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?

- Our datacenter: 36%
- Third-party datacenter: 35%
- The customer’s datacenter: 24%
- Not aware of customers having this workload: 6%
- Don’t know: 1%

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

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

451 Research

S&P Global
Market Intelligence
<table>
<thead>
<tr>
<th>Key VSP Features</th>
<th>Deliverables Available</th>
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</thead>
<tbody>
<tr>
<td>- Access to survey datasets that underpin 451’s research</td>
<td><strong>Crosstab data</strong></td>
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<tr>
<td>- License to use survey data and materials in your own work</td>
<td>Crosstabs of complete worldwide and regional survey results datasets, including key metrics and segmentation</td>
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<td>- Regular data presentations customized to your requirements</td>
<td><strong>Advisory report</strong></td>
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<td>- Ongoing inquiry access to analysts leading survey research</td>
<td>Customer trend and vendor positioning analysis based on end-user surveys and phone interviews</td>
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<tr>
<td>- Custom data cuts created by request</td>
<td><strong>Customer narratives</strong></td>
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<td></td>
<td>Transcript excerpts from in-depth phone interviews with enterprise IT buyers, segmented by respondent, company size, vendor(s) used and theme/topic</td>
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<td><strong>Charts and Figures PPT</strong></td>
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<td>PowerPoint slide deck of complete top-line survey results in charts and figures</td>
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**Key market suppliers**

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

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

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