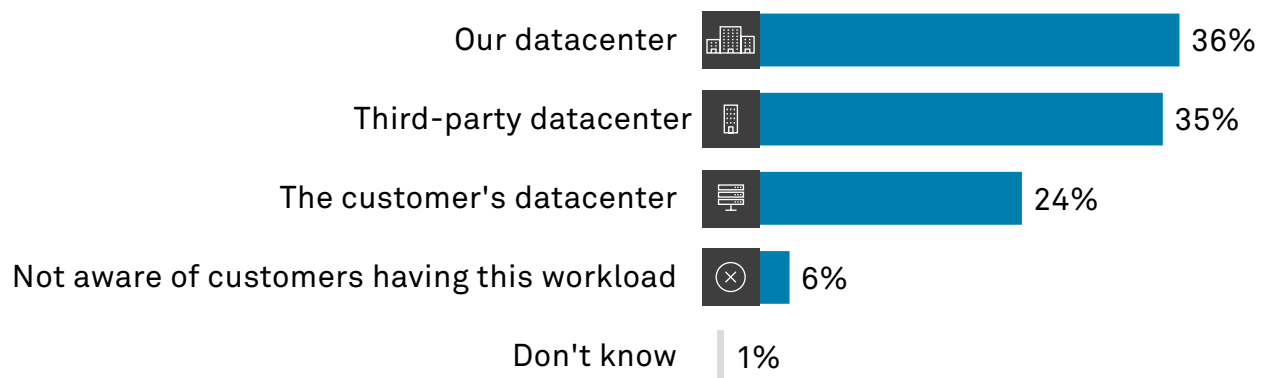


# Voice of the Service Provider

## Survey-based data and insight from a global panel of service provider decision-makers

**Understand service providers' business drivers, pain points, spending priorities and overall product roadmap.** As service providers continue to expand their relationships with enterprises, they represent a huge new opportunity for all technology vendors. Voice of the Service Provider (VSP) helps clients qualify and quantify buying behaviors and strategic priorities for the expanding universe of public cloud providers, hosting providers, managed service providers, systems integrators, SaaS companies and colocation providers.

### Thinking about your customers' workloads, where is each of the following primarily executed today?



451 Research's Voice of the Service Provider: Workloads, Key Projects & Infrastructure Evolution 2021

### Align your products and positioning to service provider requirements

Get the accurate, consistent and granular survey insights you need to calibrate your product, marketing, sales or investment strategies to address:

- Technology adoption
- Spending and budget changes and influencers
- Vendor perceptions
- IT pain points and challenges
- IT priorities and project drivers

451 Research

**S&P Global**

Market Intelligence

### 2022 Research Topics and Themes



#### Infrastructure evolution

Business drivers for legacy infrastructure transformation and adoption of software-defined and emerging technologies



#### Differentiation and vendor selection

Provider differentiation strategies, vendor selection criteria and best practices for tech partner programs



#### Budgets and spending

Provider budget trends and economic motivation for technology introduction, mass use and replacement



#### Workloads and key projects

Service provider strategies around key customer workloads, and opportunities in major client IT initiatives

# Technologies and Market Player Coverage

## Service providers business drivers

- Services offered and in plan
- Roadmap and expanding product portfolios
- Transformation required to support customers
- Competitive differentiation
- Technology challenges and pain points
- Product and service delivery strategies
- Key customer initiatives
- Vertical market focus
- Drivers and inhibitors of technology transformation
- New technology adoption plans
- Relationship with third-party infrastructure platforms

## Customer-facing products/services

- Data analytics tools and platforms
- Cloud-native applications and frameworks
- Edge computing and IoT
- Machine learning and AI
- Blockchain
- Hybrid and multicloud management

## Key market suppliers\*

AWS	IBM
AMD	Lenovo
ARM	Microsoft
Brocade (Broadcom)	NetApp
Cisco	Nutanix
Dell Technologies	Nvidia
Ericsson	Oracle
Fujitsu	Pure Storage
Google	Supermicro
Hewlett-Packard Enterprise	Unisys
Hitachi Vantara	Veritas
Huawei	VmWare
Intel	

## Vendor relationships

- Technology and service vendor selection criteria
- Partner program participation and expectations
- Relationship with third-party infrastructure platforms

\* Representative of companies that offer products and services substantially covered in the survey.

## Key VSP Features

- Access to survey datasets that underpin 451's research
- License to use survey data and materials in your own work
- Regular data presentations customized to your requirements
- Ongoing inquiry access to analysts leading survey research
- Custom data cuts created by request

## Deliverables Available



### Crosstab data

Crosstabs of complete worldwide and regional survey results datasets, including key metrics and segmentation



### Advisory report

Customer trend and vendor positioning analysis based on end-user surveys and phone interviews



### Customer narratives

Transcript excerpts from in-depth phone interviews with enterprise IT buyers, segmented by respondent, company size, vendor(s) used and theme/topic



### Charts and Figures PPT

PowerPoint slide deck of complete top-line survey results in charts and figures

**451 Research uniquely covers all phases of innovation, from investment to innovation to adoption.** Through a variety of research techniques – including face-to-face briefings, end user surveys, forecast modeling, revenue tracking, in-depth interviews and acquisition tracking – 451 Research provides compelling and comprehensive coverage of IT innovation.

**Our research and data products provide the right mix of quantitative and qualitative insight to impact your critical business decisions.**

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