



coldago
research

SURVEY 2020
coldago

End-Users Survey 2020
March 2020

Published March 16th, 2020
Document #CR-2020-011-44

Introduction

We ran an end-users survey in January 2020 to learn about storage related IT projects needs, collect users perceptions and understand their technologies adoptions. By end-users we mean companies that pick, deploy and used IT products to support their business activity and mission.

We considered 2 populations – US and Europe – with respectively 1123 US companies and 560 European ones. For Europe, we limit our study to UK, Germany and France. Each of these countries represents approximately one third of the total European users.

Users belong to the enterprise and SMB segments with 50% from each segment. Companies span several verticals in term of industries and use-cases.

The study addresses technology adoption, projects priorities and products/features needs for a total of 20 questions.

Each graphic is sorted by descending order for US.

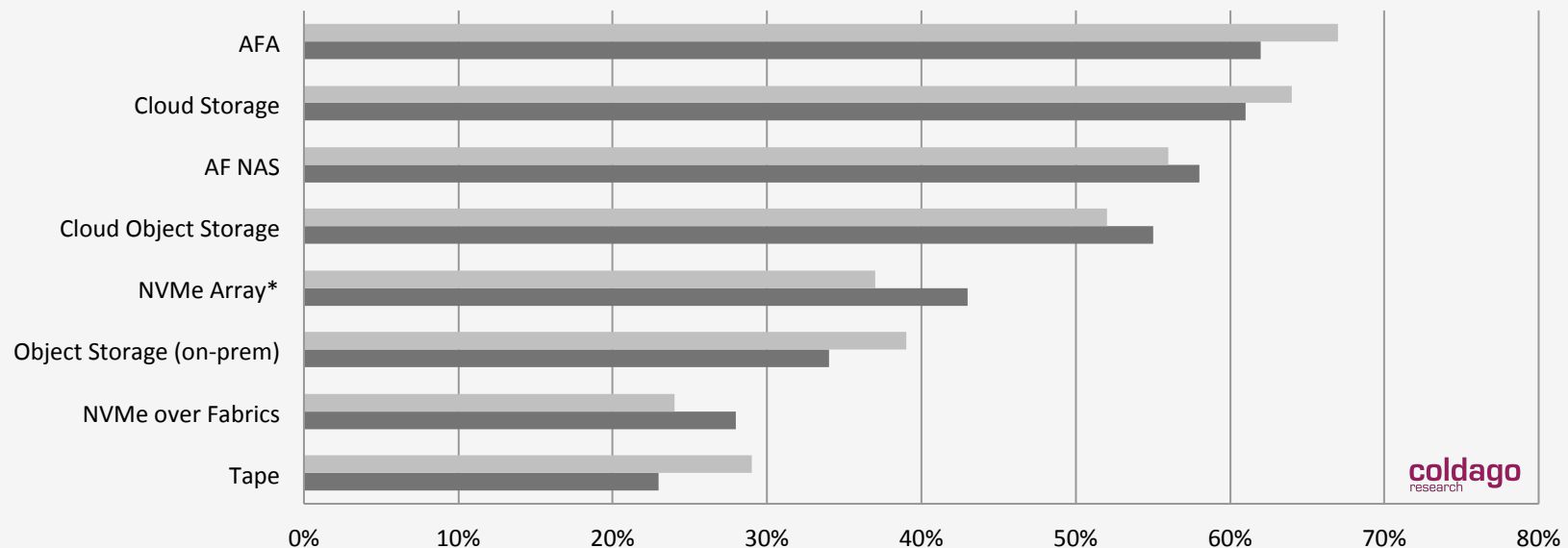
"We wished to understand end-users perspective beyond what we heard from vendors, so we asked a series of 20 questions to end-users across all verticals and industries and results are more than interesting with some surprises."

Philippe Nicolas
Founder and Lead Analyst
Coldago Research

Questions about technologies and products

#1: What are the technologies you will consider for new projects in 2020?

What are the technologies you will consider for new projects in 2020?



	Tape	NVMe over Fabrics	Object Storage (on-prem)	NVMe Array*	Cloud Object Storage	AF NAS	Cloud Storage	AFA
■ Europe**	29%	24%	39%	37%	52%	56%	64%	67%
■ USA	23%	28%	34%	43%	55%	58%	61%	62%

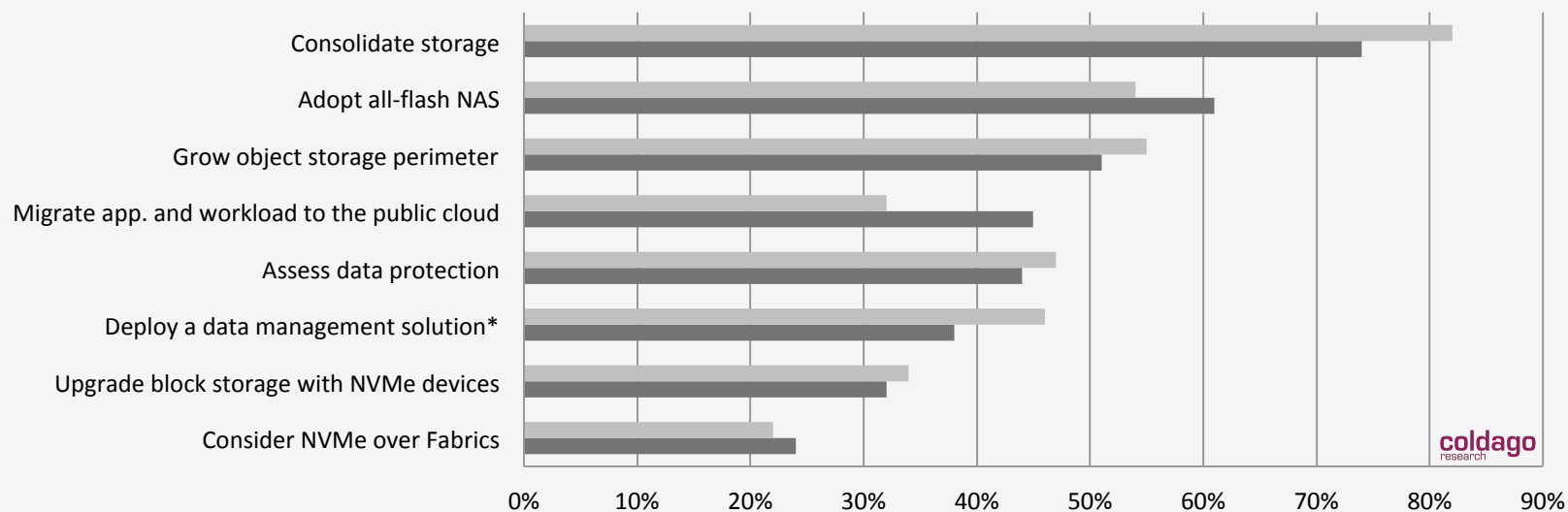
Source Coldago Research – Survey 2020

* storage array with NVMe devices
** UK, Germany, France

Questions about technologies and projects

#2: What are your top 3 priorities in storage (and data management) for 2020?

What are your top 3 priorities in storage (and data management) for 2020?



	Consider NVMe over Fabrics	Upgrade block storage with NVMe devices	Deploy a data management solution*	Assess data protection	Migrate app. and workload to the public cloud	Grow object storage perimeter	Adopt all-flash NAS	Consolidate storage
■ Europe	22%	34%	46%	47%	32%	55%	54%	82%
■ USA	24%	32%	38%	44%	45%	51%	61%	74%

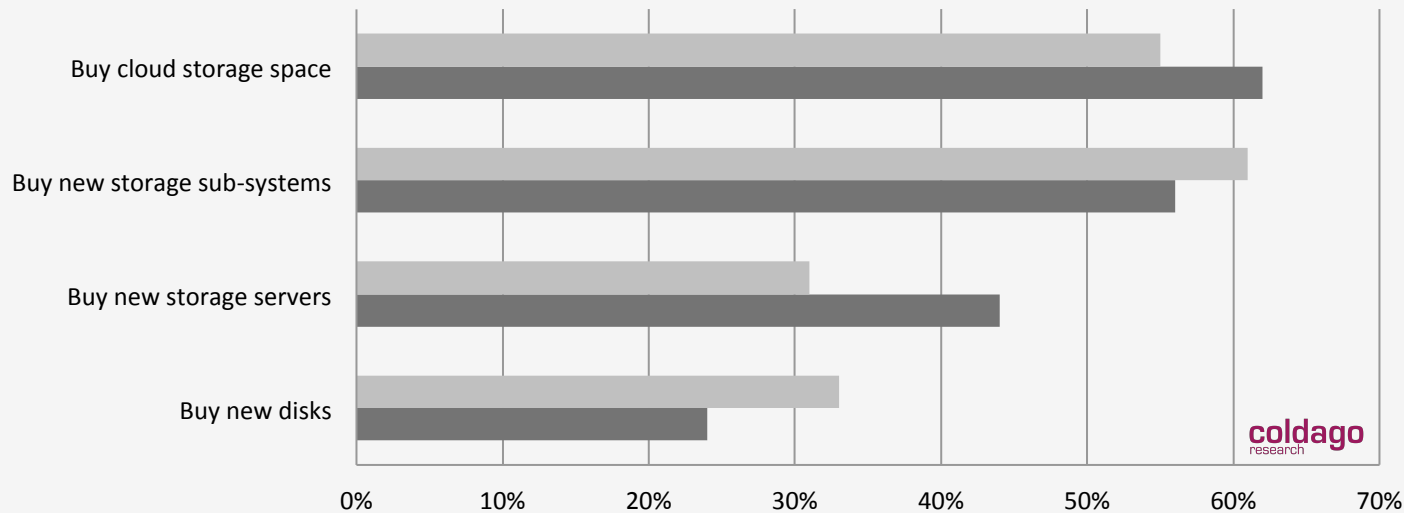
Source Coldago Research – Survey 2020

* classification, tiering, deduplication, DR...

Questions about technologies and purchase options

#3: How do you address storage capacity needs?

How do you address storage capacity needs?



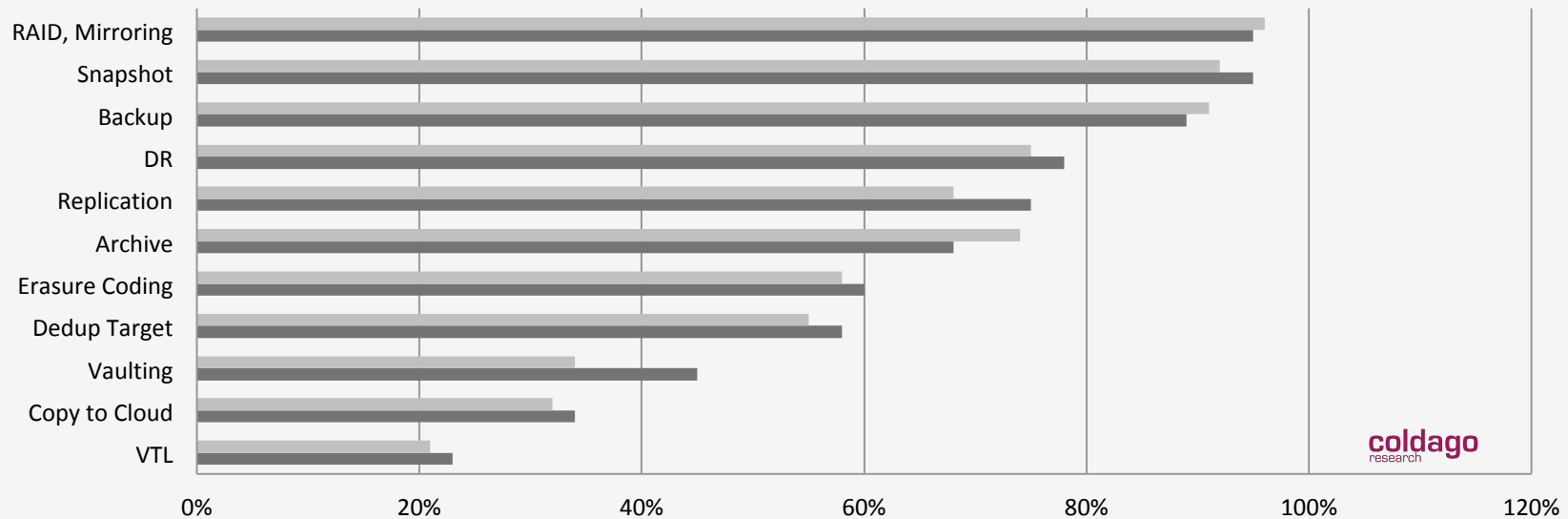
	Buy new disks	Buy new storage servers	Buy new storage sub-systems	Buy cloud storage space
Europe	33%	31%	61%	55%
USA	24%	44%	56%	62%

Source Coldago Research – Survey 2020

Questions about technologies and processes

#4: How to you protect data?

How do you protect data?



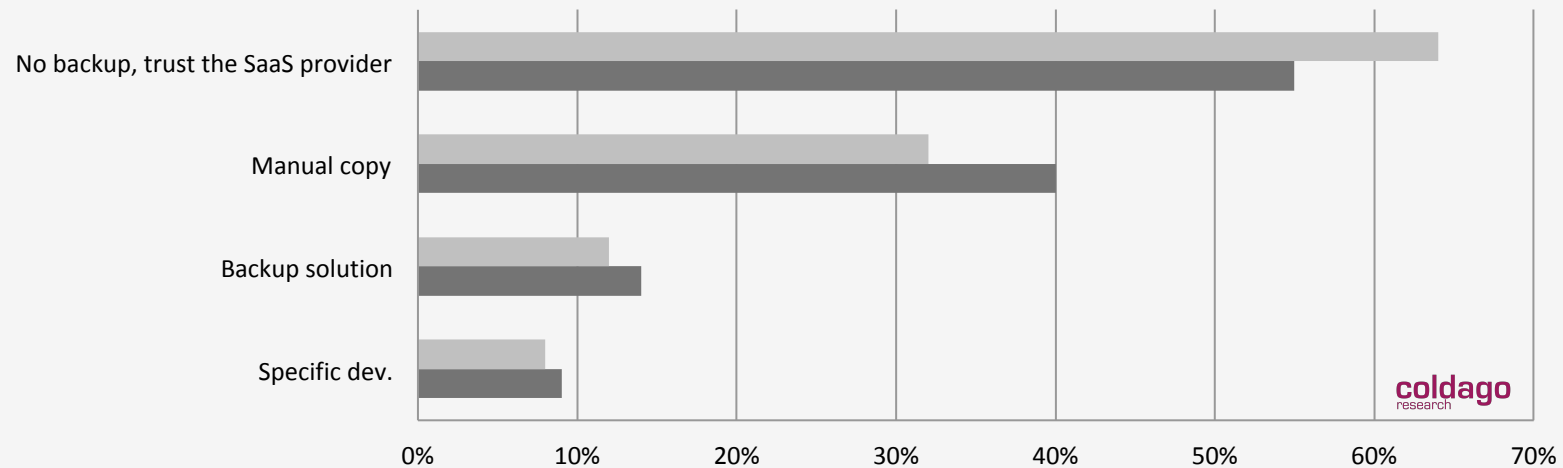
	VTL	Copy to Cloud	Vaulting	Dedup Target	Erasure Coding	Archive	Replication	DR	Backup	Snapshot	RAID, Mirroring
Europe	21%	32%	34%	55%	58%	74%	68%	75%	91%	92%	96%
USA	23%	34%	45%	58%	60%	68%	75%	78%	89%	95%	95%

Source Coldago Research – Survey 2020

Questions about technologies and processes

#5: If you use Enterprise SaaS applications, how do you protect your data?

If you use Enterprise SaaS applications, how do you protect your data?

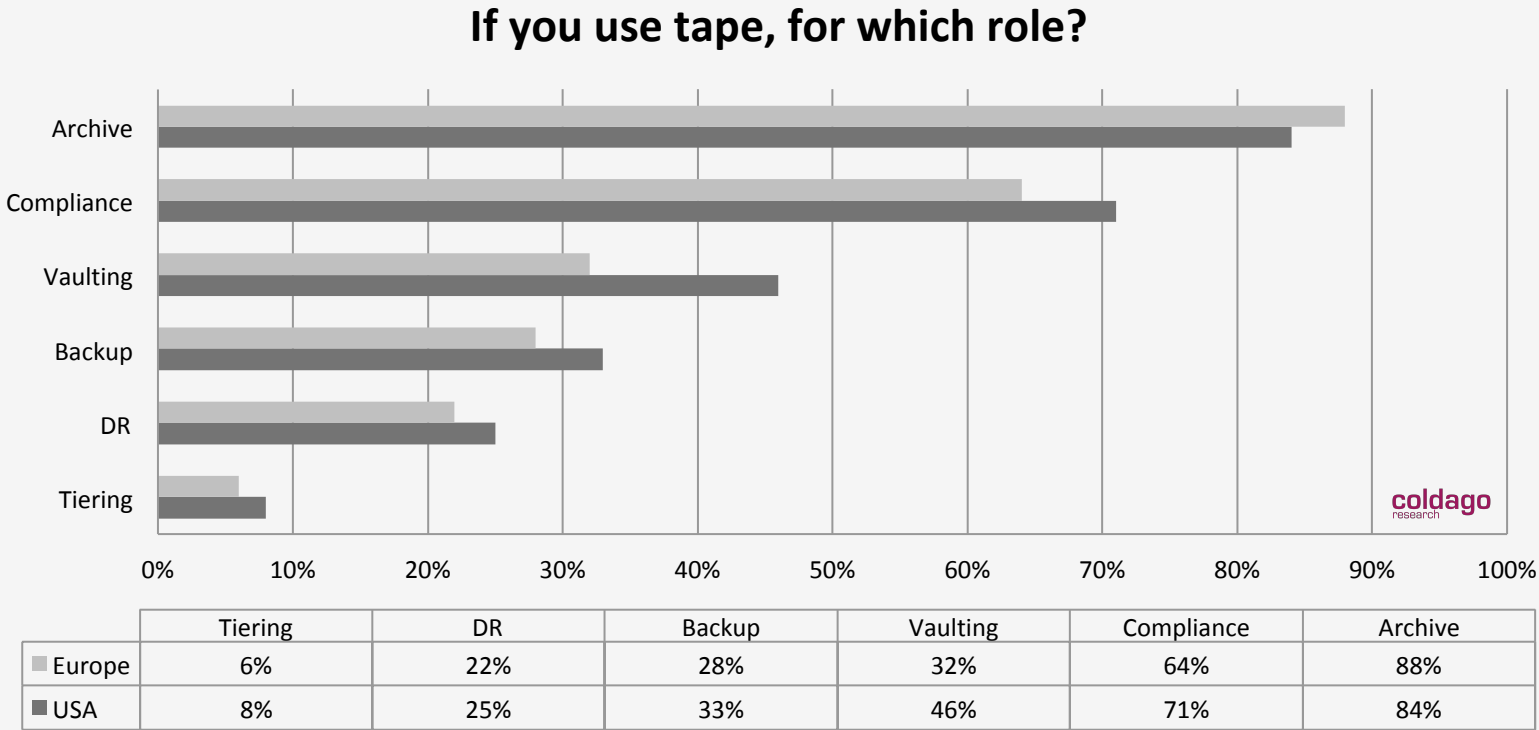


	Specific dev.	Backup solution	Manual copy	No backup, trust the SaaS provider
Europe	8%	12%	32%	64%
USA	9%	14%	40%	55%

Source Coldago Research – Survey 2020

Questions about technologies and processes

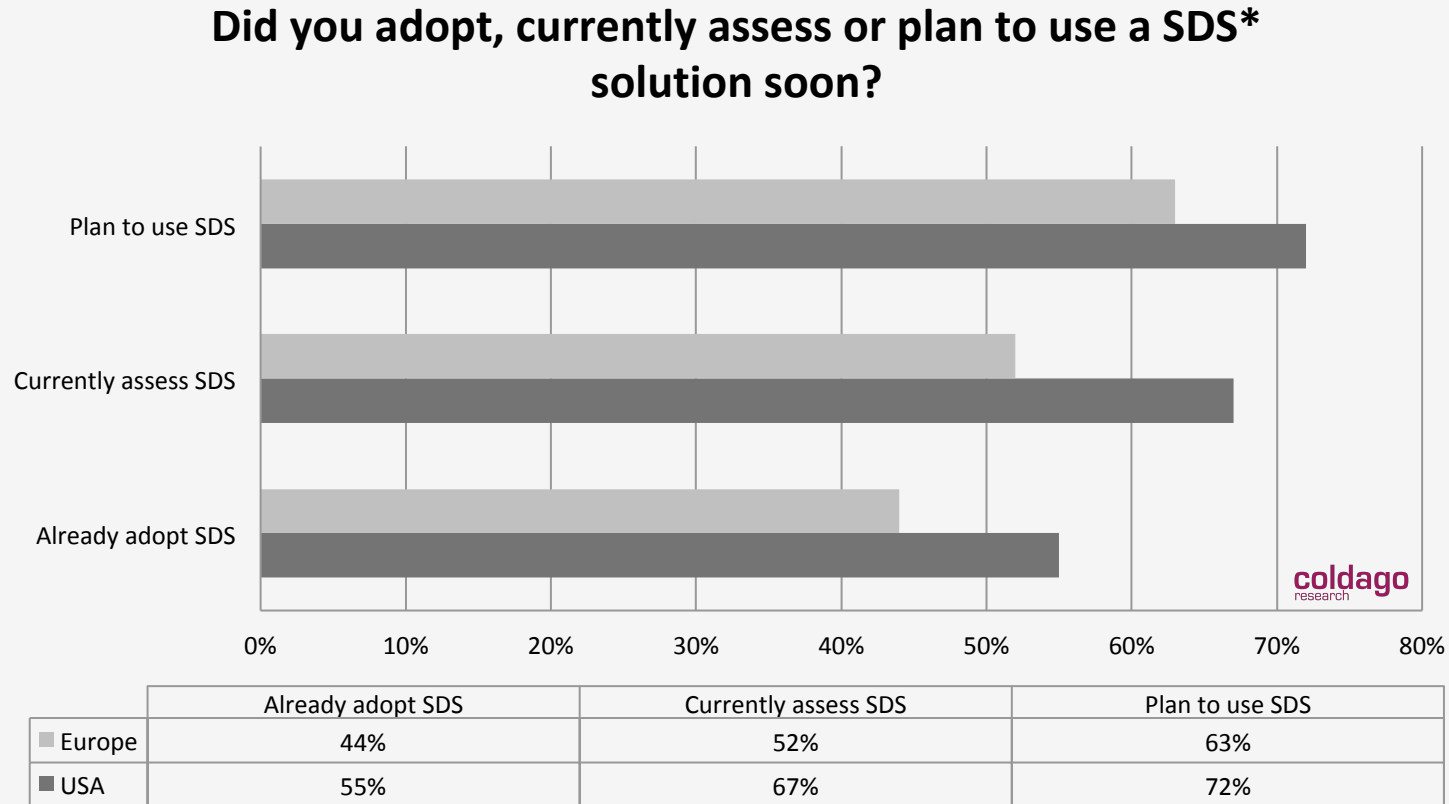
#6: If you use tape, for which role?



Source Coldago Research – Survey 2020

Questions about technologies and product behaviors

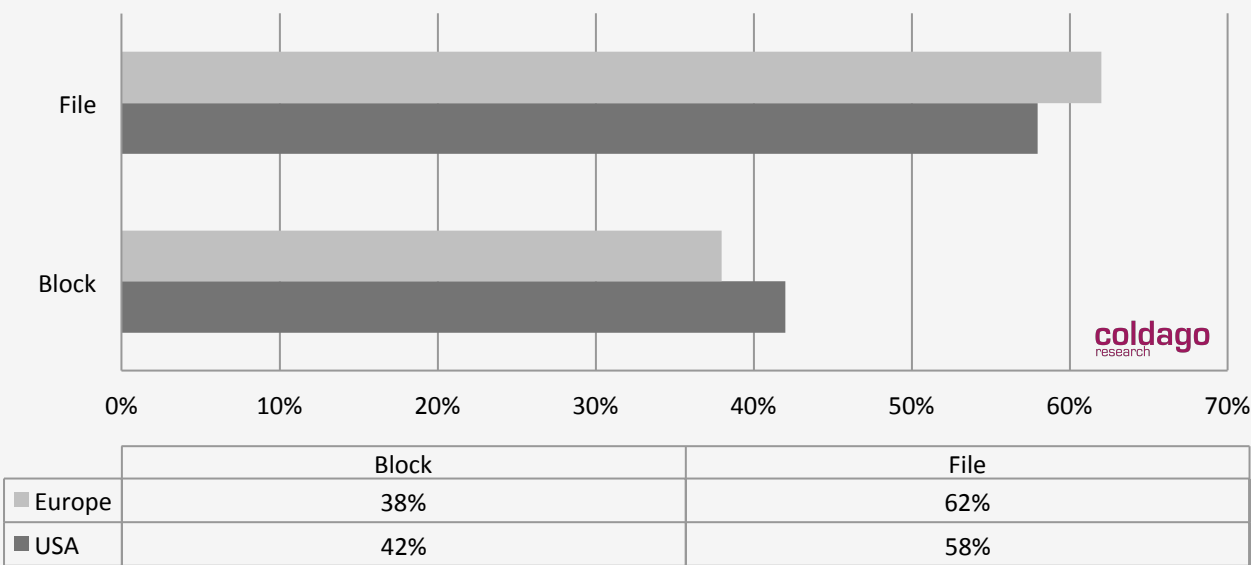
#7: Did you adopt, currently assess or plan to use a SDS* solution soon?



Questions about technologies

#8: If you use server virtualization, how is storage attached?

If you use server virtualization, how is storage attached?

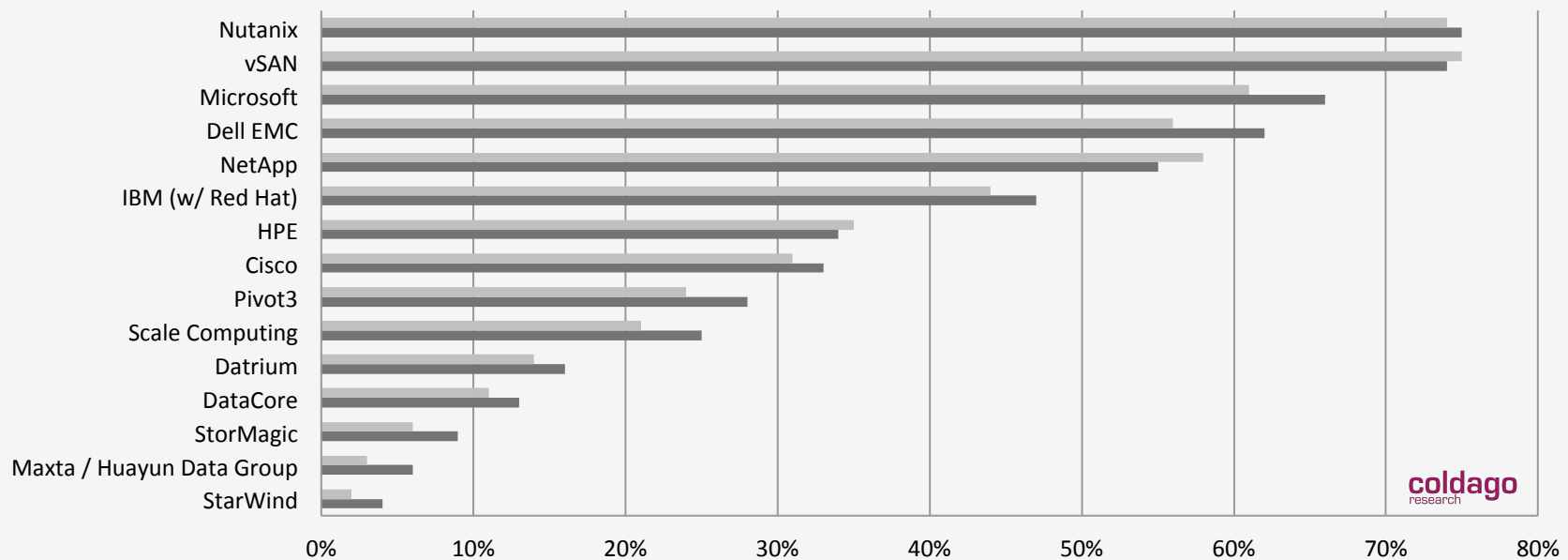


Source Coldago Research – Survey 2020

Questions about technologies and products

#9: Do you use or plan to use vSAN or alternatives?

Do you use or plan to use vSAN or alternatives?



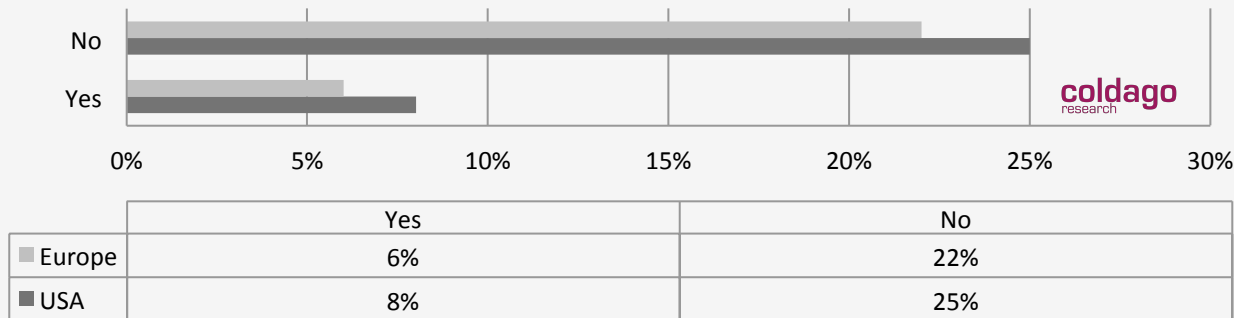
	StarWind	Maxta / Huayun Data Group	StorMagic	DataCore	Datrium	Scale Computing	Pivot3	Cisco	HPE	IBM (w/ Red Hat)	NetApp	Dell EMC	Microsoft	vSAN	Nutanix
■ Europe	2%	3%	6%	11%	14%	21%	24%	31%	35%	44%	58%	56%	61%	75%	74%
■ USA	4%	6%	9%	13%	16%	25%	28%	33%	34%	47%	55%	62%	66%	74%	75%

Source Coldago Research – Survey 2020

Questions about technologies

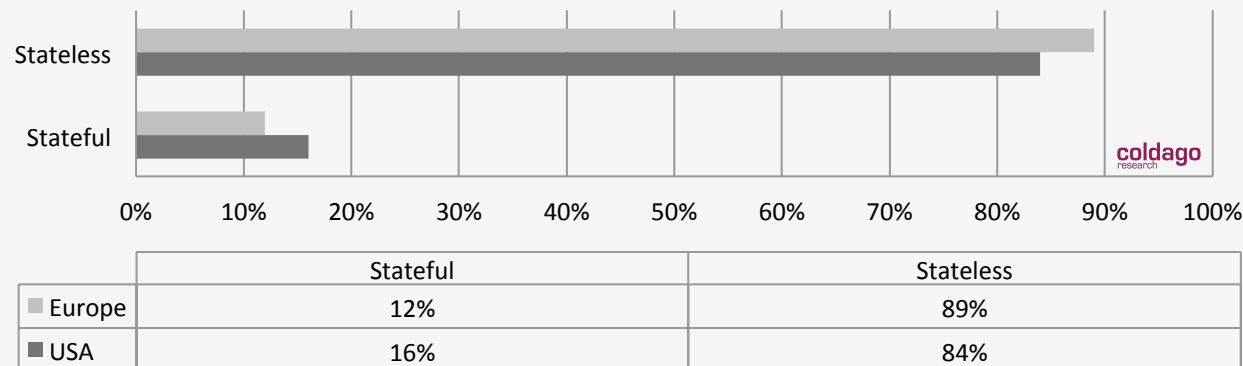
#10: Do you use or plan to use Containers? #10': With a stateful or stateless mode?

Do you use or plan to use Containers?



Source Coldago Research – Survey 2020

With a stateful or stateless mode?



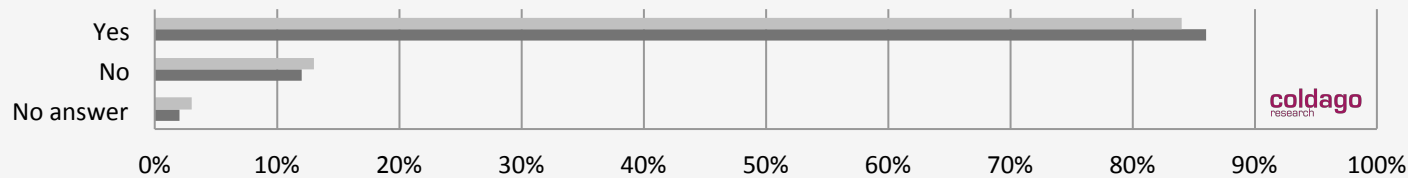
Source Coldago Research – Survey 2020

Questions about technologies

#11: If you use(d) SAN (FC or IP), did/do you and plan to adopt into NVMe-over-Fabrics?

#11' With which transport layer?

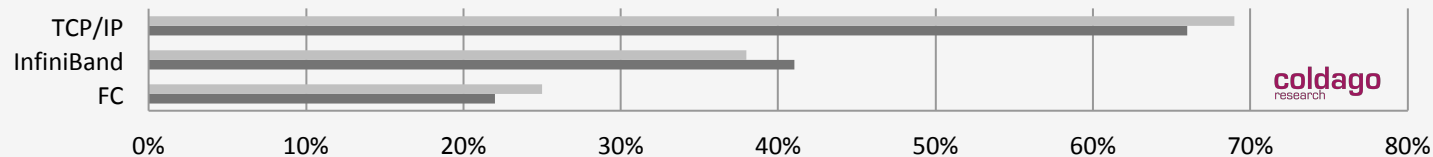
If you use(d) SAN (FC or IP), did/do you and plan to adopt into NVMe-over-Fabrics?



	No answer	No	Yes
■ Europe	3%	13%	84%
■ USA	2%	12%	86%

Source Coldago Research – Survey 2020

With which transport layer?



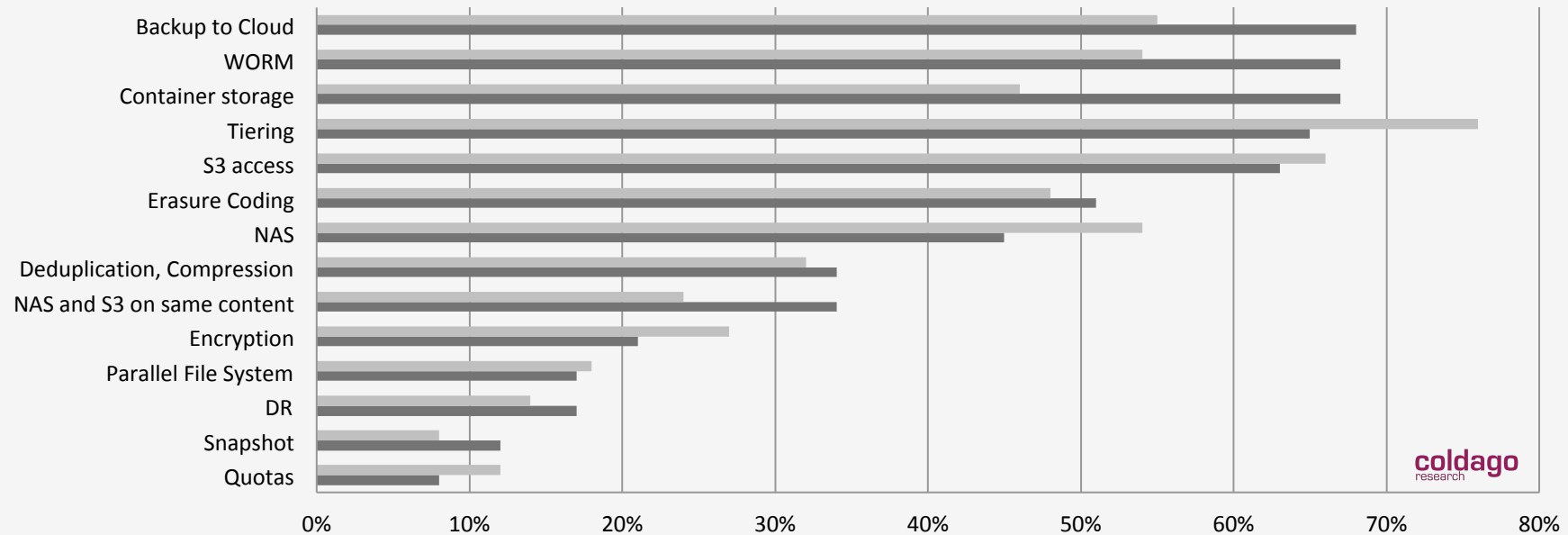
	FC	InfiniBand	TCP/IP
■ Europe	25%	38%	69%
■ USA	22%	41%	66%

Source Coldago Research – Survey 2020

Questions about technologies and product features

#12: Did What are the features* you need and think you will deploy in 2020?

What are the features* you need and think you will deploy in 2020?



	Quotas	Snapshot	DR	Parallel File System	Encryption	NAS and S3 on same content	Deduplication, Compression	NAS	Erasure Coding	S3 access	Tiering	Container storage	WORM	Backup to Cloud
■ Europe	12%	8%	14%	18%	27%	24%	32%	54%	48%	66%	76%	46%	54%	55%
■ USA	8%	12%	17%	17%	21%	34%	34%	45%	51%	63%	65%	67%	67%	68%

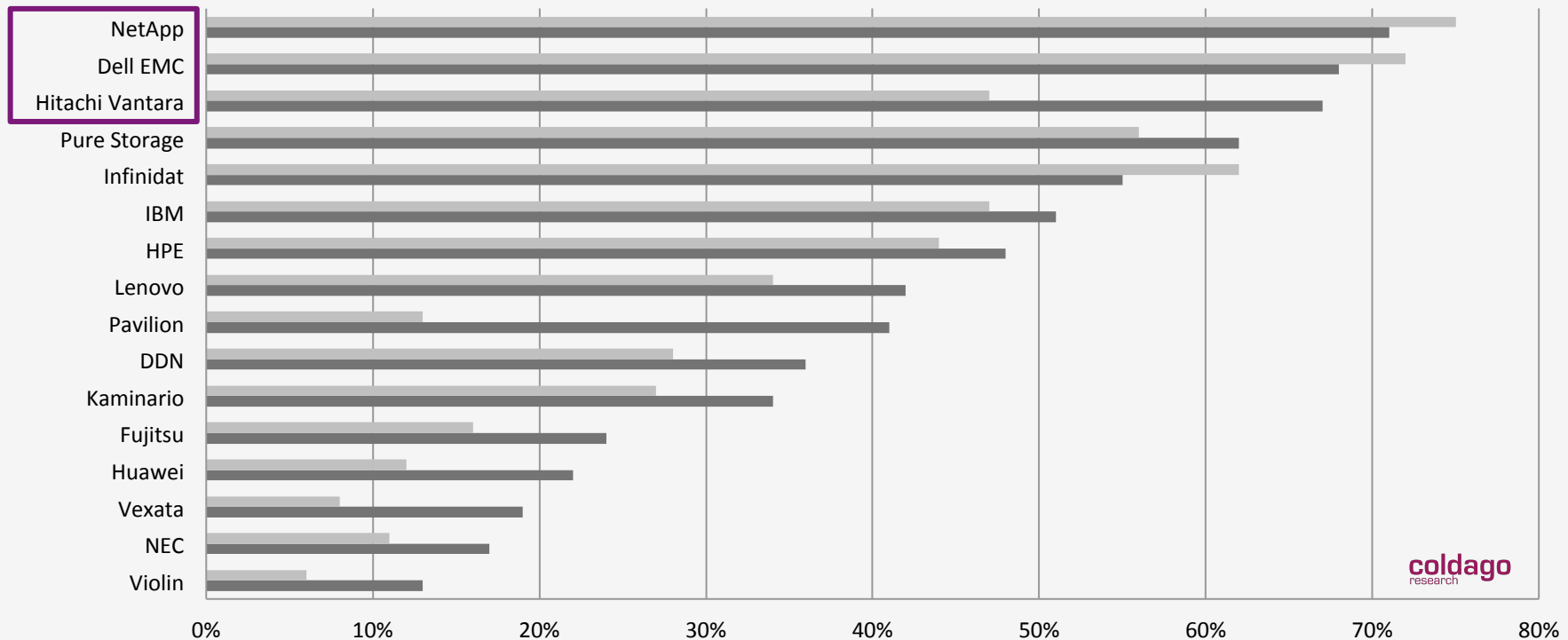
Source Coldago Research – Survey 2020

* for Storage and Data Management

Questions about technologies and vendors

#13: What are the top 3 brands you will consider in block storage?

What are the top 3 brands you will consider in block storage?

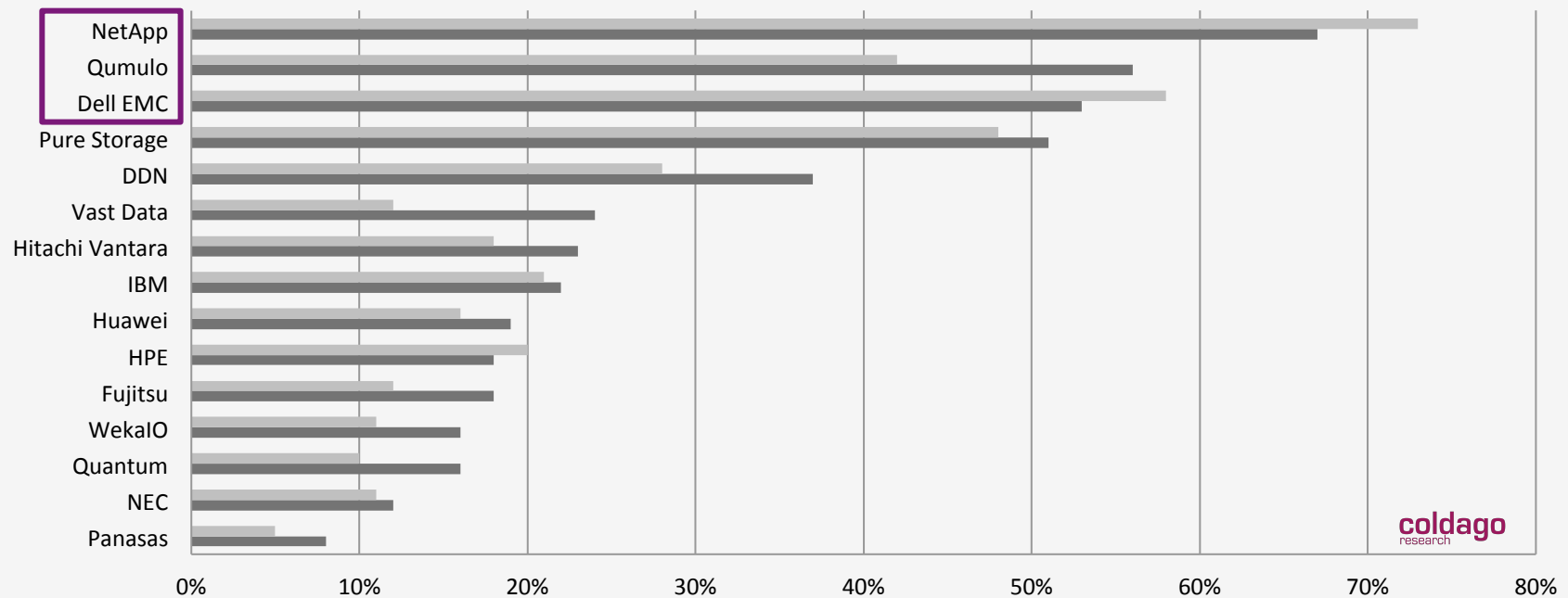


Source Coldago Research – Survey 2020

Questions about technologies and vendors

#14: What are the top 3 brands you will consider in file storage?

What are the top 3 brands you will consider in file storage?



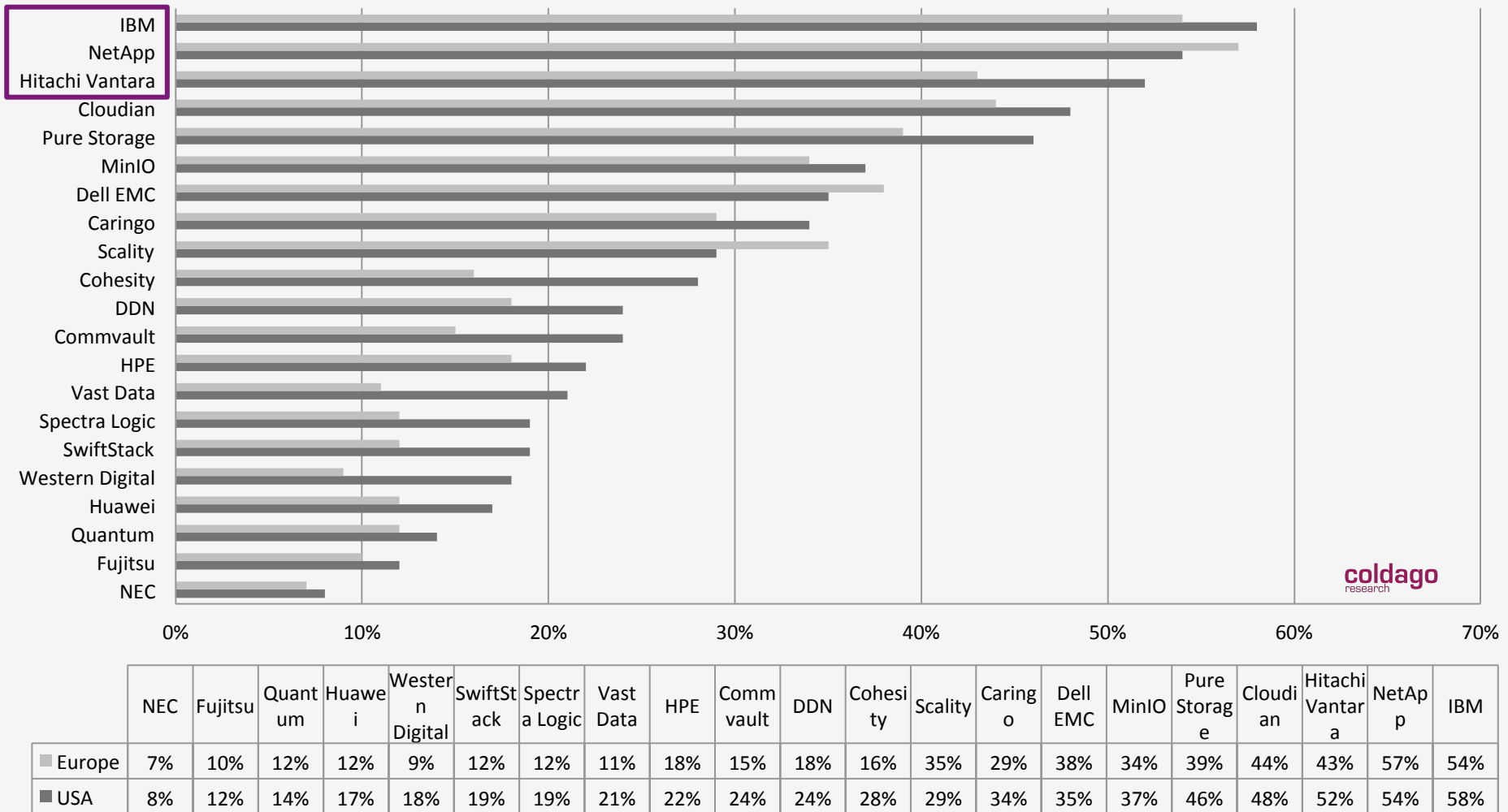
	Panasas	NEC	Quantu m	WekaIO	Fujitsu	HPE	Huawei	IBM	Hitachi Vantara	Vast Data	DDN	Pure Storage	Dell EMC	Qumulo	NetApp
■ Europe	5%	11%	10%	11%	12%	20%	16%	21%	18%	12%	28%	48%	58%	42%	73%
■ USA	8%	12%	16%	16%	18%	18%	19%	22%	23%	24%	37%	51%	53%	56%	67%

Source Coldago Research – Survey 2020

Questions about technologies and vendors

#15: What are the top 3 brands you will consider in object storage?

What are the top 3 brands you will consider in object storage?

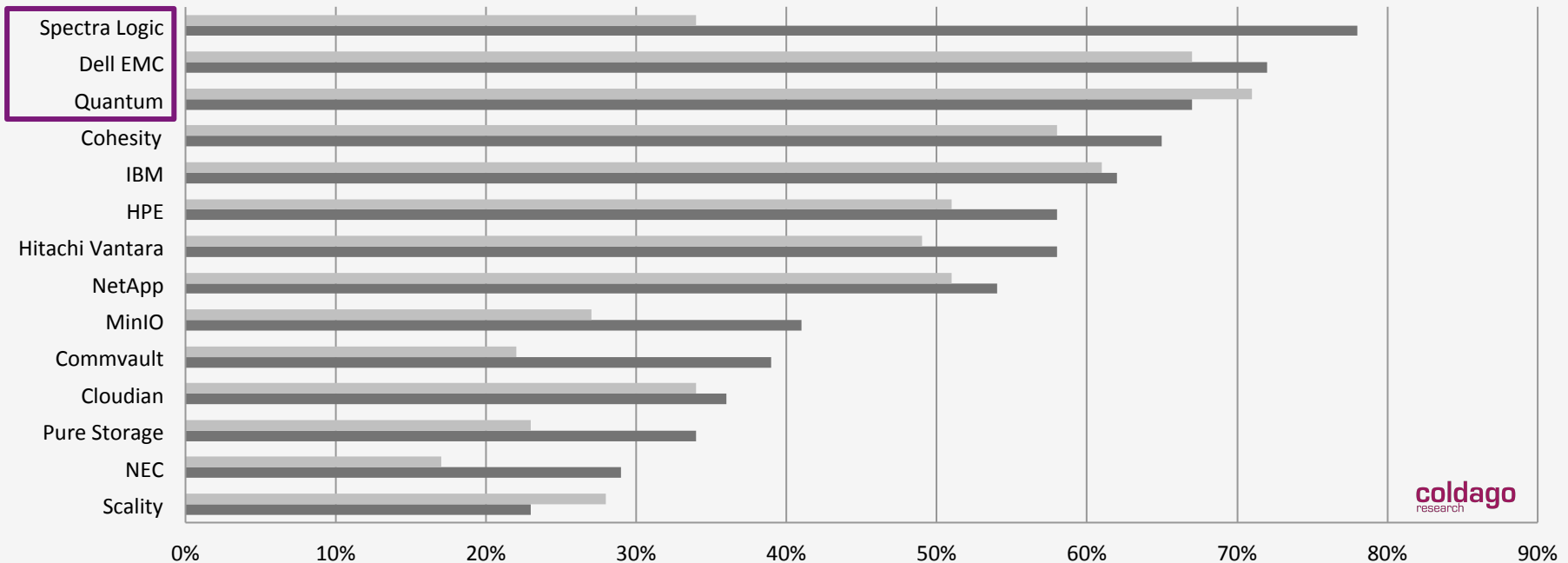


Source Coldago Research – Survey 2020

Questions about technologies and vendors

#16: What are the top 3 brands you will consider in secondary storage?

What are the top 3 brands you will consider in secondary storage?



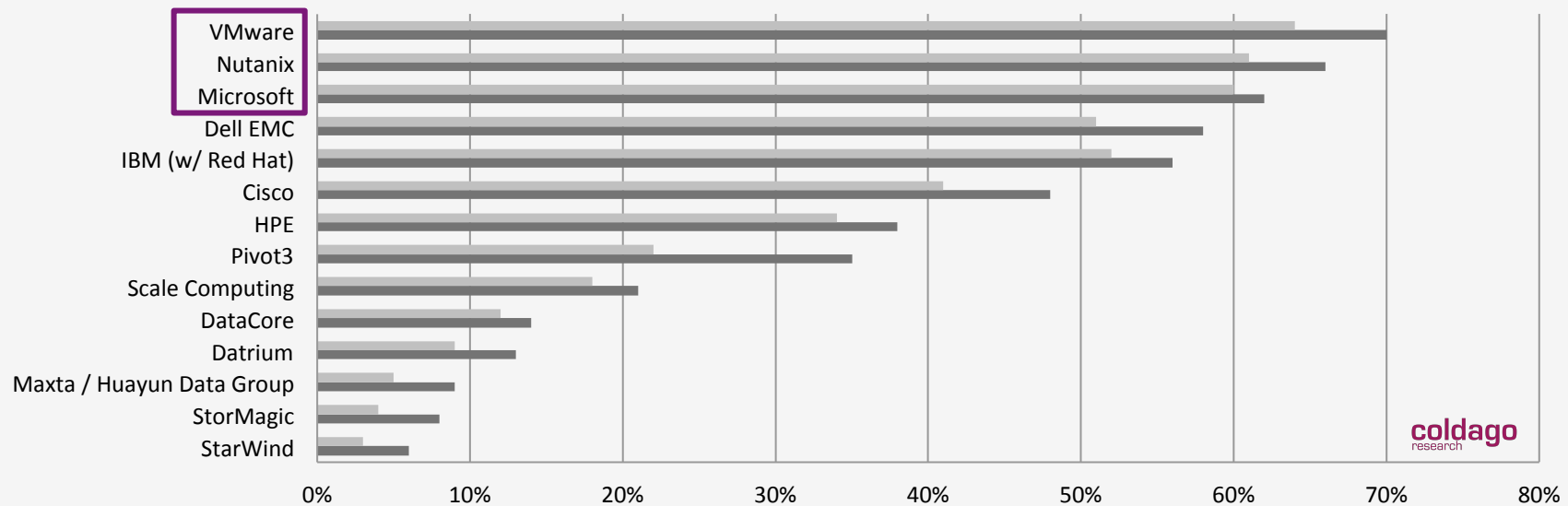
	Scality	NEC	Pure Storage	Cloudian	Commvault	MinIO	NetApp	Hitachi Vantara	HPE	IBM	Cohesity	Quantum	Dell EMC	Spectra Logic
Europe	28%	17%	23%	34%	22%	27%	51%	49%	51%	61%	58%	71%	67%	34%
USA	23%	29%	34%	36%	39%	41%	54%	58%	58%	62%	65%	67%	72%	78%

Source Coldago Research – Survey 2020

Questions about technologies and vendors

#17: What are the top 3 brands you will consider in HCI (including server virtualization)?

What are the top 3 brands you will consider in HCI (including server virtualization)?



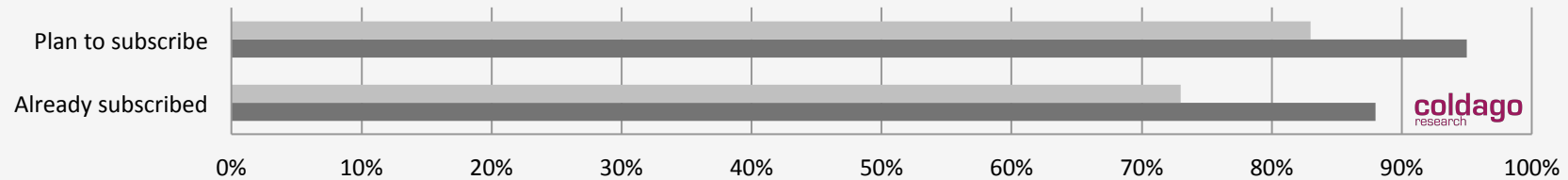
	StarWind	StorMagi c	Maxta / Huayun Data Group	Datrium	DataCore	Scale Computin g	Pivot3	HPE	Cisco	IBM (w/ Red Hat)	Dell EMC	Microsoft	Nutanix	VMware
■ Europe	3%	4%	5%	9%	12%	18%	22%	34%	41%	52%	51%	60%	61%	64%
■ USA	6%	8%	9%	13%	14%	21%	35%	38%	48%	56%	58%	62%	66%	70%

Source Coldago Research – Survey 2020

Questions about technologies and projects

#18: Do you use cloud storage service? #18': What for?

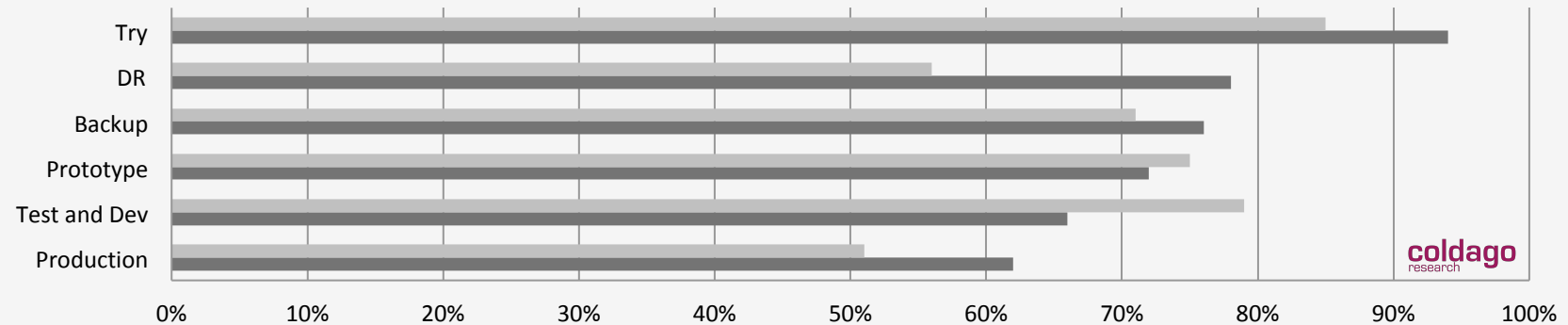
Do you use cloud storage service?



	Already subscribed	Plan to subscribe
Europe	73%	83%
USA	88%	95%

Source Coldago Research – Survey 2020

What for?

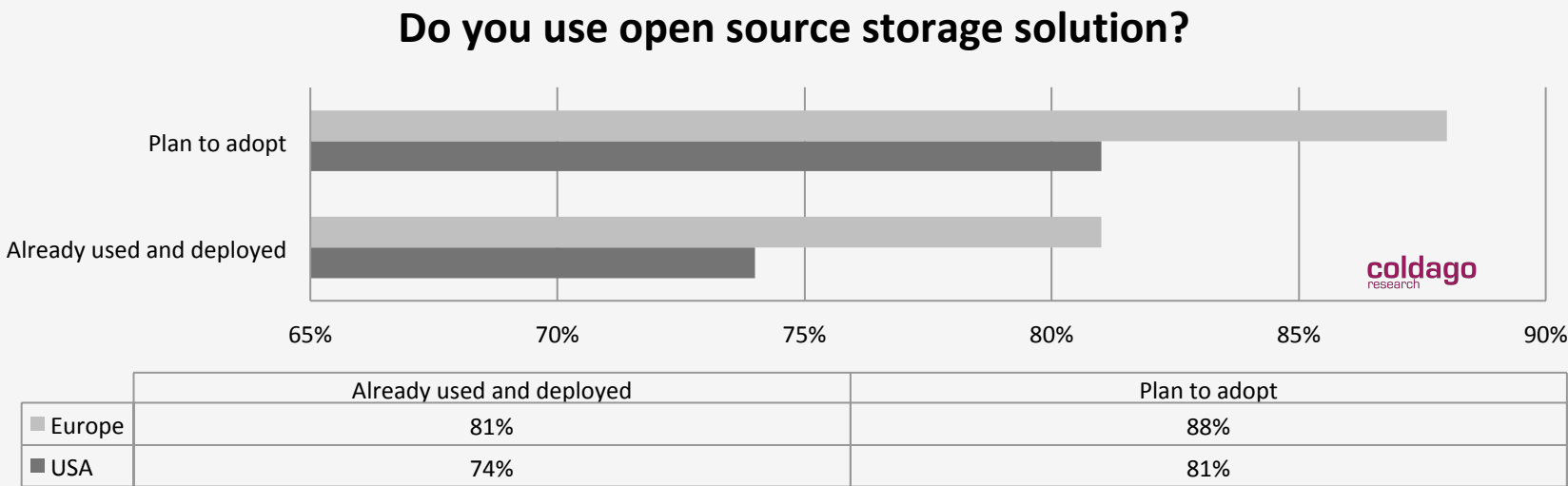


	Production	Test and Dev	Prototype	Backup	DR	Try
Europe	51%	79%	75%	71%	56%	85%
USA	62%	66%	72%	76%	78%	94%

Source Coldago Research – Survey 2020

Questions about technologies and open source

#19: Do you use open source storage solution?

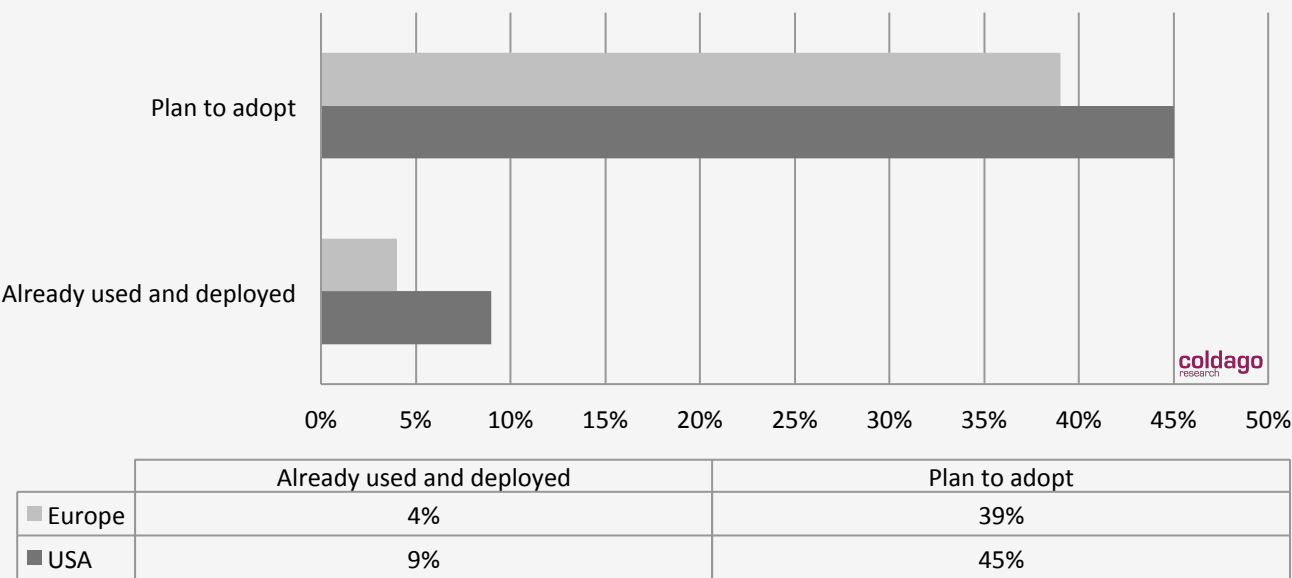


Source Coldago Research – Survey 2020

Questions about technologies and open source

#20: Do you use or plan to use Persistent Memory?

Do you use or plan to use Persistent Memory?



Source Coldago Research – Survey 2020



Disclaimer

The information contained in this report has been produced by Coldago Research following the survey operated in January 2020. The report is for general information purposes only and it can't served as professional advice or recommendations.

Published March 16th, 2020
Document #CR-2020-011-44

Coldago Research

Founded in 2009 by Philippe Nicolas as a business entity of Condor Consulting Group, Coldago Research operates as an independent market research and analysis firm for a more than a decade. Coldago Research extends its market observation with various reports, analysis, maps and rankings. More information on coldago.com.

Coldago Research
47 Cambon Drive, Suite 200
San Francisco, CA 94132