Riverbed Global Survey 2025

The Future of IT Operations in the AI Era

1,200 leaders and technical specialists share their views on AI in IT Operations (AIOps), including challenges, tools, standards, and strategies.

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Contents

Executive Summary

Confidence in AI is rising in businesses across the globe. But in 2025, our research shows persistent gaps in readiness, data quality and realistic expectations (the reality gap) among companies adopting AI technologies.

Only one in ten AI projects have been deployed, there are still issues with data across at least half of organizations, and technical specialists are less optimistic than business leaders about AI.

To address inefficiencies and siloes in their IT operations, businesses are seeking to reduce the number of tools they are using. A striking 93% are willing to switch vendors to do so, suggesting that tool consolidation will become a key gateway for competitive disruption across the marketplace.

In a world where hybrid and remote work has become the norm, companies have increased their reliance on unified communications (UC) tools, but over half are not very satisfied with their performance. The rise of UC tools has outpaced monitoring capabilities and user confidence.

Increasingly, the open-source observability framework, OpenTelemetry, has become a strategic focus across the global business landscape. However, there is a gap between how business leaders and technical specialists perceive its relevance and level of implementation in 2025.

Companies are seeking to prepare IT infrastructure for the deployment of AI by moving and sharing data, especially to public cloud and edge environments. Top considerations include the cost of data movement and storage (cited by 95% of respondents), security and compliance (94%), and network performance and reliability (94%).

The Riverbed Global Survey on the Future of IT Operations in the AI Era was conducted by Coleman Parkes Research in July 2025. We surveyed 1,200 business decision-makers, IT leaders, and technical specialists across seven countries (Australia, France, Germany, Saudi Arabia, Spain, UK, and the U.S.), with an average of $2.2 billion in annual revenue. Their industries include manufacturing, financial services, government and public sector, and healthcare providers.

Key Findings

Gaps are impeding AI-readiness

Companies have doubled their investment in AI in the past year to $27 million, and 87% report that their ROI on AIOps initiatives has met or exceeded expectations. However, our research indicates a readiness gap, with only one in ten (12%) AI initiatives fully rolled out. There is a gap in data quality for AI implementation, with 36% of business leaders vs 30% of technical specialists rating their data as excellent for relevance and suitability in relation to AI. We also see a gap in confidence in AI between business leaders and technical specialists on the ground. For example, business leaders are more optimistic than technical specialists when asked if their organization is currently fully prepared to implement AI projects (42% vs 25%).

Consolidating ITOps tools and vendors is a top priority

Most companies (96%) are consolidating the number of tools and vendors they use in IT Operations (ITOps). Organizations currently use, on average, 13 observability tools supplied by 9 vendors. To consolidate tools, 93% are considering partnering with new vendors. 78% say that their tool consolidation projects will be completed within the next two years.

UC Tools: A business necessity, but a persistent pain point

Resilient unified communications is a business necessity. Both business leaders and technical specialists spend 42% of their work week using unified communications tools (UC tools) and 65% say these tools are very important for effective operations. However, only 46% of companies are very satisfied with their performance and 43% report performance issues. Our data suggests that UC-related issues may be the number one source of IT help desk tickets. UC-related issues account for 15% of tickets, with issues taking an average of 43 minutes to solve, making this a costly problem. Half of companies aren't able to monitor UC tools in real-time, with a lack of visibility into usage, performance, and user behavior.

Embedding OpenTelemetry is a foundation of observability

Commitment to OpenTelemetry is strong across the board. The observability framework OpenTelemetry (OTel) has become an important standard for the vast majority of organizations, with leadership especially committed to it. Nine out of ten (94%) agree that OTel will become a foundation for strategic initiatives in their enterprise and 95% say it is critical to their observability strategy. 94% state that by 2027, full support for OTel will become a requirement for every vendor in the observability space. Business leaders are more likely than technical specialists to report that OTel is strategically important, already implemented in their company, and mandated by their organization.

Network performance is critical for AI success

As the AI data landscape changes, 91% of organizations state that the movement and sharing of AI data is critical (33%) or very important (58%) to their AI strategy. Throughout this process, companies are preoccupied with cost (95%), security (94%), and performance (94%). Companies expect that over the next three years, there will be a shift in the storage of data for AI, with use of public cloud growing from 36% to 39% and use of edge environments rising from 9% to 13%. A six-point drop is anticipated in the use of on-premises data centers for AI, from 23% to 17%.

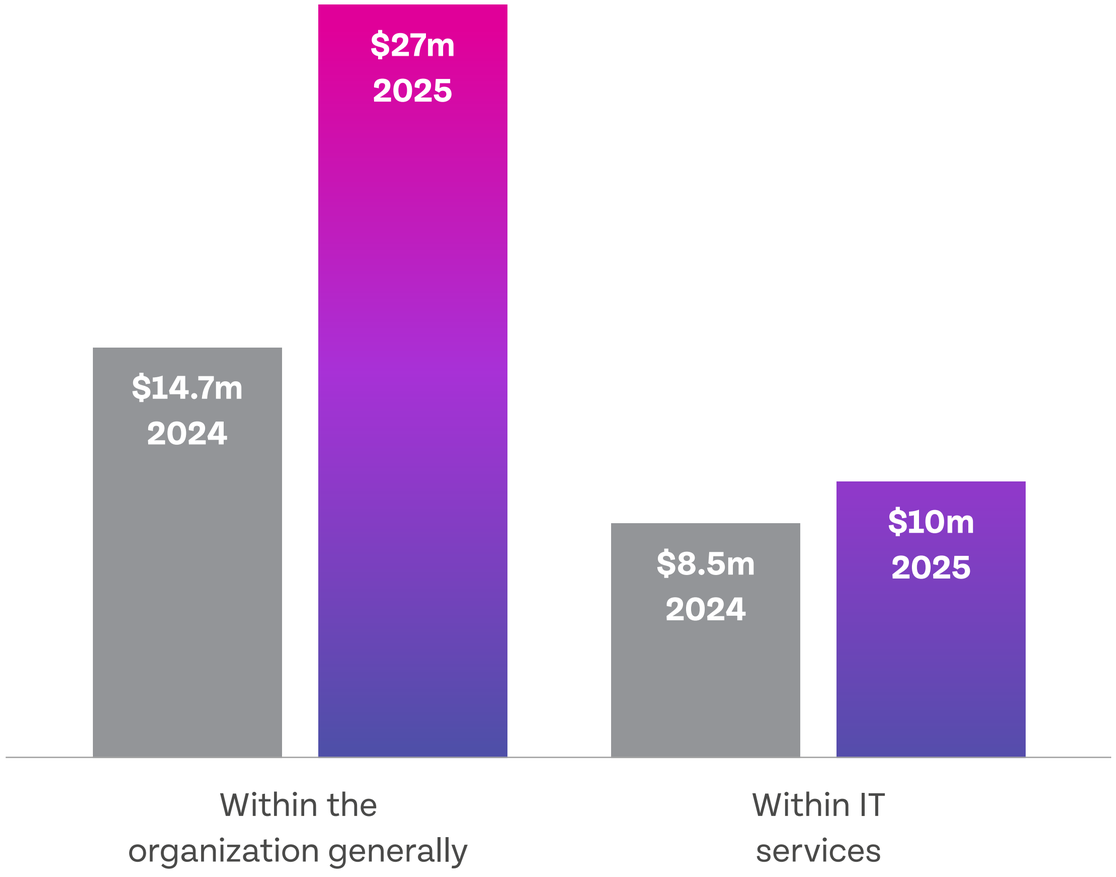
1. Gaps are Impeding AI-Readiness

Despite AI growth and ROI, critical readiness, data, and execution gaps threaten to stall enterprise adoption and operational success.

Over the past year, organizations around the world have nearly doubled their investment in AI. In 2024, companies spent $14.7 million on AI technologies, but in 2025 this has risen to $27 million (including $10 million within IT services). Reflecting this trend, 78% of respondents reported that their organization's investment in AI has increased over the past year.

Respondents to our survey report that their AI projects are very successful. The vast majority (87%) say that their return on investment (ROI) from AIOps initiatives has met or exceeded their expectations. Leaders continue to have a more optimistic view of AIOps ROI than those closer to the technical implementation, with 53% saying AIOps has exceeded original goals, compared to 42% of technical specialists.

AI Investment



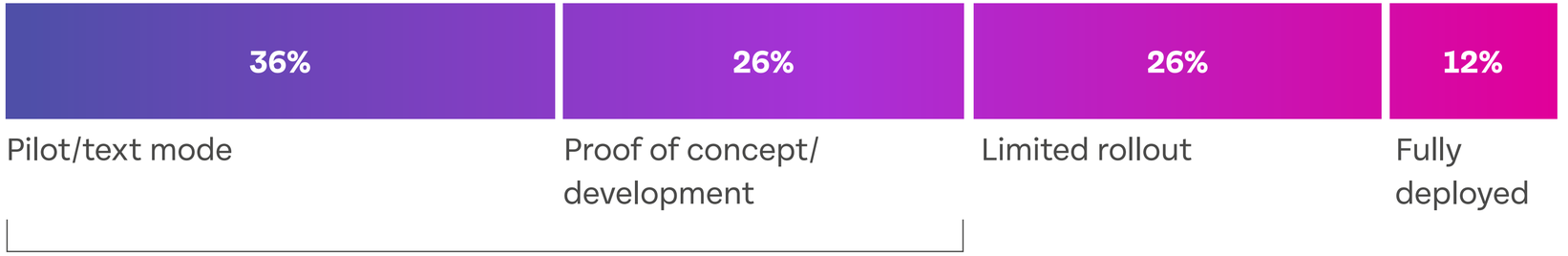
However, a closer look at the data reveals several key gaps that organizations face when implementing AI. Companies must address a readiness gap, a data quality gap, and a realistic expectations gap (reality gap) if they want to realize the full potential of AI technologies.

Although strategic confidence has grown - 59% of respondents now express confidence in their AIOps strategy, up 7 points from last year - readiness remains a significant barrier. As of 2025, only 12% of AI initiatives have reached full deployment, while 62% remain in pilot or development phases. This is unexpected, considering that AI appears to deliver a high return on investment.

87% of organizations say AIOps ROI has met or exceeded expectations

49% AIOps ROI has **exceeded expectations**

Most AI projects remain in early stages, with only 12% fully deployed across the organization



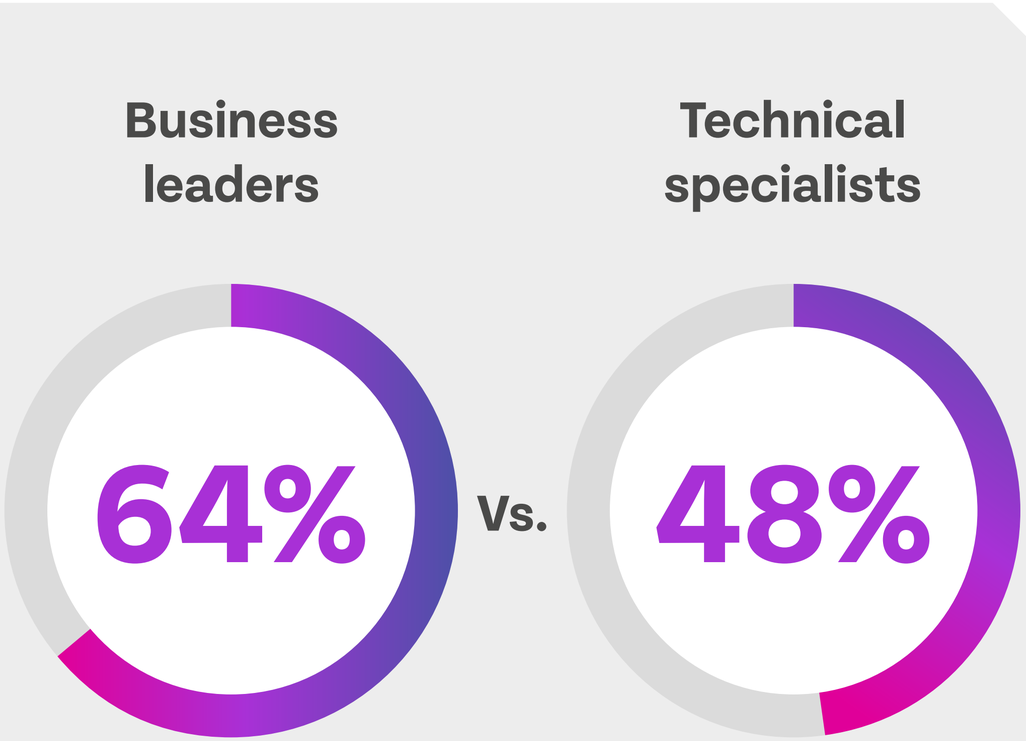
62% AI projects are in the **pilot** or **proof of concept** stages

But there is room for improvement when it comes to organization's data

Percentage of organizations rating their data as excellent

Current readiness levels are low: just 36% of organizations consider themselves prepared to operationalize AI, a slight decline from 37% last year. The readiness gap is particularly evident between roles – 42% of business leaders report being prepared, compared to only 25% of technical specialists, highlighting a disconnect between strategic intent and technical execution capacity. Looking ahead, however, there is broad consensus around future readiness. By 2028, 86% of respondents expect their organizations will be prepared to support AI at scale, with alignment between both business and technical stakeholders on this trajectory.

Organizations also face challenges in data quality as they implement AI projects. All survey respondents were asked to rate their data across multiple metrics. In 2025, only 34% rated their data as excellent for relevance and suitability, 35% rated it as excellent for consistency and standardization, 37% for security and protection, 43% for quality and completeness, 46% for accuracy and integrity, and 49% rated their data as excellent for accessibility and usability. Despite marginal year-over-year gains – most notably a six-point improvement in perceived accuracy and integrity (from 40% to 46%) – the overall confidence in data quality remains low. Just 46% of respondents say they are fully confident in the quality of their data, even though 88% acknowledge that ensuring high data quality is essential to AI success.



Are **Very Confident** in their company's AI strategy in relation to IT operations and digital experience

Another challenge is the gap between expectations and reality. Our research shows very different perceptions of AI's capabilities across different levels of an organization. Last year, we found that 82% of organizations believed they were ahead of the curve with AI (a mathematical impossibility). Companies were optimistic that they would make rapid progress with AI, with 86% expecting to be fully prepared in three years' time.

This year, we asked whether leadership and technical departments perceive AI's potential differently. We found that employees reporting to the CEO and board are more optimistic than those executing AI projects on the ground. For example, there is a 16-point gap between business leaders and technical specialists when asked how confident they are about their AI strategy in relation to IT operations and digital experience. Two thirds of business leaders (64%) declare that they are very confident, in comparison with nearly half of technical specialists (48%).

Disparities between business leaders and technical specialists

Preparedness for AI projects
Business leaders are more likely to believe their organisation is fully prepared to implement AI projects (42% vs 25% of technical specialists).

Perceived ROI from AIOps
Over half of business leaders (53%) say AIOps has exceeded expectations, compared with 42% of technical specialists.

Challenges in scaling AI
Leaders anticipate fewer challenges in implementing scalable AI (67% vs 76%).

Data accessibility and usability
Confidence in data is also higher among leaders, with 53% rating accessibility and usability as excellent, versus 42% of technical specialists.

42% **Business leaders** think their organization is fully prepared to implement AI projects currently

25% **Technical specialists** think their organization is fully prepared to implement AI projects currently

2. Eliminating Tool Sprawl is a Top Priority

Fragmented IT drives enterprises to consolidate tools and vendors, reducing complexity, streamlining observability, and unlocking strategic advantages beyond cost.

Our research shows that across organizations, complex, distributed environments are currently the norm for IT operations. Multiple tools are deployed across ITOps, especially in collaboration, monitoring, and network management.

Organizations currently use, on average, 13 observability tools supplied by 9 vendors. This equates to roughly 1 to 2 tools per vendor for each type of observability. This forces them to integrate tools they would prefer not to, making observability needlessly complex to implement.

Organizations face tool sprawl in observability

13

On average, organizations currently use 13 observability tools

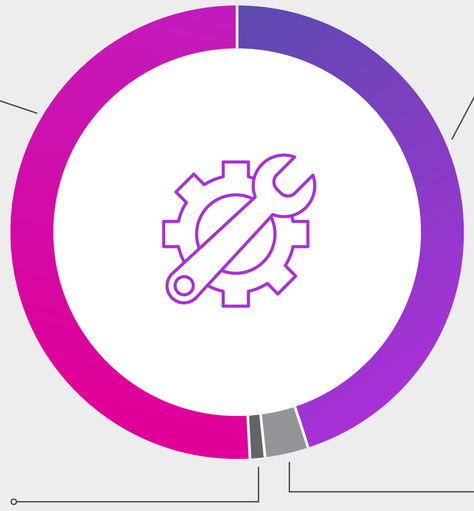
9

On average, observability tools are supplied by 9 different vendors

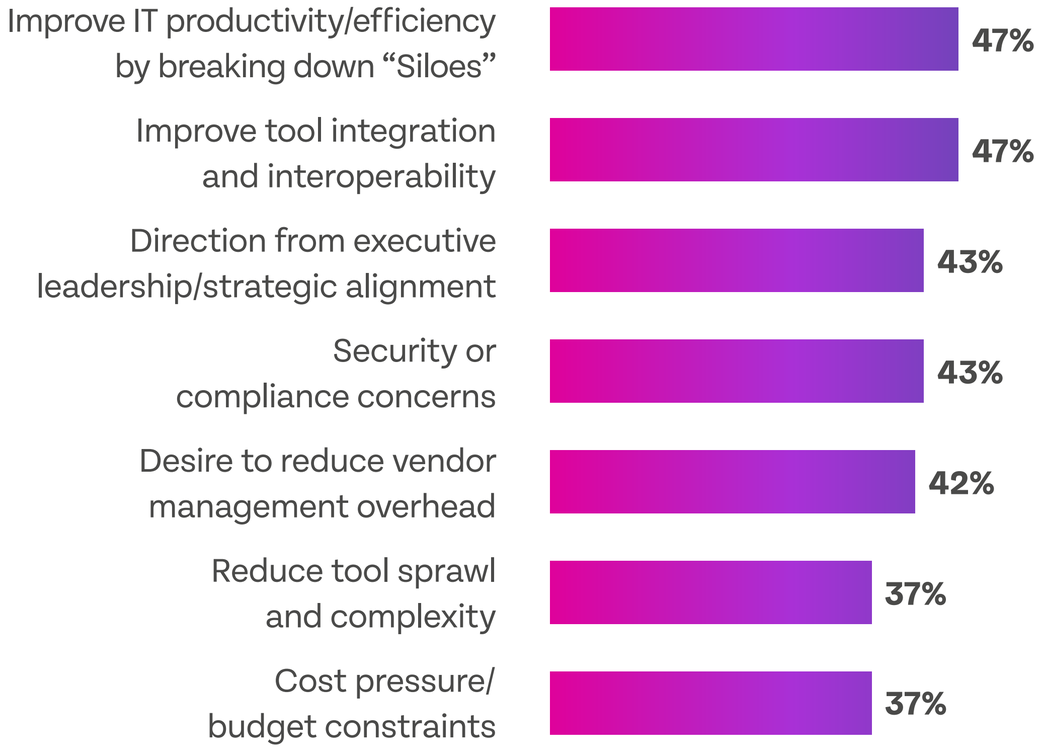
	Average number of tools used	Average number of vendors used
Collaboration & Communications	4.5	3.1
Digital experience monitoring (DEM)	3.9	2.7
Network performance management & monitoring	3.9	2.7
Security Information and Event Management (SIEM)	3.7	2.7
Application performance management & monitoring	3.6	2.4
Digital employee experience (DEX)	2.9	2.0
Cloud Management & Monitoring	2.8	2.0

Almost all organizations (96%) are consolidating the number of tools and vendors they utilize, although adoption levels vary by role with 57% of business leaders reporting that tool and vendor consolidation is already underway in their organization, compared to 40% of technical specialists. The primary drivers are improving IT productivity (47% said this was one of their top three reasons for consolidation), improving tool integration (47%), and organizational strategy (43%). These operational benefits are considered to be even more important than cost reduction (37%).

IT tool and vendor consolidation plans



Top drivers of tool consolidation include integration, productivity, and strategic alignment



In response to the issue of “observability sprawl”, most companies plan to move to a single platform. Over half of enterprises (55%) and 62% of leaders state that the capabilities of a unified platform are very important to their tool consolidation strategy. Nine out of ten (93%) agree that this approach would make it easier to identify and resolve operational issues. In order to consolidate their tools, 93% are actively considering new vendors as strategic partners. This widespread willingness to change vendors will create significant market opportunities for new players to emerge.

Companies are pursuing these plans aggressively: 51% report that their tool consolidation plans are complete, with 78% saying that they will be finished within the next two years.

93%

Agree that a **single-vendor, unified platform** approach to operations tools simplifies problem identification and resolution

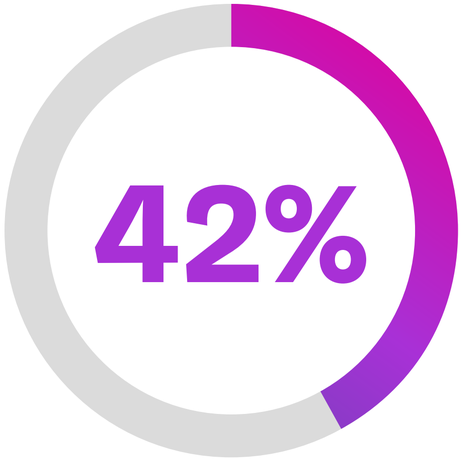
93%

Are actively considering new **strategic vendors** as part of their tool consolidation strategy

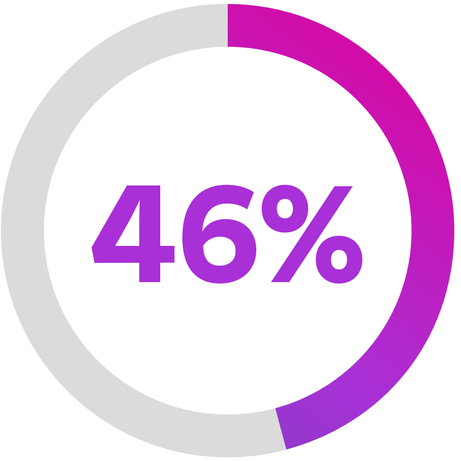
3. Resilient Unified Communications is Critical

Hybrid work makes UC indispensable, but performance gaps create inefficiencies and frustrations, demanding urgent attention from IT and business leaders.

Both business leaders and technical specialists spend on average 42% of their work week using unified communications tools (UC tools) such as video calls, messaging platforms, and collaborative workspaces. As these applications become more deeply embedded in daily work streams, 65% of companies state that they are essential to effective operations. However, at present, only 46% (and just 38% of technical specialists) are very satisfied with their performance.



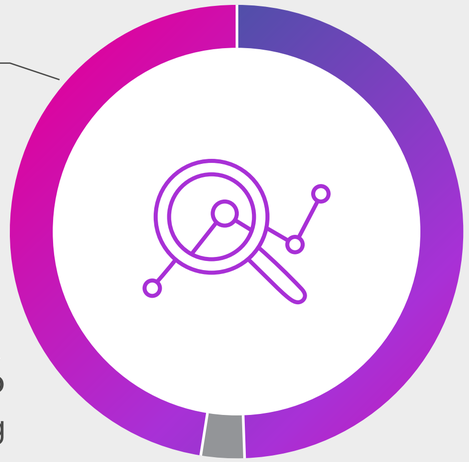
On average, employees spend 42% of their work week using **Unified Communications Tools**



Only 46% are **Very Satisfied** with the current performance of their UC tools and applications

Four out of ten enterprises (43%) report performance issues with their UC tools. The number one issue is limited visibility into usage, performance or user behavior (48%). Other common challenges to delivering a high-quality UC service are performance issues such as dropped calls and inconsistent connectivity (43%), and the need for a high level of support (37%).

Current UC monitoring capabilities



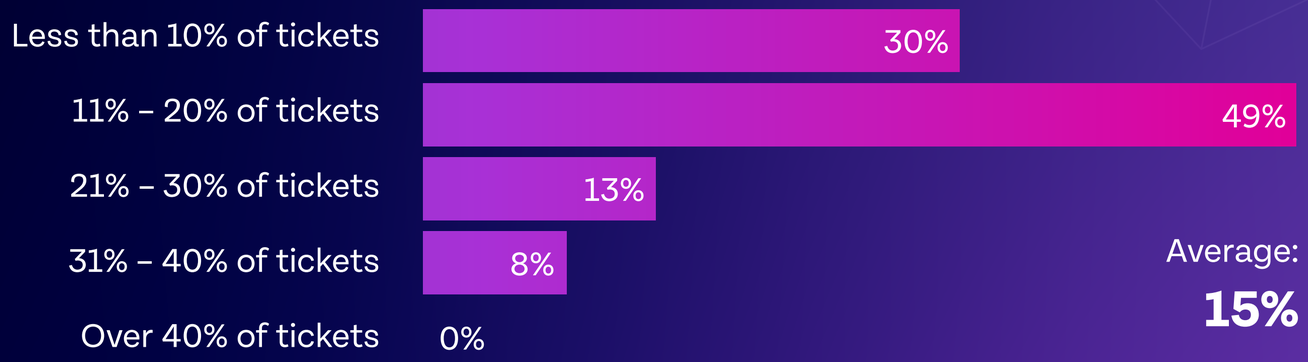
47%
Full monitoring with proactive real-time alerting and diagnostics during the call

49%
Basic or reactive monitoring after the call has ended

3%
Not monitoring currently, but we plan to monitor UC performance in the future

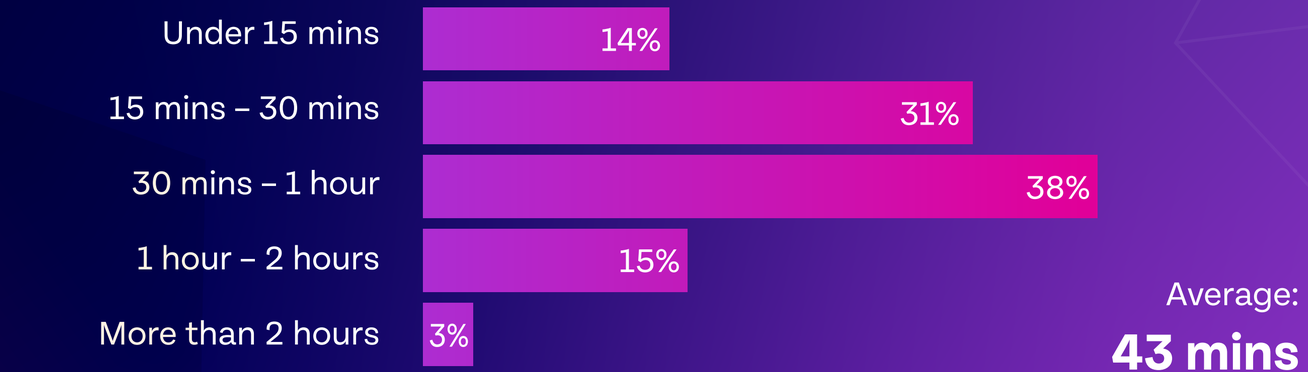
Companies admit that they lack the ability to see what's happening in real-time with these systems, despite their critical role. Nearly half (49%) are only capable of basic or reactive monitoring after the call has ended, without any real-time alerting or diagnostics during the call.

Average % of help desk tickets from UC



Average:
15%

Average duration to resolve each UC ticket



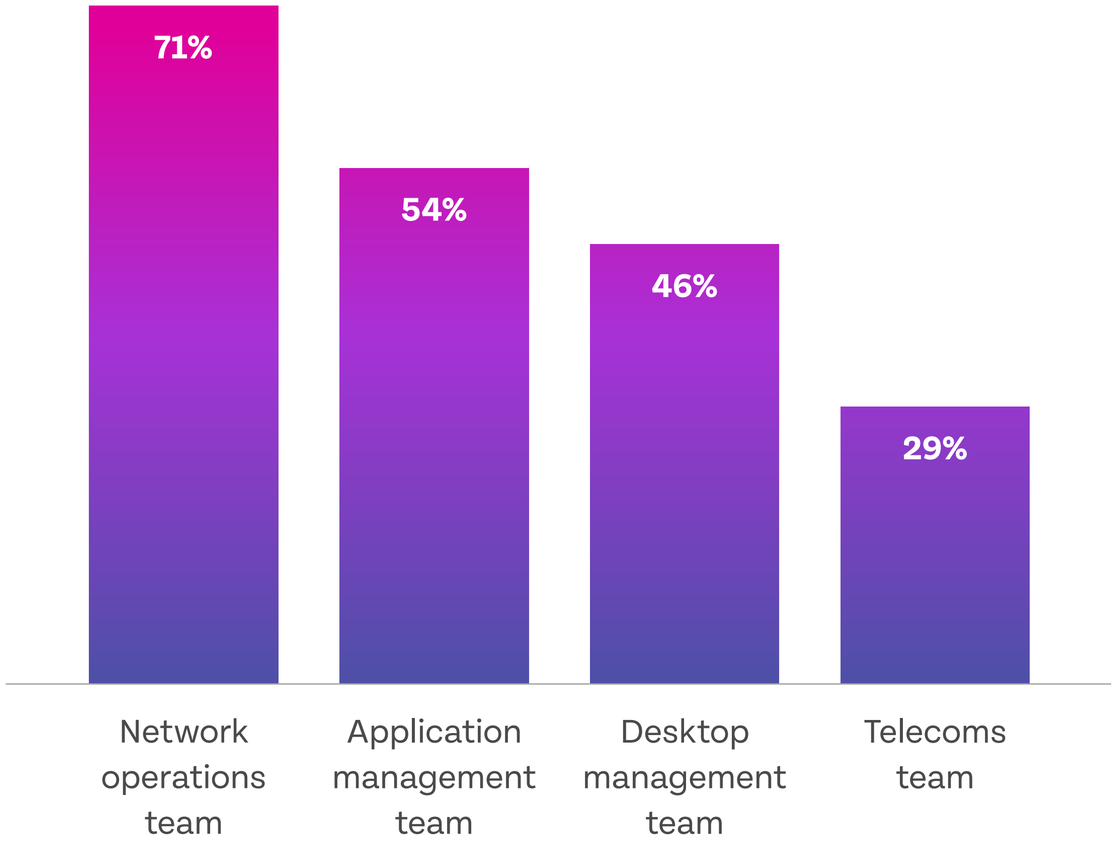
Average:
43 mins

Our data suggests that UC-related issues may be the number one source of IT help desk tickets based on frequency. The survey pool of 400 technical specialists report that the UC-related issues account for 15% of support requests. These tickets are not only frequent but also ‘sticky’, taking an average of 43 minutes to solve, an extremely long time in comparison with other help desk requests, and thus a costly issue. One in five tickets related to UC issues requires more than an hour to resolve.

Support for unified communications applications is spread throughout organizations, distributed across multiple teams, which may make it difficult to identify and assess problems. While the majority of support sits within network operations teams (71%), companies are also relying on application management teams (54%), desktop management (46%), and telecoms teams (29%). This data shows that most organizations are using more than one team to oversee UC tools.

In a post-2020 world, working patterns have undergone a fundamental shift. The new remote and hybrid models have transformed UC tools into mission-critical applications. When employees are relying so heavily on these tools, the low performance satisfaction uncovered by our research becomes a serious challenge. Technical specialists are especially attuned to these issues, in contrast with leadership.

Teams responsible for managing UC tools and applications



4. OpenTelemetry: Now a Strategic Requirement

Once niche, OpenTelemetry is now a strategic observability pillar, delivering visibility, vendor flexibility, and AI enablement.

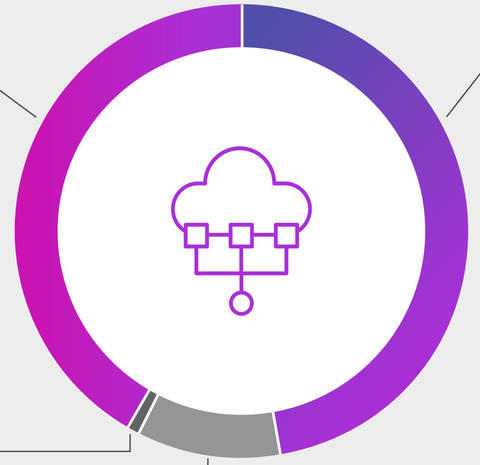
OpenTelemetry (OTel) is an observability framework used to standardize data collection across systems. Despite a lack of hype in the marketplace, our research found that its ability to enhance visibility and coordination across complex, decentralized software systems is making it increasingly important to organizations.

95%

Believe the ability to correlate OpenTelemetry data across domains is critical to their observability strategy

We found that 88% of enterprises have begun to implement the OTel standard across their IT system and infrastructure, including 41% who have fully implemented it and 47% who have partially implemented it. The vast majority (95%) say that the ability to correlate OTel data across domains (e.g. applications, infrastructure, and user experience) is important to their observability strategy, including 44% who identify it as very important.

Current OpenTelemetry adoption



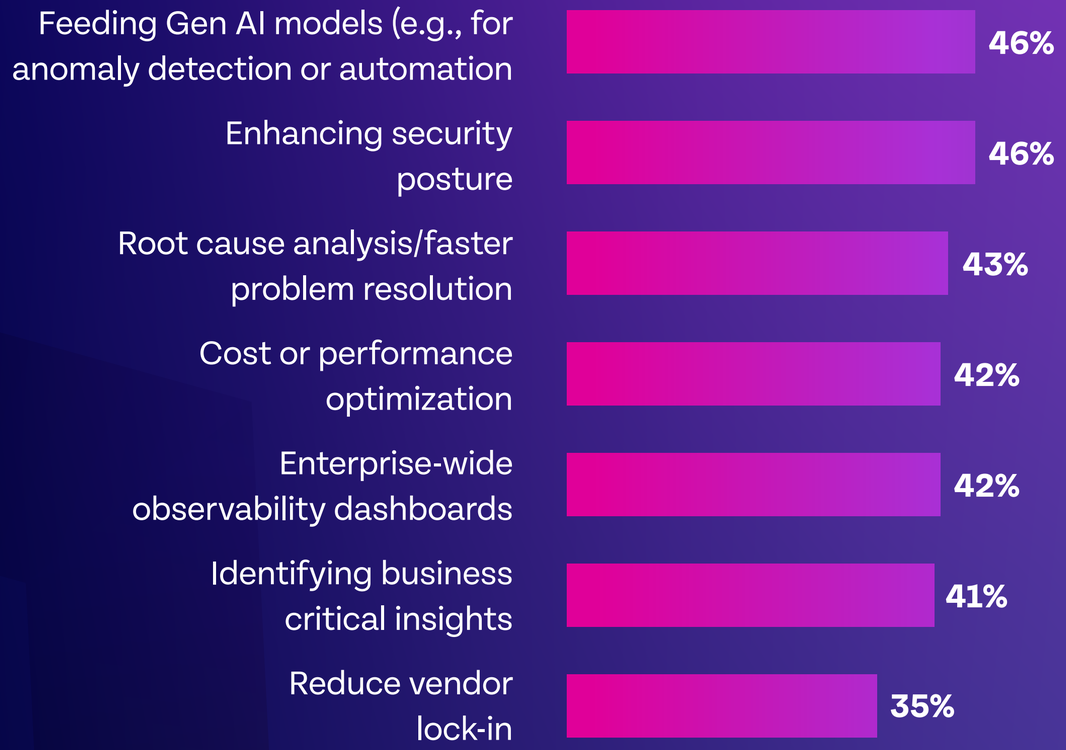
41 %
We have **fully implemented** the OTel standard across the entire organization

47%
We have **partially implemented** the OTel standard in selected systems or business units

1%
No current plans to have the OTel standard

10%
We **plan to adopt** the OTel standard in the next 24 months

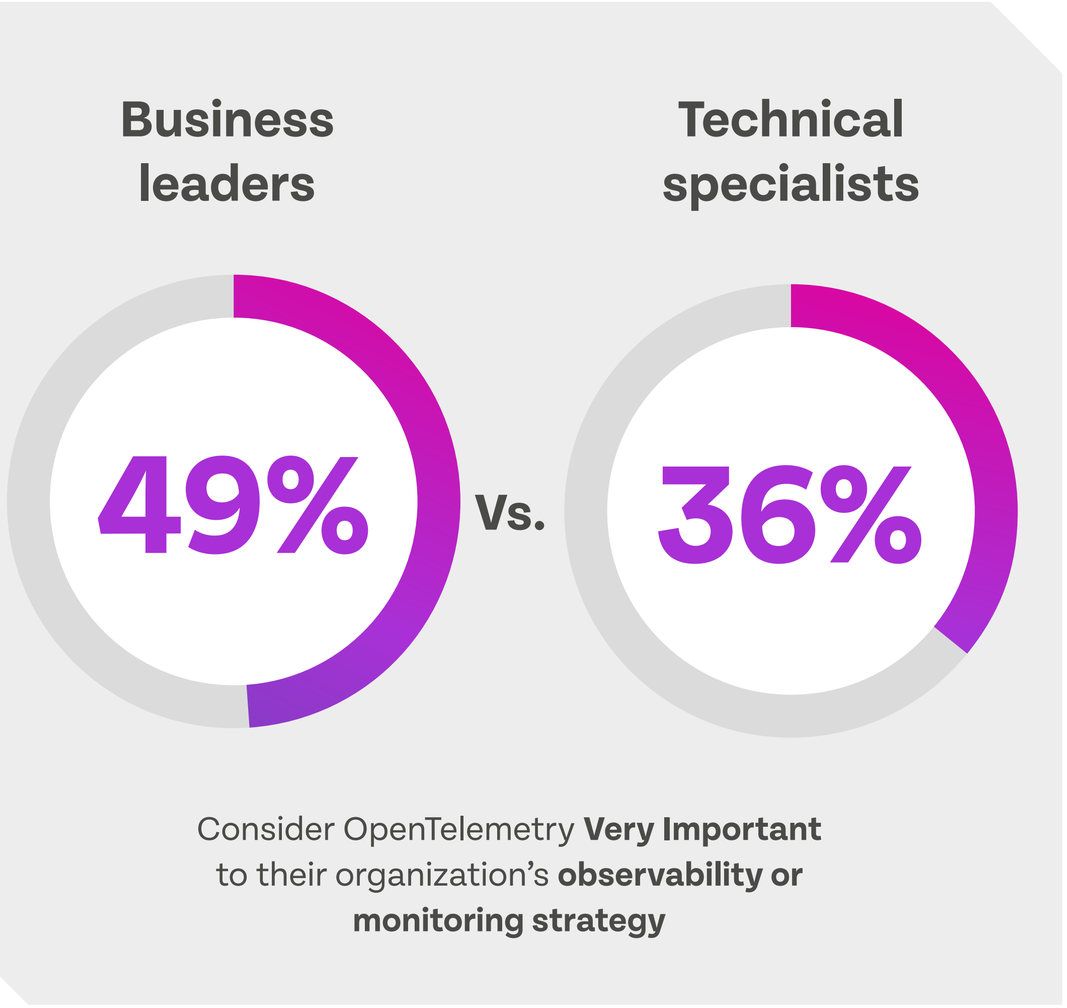
Top OpenTelemetry use cases include feeding Gen AI, enhancing security, and faster problem resolution



The adoption of OTel is being driven by several factors. When asked to select their top three use cases for the framework, respondents say they want to use it to feed generative AI models, e.g. for anomaly detection or automation (46%), enhance security (46%), and for root cause analysis, i.e. identifying the sources of issues (43%).

Increasingly, the use of OTel is seen as a strategic priority. Nine out of ten enterprises (94%) agree that OTel will be the foundation for future initiatives such as AI-driven automation. Respondents link the rise of OTel with the need to support integration across increasingly complex, distributed IT environments. Almost all (98%) agree that using OTel helps reduce vendor lock-in and grants more flexibility in selecting tools.

Interestingly, there appears to be a role-based perception gap where OTel is concerned. When respondents assess how important OTel is to their organization's observability strategy, business leaders are 13 points ahead of technical specialists. Nearly half (49%) of business leaders say OTel is very important to their strategy, compared to just 36% of technical specialists, suggesting that leadership sees centralized data visibility as a more urgent strategic priority than those closer to implementation.



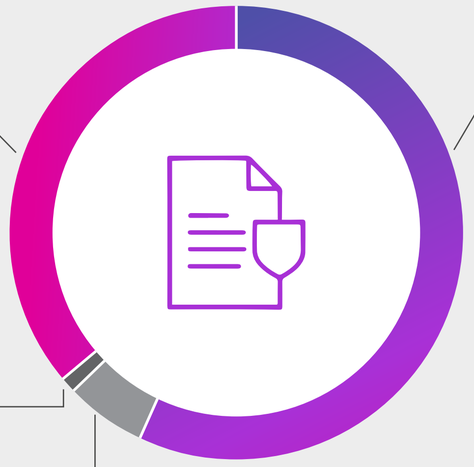
We can observe a similar phenomenon related to our research into whether the standard has been implemented in organizations. Almost half of business leaders (47%) believe that OTel has been fully implemented in their enterprise, in contrast to less than a third of technical specialists (30%). When asked if OTel is already a mandate within their company, over a third (36%) agree. However, there's a 14-point gap between leaders and technical specialists, with 41% of leaders believing that OTel is mandated in contrast with only 27% of technical specialists.

OTel is clearly gaining traction as a strategic focus. Over half of companies (57%) expect that it will be widely adopted within the next two years.

Here, the gap between business leaders and technical specialists is reversed, with technical specialists more likely to see OTel on the horizon rather than already fully implemented. Two thirds of technical specialists (64%) and about half of leaders (53%) predict that OTel will become a common standard in 2027. Presumably this is because leaders believe that it's already here.

Almost all agree that OTel will become a foundational standard for enterprises in the observability space. Nine out of ten respondents (94%) state that full support for OTel will become a requirement for every vendor in the observability space in the next 24 months.

OTel as a current or future mandate



36%
It's **already a mandate**

57%
Expect it to become a mandate within the next 24 months

1%
Believe OTel is not relevant to their organization's strategy

6%
Believe it will only be optional or situational

94%

Believe full OTel support will be mandatory for all vendors within 24 months

5. AI Demands a High Performance Network

As AI scales, data movement is mission-critical; cost, security, and performance are critical enablers of data movement across cloud, edge, and data centers.

Data movement is central to the utilization of the latest AI technologies, whether in training AI models, analyzing data for the purposes of inference, or implementing agentic AI.

Nine in ten enterprises (91%) view the movement and sharing of AI data as vital to their AI strategy – 33% overall (and 38% of leaders) say it is critical, while 58% call it very important.

Importance of AI data movement and sharing

Somewhat important
- relevant, but not a primary driver

Very important
- a major consideration in most AI decisions

Critical
- foundational to how we design and execute AI

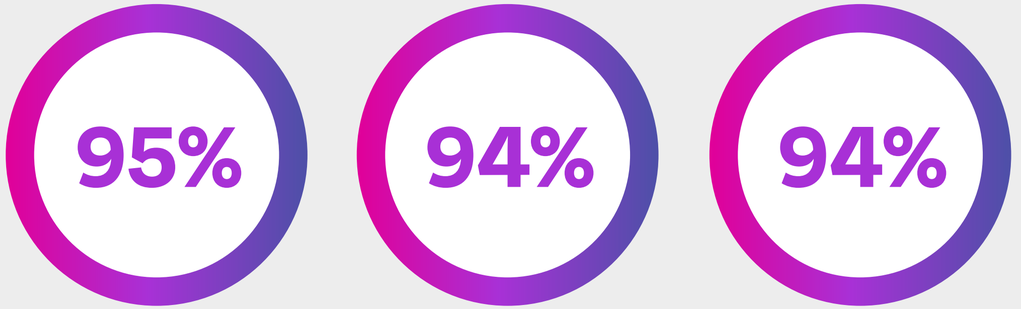
For this reason, companies are building infrastructure to support AI data needs. 70% say that they expect a growing portion of their corporate and operational business data will be considered as AI-related over the next three years. Three quarters of organizations (75%) plan to establish an AI data repository strategy by 2028.

Our research shows that when organizations attempt to move and scale data across environments, the top three considerations are the cost of data movement and storage (cited by 95% of respondents), security and compliance (94%), and network performance and reliability (94%). Success factors for AI also reflect these priorities, with 78% of respondents – rising to 81% among business leaders – identifying network performance and security as critical components of their AI strategy.

75%

Plan to establish an **AI data repository strategy** within the next 3 years

Cost, security, and network reliability top the list of critical enablers for scalable, cross-environment data movement

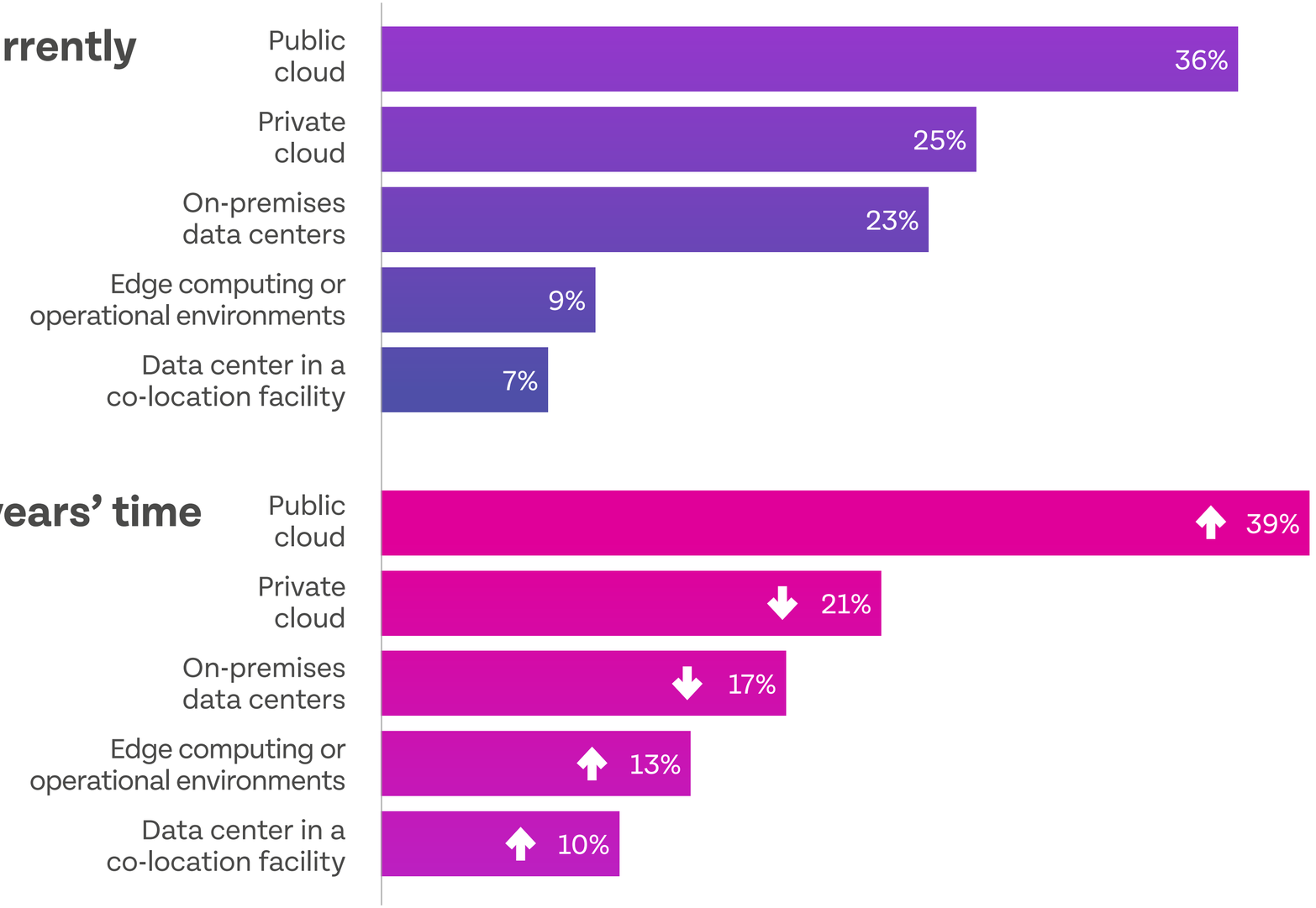


Cost of data movement and storage

Data security and compliance

Network performance and reliability

Shifting landscape of AI data storage by 2028



These factors will remain top of mind over the next three years, as the AI data landscape shifts to more distributed architectures. Organizations expect public cloud and edge environments to grow by 2028.

Currently, companies are storing 36% of their AI-related data in the public cloud, but by 2028 they expect this to be 39%, while private cloud data storage will drop from 25% to 21% and storage in on-premises data centers from 23% to 17%. AI-related data storage in edge computing environments is expected to grow from 9% to 13% and in co-location facilities from 7% to 10%.

Conclusion: Strategies for AI Success

There is tremendous momentum for AI adoption, with transformative potential for organizations. Yet many still face challenges. Our research highlights AI-readiness gaps and provides insights into strategies for success.

1. **Align leadership vision with technical execution**

   Companies report high investment in AI technologies and higher than expected returns, but only one in ten initiatives has been fully rolled out. A key reason is the gap between executive optimism and technical realities. Alignment – via cross-functional governance, shared KPIs, and joint decision-making – helps avoid overpromising and underdelivering.

2. **Ensure AI-readiness with a strategy for data quality**

   Only 34% of enterprises rate their data as excellent in terms of its relevance and suitability for AI, and less than half rate their data as excellent for AI across all metrics. Investing in data quality initiatives and establishing a central repository builds a solid foundation for scaling AI. Furthermore, to access immediate insights and make rapid decisions, businesses need access to high quality data in real-time.

3. **Consolidate and move from tool sprawl to a unified platform**

   Organizations use an average of 13 observability tools, creating complex workflows with a negative impact on productivity. Without planning and a strategy for consolidation, the adoption and deployment of AI technologies will worsen this problem. By consolidating tools and vendors and pursuing an integrated platform, companies can reduce complexity and cost and operate more strategically.

4. **Embed OpenTelemetry (OTel) for AI-driven observability**

   More than half of companies (57%) expect OTel will be mandated within two years, and 94% say that it will become a foundational standard for organizations within the observability space. It enhances data quality, interoperability, and AI-driven automation. Accelerating OTel adoption ensures organizations maintain a competitive edge.

5. **Implement real-time UC monitoring**

   UC tools are critical but cause 15% of helpdesk tickets. Real-time monitoring of UC sessions provides data and telemetry to fix issues faster and with AI-driven automation, organizations can shift to fixing issues in real-time. Companies that implement real-time monitoring and diagnostics for UC tools can consolidate support under a single accountable team and invest in proactive monitoring with real-time alerting and diagnostics during the call.

Riverbed – Delivering Practical AI to Optimize Digital Experiences and IT Operations

Riverbed is helping organizations globally improve user experiences and IT operations. With extensive experience in data collection and AI and machine learning, Riverbed's AI is safe, secure and accurate, and supports AIOps and digital experience efforts.

The Riverbed Platform provides open full-stack observability with full-fidelity data, enabling customers to optimize digital experiences by using AI to prevent, identify, and resolve IT issues. The Riverbed Platform consists of next-generation AIOps, Observability and Acceleration solutions.

Unified Observability:
Riverbed collects the broadest range of telemetry across the modern IT landscape, with observability spanning: networks, infrastructure, digital experience, devices, apps, and with NPM+ and Aternity Mobile Experience, visibility into blinds spots including Zero Trust architectures, public cloud, remote work and enterprise-owned mobile devices. Riverbed IQ Ops, an AIOps solution, utilizes AI-driven correlation and automation to rapidly identify and remediate issues fast, with limited human intervention.

Application Acceleration:
Riverbed offers industry-leading Acceleration solutions that provide fast, agile, secure acceleration of any app, over any network, to users anywhere. With Riverbed Acceleration solutions, customers can take action based on insights from the observability tools. Riverbed Acceleration solutions include: SteelHead, SteelHead Cloud, SteelHead Mobile, SteelHead RS, and SteelHead SaaS.

About Riverbed

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About Coleman Parkes

Coleman Parkes is a full-service B2B market research agency specializing in IT/technology studies, targeting senior decision makers in SMB to large enterprises across multiple sectors globally. For more information, contact IanBeston@coleman-parkes.co.uk

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