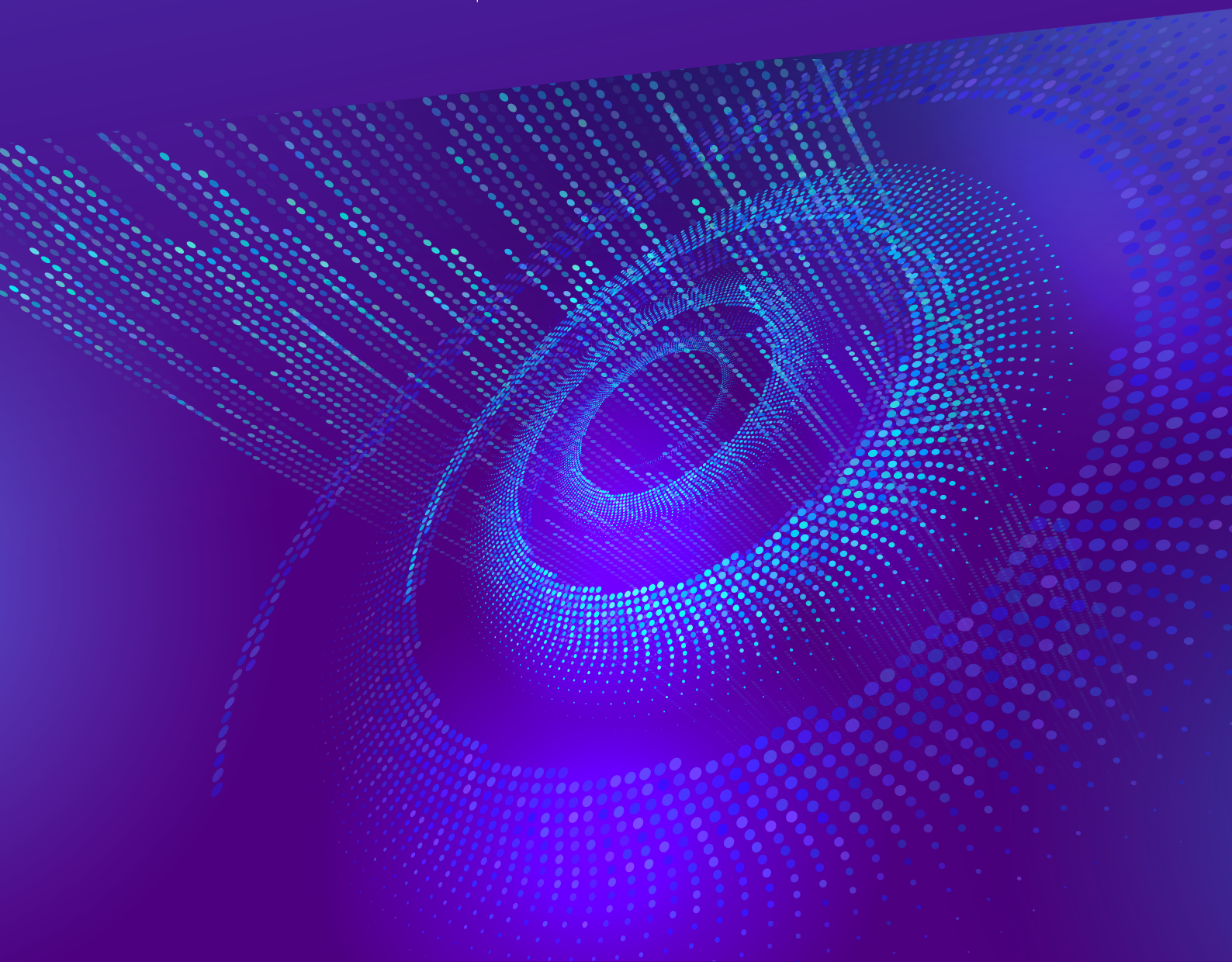
2026 Wasabi Global Cloud Storage Index

Healthcare Executive Summary Report

A collaboration between

wasabi hot cloud storage | VansonBourne



Summary of key findings

The cloud storage market has a fee problem

- When it comes to cloud storage billing, just under half (**49%**) of users' spending is on storage-related **FEES** (e.g., API operations, data access, egress) – not capacity
- **62%** of healthcare organizations say they **exceeded budget spending** for cloud storage in 2025
- Why are users exceeding their budgets?
  Fees play a big role: **42%** incurred higher data operation fees than expected; **37%** say they incurred higher API call fees than expected

Multicloud & hybrid storage deployments are foundational components of modern infrastructure strategy

- The openness and interoperability of cloud object storage (i.e., S3 API support) remain a valuable differentiator for both legacy and emerging workloads
- Multicloud storage deployments remain status quo: **73%** of healthcare respondents say they use more than one public cloud service provider for their object storage capacity
- Meanwhile, hybrid storage (a mix of on-prem and public cloud) has become the AI standard; with **65%** of respondents saying they **use hybrid storage deployments to support their AI workflows**

AI infrastructure spending will continue to increase, but the runway to deliver positive ROI is shortening

- Almost two-thirds (**64%**) of healthcare respondents believe their infrastructure budget for AI projects **will increase** over the next 12 months
- Today, allocations are skewed towards infrastructure spending – with an average of **67%** of AI budgets going towards data, storage and compute, the remainder (**33%**) allocated to software & SaaS
- However, just **34%** of healthcare organizations say their AI projects and solutions achieve a **positive return** today, while **41%** expect AI projects to deliver positive returns in the next 12 months

Control & visibility of "Dark Data" remains a challenge for many orgs

- AI initiatives are pressuring organizations to connect, analyze and derive value from data more than ever before, however, this year's survey results show many orgs struggle to execute in this area
- Part of the challenge is over half of healthcare organizations believe **anywhere between 25% and 74%** of their storage capacity is un-analyzed, underutilized or "dark data", on average
- Organizations will move fast to address this challenge; nearly all (**95%**) respondents say it is a priority to better analyze and operationalize "dark data" to support strategic decision making

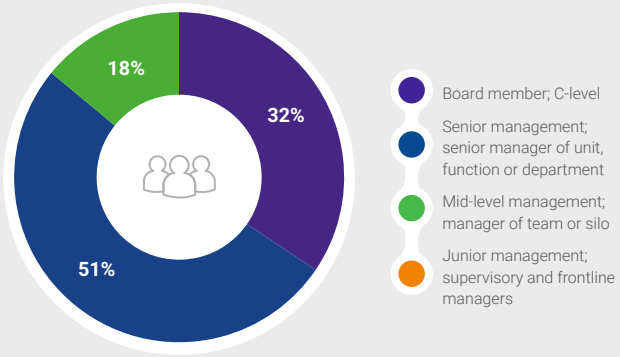
The 2026 Global Cloud Storage Index

In late 2025, Wasabi commissioned primary market research to better understand cloud storage market trends and dynamics. This Executive Summary provides a high-level overview of the results that IT decision makers should care about and apply to their organization's cloud storage strategy.

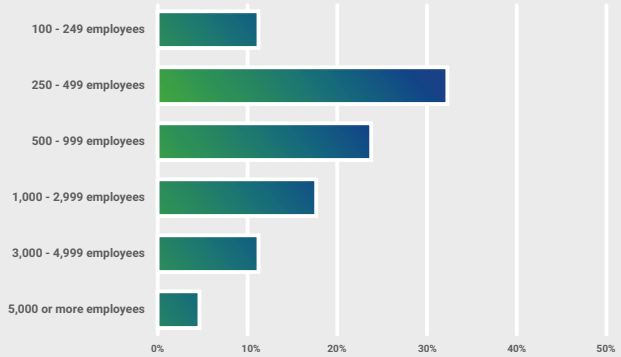
2026 marks the fourth consecutive year for the Wasabi Cloud Storage Index. This year, Vanson Bourne surveyed 1,700 IT decision makers around the world, including 171 respondents in the healthcare sector. Respondents chosen to participate in the survey had to be involved in their organization's cloud storage purchase process. Respondents were asked questions covering a range of topics, including their organization's purchasing preferences for cloud storage, key budgetary and usage challenges, billing segmentations and impact of various fee structures, expectations for data security and compliance, and how organizations are leveraging cloud object storage for AI use cases.

The findings from our survey are designed to be representative of the public cloud storage market in healthcare as a whole and provide IT decision makers with reliable data points to help guide their strategic initiatives and understanding of market dynamics.

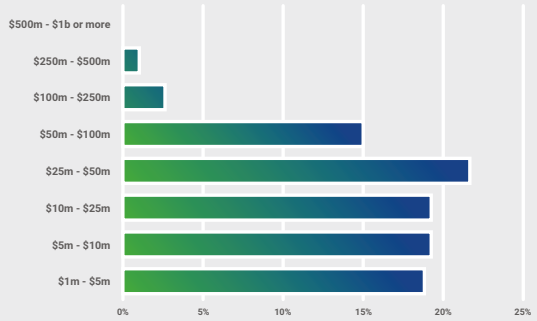
Which of these best describes your position in the organization?



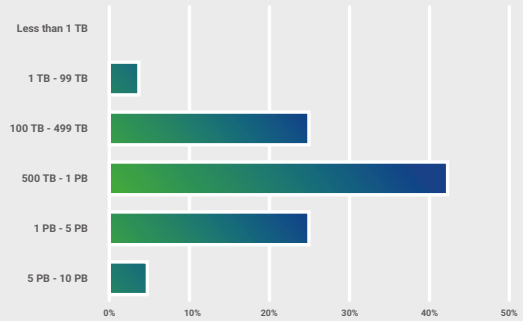
Approximately, how many employees does your organization have globally?



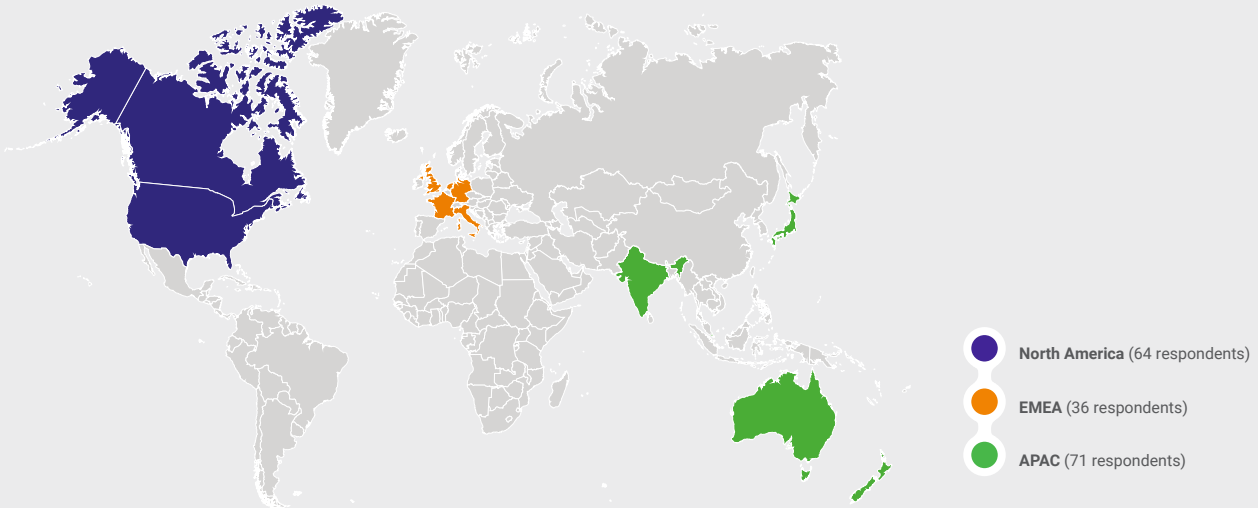
What is your organization's global IT budget?



Approximately, what is your organization's total current storage capacity, including both cloud and on-premises environments? (Average in TB)



Region



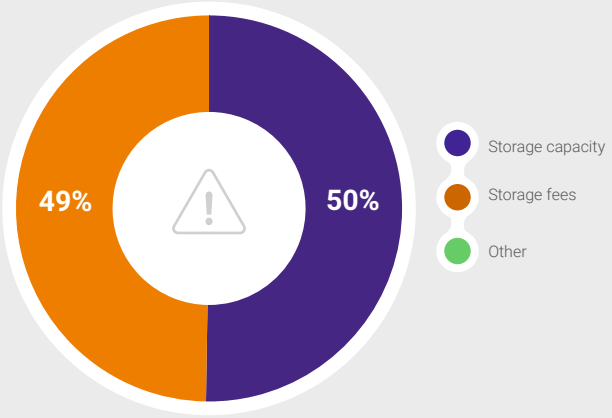
The cloud storage market has a fee problem

On average, just under half (49%) of an organization's cloud storage bill in the healthcare sector is allocated to FEES, not stored capacity.

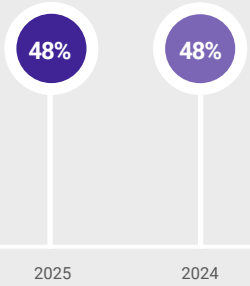
No changes to the status quo. For the fourth year in a row, survey results illustrate the high proportional mix of fees incurred by organizations using public cloud services.

To be exact, respondents indicate that on average **49%** of their billing is allocated to **storage-related fees**, while **50%** is allocated to actual storage capacity.

Approximately, what percentage of your organization's total public cloud storage subscription/ bill is allocated to the following areas:



Wasabi has tracked this metric over the past 3 years in the Cloud Storage Index. Unfortunately, the proportions have not changed – which further illustrates the embedded nature of this fee-based billing model in healthcare:



To see a more detailed example of how data access & egress fees can impact cloud storage, check out our calculator

What exactly are these fees? Most leading cloud storage providers charge a range of usage and access fees for data stored in their environments. Networking fees like egress, and API-based data operations fees for reads, writes, and lists are some of the most recognizable. But often, these are just the tip of the iceberg, with lesser-known fees associated with things like data retrieval, object lock, and replication requests making a material impact on monthly billing.

Check out Wasabi's detailed ebook, Demystifying Cloud Object Storage Costs: The Ultimate Guide to the Hidden Fees That Can Break Your Budget to get all the details.

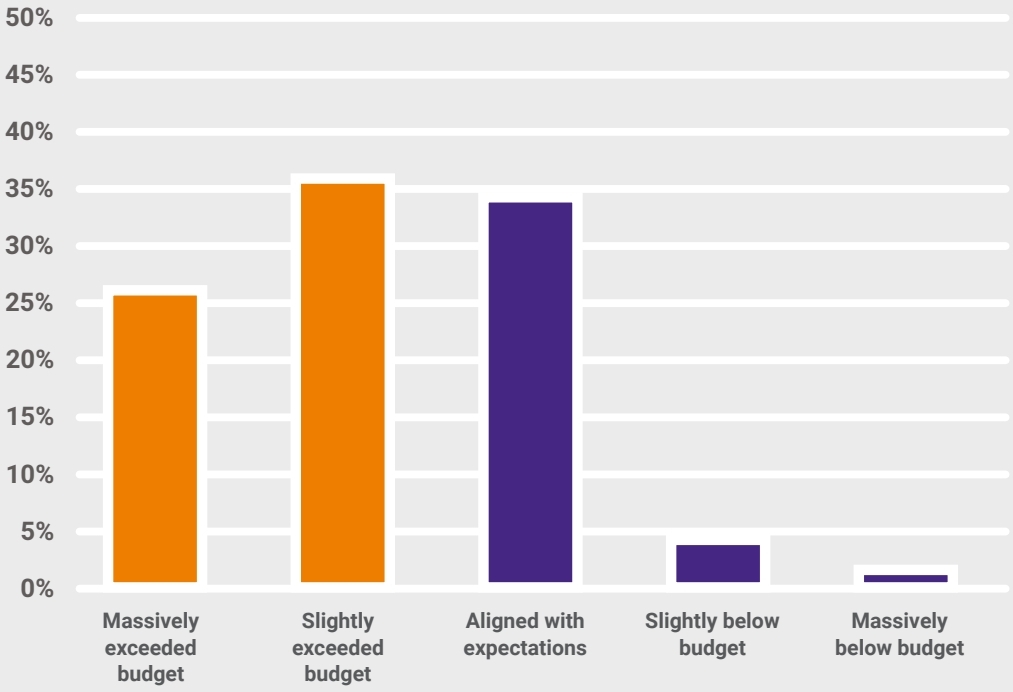
And don't just take our word for it, here's what respondents in healthcare told us this year when asked about the importance of price and TCO when considering a cloud storage service:

- *"We aim to maintain a budget relatively in line with forecasts, as we face general budget constraints"* – **France, CIO or CTO equivalent**
- *"Managing total cost helps ensure cloud storage delivers real value, not just technical capability"* – **USA, Cybersecurity Manager**

Spending overruns remain a challenge, with 62% of healthcare organizations exceeding cloud storage budgets in 2025

Bottom line: complex fee structures imposed by hyperscalers make it impossible to control or accurately forecast spending

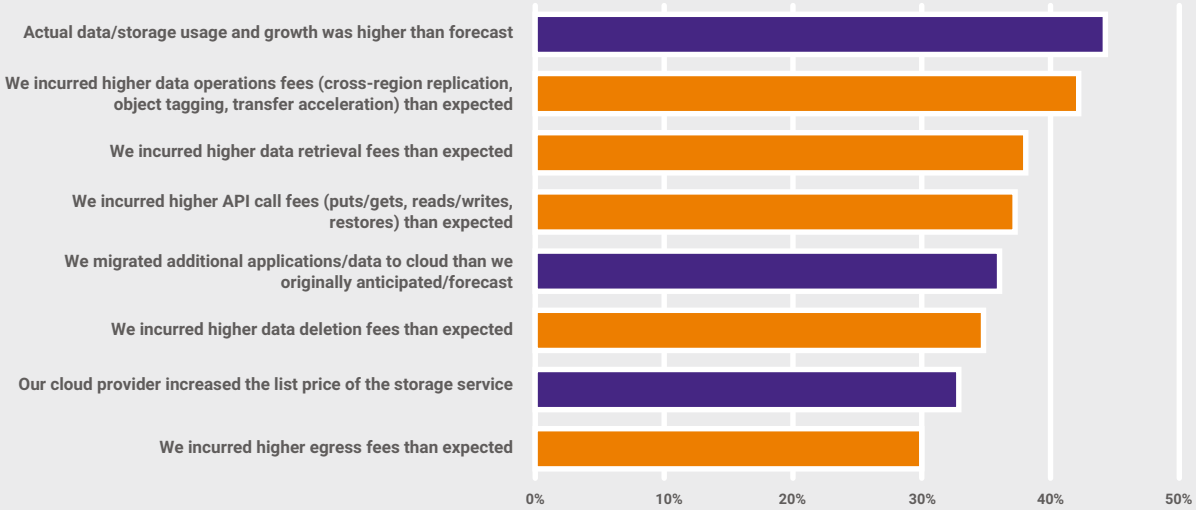
Over the last year, how has your organization's actual spending on public cloud storage aligned with budget expectations?



Unfortunately, **62%** of healthcare organizations say they exceeded budgeted spending for cloud storage in 2025.

Budget excess is driven by a combination of factors, including increased data usage, growth, and migration; compounded by a range of storage-related fees. In fact, **93%** of those who exceeded budgeted spending in 2025 identified higher than expected fees as one of the reasons why:

Why do you believe your organization's spending on public cloud storage exceeded budget expectations?



To help minimize and avoid the impact of fees and budget overruns, healthcare organizations turn to multicloud and hybrid cloud deployments

The market always finds a way. In this case, self-correction is achieved through the use of multiple storage providers, complemented by a multitude of deployment types

This year's survey confirms that multicloud storage adoption remains the norm, with **73%** of healthcare respondents saying they **use more than one public cloud service provider for storage.**

No surprises here, but what is interesting are the reasons why IT and storage decision-makers are prioritizing multicloud deployment:

Most cited reasons driving multicloud adoption:

Application availability requirements (apps required to be hosted in specific clouds)

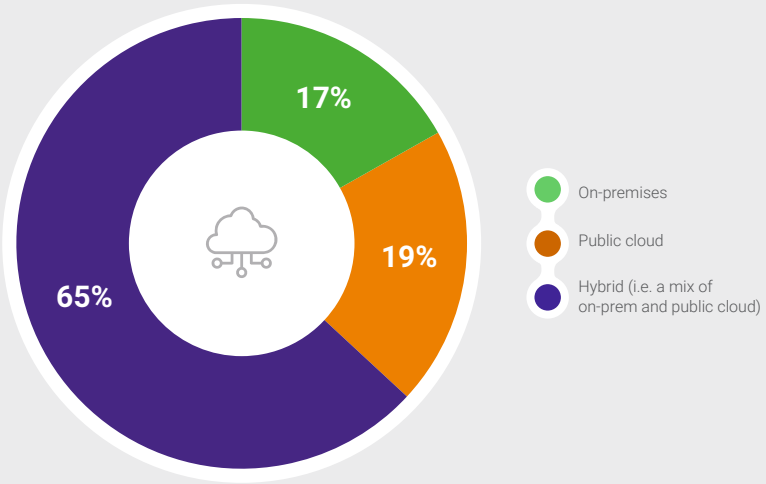
Ability to take advantage of a wider range of performance options

Ability to take advantage of lower price points/ better total cost of ownership (TCO)

- *"Prevent an excessive reliance on single [vendor] allowing us the freedom to transfer services or data when necessary"* **– USA, IT/solutions architecture engineering**
- *"Strengthens the enterprise's entire data protection strategy by avoiding a single point of failure"* **– USA, Cyber security specialist**

Similarly, organizations in healthcare prefer Hybrid Storage deployments to support their AI workflows.

Which of the following storage method(s) are used by your organization to support its AI workflows?



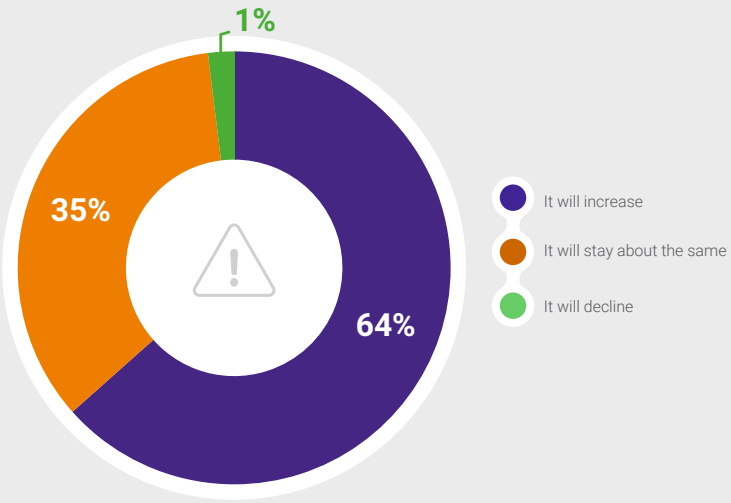
Hybrid storage (defined as a combination of on-premises and cloud) is the clear favorite **to support AI workloads** – with **65%** of healthcare organizations pursuing hybrid storage deployments.

This is another great indicator of buyer and market preferences moving towards flexibility and choice of provider/platform – even when it comes to nascent and emerging workloads like AI.

Majority of healthcare organizations will increase infrastructure budgets to support AI, targeting spending on data, storage and compute

Organizations are prioritizing spending on infrastructure (data & compute) to support their AI projects, but the timeline for delivering ROI is shortening

How is your organization's infrastructure budget for AI projects expected to change over the next 12 months, if at all?



No surprises here: almost all respondents surveyed in healthcare (**99%**) stated their organization has an infrastructure budget in place for AI.

Furthermore, **64%** of healthcare organizations **expect infrastructure budgets for AI to increase in the next year** – a positive indicator for the healthcare market over the coming 12 months.

However, our survey this year points out an important nuance: the AI honeymoon period won't last forever. Just **34%** of respondents in healthcare **believe their AI projects/solutions deliver positive ROI today**. Yet **41%** of respondents believe **their AI projects will deliver a positive return in the next 12 months**.

That's a big swing in expectations over a short period of time – which will undoubtedly create pressure on AI technology providers and practitioners to work together to successfully deliver this goal.

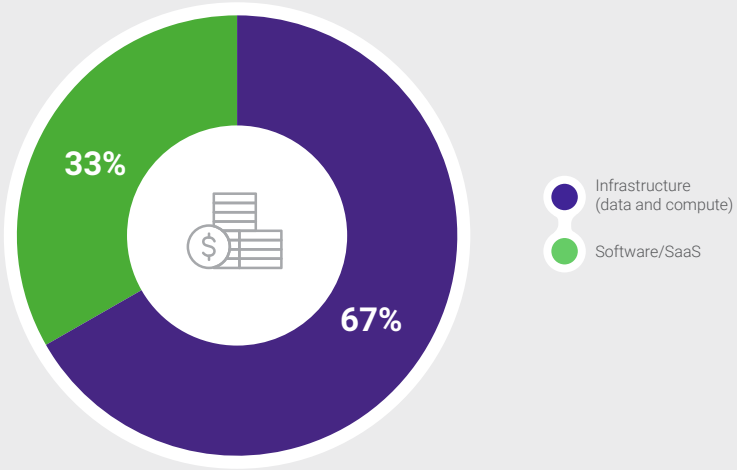
Where is AI infrastructure spending allocated?

Survey results show the majority of AI budgets (**67%**) are **allocated to infrastructure (data, storage and compute), on average, as opposed to software/SaaS**.

This provides valuable insight into how organizations allocate AI spending today, and illustrates the significant cost of compute, memory, storage, and networking components required to build modern AI workflows which support a range of solutions.

As the market matures, we expect budget allocations to become more equal proportionally, eventually favoring the Software/SaaS category.

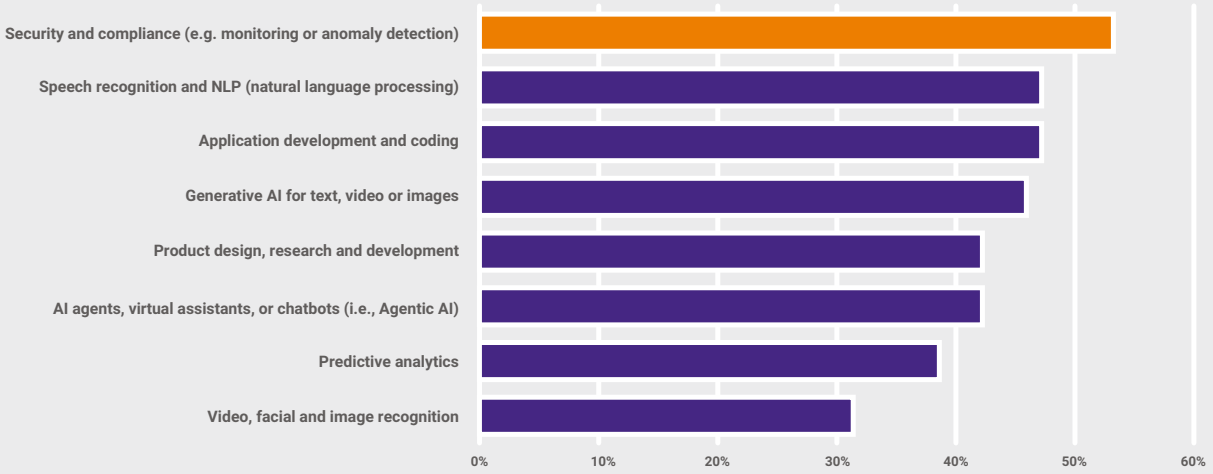
Approximately, what proportion of your organization's AI budgets are allocated to the following:



Leading AI use case categories include security, compliance, and speech recognition as workloads mature beyond GenAI

AI solutions for a range of security and compliance use cases now rival GenAI

Which of the following AI use cases/ workloads has your organization deployed?



The good news: results point to a positive proliferation and expansion of AI use cases across enterprises beyond GenAI. Healthcare organizations are finding value in AI-based solutions with real-world applicability, like security monitoring and anomaly detection.

The bad news: AI solution implementation isn't easy, and unfortunately, data-related challenges top the list:

- **48%** of healthcare organizations experience **data storage challenges (e.g. cost of storage, data access, migration or management) when implementing AI** projects & solutions – making it the most cited challenge
- **40%** are dealing with **data quality challenges (e.g. cleansing, preparation)**, when implementing AI projects or solutions

Enterprise storage providers have a key role to play in helping alleviate some of these AI data-related challenges.

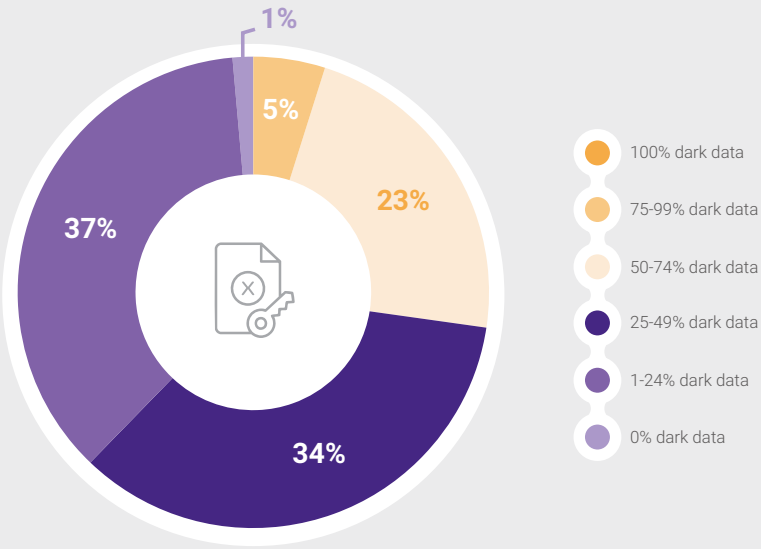
Specifically, by providing users with advanced capabilities and features for automated processes at scale (e.g., batch operations, automated metadata tagging and indexing); as well as cost effective access to data wherever it resides (on-premises, cloud, edge), to ensure the data feeding AI workflows remains accessible without financial penalty.

Need more detail? Check out Wasabi's technical blog on object storage in the age of Generative AI to learn more

The “dark data” conundrum: healthcare organizations are collecting vast volumes of data, but large proportions remain un-analyzed

As organizations are pressured to process, analyze and drive insights from data now more than ever before, dark data remains a big hurdle

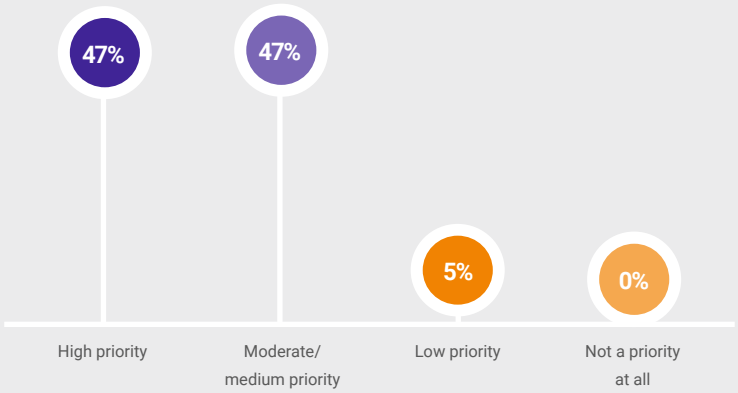
Approximately, what percentage of your organization’s current storage capacity do you believe to be unknown or inaccessible i.e., “dark data?”



The 2026 Cloud Storage Index found that over half of healthcare organizations believe anywhere between **25% and 74% of their stored capacity is un-analyzed, underutilized or “dark data”.**

By “dark data,” we mean data that their organization collects but does not use for analysis, decision-making, customer value, compliance, or other strategic purposes. Examples include logs, call recording archives, chat archives, email archives, video or document archives, etc.

How much of a priority do you believe it is for your organization to better manage, operationalize, and analyze “dark data” to support strategic decision making?



Organizations seem well aware of this reality and are keen to address the issue. In fact, **95%** of healthcare respondents **say it is a priority to better analyze and operationalize “dark data.”**

Clearly, organizations realize the business value associated with improved control and visibility over their dark data – especially as it may pertain to AI initiatives. However, executing changes across existing storage installed bases can be hampered by operational siloes, legacy systems, and the cost associated with data migration, modernization, or access.

Survey methodology

Survey details

Wasabi commissioned independent agency Vanson Bourne to conduct primary research into cloud storage. The study surveyed 1,700 IT decision makers who had at least some involvement in or responsibility for public cloud storage purchases in their organization. This report focuses specifically on the results in healthcare, for which there were 171 respondents. The research took place in November and December 2025 and surveyed organizations with more than 100 employees across public and private sectors. All interviews were conducted using a rigorous, multi-level screening process to ensure that only suitable candidates were given the opportunity to participate.

Vanson Bourne

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