ensure that stakeholders are able to find the information they need regardless of where that data lives. They expect search capabilities to help limit data security issues and drive better customer satisfaction, cost control, and overall security.

"What outcomes does your organization seek to deliver with search-powered technology?"

48%
Higher data quality

47%
Faster, more efficient digital transformation initiatives

45%
The ability to find data needed to make critical business decisions

44%
Easier-to-find information in multicloud environments

44%
Mitigated data security issues or other risk exposures

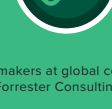**42%**
Improved overall customer satisfaction

41%
Better cost control

40%
Stronger overall security posture

Base: 832 data architecture strategy decision-makers at global companies
Source: A commissioned study conducted by Forrester Consulting on behalf of Elastic, April 2022

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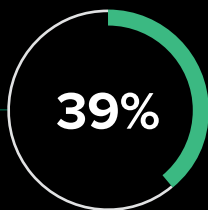Current State

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All Respondents' Firms Will Invest In Improving Their Ability To Find, Manage, And Deploy Data.

Revamped data strategies will require investment, and every survey respondent indicated they expect their firm to invest in improving its search-powered technologies. More to the point, they expect these investments to deliver results that will address their key data challenges. Respondents were most likely to tie their firm's search-powered technology investments to improvements in their ability to manage unstructured data, which they previously identified as their top challenge. Thirty-nine percent said their firm's search-powered technology investments would make it easier to find information across multiple cloud and on-premises environments, while 37% are looking to improve data visualization, and 36% are looking to drive improvements in data maintenance and governance.
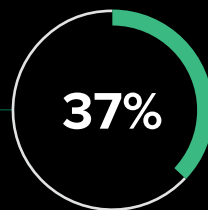
"Which of the following improvements does your organization seek to make by investing in search-powered technologies?"
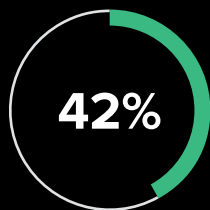
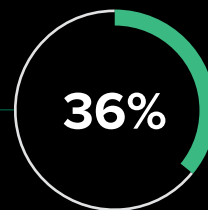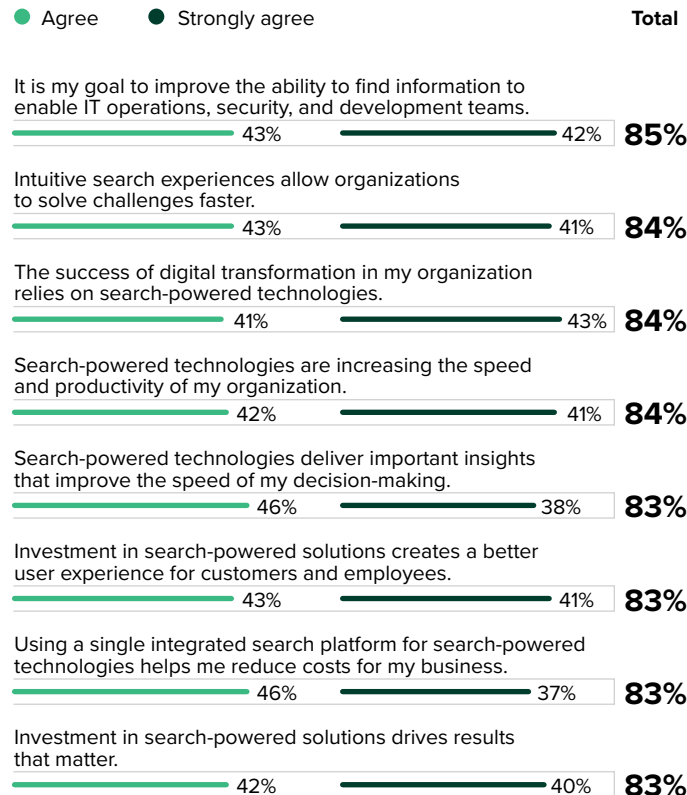| 42%	39%	37%	36%	0%
				Δ100%
More easily managing unstructured data	More easily finding information across multiple clouds and on-premises locations proactive support and engagement	Improving data visualization/ presenting data in a more meaningful way	Improving data maintenance and information governance	We aren't planning to invest in improving our search powered technologies.

Data Leaders Are Counting On Intuitive, Integrated Search-Powered Technology To Drive Business Speed And Productivity

Eighty-five percent of survey respondents said that they have set a goal to improve their organization's ability to find the information it needs to better enable IT operations, security, and development teams. They require solutions that will help deliver intuitive experiences that will speed problem-solving, and they see search-powered technologies as a key factor to increasing their organizations' speed and productivity.

They believe that search-powered technology accelerates decision-making and helps them create better customer experiences and employee experiences. Three-quarters believe that investing in search-powered technologies will drive results that matter for their business, and 81% specifically agree that a single integrated search platform would give valuable time back to data teams while helping reduce costs.

"How much do you agree with each of the following statements?"

● Agree   ● Strongly agree   **Total**

It is my goal to improve the ability to find information to enable IT operations, security, and development teams.
43%   42%   **85%**

Intuitive search experiences allow organizations to solve challenges faster.
43%   41%   **84%**

The success of digital transformation in my organization relies on search-powered technologies.
41%   43%   **84%**

Search-powered technologies are increasing the speed and productivity of my organization.
42%   41%   **84%**

Search-powered technologies deliver important insights that improve the speed of my decision-making.
46%   38%   **83%**

Investment in search-powered solutions creates a better user experience for customers and employees.
43%   41%   **83%**

Using a single integrated search platform for search-powered technologies helps me reduce costs for my business.
46%   37%   **83%**

Investment in search-powered solutions drives results that matter.
42%   40%   **83%**

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To excel in an era of digital transformation, businesses'
differentiation rests on technologies that turn data into
actionable business insights, and survey respondents revealed
that search-powered technologies play a critical enabling role.
As they evaluate the next generation of solutions, data leaders
should bear the following in mind:

- Every respondent said their firm is investing in search-
  powered technologies. They are looking to improve
  decision-making, shore up data management, and
  accelerate the journey from data insight to business value.

- Integrated search platforms drive data access, boost
  speed, and reduce costs. Respondents show a preference
  for integrated search platforms comprising multiple
  point-solution capabilities to reduce friction and enable
  enterprisewide data access and usage.

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Methodology

This Opportunity Snapshot was commissioned by Elastic. To create this profile, Forrester Consulting supplemented this research with custom survey questions asked of data architecture strategy leaders at global enterprises. The custom survey began in April 2022 and was completed in April 2022.

ENDNOTES

[1] Source: "Chart Your Course To Insights-Driven Business Maturity," Forrester Research, Inc., April 27, 2021.

[2] Source: "The Forrester Wave™: Cognitive Search, Q3 2021," Forrester Research, Inc., July 12, 2021.

[3] Source: "Successful Digital Transformations Focus On Three Core Elements," Forrester Research, Inc., April 19, 2022.

[4] Source: "Gauge Your Insights-Driven Business Maturity," Forrester Research, Inc., August 2, 2021.

ABOUT FORRESTER CONSULTING

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Demographics

REGION	
Australia	**13%**
Brazil	**13%**
France	**12%**
Germany	**12%**
Japan	**12%**
The Netherlands	**12%**
United Kingdom	**13%**
United States	**13%**

INDUSTRY	
Financial services and/ or insurance	**45%**
Telecommunications	**35%**
Public sector/ government	**19%**

SIZE (EMPLOYEES)	
1,000 to 3,999	**29%**
4,000 to 19,999	**45%**
20,000 or more	**26%**

Note: Percentages may not total 100 because of rounding.