Member Pulse Report 2024

Trends for technology and participation behavior in the Google Cloud customer community.

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Executive Summary

OVERVIEW

Background

Our recent research study—the C2C Member Pulse—examines trends in the role of Google Cloud for our community members. Our analysis sheds light on the prevalent skill gaps within organizations, their priorities, and their challenges with cloud technology.

We also recognized the significance of exploring the role of community in supporting and enriching the overall cloud experience. A vibrant and supportive community is pivotal in knowledge sharing, problem-solving, and collaboration. The perspectives we collected—from customer and partners across various roles—will be instrumental in how C2C addresses member concerns, improves future programs, and empowers individuals.

This is the second year of this research and where applicable in this report, trended data is shown. This year's survey fielded from March through April 2024 and respondents were provided with incentives for completing the survey.

OVERVIEW

Objectives

This year's study looked to a few key areas:

Technology and Transformation

Investigate year-over-year trends for organizational priorities, challenges, influence over technology purchases. Plus, explore new areas around generative AI, including involvement levels, value of and trust in generative AI tools, and the impact of AI over the past year.

Organizational Upskilling and Professional Development

Understand how missing skill sets at organizations correlate with priorities and challenges and how skills are sourced to fill those gaps.

Google Cloud Investment and Solution Usage

Observe which solution areas from Google Cloud are popular among C2C members, including usage growth and overall changes in investment levels in Google Cloud at members' organizations.

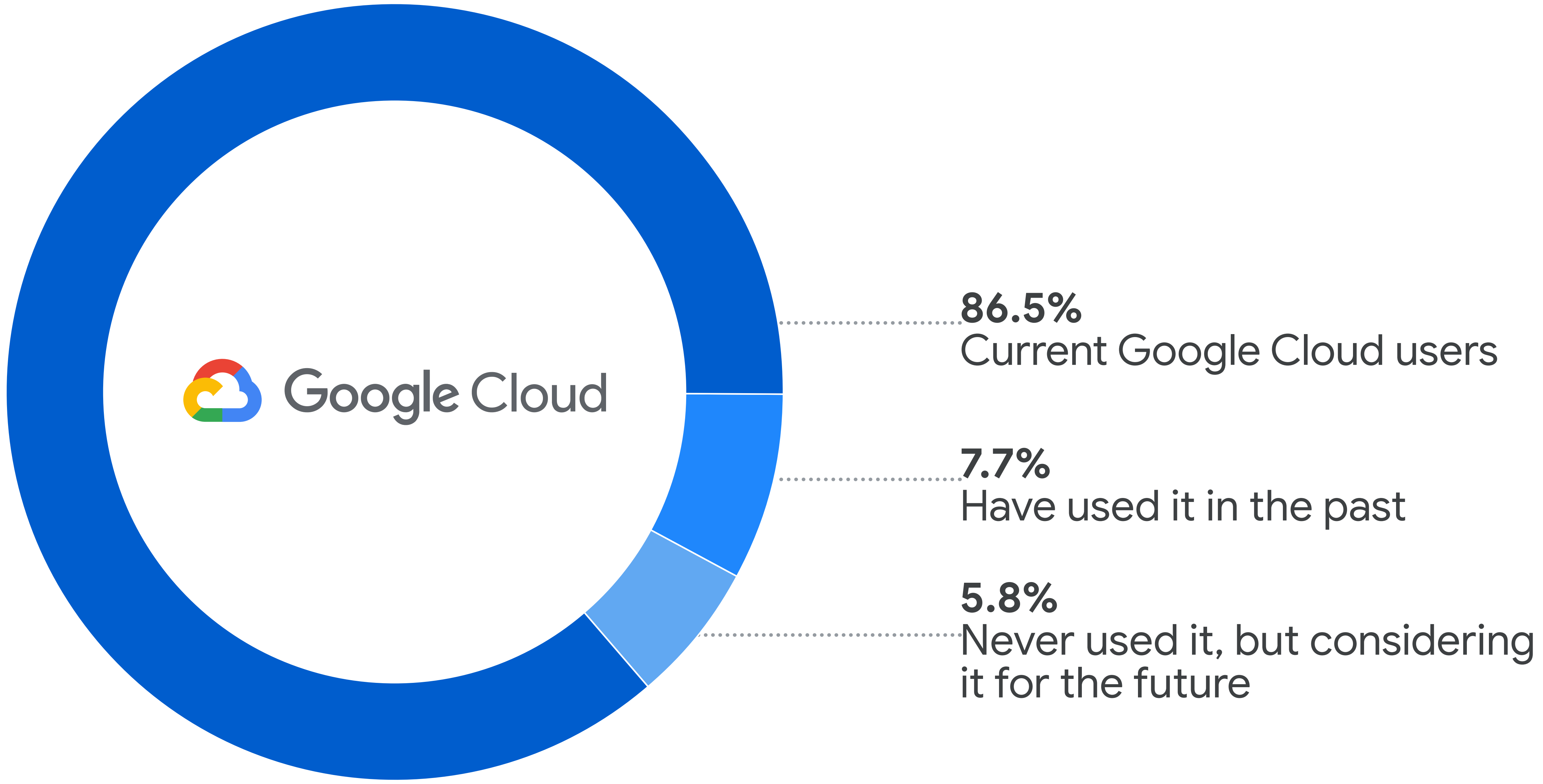
Community Engagement and Member Behavior

Contextualize community preferences in event participation, communication channels, and peer networking so that C2C can better serve members' needs.

Audience

C2C received a total of 482 completed responses for this survey. Respondents needed to pass qualifying questions to identify themselves as Google Cloud users from Google Cloud partner and customer companies.

Participant firmographic and demographic information is similar that of the 2023 study, making for comprable audiences when comparing and contrasting year-over-year data.



Q: DO YOU USE PRODUCTS, SERVICES, OR OTHER SOLUTIONS FROM GOOGLE CLOUD AS PART OF THE TECHNOLOGY STACK IN YOUR DEPARTMENT OR ORGANIZATION? (N=482)

KEY FINDINGS

Survey Takeaways

AI and Machine Learning Overtake Center Stage

AI and ML are now the top priorities for C2C members, but reaching their full potential requires smoother workflows and clearer cost benefits.

→ Read More

Budgets Tighten, But Cloud Commitment Remains Strong

Though respondents' organizations are facing fewer challenges in 2024 compared to 2023, budgetary concerns only continue to grow.

→ Read More

Organizational Upskilling Evolves Beyond Certifications

Google Cloud training remains valuable to fill organizational skill gaps, but the C2C community is emerging as a key resource for upskilling.

→ Read More

Community Cravings: Learning, Connection, and Career Growth

Your fellow C2C members are eagerly awaiting connection! Results show a clear desire more holistic experiences that go beyond just content.

→ Read More

KEY FINDINGS

AI and Machine Learning Overtake Center Stage

While cloud infrastructure and data analytics remain crucial, AI and ML are now the top focus areas for C2C members. These technologies saw the most notable increase in prioritization at members' organizations and usage among Google Cloud solutions year-over-year. This trend is expected to persist, with generative AI and LLMs driving most respondents' digital transformation efforts over the next two years.

However, exploring generative AI and its practical uses reveals complexities. Despite near-universal adoption and a perceived skills advantage, many members struggle with seamless integration. Smoother workflow integrations, enhanced trust and data security, and clearer cost-savings are needed to truly unlock the potential value of the AI landscape.

KEY FINDINGS

Organizational Upskilling Evolves Beyond Certifications

While training and certifications sourced directly from Google Cloud remain a cornerstone for enhancing both individual and organizational skill sets, the focus for upskilling has shifted in 2024.

Compared to 2023, there's a notable decrease in reported skill gaps, suggesting a more stabilized workforce or increased upskilling efforts. This is further supported by the growing role of the C2C community in skill development. Over a third of respondents now utilize the C2C platform to improve or acquire skills, highlighting its growing importance as a learning resource.

However, a key skill set gap persists: training and deploying machine learning (ML) models. C2C has a unique opportunity to collaborate with its members and partners—and with Google Cloud—to focus on training sessions and skill development initiatives around ML skills. Member organizations should look to community to bridge this critical gap and unlock the full potential of Google Cloud technologies.

KEY FINDINGS

Budgets Tighten, But Cloud Commitment Remains Strong

Overall, respondents reported fewer organizational challenges compared to 2023. However, budget constraints have emerged as a notable exception, presenting more difficulties this year and surfacing as the top challenge experienced.

Despite rising uncertainty and budget concerns, this hasn't impacted the year-over-year use of Google Cloud solutions, with products and services around application modernization being the most popular investment. Additionally, cost is no longer a major factor influencing event attendance for cloud professionals. **This suggests a continued commitment to Google Cloud, even in a tighter economic climate.**

KEY FINDINGS

Community Cravings: Learning, Connection, and Career Growth

Building skills and fostering connections are top priorities for C2C members. They value training, education, and opportunities to connect with peers and Google Cloud leadership, particularly at in-person events. This highlights a desire for a more holistic experience beyond just informative content.

While internal skill gaps have stabilized, C2C remains a key resource among other options like Google Cloud resources, licenses and certifications, or other learning programs. **Hearing directly from our community, we infuse member insights to build further and empower members by addressing areas they tell us are important.**

That includes the formats of the experiences we offer. For instance, face-to-face events are preferred for networking and accessing job-related information; conversely, virtual events offer flexibility to those who don't have the personal time available to attend in person. In either case, C2C focuses on compelling content—with topics like cloud optimization, data analytics, and artificial intelligence—and facilitates connections between peers.

Transformation and Upskilling

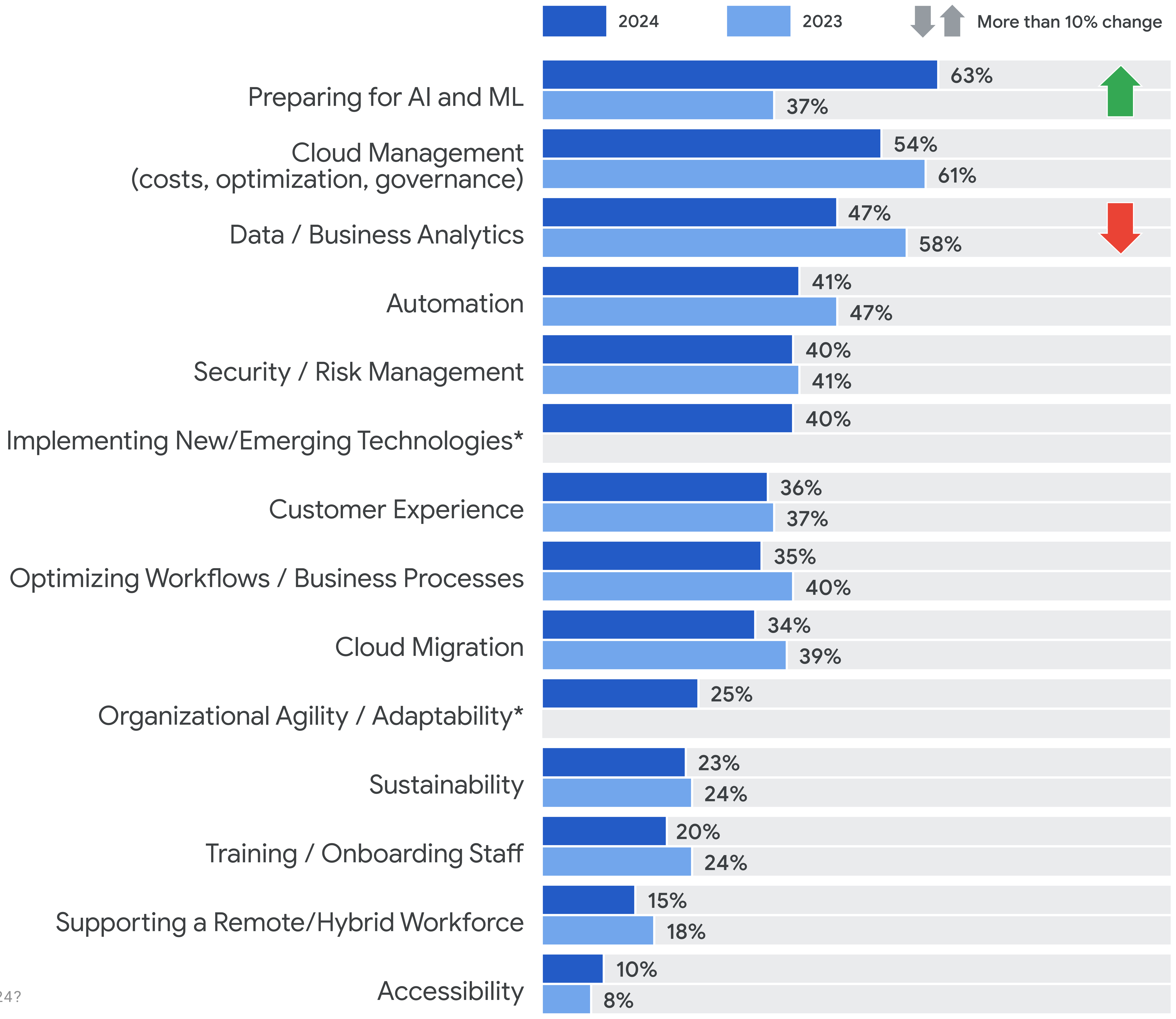
PRIORITIES AND CHALLENGES

Areas of Focus

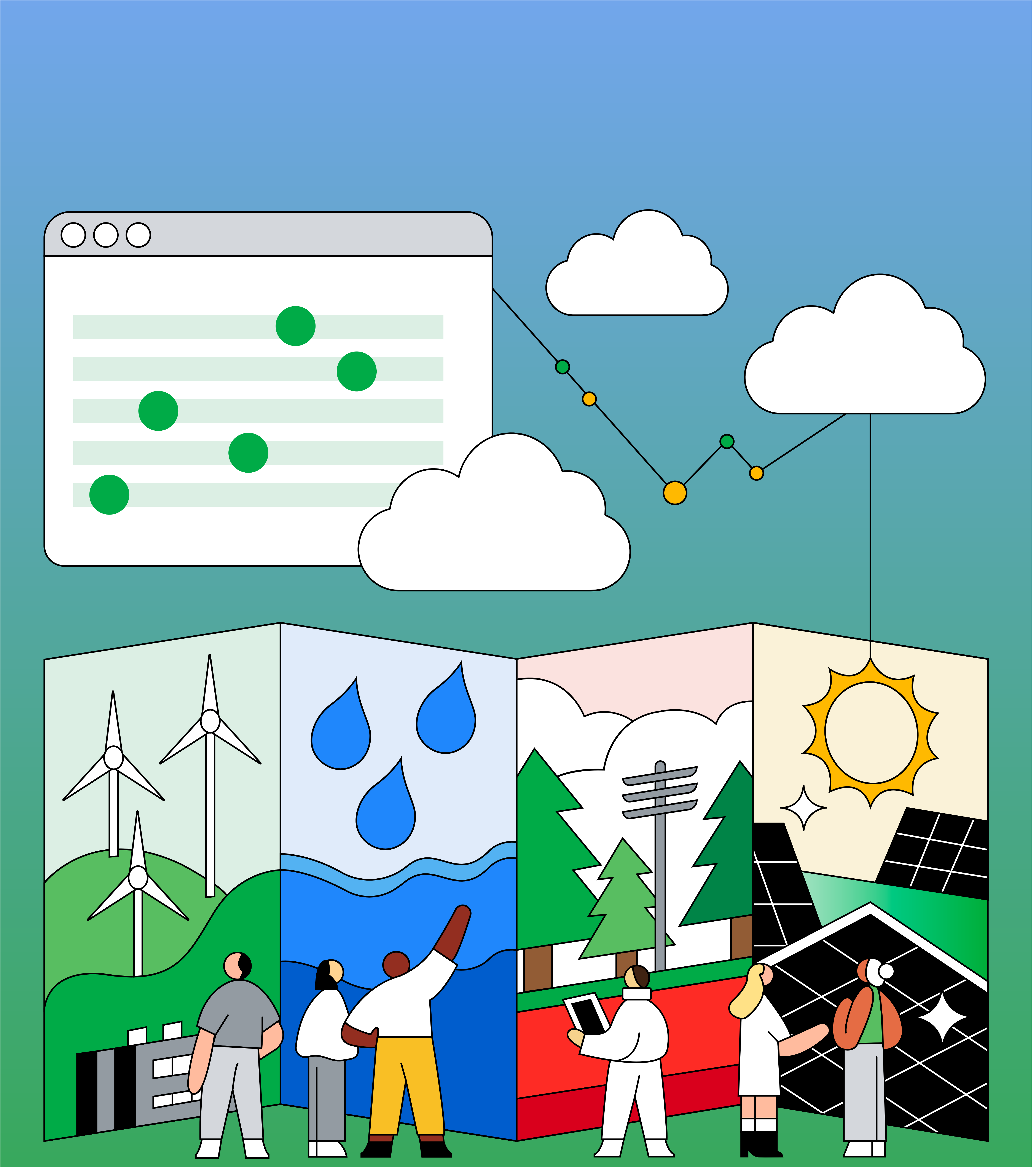
Kicking off with one of the biggest changes over the past year is the **skyrocketing of AI and ML preparation to the top of members' priority lists**. While generative AI was around for our 2023 survey, it had yet to encompass the ins and outs of daily life, and its growing allure is likely to blame for this leap.

As we said in 2023, AI was on the radar, but the *why* hadn't yet been defined for members to move on from discovery phase to implementation. One compelling reason: members are likely using AI and ML to address data, business analytics, and automation—each of which saw declined emphasis in the year-over-year shifts.

That said, the order of each area is generally consistent with 2023, and more topical or people-oriented areas—like sustainability, training, and supporting remote workforces—are of lesser focus.



Q: WHAT ARE THE AREAS OF FOCUS THAT ARE MOST IMPORTANT TO YOUR ORGANIZATION IN 2024? (PLEASE SELECT ALL THAT APPLY.) (N=482 2024, N=461 2023) *OPTION ADDED IN 2024*



PRIORITIES AND CHALLENGES

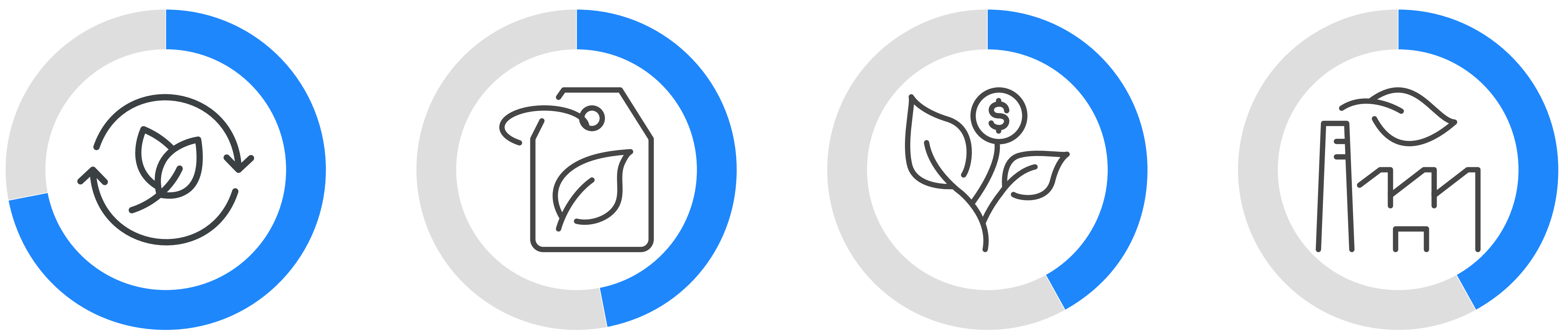
A Closer Look at Sustainability

Sustainability is on the radar for some respondents, but focus remains stagnant year-over-year. Those not focused on sustainability expect to be in the next 2 to 5 years. **Unless sustainability is embedded in the organization respondents work for, this focus is being pushed further down the road.**

23% ...is a focus area

77% ...is not a focus area

Top Reasons Organizations Are Focusing on Sustainability



72% It has always been an important focus

47% To gain a competitive edge

42% To promote cost savings

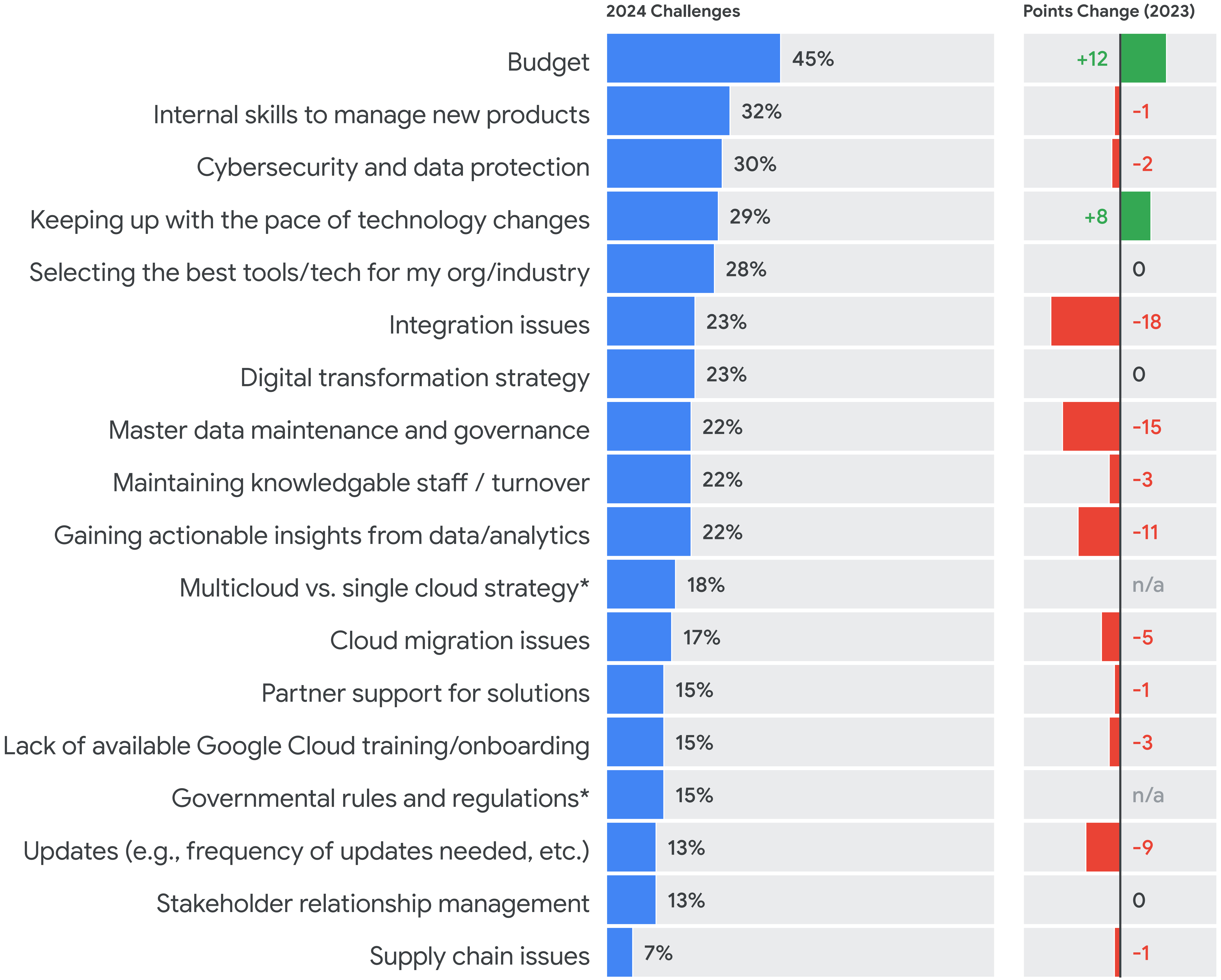
42% Important for the industry I work in

Q: WHICH OF THE FOLLOWING BEST DESCRIBES WHY YOUR ORGANIZATION IS FOCUSING ON SUSTAINABILITY? (PLEASE SELECT ALL THAT APPLY.) (N=113 2024, N=112 2023) | Q: WHEN DO YOU EXPECT SUSTAINABILITY TO BECOME A MORE IMPORTANT FOCUS AREA FOR YOUR ORGANIZATION? (N=369 2024, N=349 2023)

Top Challenges

Hearing from our members on their organizational priorities and challenges helps us tackle the *now* and the *here*—it's all specific to our community, not generalized based on tech hype in various news outlets. Luckily for our members, **overall, respondents are facing significantly fewer challenges in 2024**, especially regarding some of the top challenges reported in 2023: integrations, master data maintenance and governance, and gaining actionable insights from data and analytics.

However, budget challenges are the exception, having risen as the top threat respondents face and consistently topping the list across all organization sizes, signifying widespread increases in budgetary concerns. This can affect the adoption of new tech, the skill sets available to keep up with said new tech, and investment levels in Google Cloud.

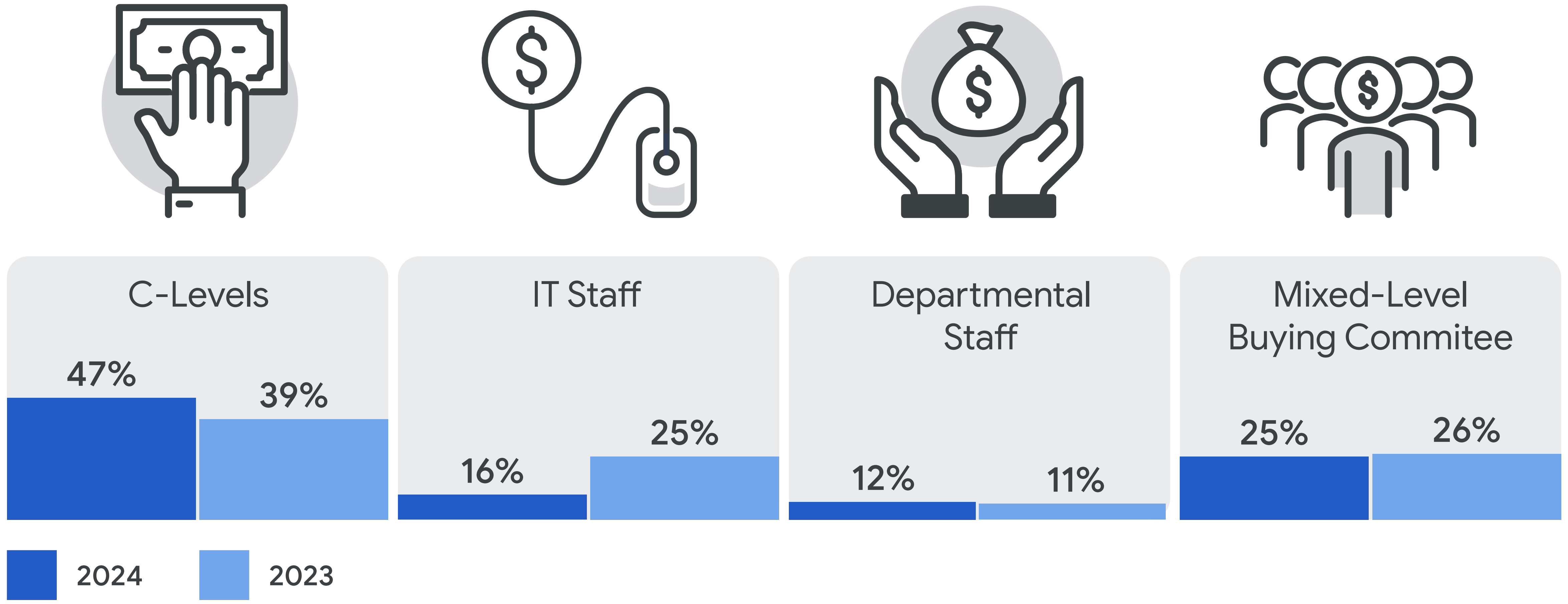


Q: WHICH OF THE FOLLOWING CHALLENGES IS YOUR ORGANIZATION CURRENTLY EXPERIENCING? (PLEASE SELECT ALL THAT APPLY.)(N=482 2024, N=461 2023) **OPTION ADDED IN 2024*

KEEPING UP WITH TECHNOLOGY

Influence Over Technology Purchases

As budget concerns increase, organizations are likely scrutinizing technology investments more closely. **This heightened financial pressure may be driving an upward shift in purchasing power**. C-level executives, with their broader view of the organization's goals and financial health, are likely taking a more active role in technology decisions.



This could be a strategic move to ensure these investments directly align with overall business objectives. Conversely, IT staff's influence on purchasing decisions might decrease as cost-saving measures are prioritized.

Q: WHEN IT COMES TO BUYING NEW TECHNOLOGY FOR YOUR ORGANIZATION, WHICH OF THE FOLLOWING BEST DESCRIBES WHO IS RESPONSIBLE FOR THOSE DECISIONS? (N=482 2024, N=461 2023)

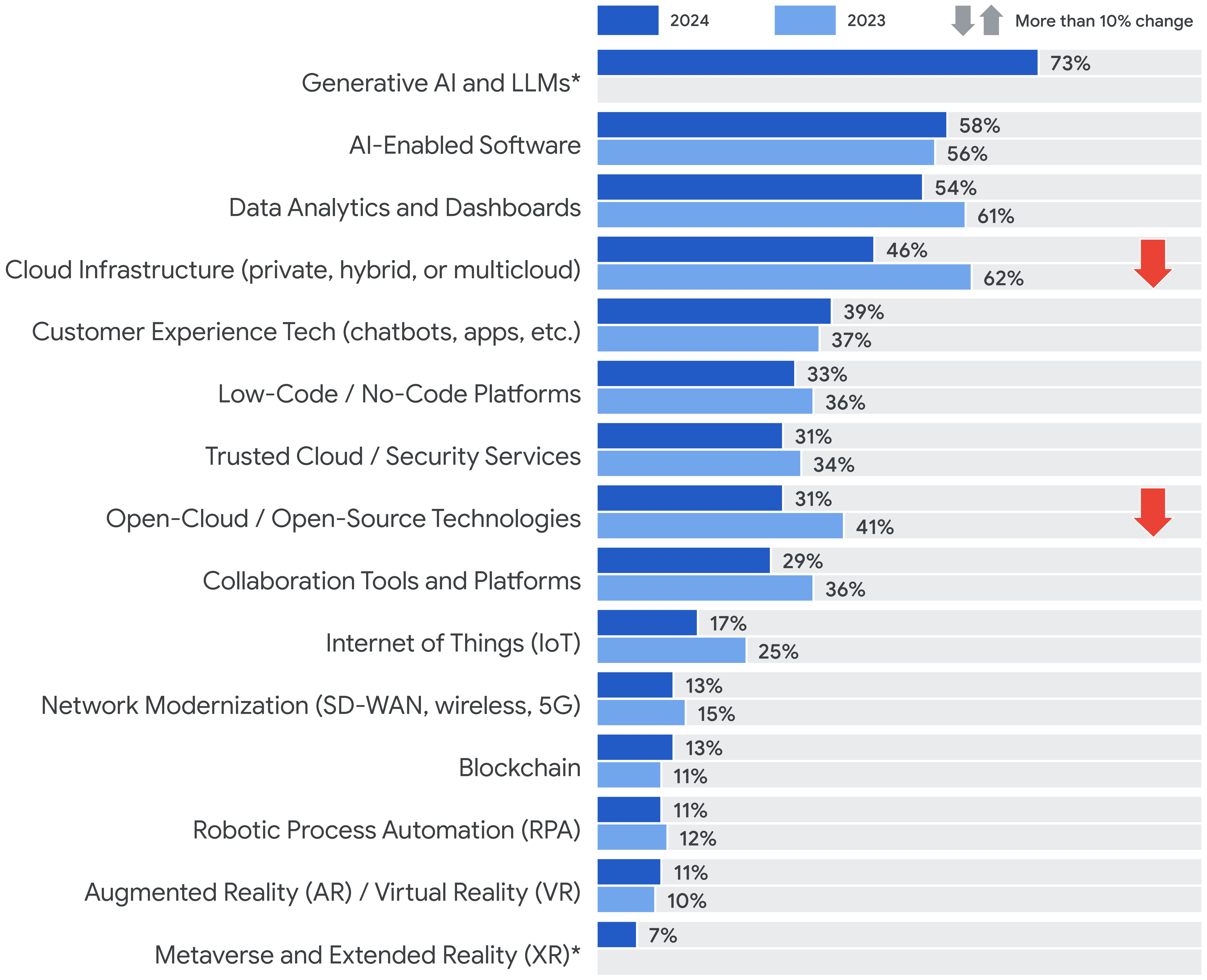
KEEPING UP WITH TECHNOLOGY

Ranking Impact

There's no denying the organizational impact of constantly evolving technology in the cloud and beyond. As the Google Cloud customer community, we want to ensure we're matching our members' needs in upskilling and staying on top of the latest in cloud.

While established technologies like data analytics and cloud infrastructure—both of which held the most interest in 2023—remain crucial, **generative AI and LLMs will overwhelmingly drive members' digital transformation efforts in the next two years**. consistent with the shifts in top focus areas.

Aligned with results from 2023, more emerging forms of technology, like IoT, blockchain, or AR and VR are all noted least by respondents.



Q: WHICH OF THESE TECHNOLOGIES, IF ANY, DO YOU EXPECT TO GREATLY AFFECT YOUR ORGANIZATION'S DIGITAL TRANSFORMATION EFFORTS IN THE NEXT TWO YEARS? (PLEASE SELECT ALL THAT APPLY.)
(N=482 2024, N=461 2023) *OPTION ADDED IN 2024

KEEPING UP WITH TECHNOLOGY

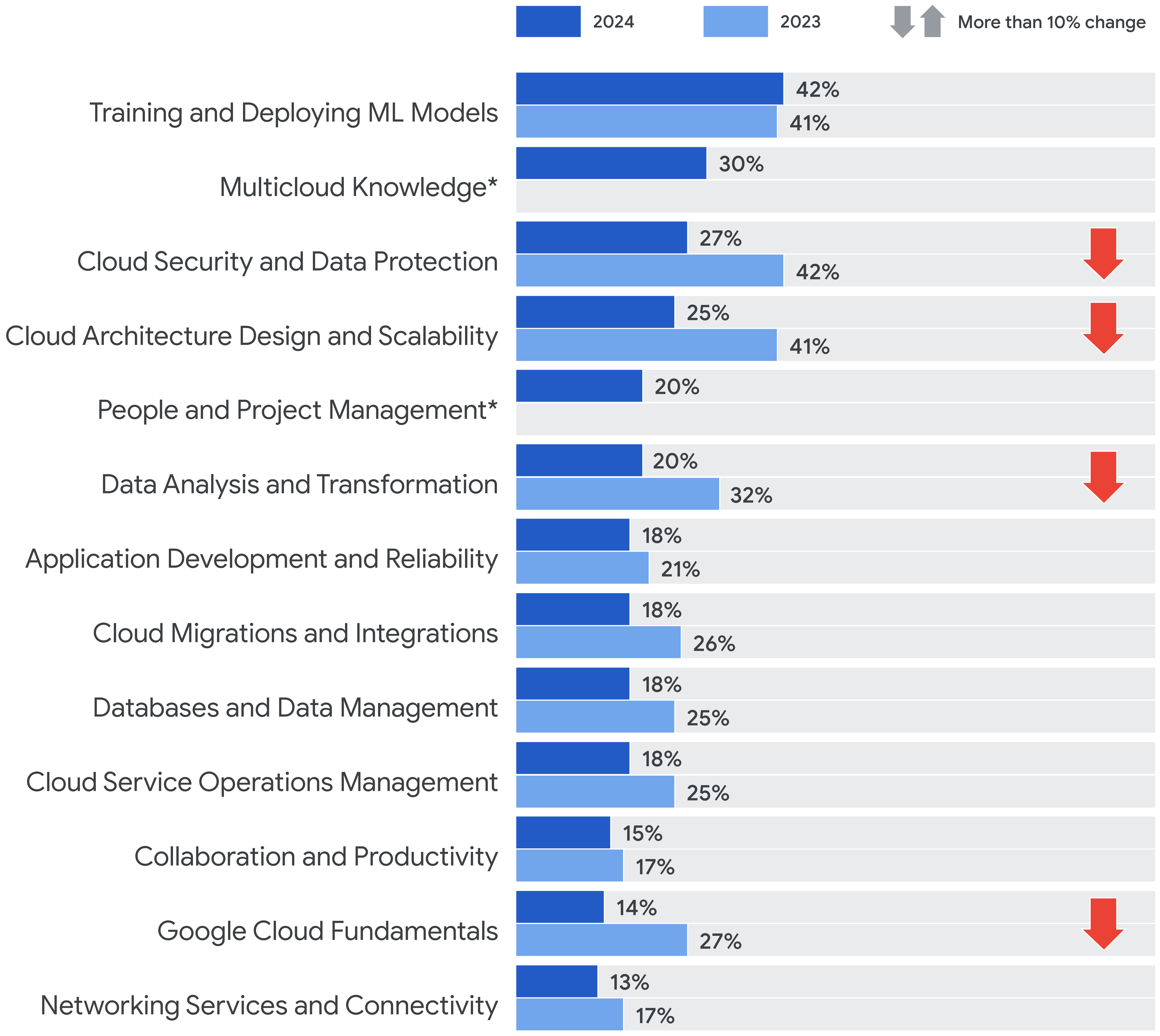
Missing Skill Sets

Organizations are facing pressure to either find internal skills to manage new products or risk falling behind their competitors. Employees are running their own skills-boost race against the demands of their employers for incredibly complicated areas.

Overall, notably fewer skill sets are missing or lacking in 2024 compared to last year. The availability of workers who can train and deploy ML models continues to be a deficit, but other skill gaps—like cloud security, data protection, and cloud architecture design and scalability—have narrowed.

The most notable shift lies in the need for multicloud expertise. Introduced in 2024, it is one of the most prominent internal gaps, highlighting the importance of navigating and managing diverse cloud environments to optimize resources and meet evolving business needs.

Q: OUT OF THE FOLLOWING FOCUS AREAS, PLEASE SELECT WHERE INTERNAL SKILL SETS ARE MISSING OR LACKING AT YOUR ORGANIZATION. (PLEASE SELECT ALL THAT APPLY.) (N=482 2024, N=461 2023) **OPTION ADDED IN 2024. 12% SELECTED 'THERE ARE NO INTERNAL SKILLSETS MISSING OR LACKING AT MY ORGANIZATION.'*



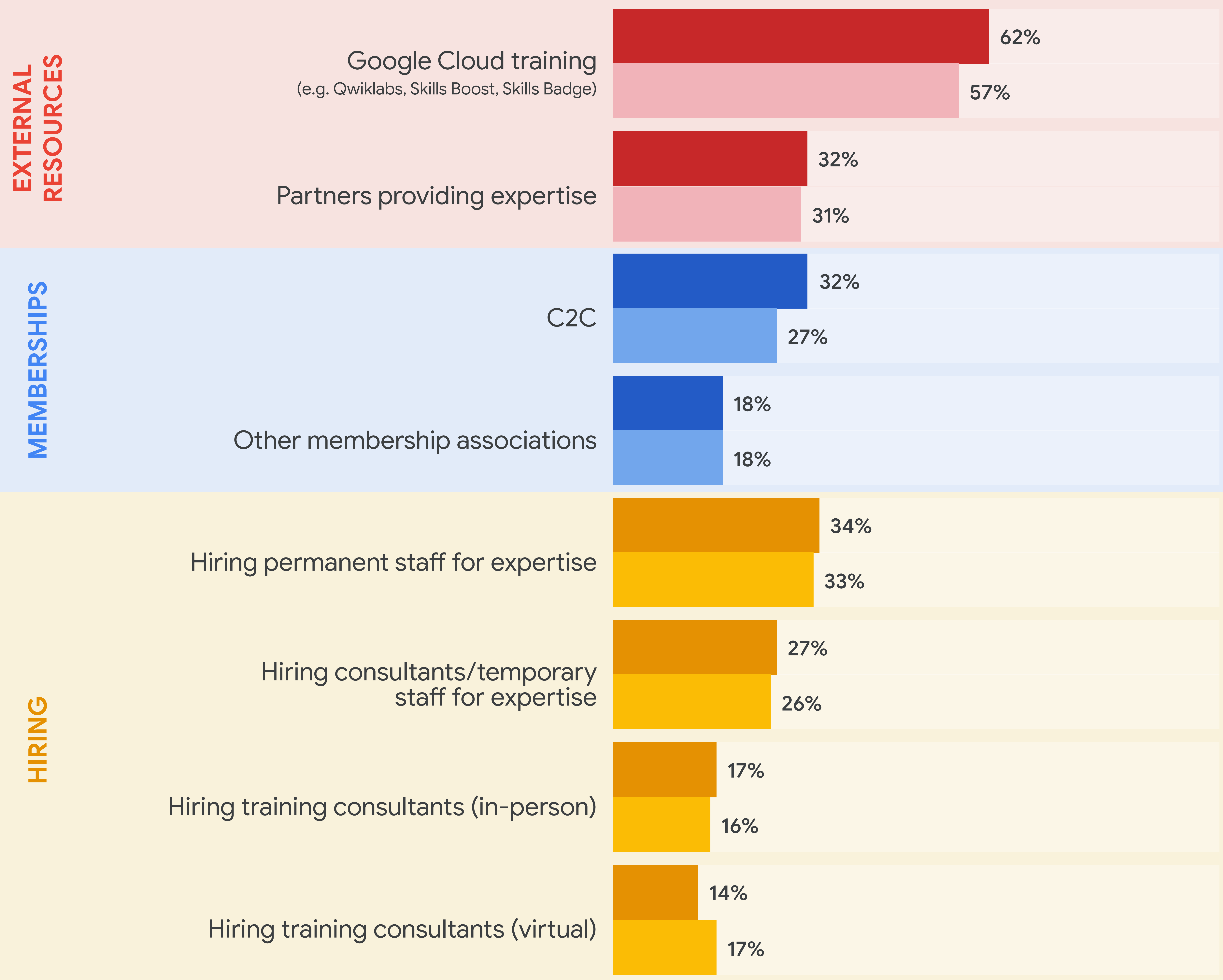
KEEPING UP WITH TECHNOLOGY

Filling Skill Gaps

Cloud skills aren't born out of nowhere—multiple resources exist for organizations to acquire talent to address their business needs.

For example, Google Cloud has dedicated training courses for many of their products and services, which companies may encourage their employees to take advantage of. **Both learning on the job and hiring new staff remain popular approaches for boosting skills.**

C2C has also experienced a 5% increase year-over-year as a resource for organizations. As C2C garners reputation and continues to aid in education and networking for Google Cloud users, higher numbers of employees per organization are benefiting from membership.



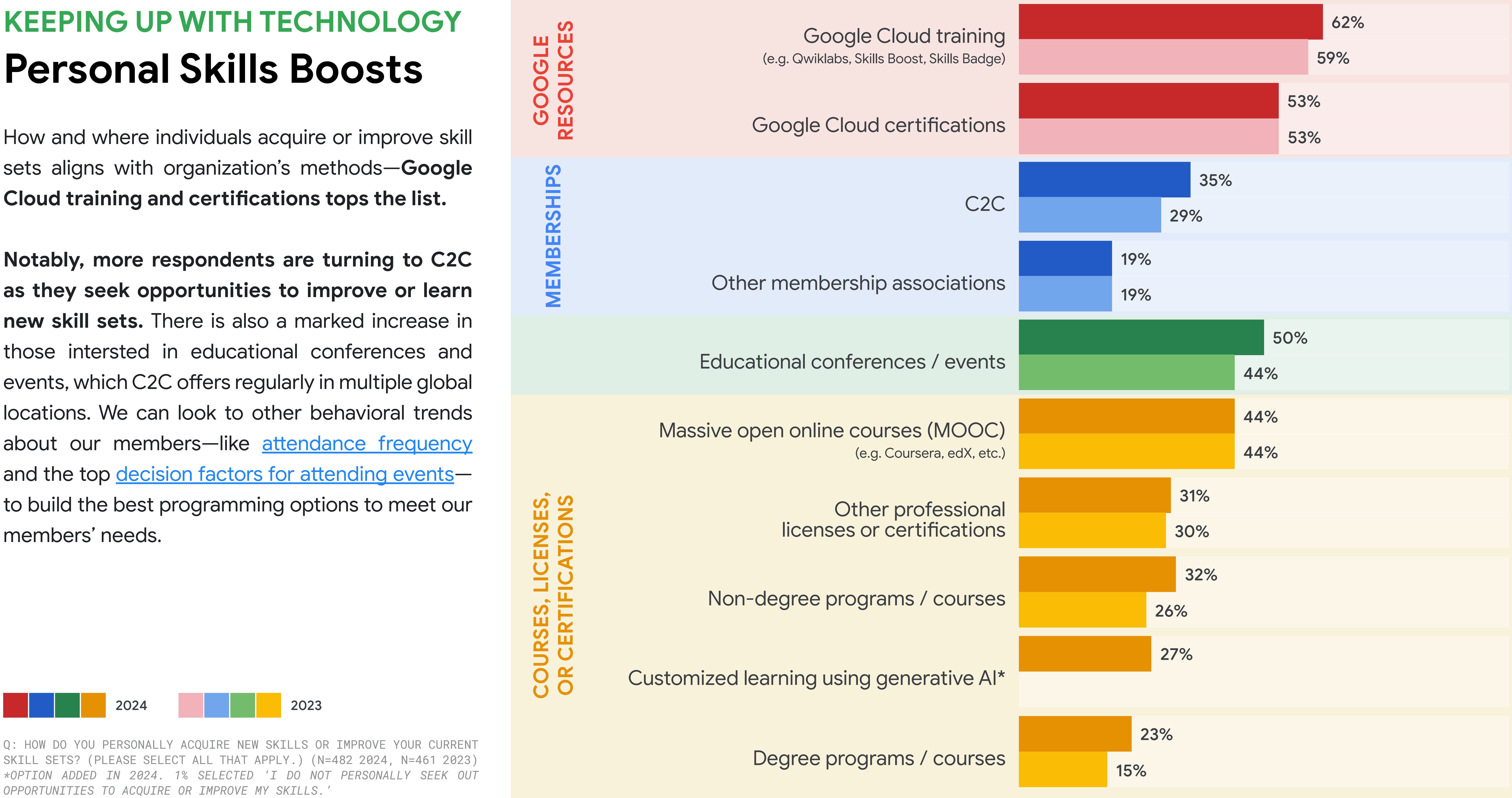
Q: PLEASE SELECT HOW/WHERE YOUR ORGANIZATION CURRENTLY ACQUIRES NEW SKILLS OR IMPROVES CURRENT SKILL SETS. (SELECT ALL THAT APPLY.) (N=482 2024, N=461 2023) *3% SELECTED 'MY ORGANIZATION DOES NOT HAVE ANY INITIATIVES IN PLACE TO ACQUIRE NEW SKILLS OR IMPROVE SKILL SETS.'*

KEEPING UP WITH TECHNOLOGY

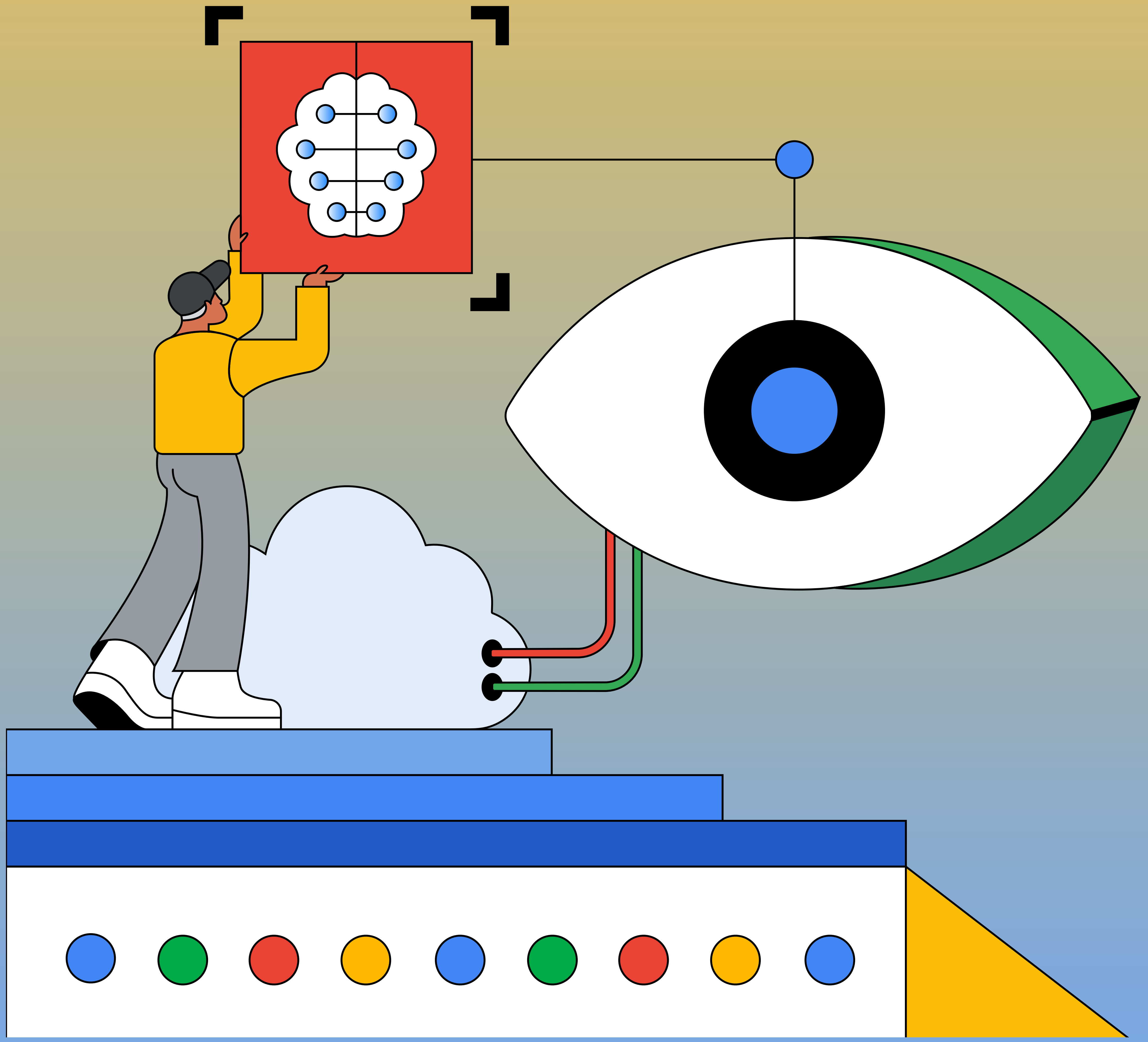
Personal Skills Boosts

How and where individuals acquire or improve skill sets aligns with organization's methods—**Google Cloud training and certifications tops the list.**

Notably, more respondents are turning to C2C as they seek opportunities to improve or learn new skill sets. There is also a marked increase in those intersted in educational conferences and events, which C2C offers regularly in multiple global locations. We can look to other behavioral trends about our members—like attendance frequency and the top decision factors for attending events—to build the best programming options to meet our members' needs.



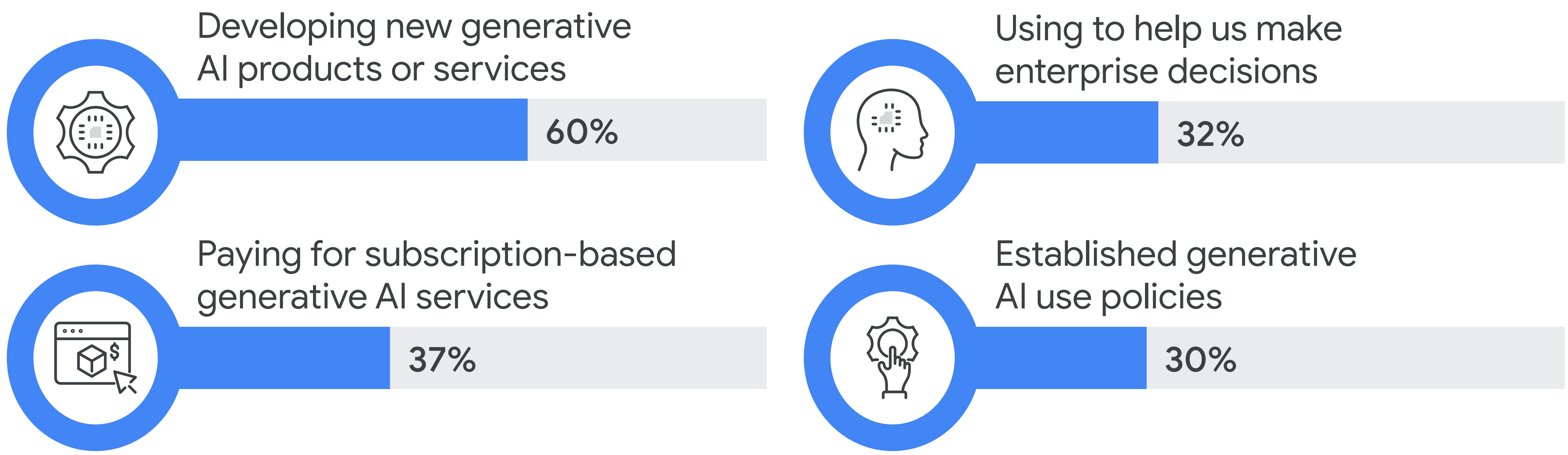
Q: HOW DO YOU PERSONALLY ACQUIRE NEW SKILLS OR IMPROVE YOUR CURRENT SKILL SETS? (PLEASE SELECT ALL THAT APPLY.) (N=482 2024, N=461 2023)
*OPTION ADDED IN 2024. 1% SELECTED 'I DO NOT PERSONALLY SEEK OUT OPPORTUNITIES TO ACQUIRE OR IMPROVE MY SKILLS.'



GENERATIVE AI

Levels of Involvement

We already saw generative AI dominating in organizational priorities and technological impact. But what does that look like in practice? We introduced new questions this year to understand broadly how our members are involved.



Since our October 2023 survey, where we asked members similar questions, **there has been a jump both in the development new generative AI products and in the use of generative AI to help make enterprise decisions** (38% to 60%, and 25% to 32%, respectively). The development of new generative AI is relatively consistent across organizational sizes, though respondents from organizations with more than 1,000 employees do highlight this most at 66%.

Q: WHICH OF THE FOLLOWING BEST DESCRIBES HOW YOUR ORGANIZATION IS INVOLVED WITH GENERATIVE AI TECHNOLOGIES? (SELECT ALL THAT APPLY.) (N=482) *5% SELECTED 'MY COMPANY IS NOT INVOLVED IN ANYTHING RELATED TO GENERATIVE AI.' ; 6% SELECTED 'OTHER'; 5% SELECTED 'DON'T KNOW/NOT SURE'*

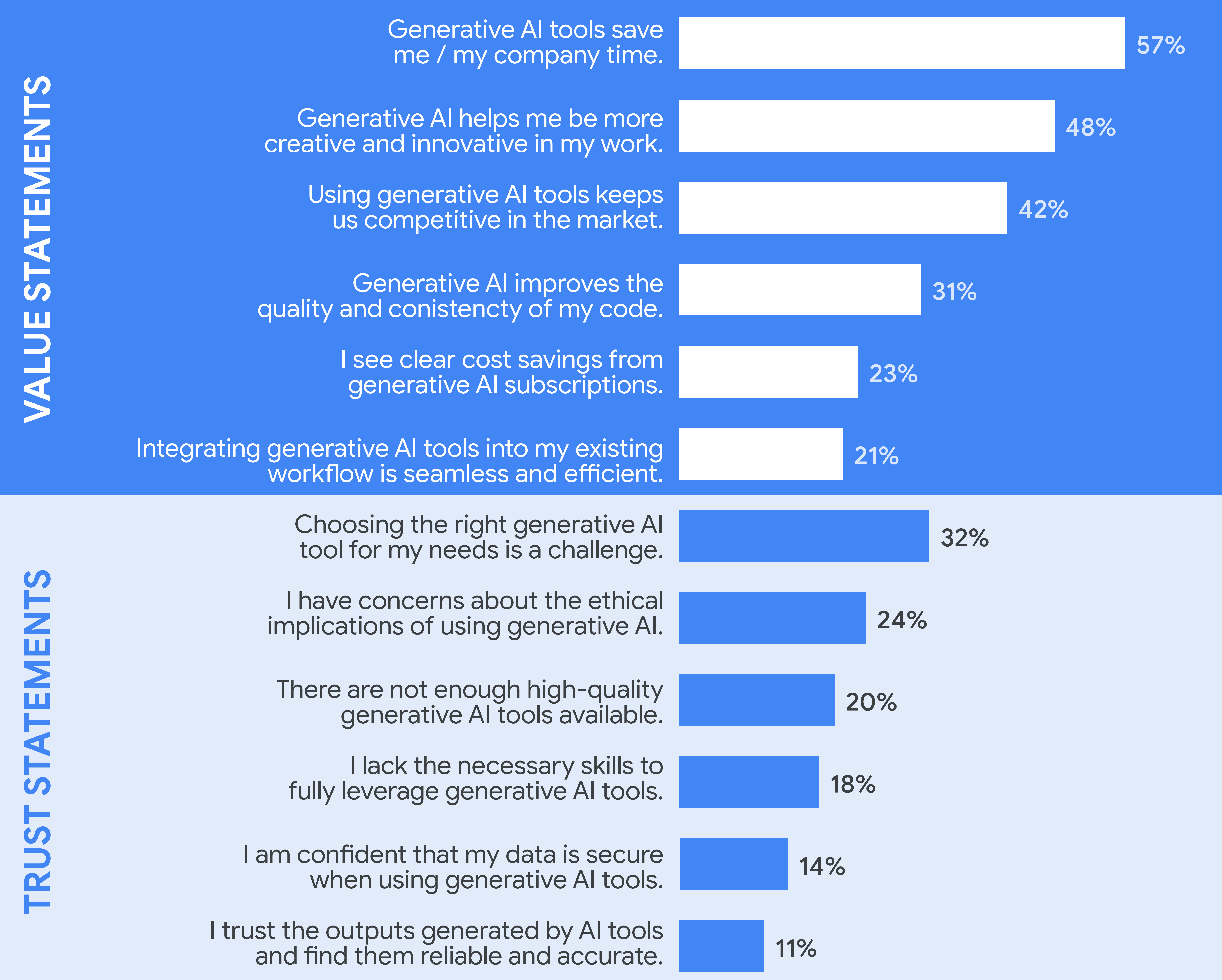
GENERATIVE AI

Value and Trust

Over a third of respondents are diving headfirst into generative AI subscriptions. However, a crucial gap exists: policy. Most companies have yet to establish guidelines for using these powerful technologies, leaving members caught between trust and value. Budget concerns further complicate the picture.

While only 14% feel confident about data security and 11% trust the accuracy of outputs, a whopping 57% still acknowledge the time-saving benefits. **This suggests a trade-off: efficiency and innovation versus data security and reliable results.**

The good news? The skills gap is fairly narrow. With only 18% reportedly lacking the skills to navigate gen AI, respondents are increasingly aware of both the risks and rewards. This presents an opportunity to bridge the policy gap and unlock the true potential of generative AI while mitigating potential downsides.



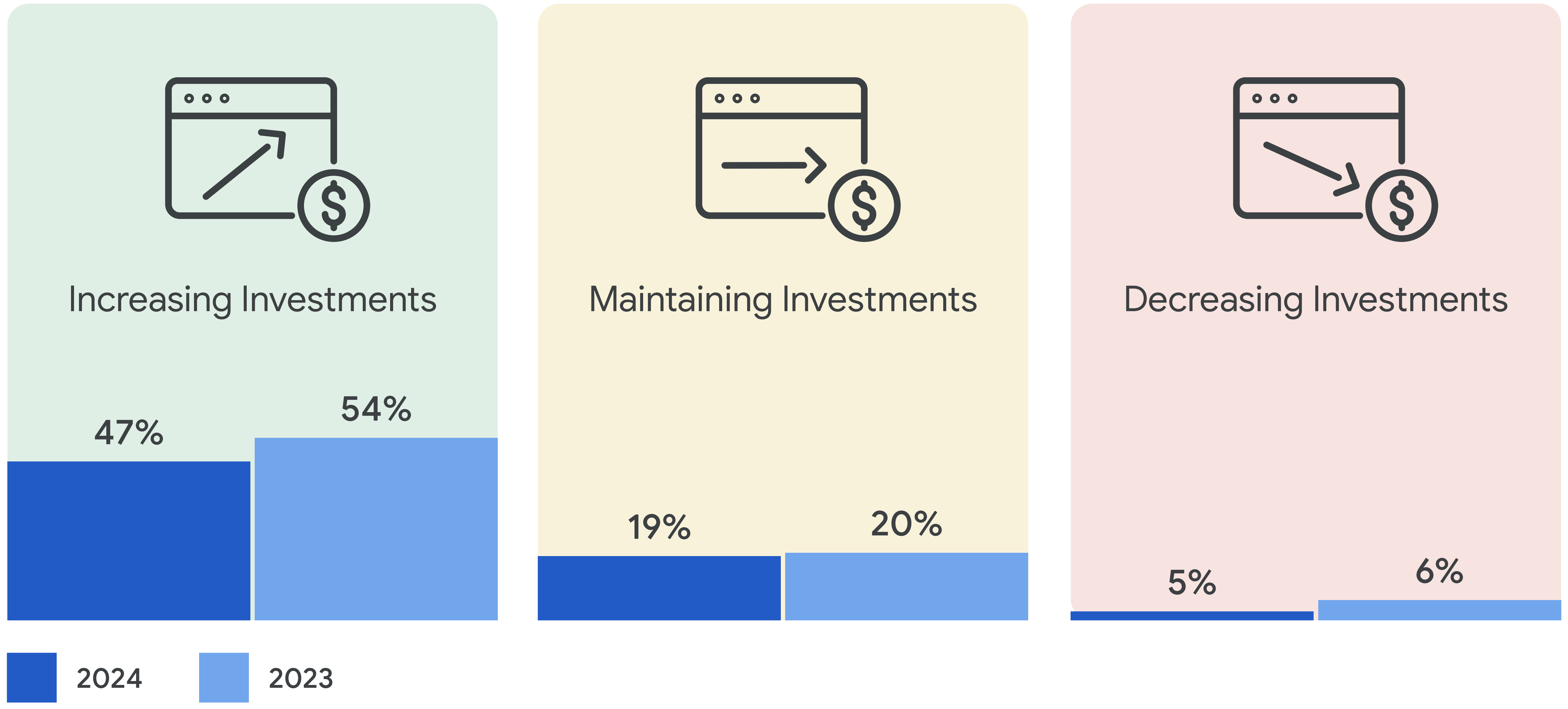
Q: WHICH OF FOLLOWING STATEMENTS ACCURATELY DESCRIBE YOUR EXPERIENCE WITH GENERATIVE AI TOOLS IN YOUR PROFESSIONAL WORK? (SELECT ALL THAT ARE TRUE.) (N=482) *5% SELECTED 'I HAVE NOT YET USED ANY GENERATIVE AI TOOLS.' TRUST AND VALUE CATEGORIZATIONS NOT SHOWN TO RESPONDENTS.*

THE ROLE OF GOOGLE CLOUD

Changing Investment Levels

Aligning with 2023, the bulk of respondents are increasing investments in Google Cloud. However, distribution across all options have decreased due to more respondents being uncertain about their organization's Google Cloud investments, consistent with the significant rise of budget challenges in 2024. This uncertaintly is likely tied to the shift in technology purchasing power.

The majority of respondents across all organizational sizes are making more investments into Google Cloud.



Q: HOW IS YOUR INNOVATION AND TECHNOLOGY JOURNEY AFFECTING THE ROLE OF GOOGLE CLOUD IN YOUR TECHNOLOGY STACK? (N=482 2024, N=461 2023) *30% SELECTED 'DON'T KNOW / NOT SURE'*

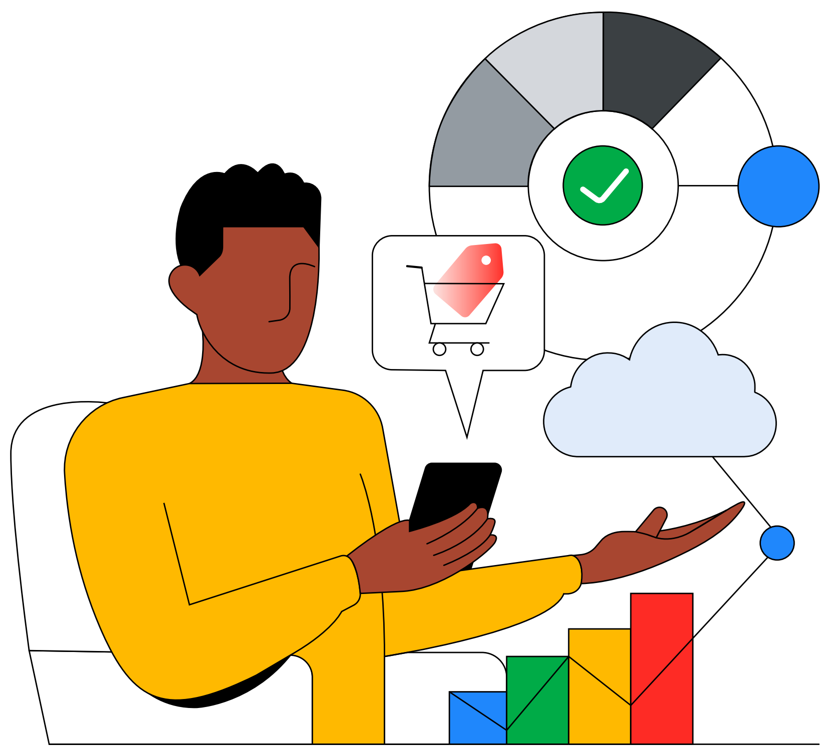
Reasons for Change

Google Cloud caters to a diverse community, and the motivations behind using its products and services differ between customers and partners.

For customer organizations, who use Google Cloud to power their business, growth is the key driver of investment. They're scaling their business, services, and workloads on Google Cloud, requiring more investment. Conversely, a shift to other cloud providers like Amazon Web Services (AWS) or Azure is the primary reason for decreasing investment among customers.

Partners, who resell and implement Google Cloud solutions, are most impressed by Google Cloud's superior performance compared to competitors, driving their increased investment. However, budget constraints can limit their spending.

Interestingly, both customers and partners see the rise of AI and ML as a reason to invest more in Google Cloud.



	Google Cloud Customers	Google Cloud Partners
Increasing Investments	• **Scaling business services** and workloads that use Google Cloud • **Integrating or migrating** more systems that use Google Cloud • Google Cloud using **AI and ML** more than its competitors	• Google Cloud's **superior performance** compared to competitors • Google Cloud has excellent capabilities for **AI and ML** • Supporting the needs or **preferences of their clients**
Maintaining Investments	• Maintaining current systems and have **no need to make any changes** • Constraints with **budget or cost**	• Focusing on **optimizing** current spend and have **no need to make any changes** • Constraints with **budget or cost**
Decreasing Investments	• Using **other cloud vendors** in place of Google Cloud • Constraints with **budget or cost**	• Constraints with **budget** or issues with Google Cloud being **too expensive** • More demand for **other tools or cloud providers**

Q: HOW IS YOUR INNOVATION AND TECHNOLOGY JOURNEY AFFECTING THE ROLE OF GOOGLE CLOUD IN YOUR TECHNOLOGY STACK? | Q: WHY IS YOUR ORGANIZATION [MAKING MORE INVESTMENTS/MAKING THE SAME/MAKING FEWER INVESTMENTS] INTO GOOGLE CLOUD? PLEASE BE SPECIFIC. *NOTE: SAMPLE SIZES ADJUSTED TO ACCOUNT FOR PARTICIPANTS WHO RESPONDED TO THE OPEN-ENDED QUESTION; FEEDBACK COULD BE CODED INTO MULTIPLE THEMES*

Increasing Investment Levels

"In the competitive landscape of cloud services, Google Cloud has been making significant investments. Google Cloud's **focus on AI tools and services** has led to impressive revenue growth. They recognize **the importance of AI** and continue to invest in infrastructure and data centers to meet the rising demand."

"Step by step, **we get more value from Google Cloud.** The process is slow but steady. The investments grow accordingly."

"Our innovation and technology journey has significantly impacted the role of Google Cloud within our technology stack. As we strive for **greater efficiency, scalability, and agility**, Google Cloud has emerged as a pivotal component in achieving these objectives."

"We are looking to make Google Cloud the hub of all of our company's data and **integrate as much of our tech stack into it as possible.**"

"**Fantastic partnership.** The majority of our current solutions on-prem, not centralized and not scalable, and the Google Cloud users within the company have been advocating for a **migration to Google Cloud**. Our other cloud solution has had service outages twice in a short period of time."

Q: WHY IS YOUR ORGANIZATION MAKING MORE INVESTMENTS INTO GOOGLE CLOUD? PLEASE BE SPECIFIC.

Maintaining Investment Levels

"There is demand for Google Cloud however, as UK is battling recession it seems to have impacted the business and demand seems to be **keep the status quo for medium term** and there may be higher investment by businesses to **push the demand in future.**"

"**Cloud costs can get expensive**. We need to diversify."

"As we gain more experience in using Google Cloud, we're able to **do more with fewer resources.**"

"We are **currently over-committed**—there's no move away from Google, but we **need to be seeing more return on that investment**, and there's little scope for increased budget."

"In **sustainment process currently.** Will be moving back into growth phase in next couple years."

Q: WHY IS YOUR ORGANIZATION [AKING THE SAME LEVEL OF INVESTMENTS INTO GOOGLE CLOUD? PLEASE BE SPECIFIC.

Decreasing Investment Levels

"We're currently **getting credits for Microsoft Azure** through the Microsoft startup program. In the future, we want to run a hybrid (Google Cloud + on-premise + possibly other cloud providers) **strategy to minimize cost.**"

"Google Cloud has **not been partner-friendly** in the last few months with margin cuts and hits against FSR attainment, so we are not focusing on Google Cloud sales."

"Google Cloud offers **too few high-quality AI functions**. And is not rolling them out in the EU quick enough. Lastly, some things are **too expensive** verses alternatives."

"We fused into other organization that uses **Amazon Web Services features and tools.**"

"We find other service providers **cost effective.**"

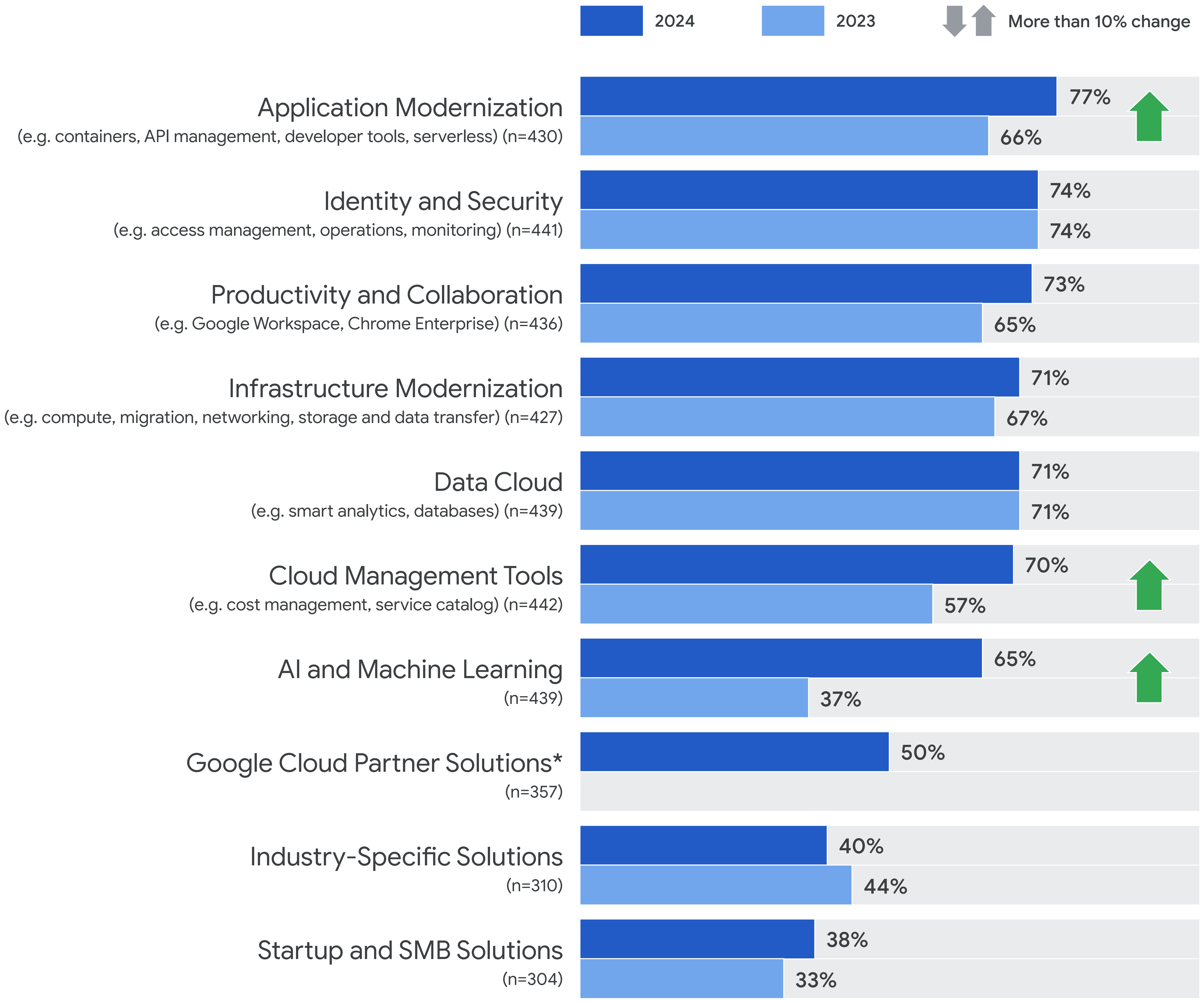
Q: WHY IS YOUR ORGANIZATION MAKING FEWER INVESTMENTS INTO GOOGLE CLOUD? PLEASE BE SPECIFIC.

Current Solution Usage

Google Cloud has a robust suite of products and services to choose from, so where exactly are C2C members' investments in Google Cloud going?

Usage has either increased or remained stable across all Google Cloud solutions, indicating that declines in investments are likely due to budget uncertainties rather than a shift away from Google Cloud usage. The most significant rise, nearly 30%, is observed in AI and ML applications. Notable increases are also seen in application modernization and cloud management tools.

Additionally, half of the respondents tap into Google Cloud Partner Solutions, which were introduced as an option to this question in 2024.



Q: HOW WOULD YOU DESCRIBE YOUR ORGANIZATION'S EXPERIENCE WITH EACH OF THE FOLLOWING SOLUTION AREAS FROM GOOGLE CLOUD? *DISPLAYING "CURRENTLY USE" ; SAMPLE SIZES AND DATA ADJUSTED TO EXCLUDE RESPONDENTS WHO SELECTED 'DON'T KNOW / NOT SURE' *OPTION ADDED IN 2024*

THE ROLE OF GOOGLE CLOUD

Total Experiences with Google Cloud

	Total Awareness	Currently Use	Plan to Use	Previously Used	No Plans to Use
AI and Machine Learning (n=439)	100%	65%	23%	9%	3%
Data Cloud (e.g. smart analytics, databases) (n=439)	99%	71%	14%	11%	3%
Application Modernization (e.g. containers, API management, developer tools, serverless) (n=430)	98%	77%	10%	9%	2%
Identity and Security (e.g. access management, operations, monitoring) (n=441)	98%	74%	11%	10%	3%
Productivity and Collaboration (e.g. Google Workspace, Chrome Enterprise) (n=436)	98%	73%	9%	9%	7%
Infrastructure Modernization (e.g. compute, migration, networking, storage and data transfer) (n=427)	98%	71%	11%	11%	5%
Cloud Management Tools (e.g. cost management, service catalog) (n=442)	98%	70%	12%	10%	5%
Google Cloud Partner Solutions (n=357)	89%	50%	21%	11%	6%
Industry-Specific Solutions (n=310)	84%	40%	25%	9%	11%
Startup and SMB Solutions (n=304)	82%	38%	18%	13%	13%

Q: HOW WOULD YOU DESCRIBE YOUR ORGANIZATION'S EXPERIENCE WITH EACH OF THE FOLLOWING SOLUTION AREAS FROM GOOGLE CLOUD? *SAMPLE SIZES AND DATA ADJUSTED TO EXCLUDE RESPONDENTS WHO SELECTED 'DON'T KNOW / NOT SURE'*

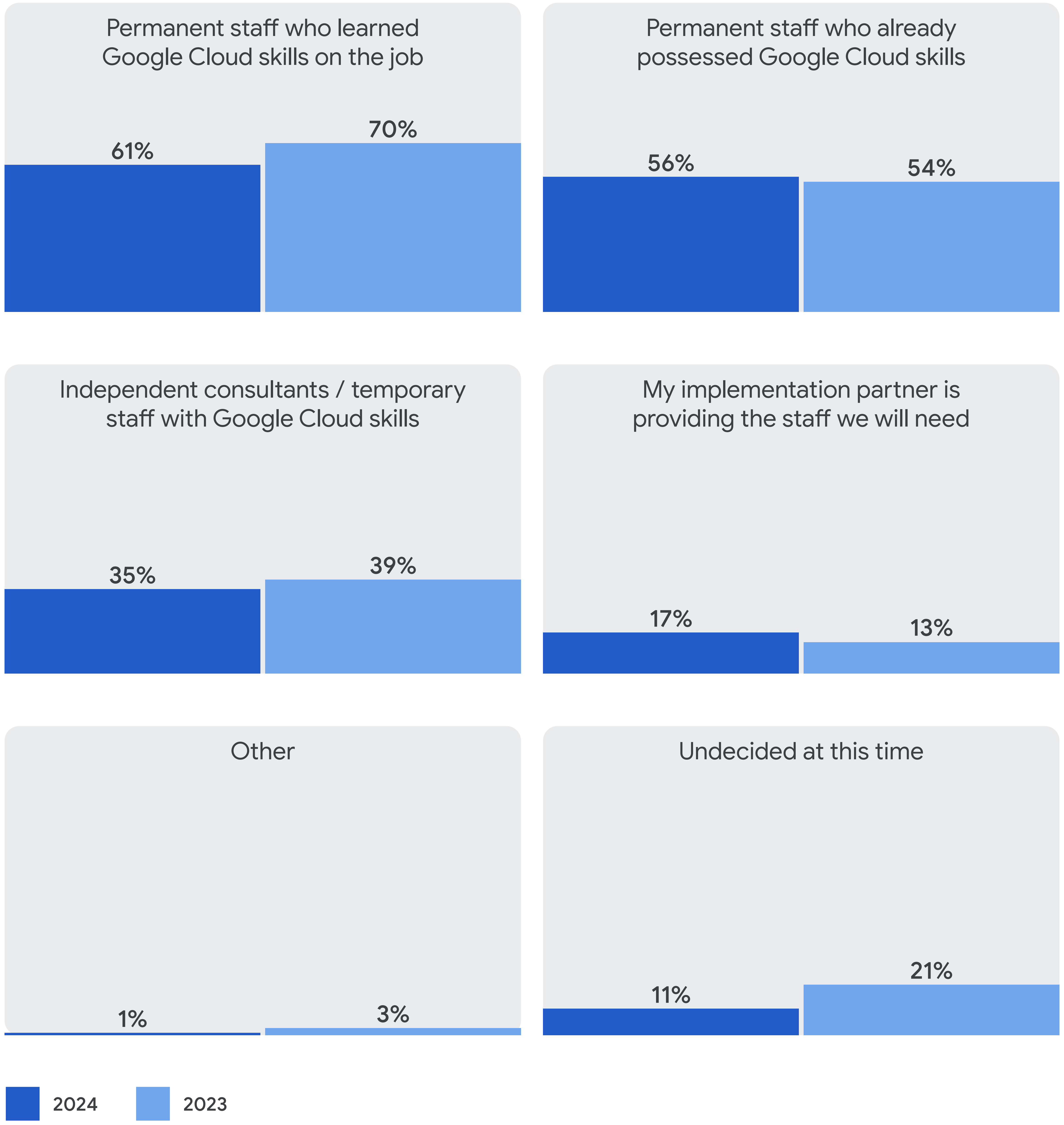
THE ROLE OF GOOGLE CLOUD

Sourcing Google Cloud Talent

Since organizations are making more investments in Google Cloud overall, it's reasonable to infer their staff must grow to include more Google Cloud talent.

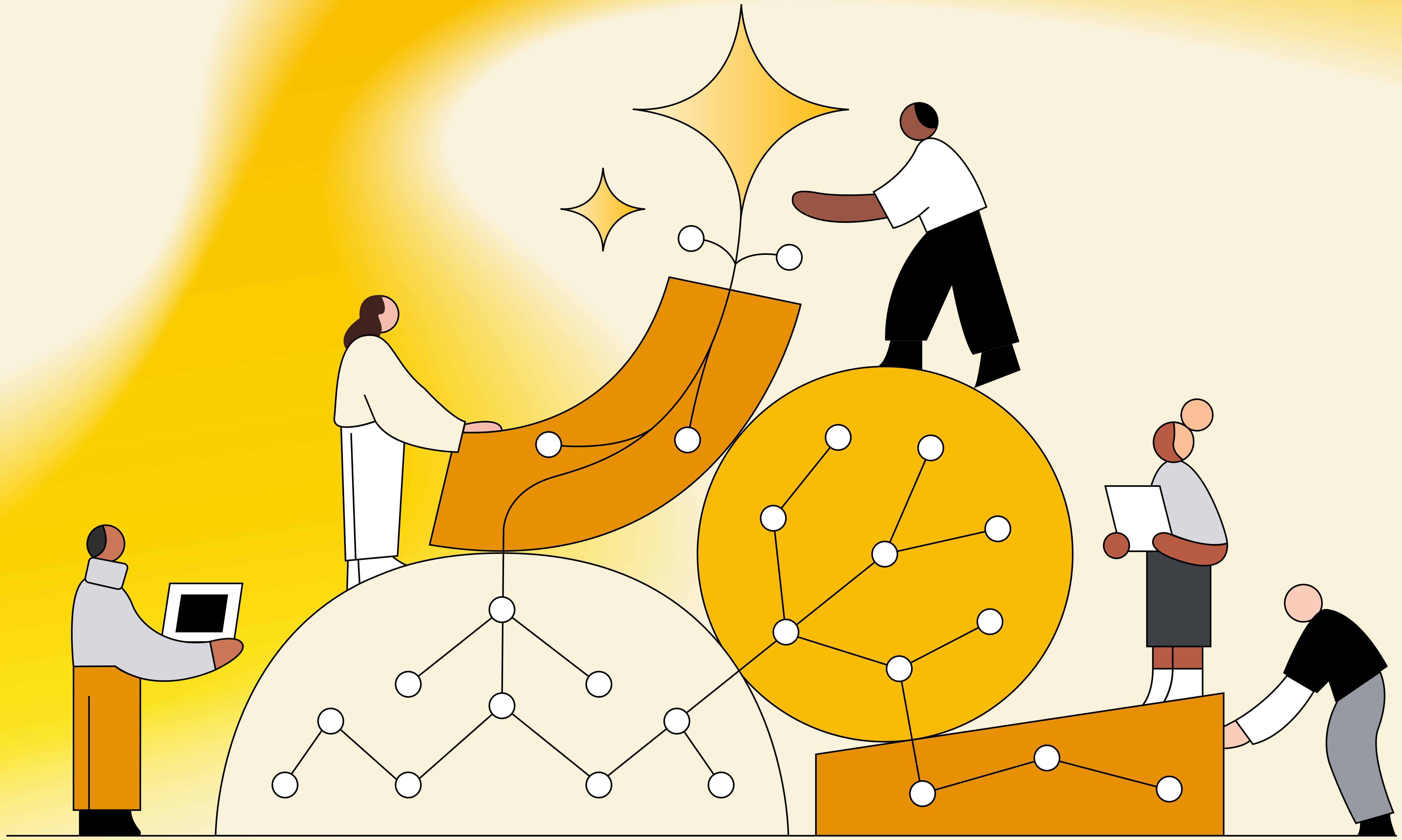
The traditional method of upskilling existing staff remains the most popular, but it's facing some healthy competition. We're seeing a **rise in organizations hiring permanent staff who already possess Google Cloud expertise**, suggesting a growing pool of qualified candidates in the job market. Plus, **implementation partners are stepping up, providing organizations with the skilled staff they need.** This allows companies to tap into external expertise without the long-term commitment of permanent hires.

Interestingly, regardless of company size, on-the-job learning continues to be the go-to method. This suggests a commitment to building a future-proof workforce, even if it means starting from scratch.



Q: HOW DID OR WILL YOU FIND SKILLED TALENT TO WORK ON PROJECTS INVOLVING GOOGLE CLOUD PRODUCTS? (PLEASE SELECT ALL THAT APPLY.) (N=482 2024, N=461 2023)

Community Motivations



ENGAGEMENT PREFERENCES

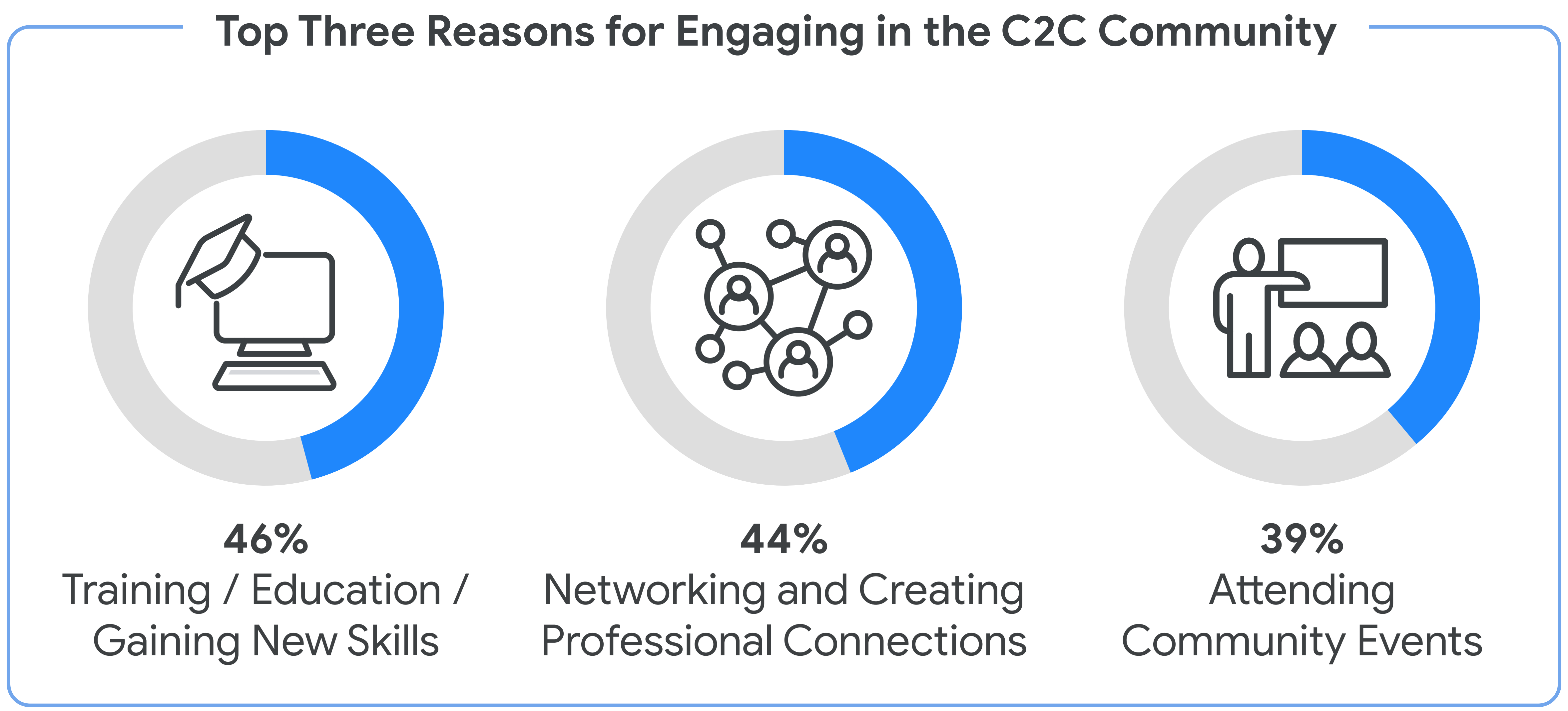
Joining C2C

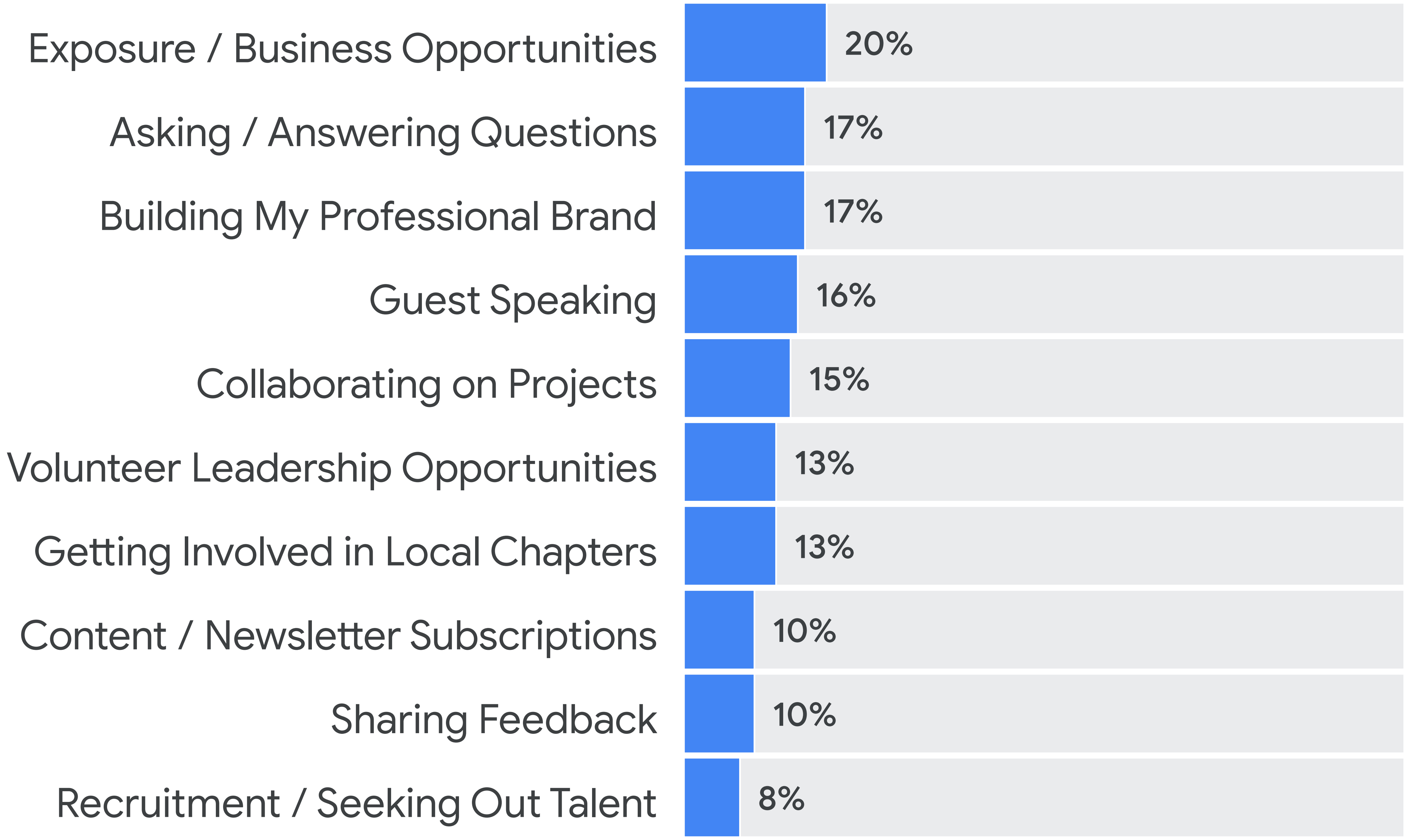
Communities exist everywhere; choosing the right one and getting value from participation can be overwhelming. Understanding our members' motivations behind clicking that "join" button on our website helps the C2C team to make that act a little less daunting as we evolve of the experiences we craft.

For example, respondents noted that **the primary reasons for joining C2C are opportunities for training, education, and gaining new skills.** And members report positively on that outcome as being part of the community.

Closely following are the need for networking, creating professional connections, and attending community events, which are both some of C2C's top priorities. Did you know that most members are making between 1-6 connections at C2C events? Facilitating quality connections between members is just one of many factors we consider for those planning to meet up face to face.

All other areas to engage with within the C2C community may be seen as "nice to have" but are not the main attraction. This is consistent across industry experience—no matter how long respondents have been active in their industry,





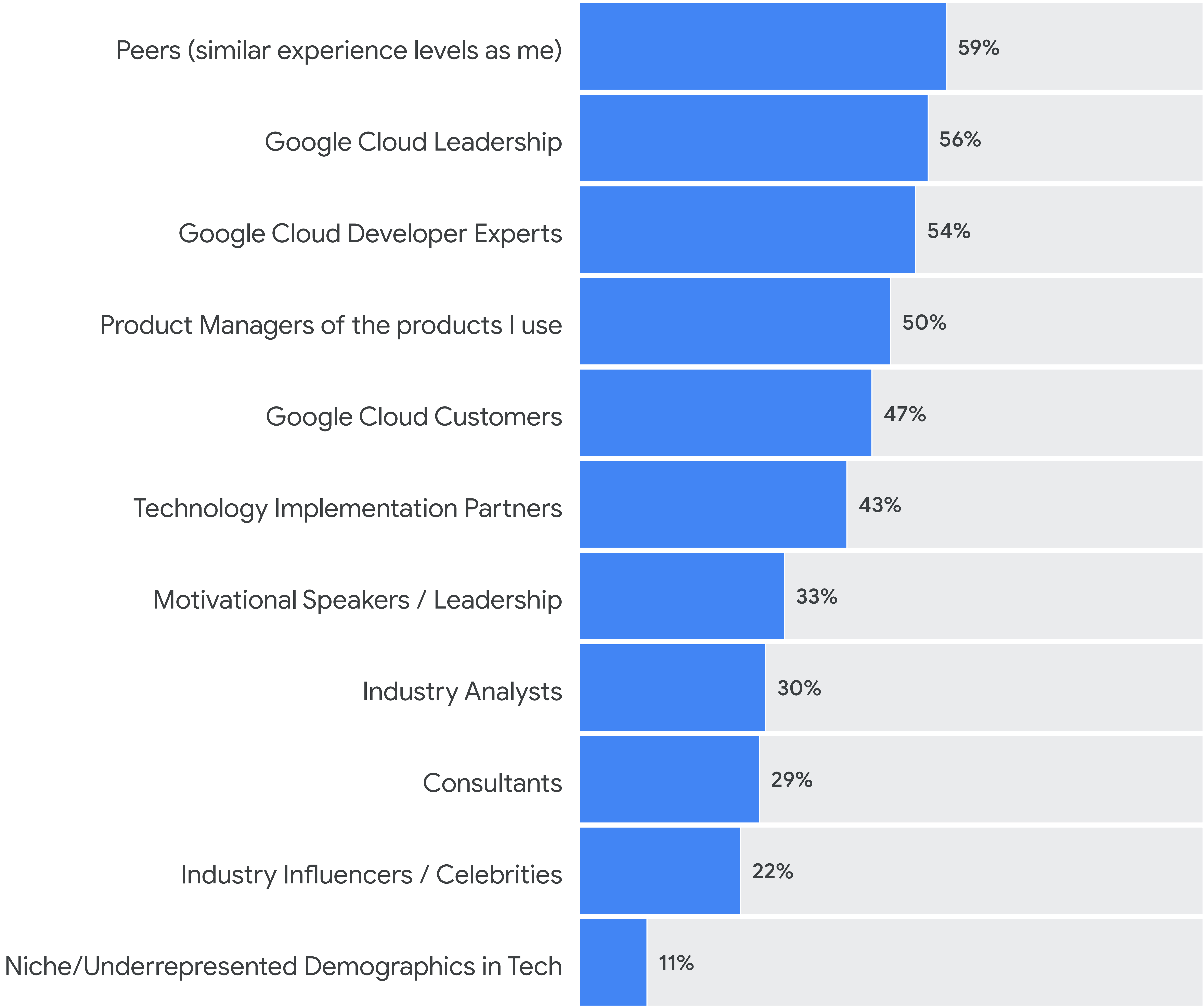
Q: WHICH OF THE FOLLOWING AREAS ARE YOU MOST INTERESTED IN ENGAGING WITH WITHIN THE C2C COMMUNITY? (PLEASE SELECT UP TO THREE OPTIONS.) (N=482)

ENGAGEMENT PREFERENCES

Making Connections

There's a reason why networking and creating professional connections is a top priority within the C2C community. **Members understand the power of connecting with peers who share their experience level.**

C2C members also show a heavy interest in connecting with Google Cloud employees who can provide a direct link between customers and the products they use. For members with over five years of experience, connecting with product managers allows them to tap into advanced knowledge specific to their needs. Meanwhile, members with less experience benefit from connecting with Google Cloud developer experts who can offer targeted support and guidance.



Q: WHEN JOINING AND PARTICIPATING IN COMMUNITIES, WHAT TYPE(S) OF COMMUNITY MEMBER(S) ARE YOU HOPING TO CONNECT WITH? (PLEASE SELECT ALL THAT APPLY.) (N=437) *SAMPLE SIZE AND DATA ADJUSTED TO EXCLUDE RESPONDENTS WHO DON'T ATTEND IN-PERSON EVENTS*

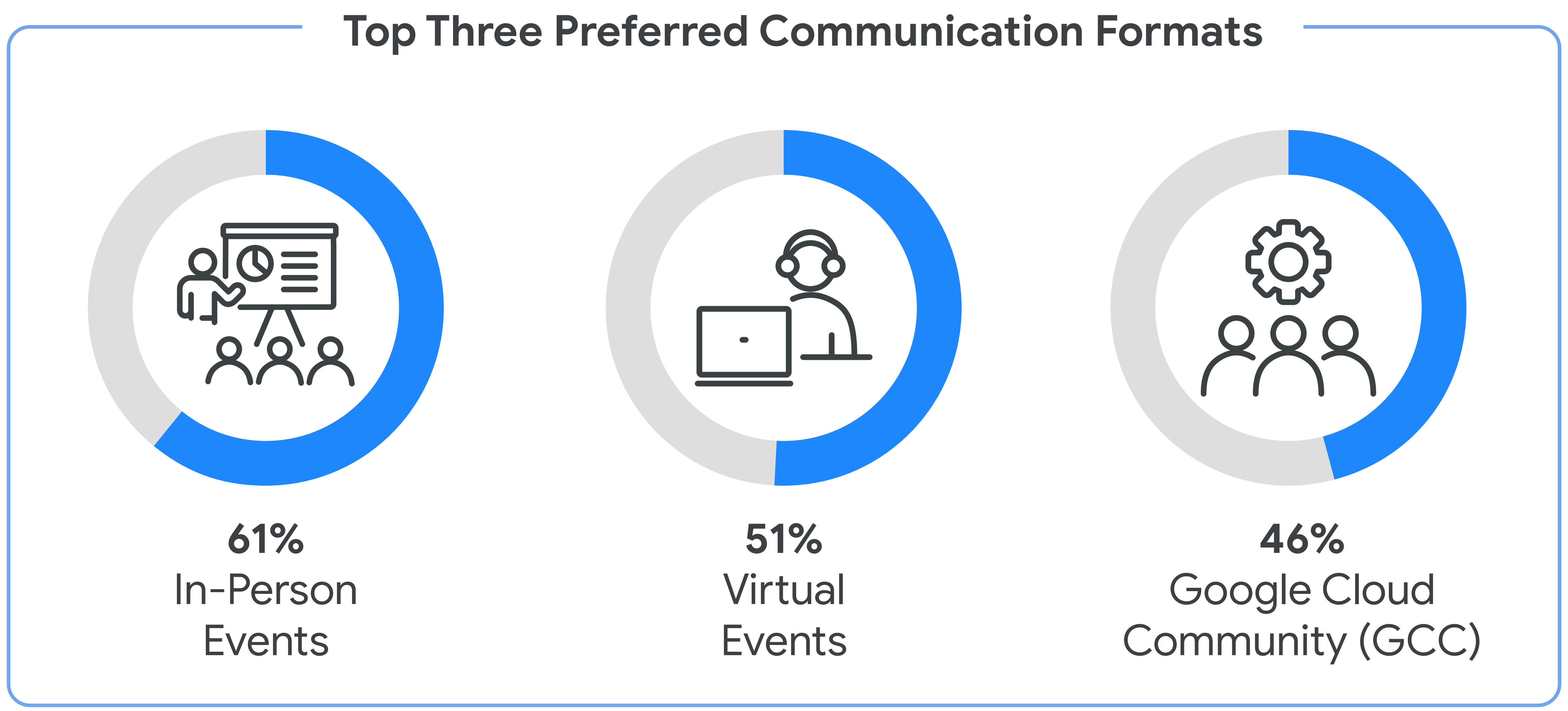
ENGAGEMENT PREFERENCES

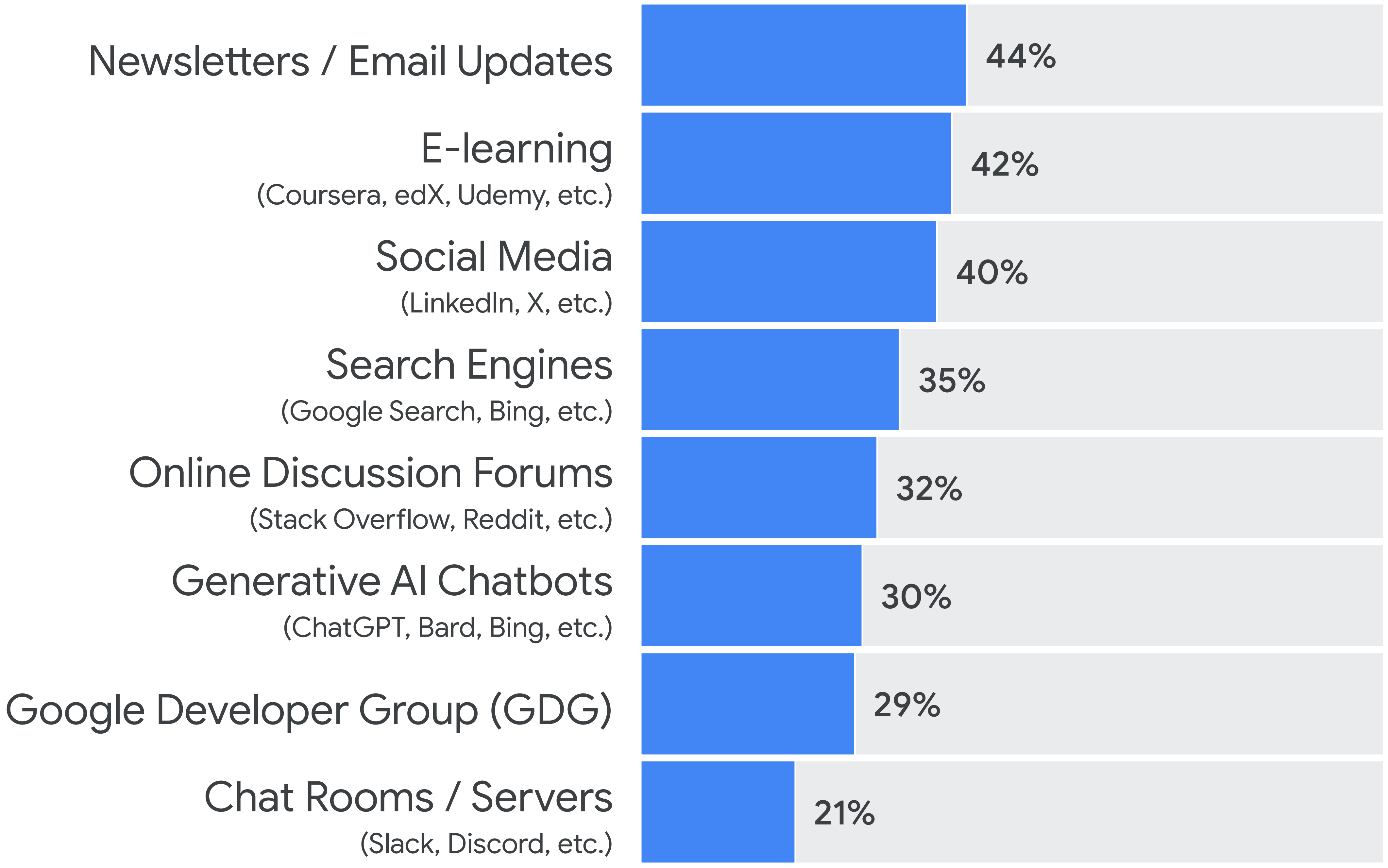
Communication Formats

C2C offers a variety of communication formats to help members stay connected to the latest in the community. These formats cater to different learning styles and preferences.

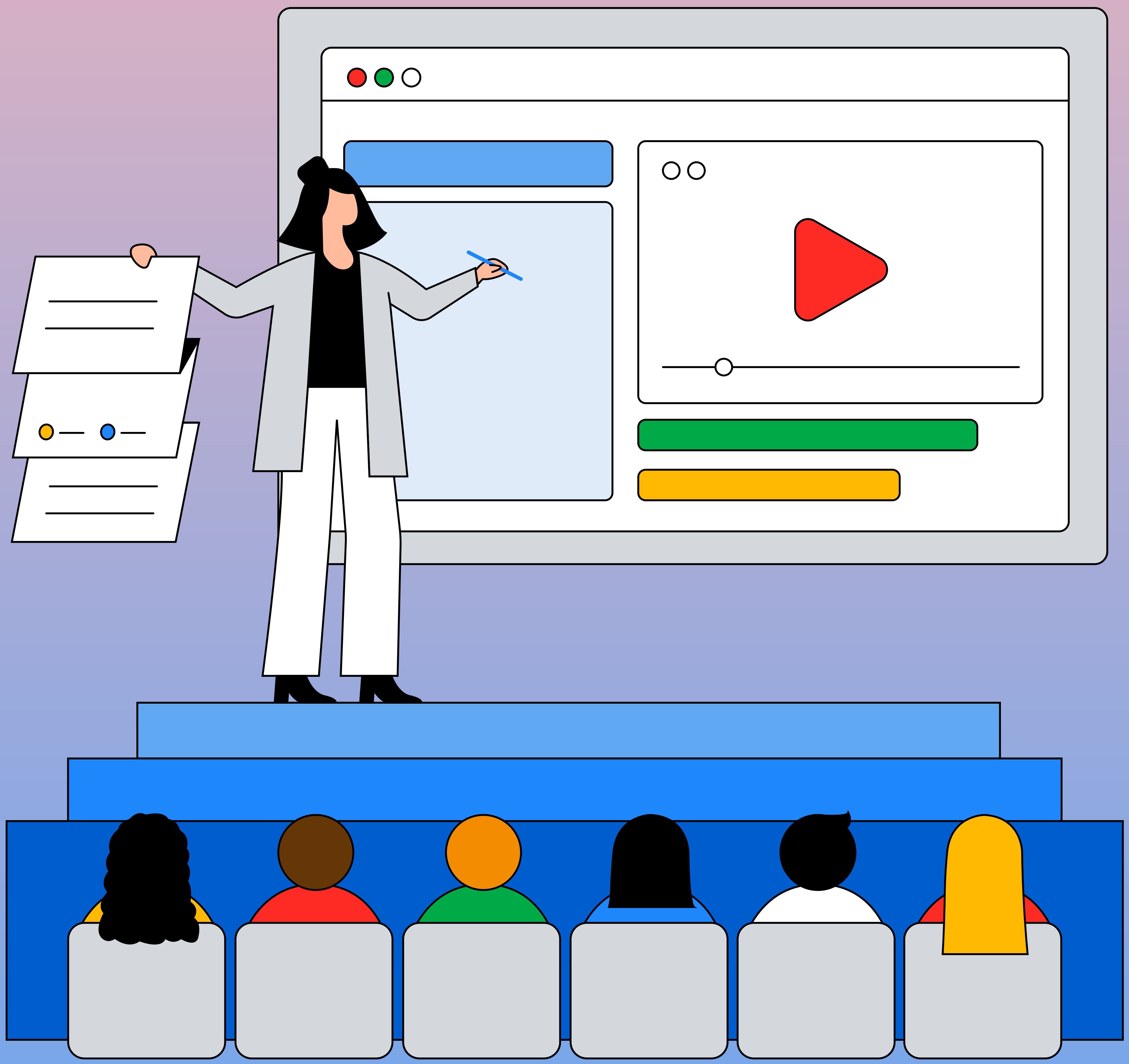
While newsletters, e-learning modules, and social media provide valuable bite-sized updates, **in-person and virtual events are the clear favorites when it comes to accessing information relevant to your professional role**. Though virtual events are likely to be more frequently attended by any individual, in-person events hold a slight edge (+10%) over virtual events for this purpose.

Behind the curtains, the C2C team ultimately aims to provide a comprehensive toolbox of resources to empower your Google Cloud journey, regardless of your preferred learning style.





Q: WHICH OF THE FOLLOWING COMMUNICATION FORMATS/CHANNELS DO YOU PREFER TO SEEK/RECEIVE INFORMATION RELATED TO YOUR PROFESSIONAL ROLE? (PLEASE SELECT ALL THAT APPLY.) (N=482) *1% SELECTED 'OTHER'*



INDUSTRY EVENTS

Attendance Trends

The C2C community offers a mix of virtual and in-person events to cater to your busy schedule and preferred learning style. Our data shows that **most members attend virtual events monthly for quick updates and knowledge sharing. In-person events, known for deeper discussions and networking, are typically attended quarterly.**

	Total Attendance	Monthly	Quarterly	Yearly	Never
Virtual Events	94%	54%	31%	9%	7%
In-Person Events	90%	22%	40%	28%	9%

Attendance patterns are generally consistent across job roles, but the preferred format of events changes based on roles. For example, monthly attendance seems to be favored for maintaining—or building new—connections with other members. But CEOs, for example, favor the flexibility of virtual events, while IT decision-makers prioritize in-person events.

Q: HOW FREQUENTLY DO YOU TYPICALLY ATTEND EVENTS (VIRTUAL OR IN-PERSON) RELATED TO YOUR PROFESSIONAL ROLE AND/OR INDUSTRY? (N=482)

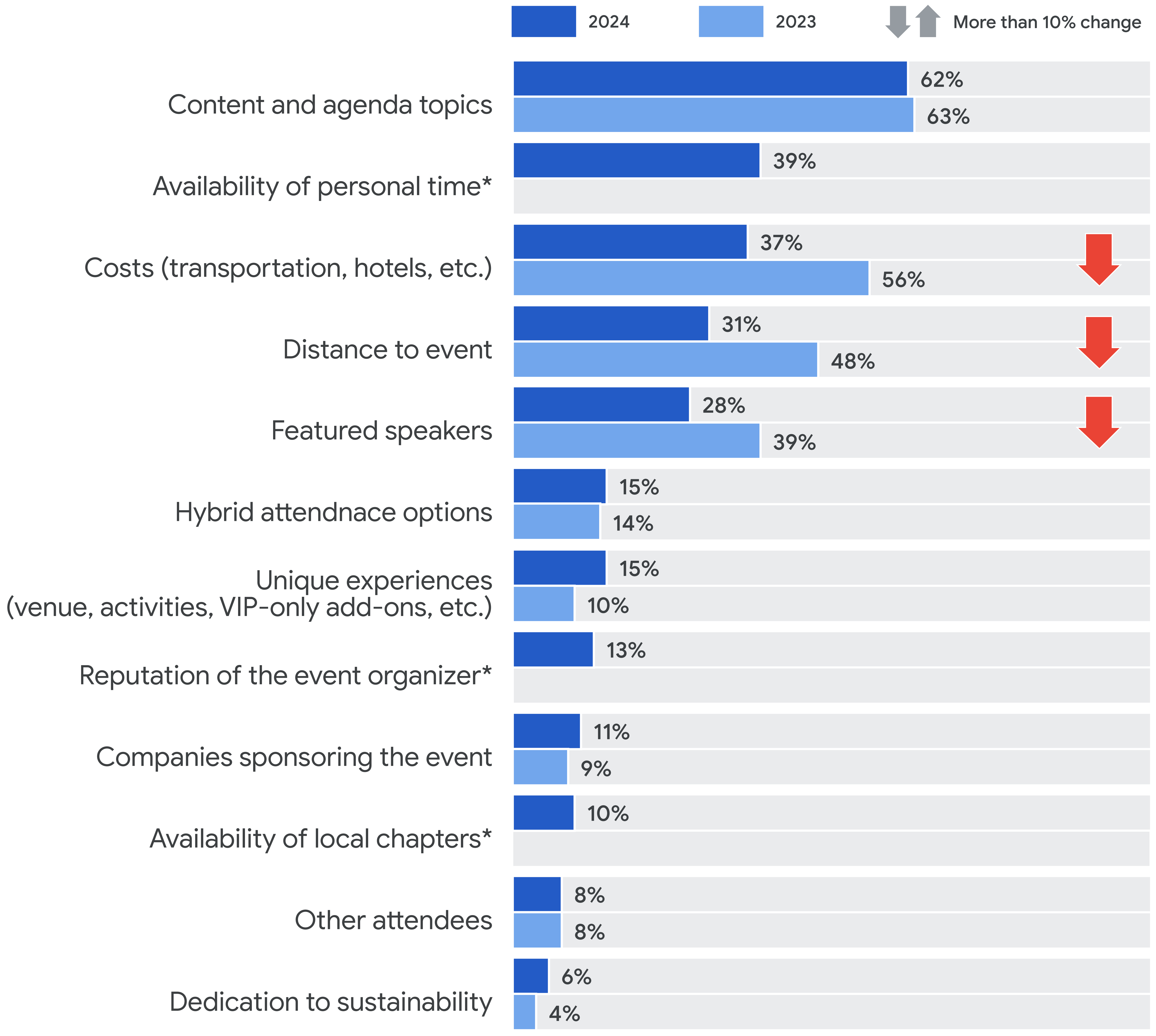
INDUSTRY EVENTS

Attendance Factors

This year's report reveals a positive shift in event attendance behavior. Despite increased budget concerns, **cost is no longer a major deciding factor for most members when considering events.** Similarly, the distance to the event has become less of a hurdle.

The good news? The top factors influencing attendance remain consistent across different job roles, industry experience, and member types (partners or customers). This means C2C can hone in on the main draws of community: delivering high-quality content and engaging experiences to attract a wider audience.

While CEOs and business-focused roles may still prioritize the location of events, **overall, the focus has shifted towards value proposition: quality content and the takeaways attendees will gain.**

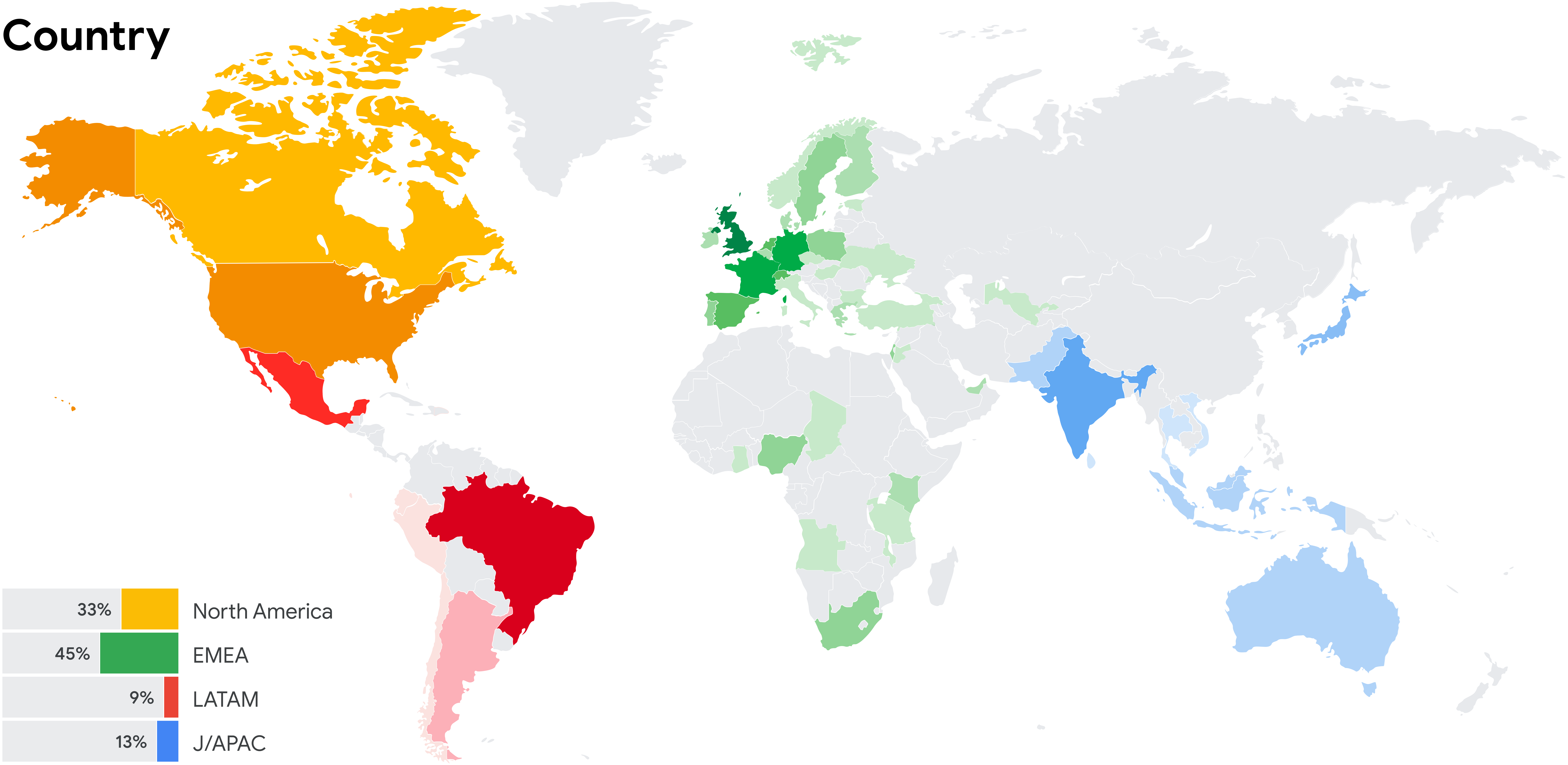


Q: WHAT ARE THE TOP FACTORS THAT IMPACT YOUR DECISION TO ATTEND EVENTS? (PLEASE SELECT UP TO THREE OPTIONS.) (N=437)
*SAMPLE SIZE AND DATA ADJUSTED TO EXCLUDE RESPONDENTS WHO DON'T ATTEND IN-PERSON EVENTS *OPTION ADDED IN 2024*

Who Took the Survey?

FIRMOGRAPHICS

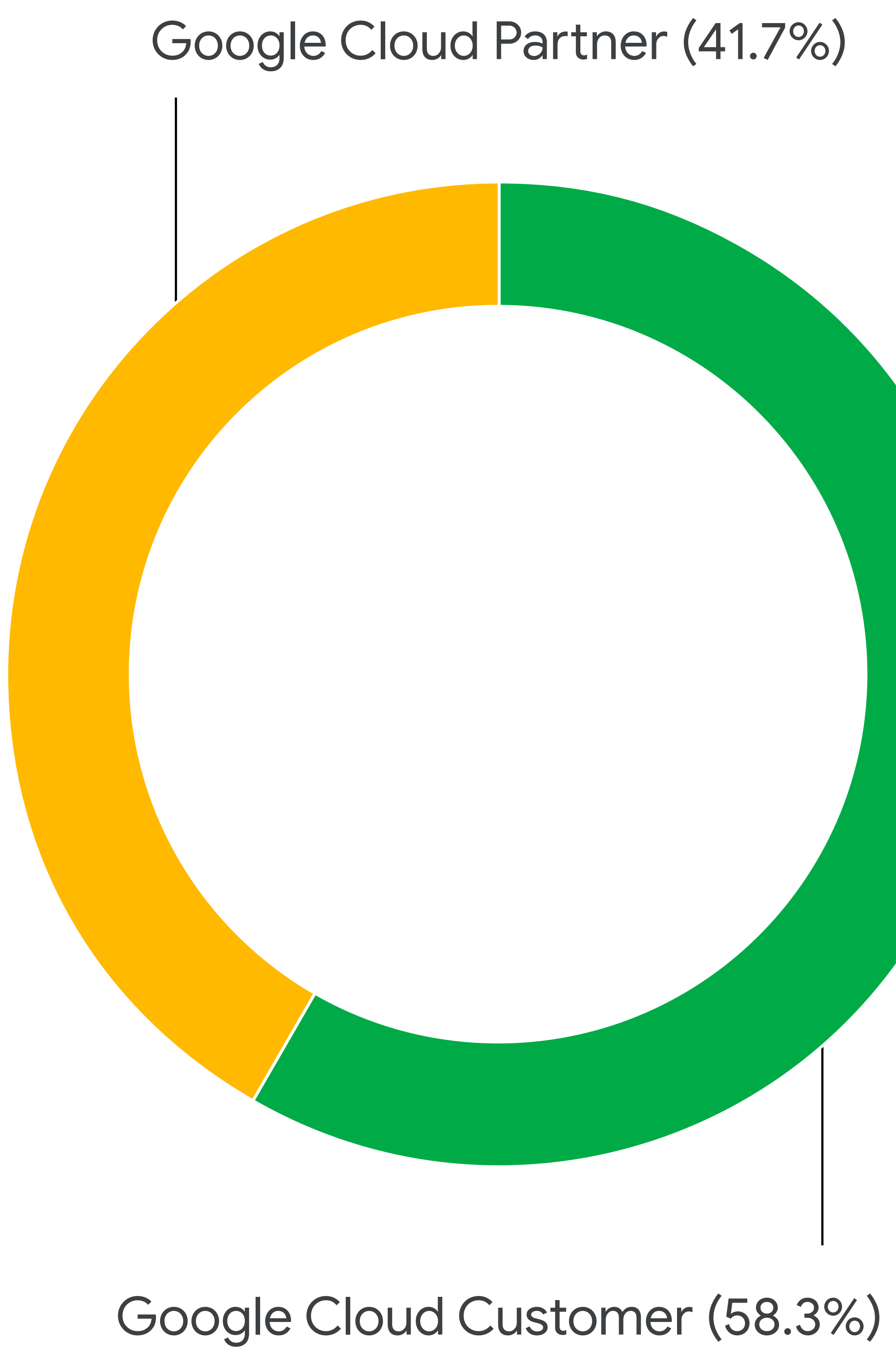
Country

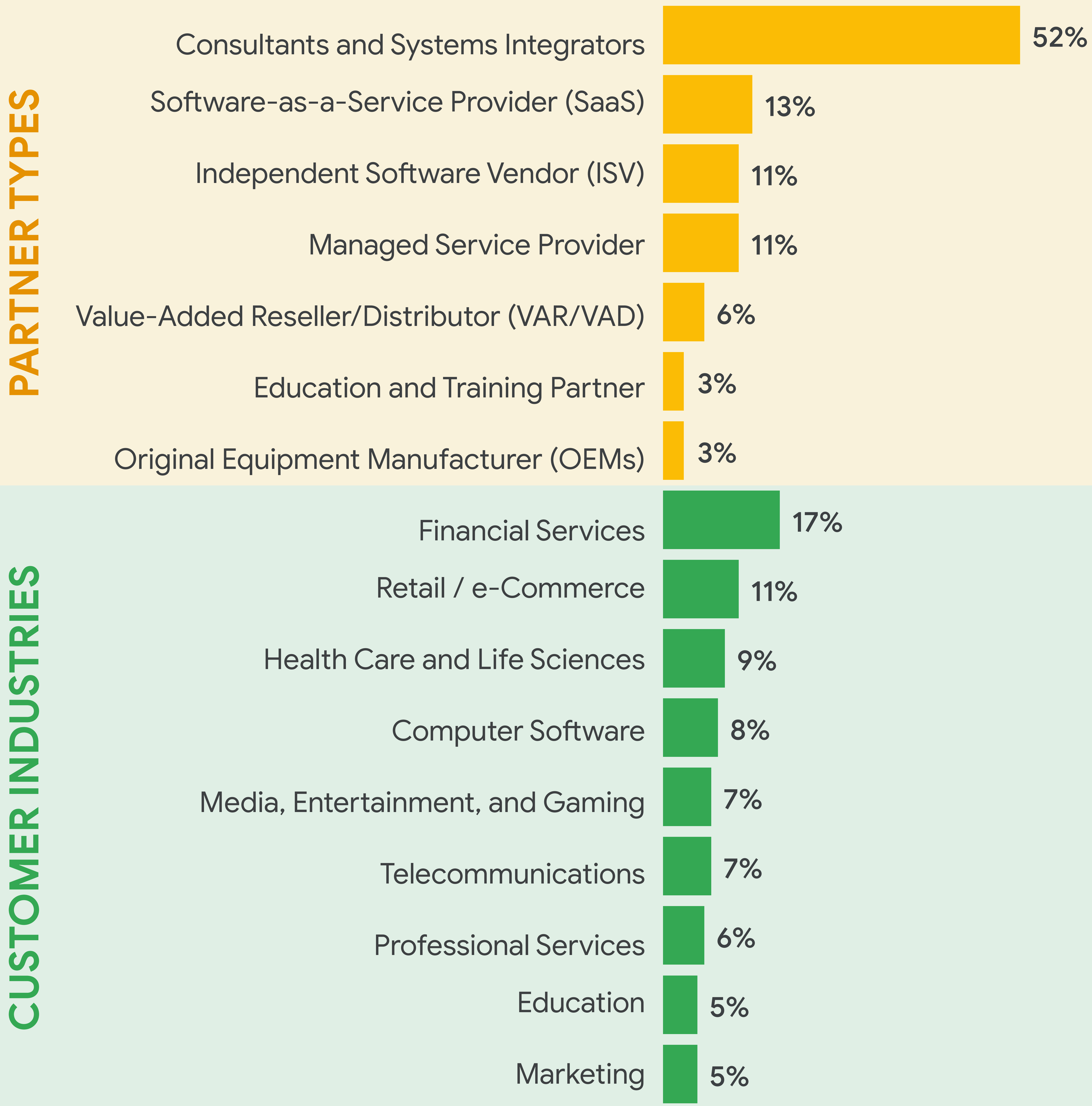


Q: IN WHICH COUNTRY DO YOU WORK?

FIRMOGRAPHICS

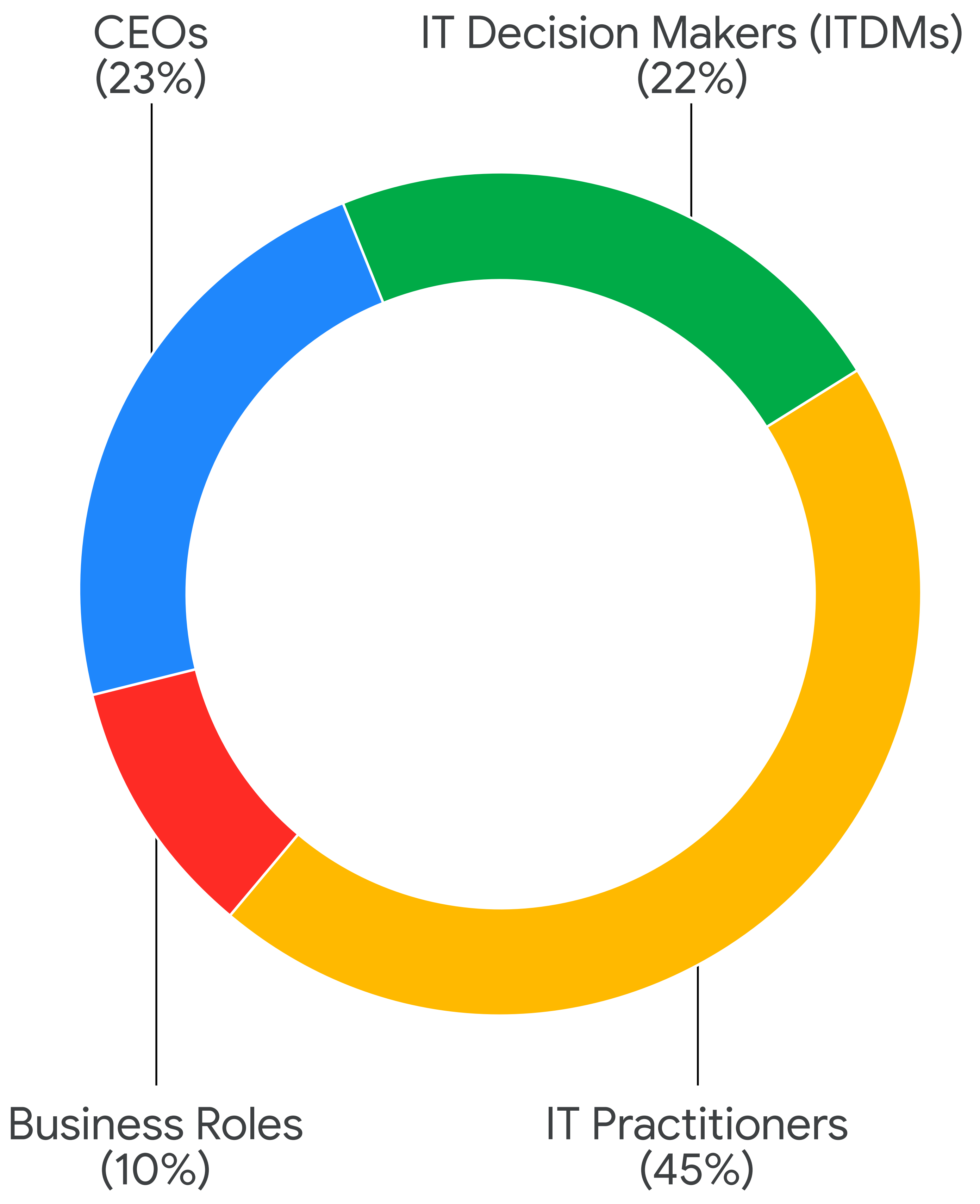
Organization Type

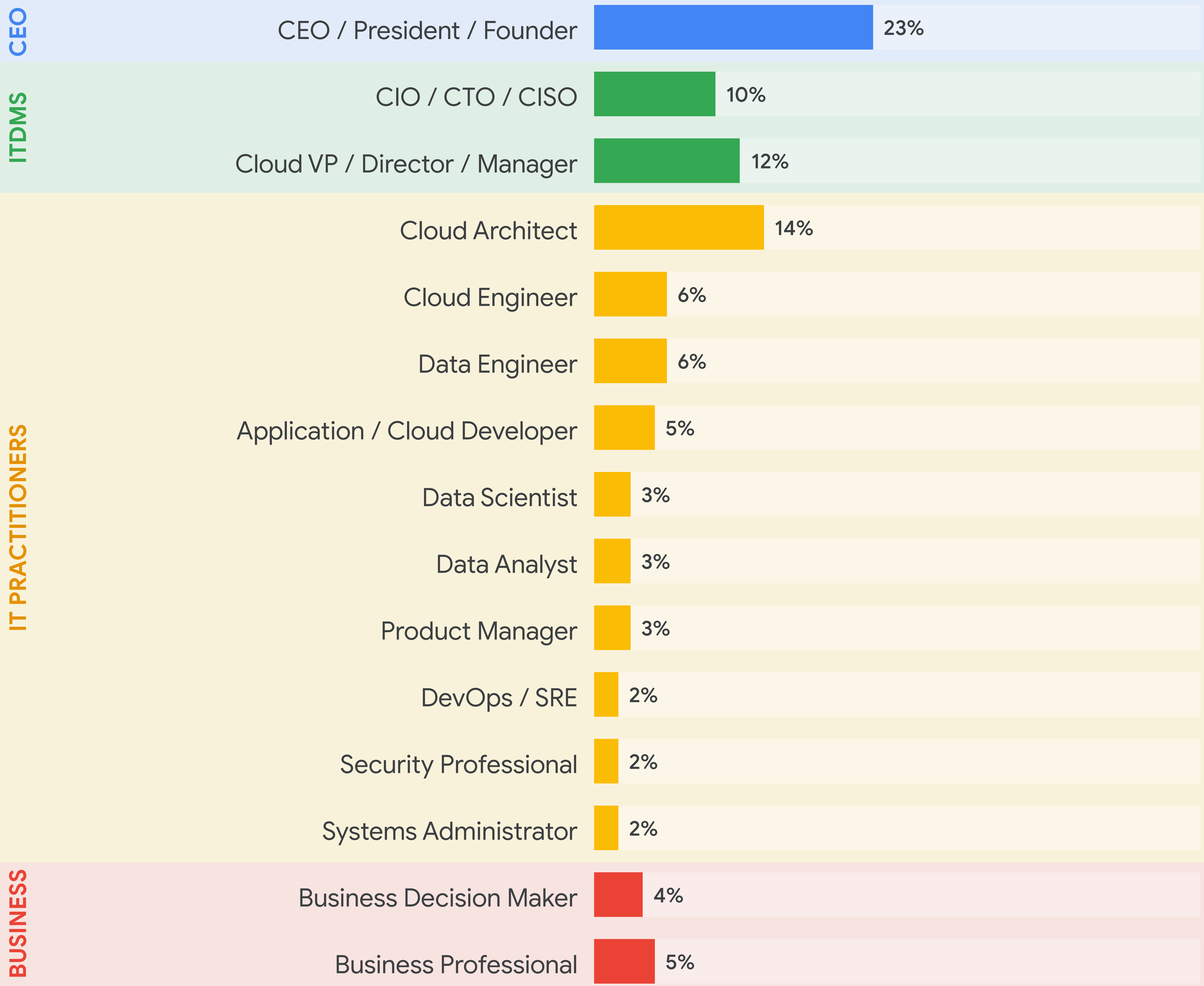




Q: WHICH OPTION BEST DESCRIBES THE TYPE OF ORGANIZATION YOU WORK FOR? | Q: WHAT INDUSTRY DO YOU WORK IN? *ALL OTHER INDUSTRIES REPRESENT LESS THAN 5% OF RESPONDENTS. QUESTION ONLY ASKED TO RESPONDENTS WHO SELECTED 'CUSTOMER INDUSTRY / B2B / B2C'

Job Role

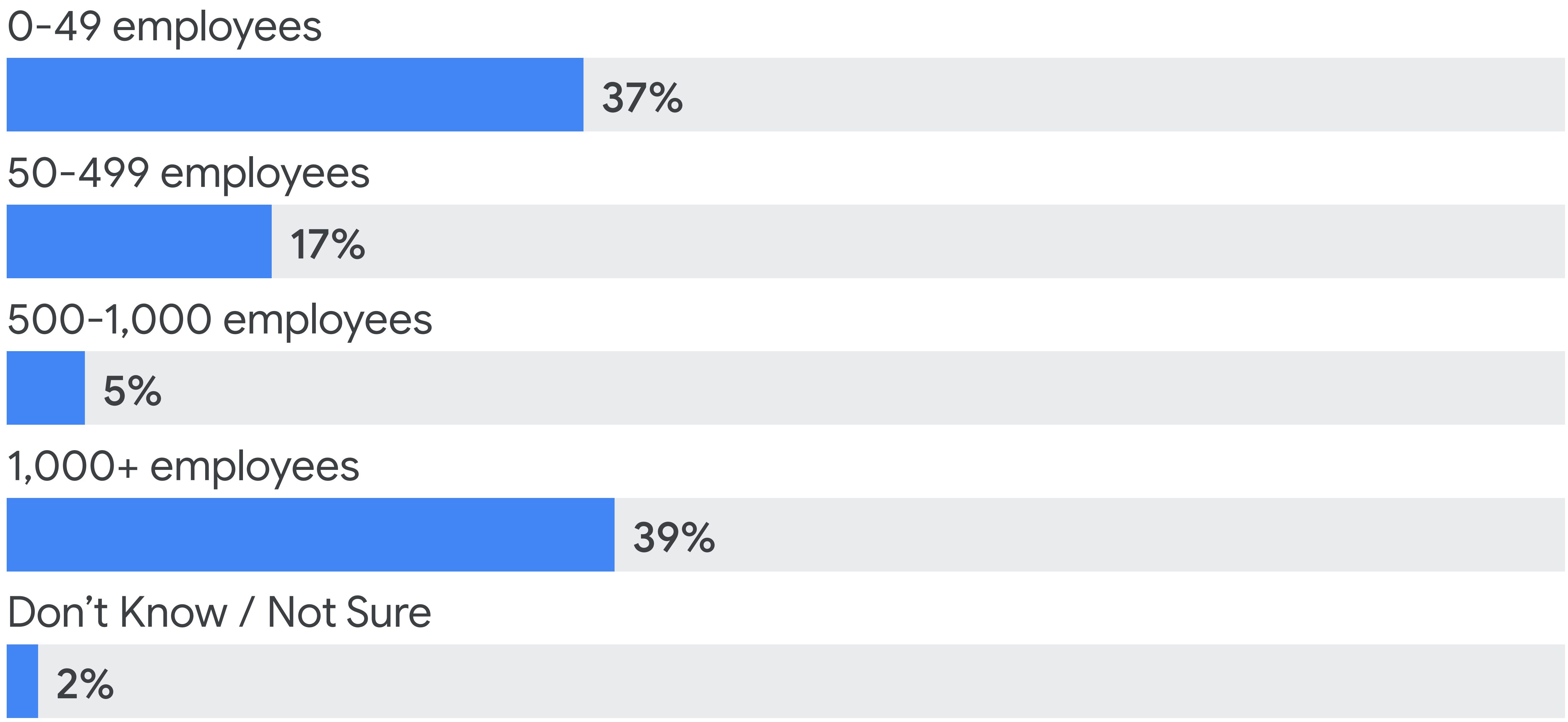




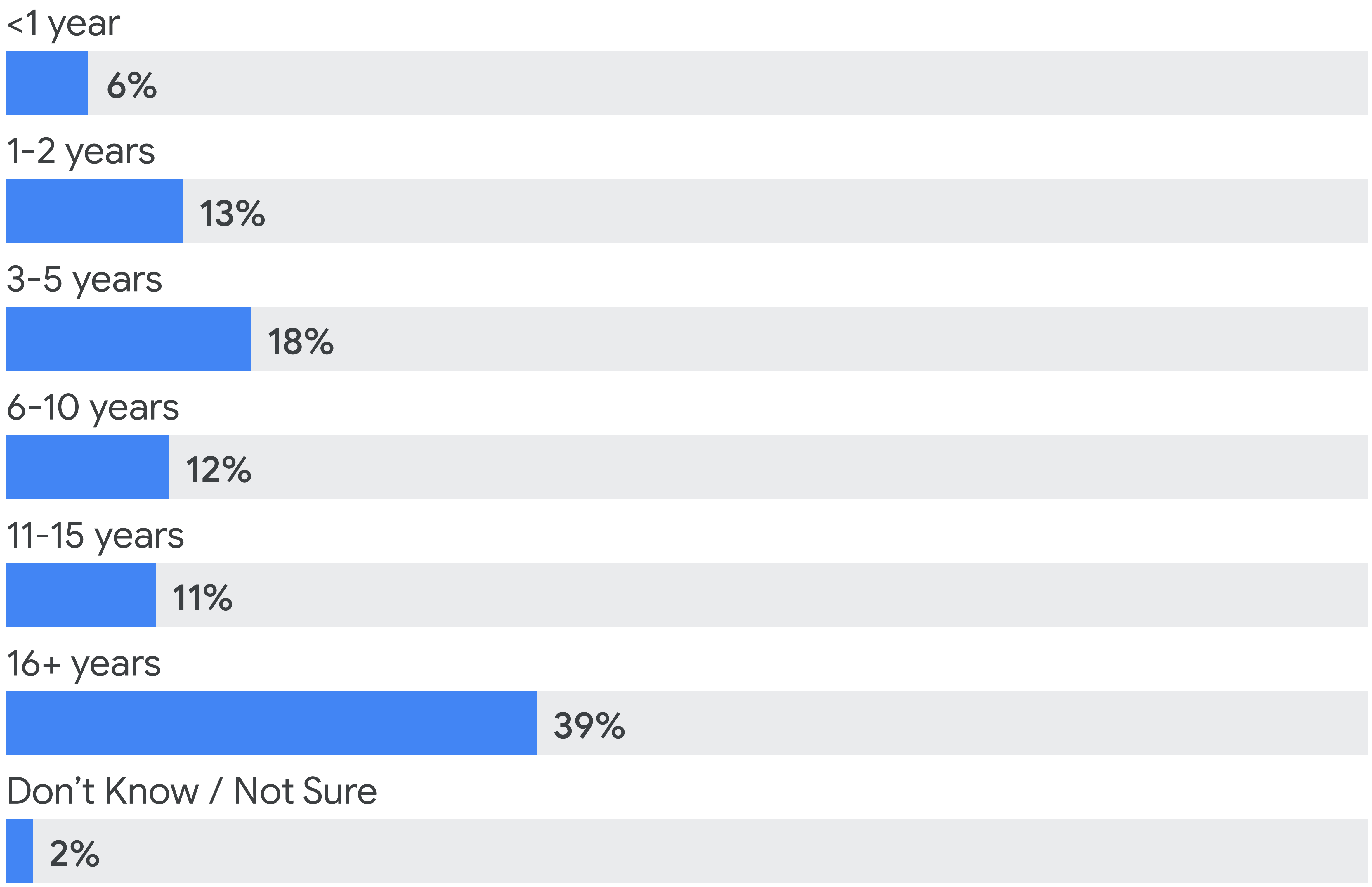
Q: WHICH OF THE FOLLOWING MOST CLOSELY DESCRIBES YOUR JOB ROLE? (N=482)

FIRMOGRAPHICS

Organization Size



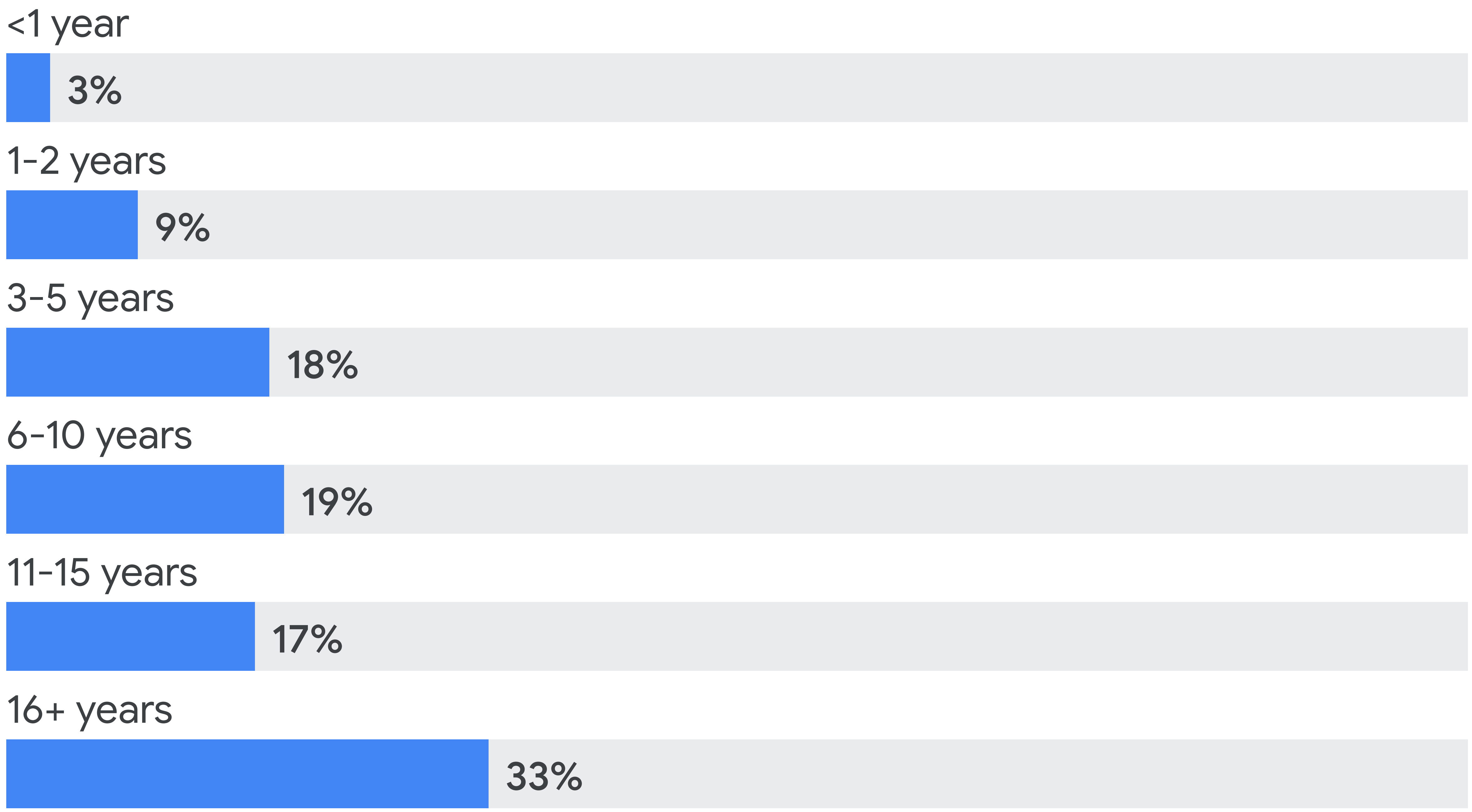
Organization Years Active



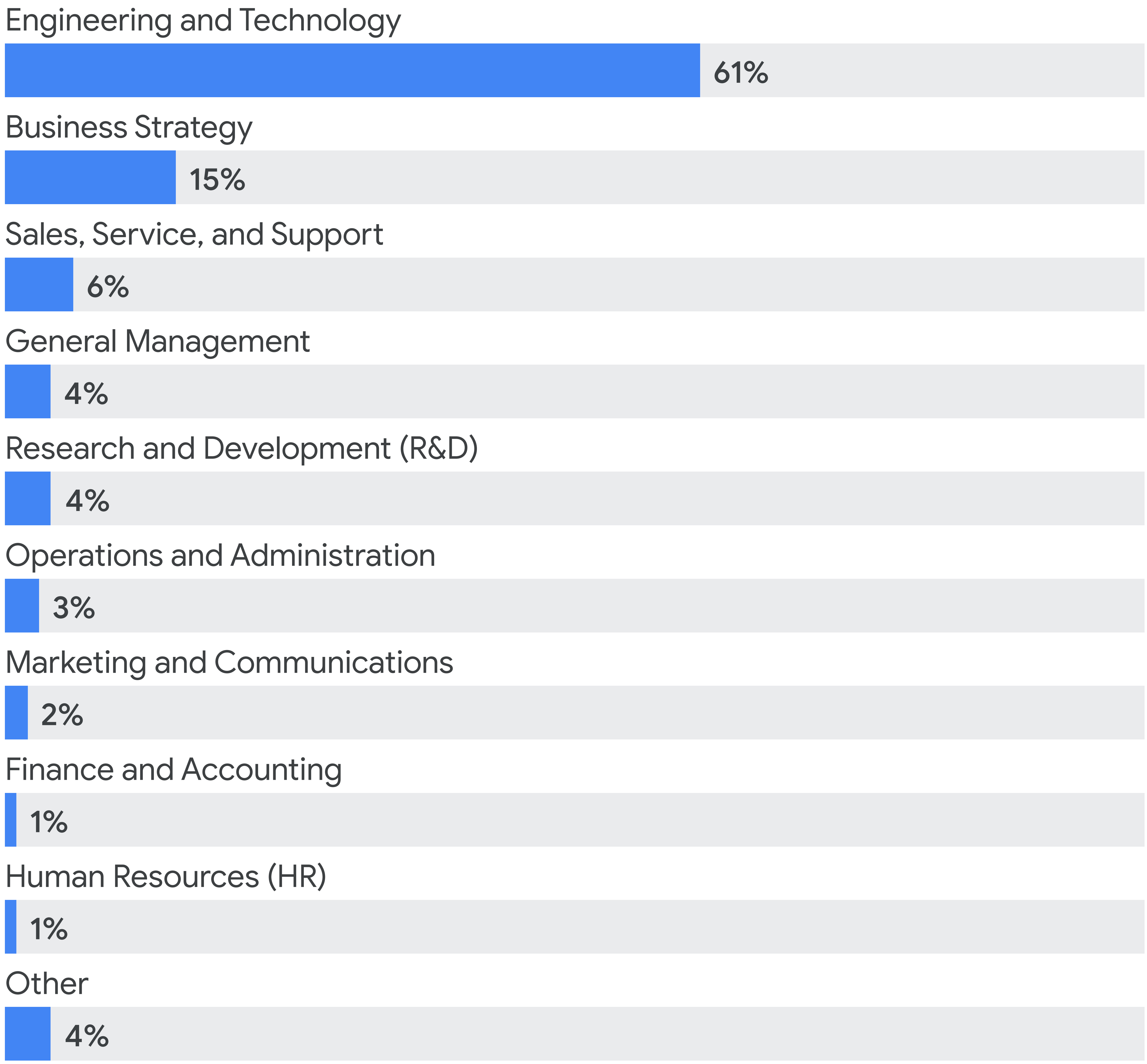
Q: WHAT IS THE SIZE OF YOUR ORGANIZATION?
Q: HOW MANY YEARS HAS YOUR COMPANY BEEN ACTIVE?

FIRMOGRAPHICS

Years Active in Industry



Department

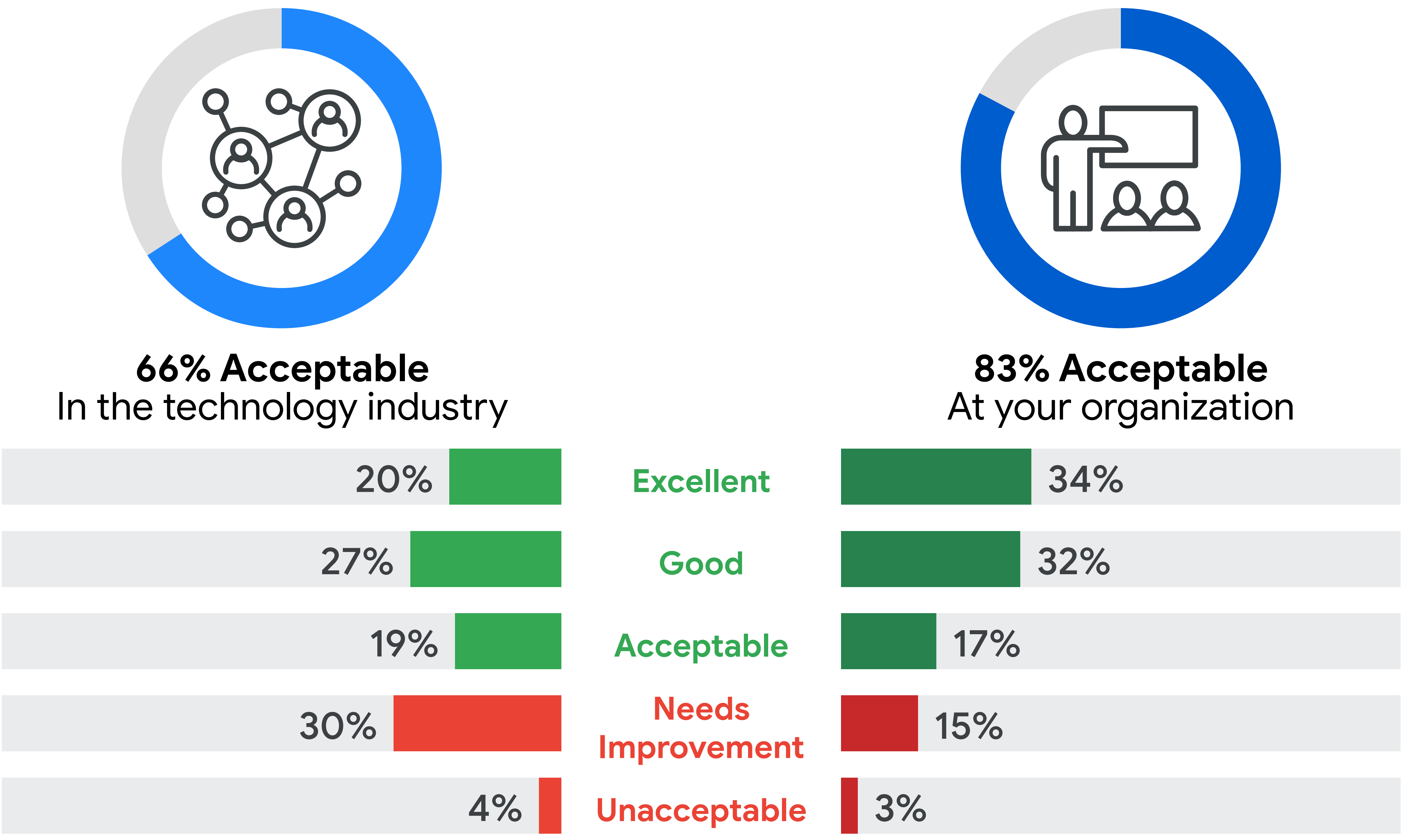


Q: HOW MANY YEARS HAVE YOU BEEN ACTIVE IN YOUR INDUSTRY?
Q: WHICH OF THE FOLLOWING MOST CLOSELY DESCRIBES THE DEPARTMENT WHERE YOU WORK?

DEMOGRAPHICS

Diversity, Equity, and Inclusion

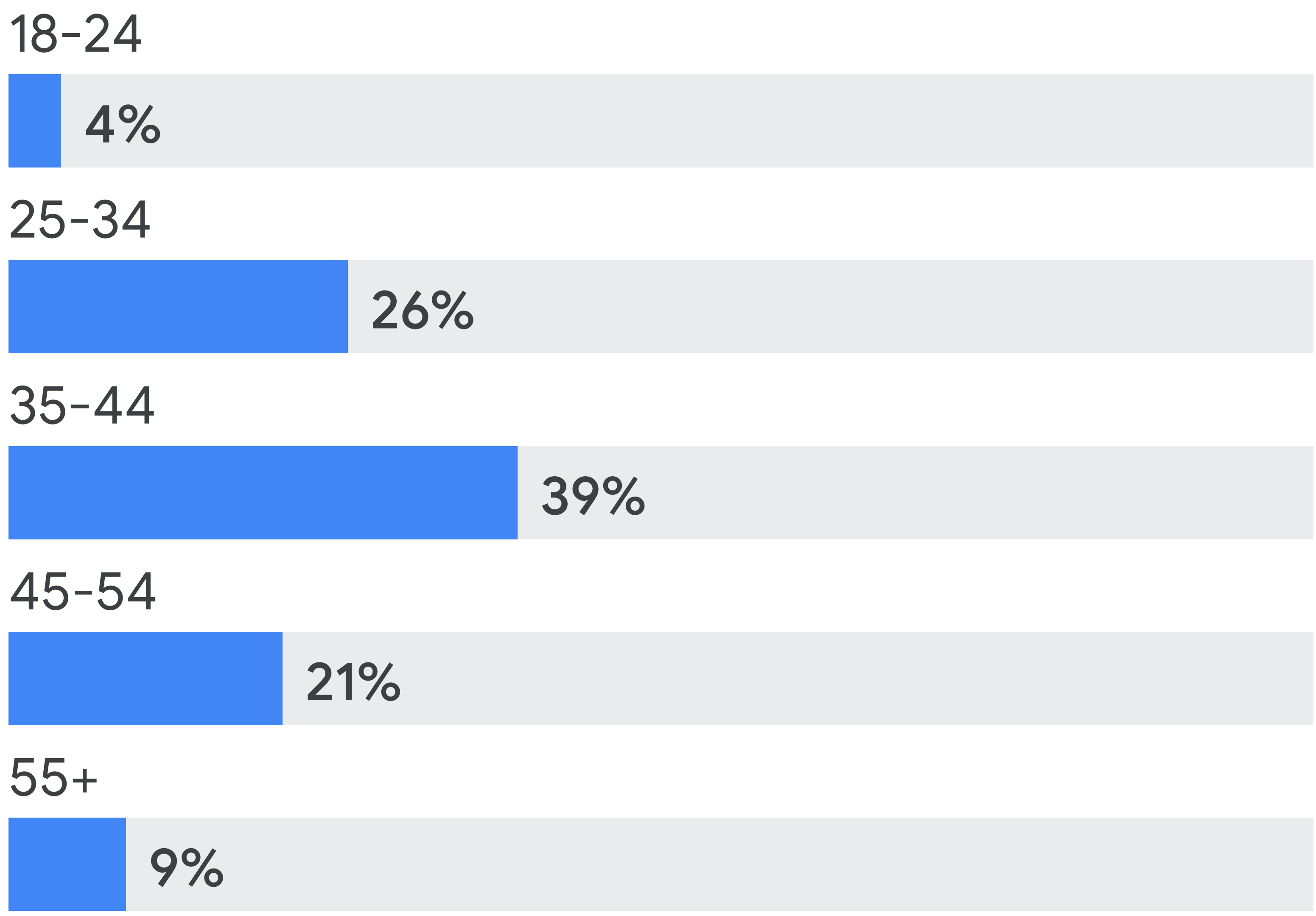
We asked respondents to rate their perception of DEI in the technology industry overall and within their own organizations. Every organization has their own DEI policies in place—or some not at all—but nothing spans the entire tech industry. **Respondents rate DEI as much more favorable in their organizations than in the technology industry.**

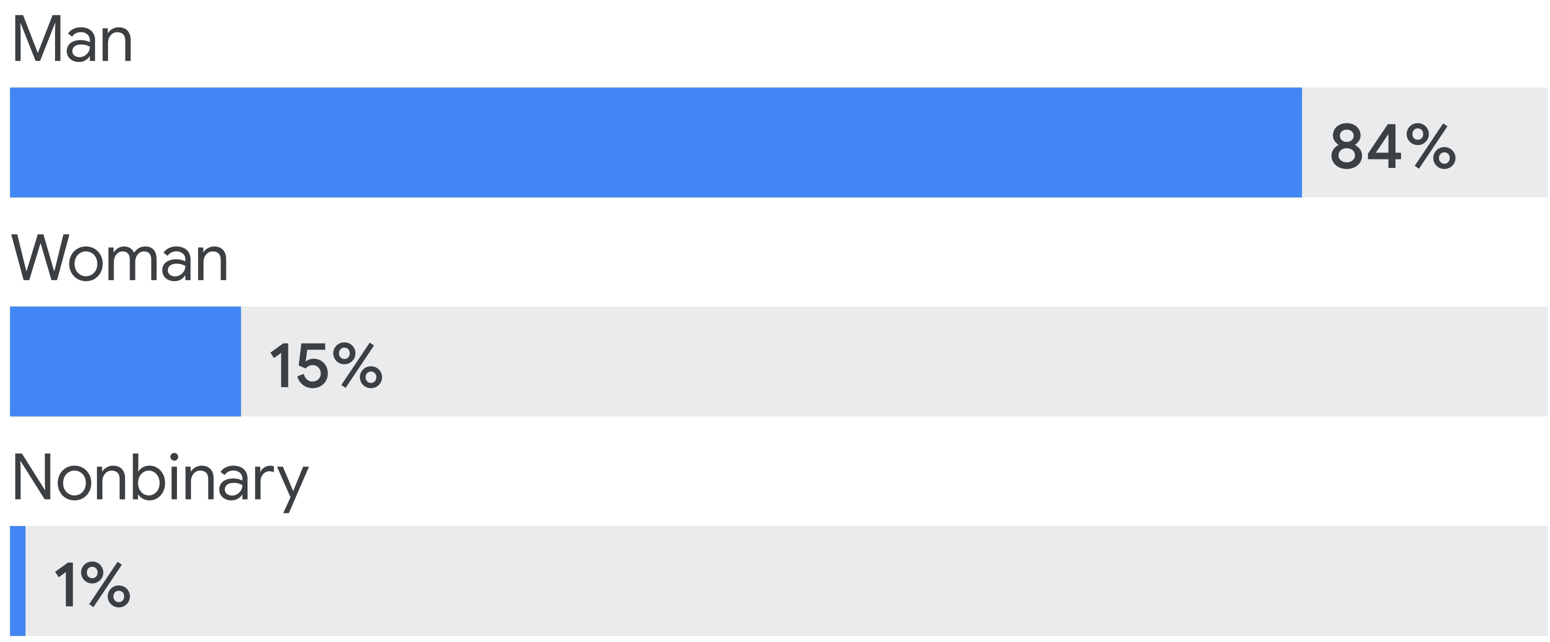


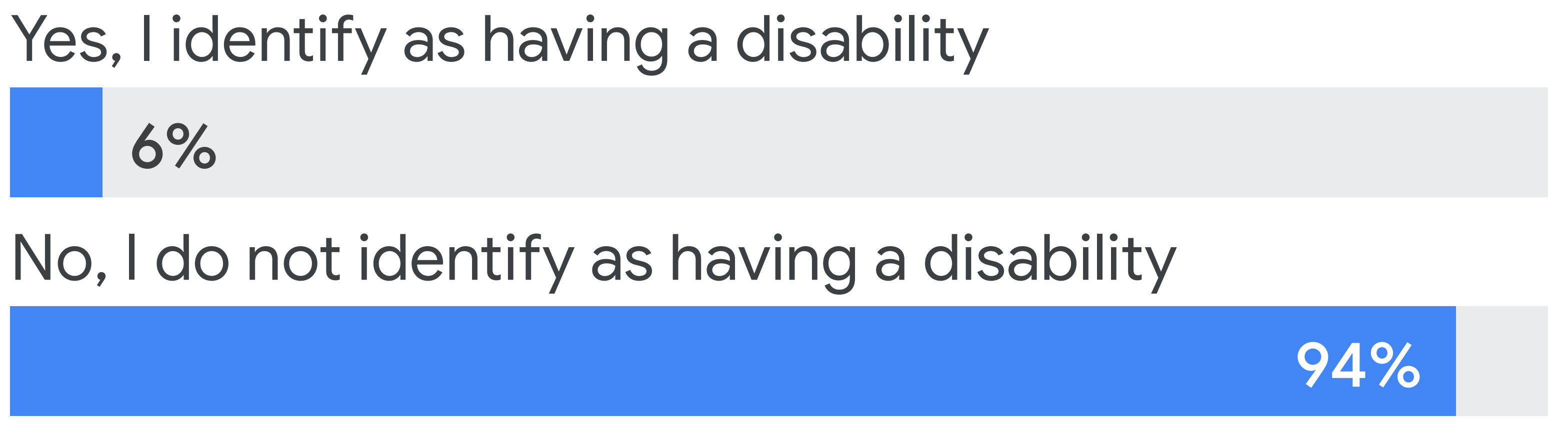
Q: OVERALL, HOW WOULD YOU RATE DIVERSITY, EQUITY, AND INCLUSION… *SAMPLE SIZE AND DATA ADJUSTED TO EXCLUDE RESPONDENTS WHO SELECTED 'DON'T KNOW / NOT SURE' OR 'PREFER NOT TO SAY'*

DEMOGRAPHICS

Age, Gender, and Disability Status







Q: WHICH OF THE FOLLOWING BEST DESCRIBES YOUR DISABILITY STATUS? (N=443 2024, N=417 2023)
Q: WHICH OF THE FOLLOWING BEST DESCRIBES YOUR GENDER? (N=466 2024, N=434 2023)
Q: WHICH OF THE FOLLOWING BEST DESCRIBES YOUR AGE? (N=456 2024, N=439 2023)
SAMPLE SIZE SAND DATA ADJUSTED TO EXCLUDE RESPONDENTS WHO SELECTED ‘PREFER NOT TO SAY’

Further Reading

FURTHER READING

Credits

Alex Maksymec
Manager of Customer Insights and Research, C2C
Program objectives and oversight, data visualization, written publication

Olivia Kamps
Brand Designer, C2C
Illustrations and design review

Marissa Gilbert
Research Director, UGS Research
Survey program consultation

Blake Baltazar
Senior Project and Research Analyst, UGS Research
Survey programming and analysis

Acknowledgements

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- The entire C2C team for sharing their curiosity about our members' desires
- The C2C Board of Directors for offering expertise and unique perspectives
- The Google Cloud Developer Relations team for bringing this project to C2C

As a point of guidance, your contribution is vital to continue our important work.

Looking for more insights?

Download our most recent development trends report.

FURTHER READING

Powered by people like you.

C2C brings together Google Cloud customers from around the globe to share ideas, insights, and strategies in a space that's built for authentic, peer-to-peer cloud conversation. Whether you're looking to overcome challenges, drive business growth, or dive into technical details, you can tap into the collective wisdom of cloud professionals like you.

Join C2C Today

"After just one C2C event, I made connections in the double figures who I still keep in touch with. It's a vibrant community for partners and customers alike. There is a very natural atmosphere and the content is very engaging and informative."

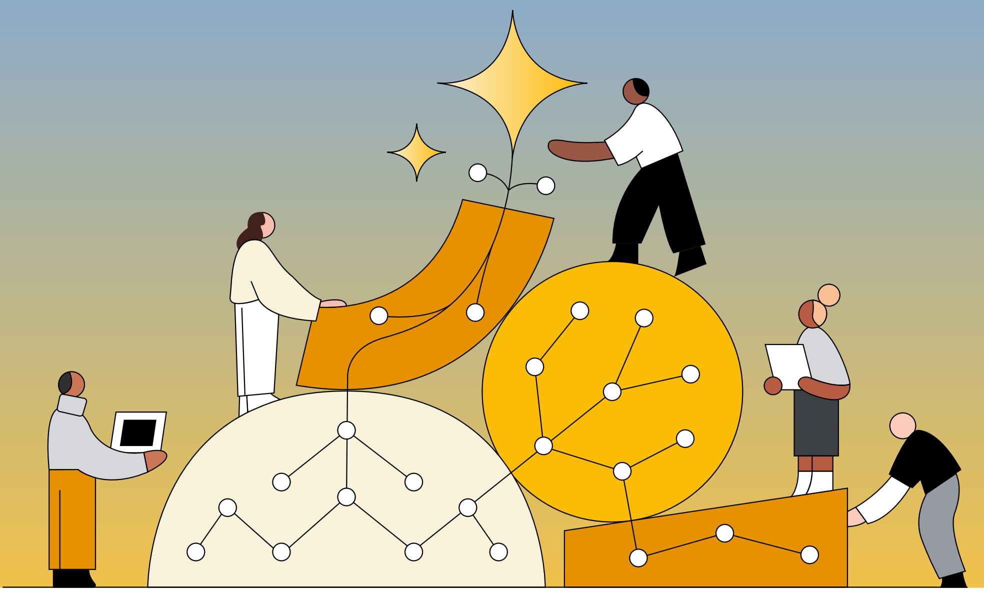
— **Simrin Gill**
Cobry

"Where else could you hear first hand from customer leaders and innovators making the most of Google Cloud?! No sales pitches either—just customers sharing with each other. "

— **Andy Hardy**
EMEA Sales Leader at Workspot

Articles

Events



C2C for Partners

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