

Research Report

***Abstract:***

## **Software-defined Storage (SDS) Market Trends**

The Drivers, Benefits, and Challenges of Software-defined Storage

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## Introduction

### Research Objectives

In order to assess organizations' evaluation and use of SDS, ESG recently surveyed 303 IT professionals representing midmarket (100 to 999 employees) and enterprise-class (1,000 employees or more) organizations in North America. All respondents had to currently be utilizing or evaluating SDS or interested in SDS as a long-term strategy but with no formal initiatives underway yet.

The survey was designed to answer the following questions:

- Which of the leading SDS definitions and value propositions resonated most with storage decision makers?
- What specific types of SDS technology are IT leaders evaluating and deploying? And what benefits do they expect?
- What benefits are IT organizations actually experiencing after deploying SDS technology?
- If an IT organization deployed SDS to support hyperconverged infrastructure, who did they procure the technology from and why?
- What types of storage infrastructure does SDS technology compete with and what does it replace?
- When someone selected an SDS solution over the public cloud, what was the rationale?
- To what extent has SDS technology taken over IT organizations' storage and application footprint? And how is that expected to change in the future?
- How has SDS altered the evaluation, the purchase, and the deployment process for storage technology?
- Where and how are IT organizations procuring the hardware to support their SDS deployments?
- What challenges or concerns do IT organizations have with SDS technology? How does that change among current and potential users of SDS?
- Why are some IT organizations not interested in SDS technology?

Survey participants represented a wide range of industries, including financial services, manufacturing, business services, communications and media, and government. For more details, please see the Research Methodology and Respondent Demographics sections of this report.



## Research Methodology

To gather data for this report, ESG conducted a comprehensive online survey of IT professionals familiar with and/or responsible for evaluating, purchasing, and managing data storage technology—including external disk-based storage systems—for their organization in North America (United States and Canada) between September 21, 2016 and October 3, 2016. All respondents were provided an incentive to complete the survey in the form of cash awards and/or cash equivalents.

After filtering out unqualified respondents, removing duplicate responses, and screening the remaining completed responses (on a number of criteria) for data integrity, we were left with a final total sample of 303 IT professionals.

Please see the Respondent Demographics section of this report for more information on these respondents.

Note: Totals in figures and tables throughout this report may not add up to 100% due to rounding.

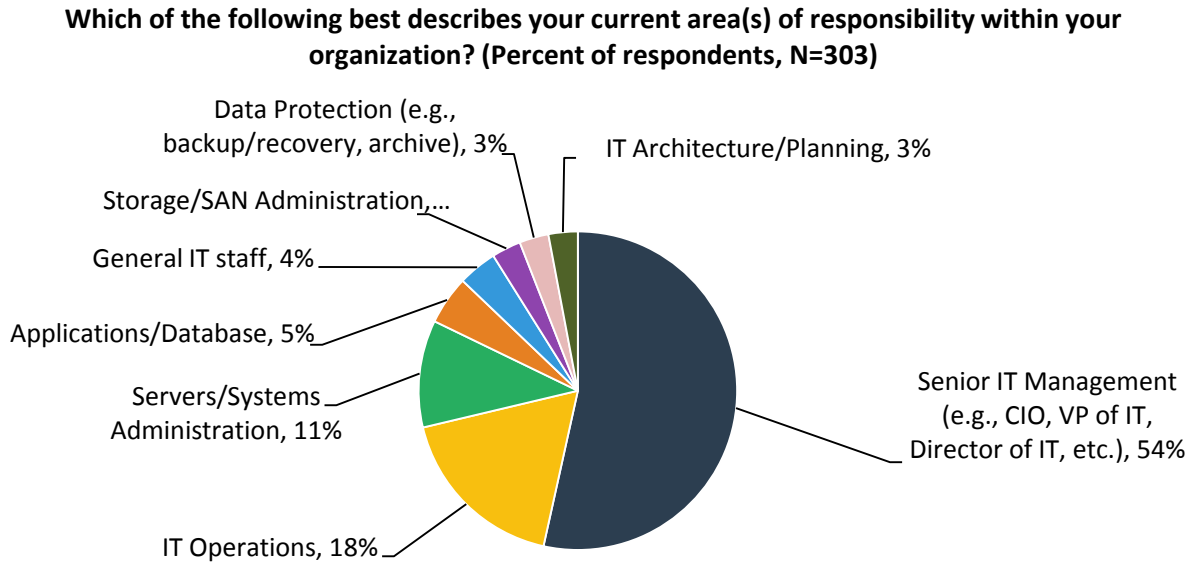
## Respondent Demographics

The data presented in this report is based on a survey of 303 qualified respondents. Figures 1-4 detail the demographics of the respondent base.

### Respondents by Current Responsibility

Respondents' current responsibilities are shown in Figure 1.

**Figure 1. Respondents by Role**

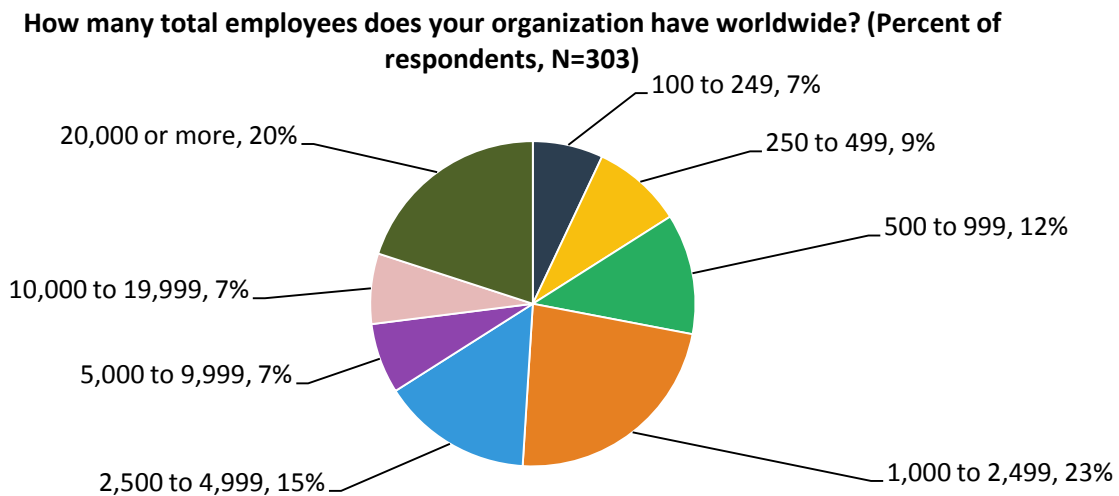


Source: Enterprise Strategy Group, 2017

### Respondents by Number of Employees

The number of employees in respondents' organizations is shown in Figure 2.

**Figure 2. Respondents by Number of Employees Worldwide**

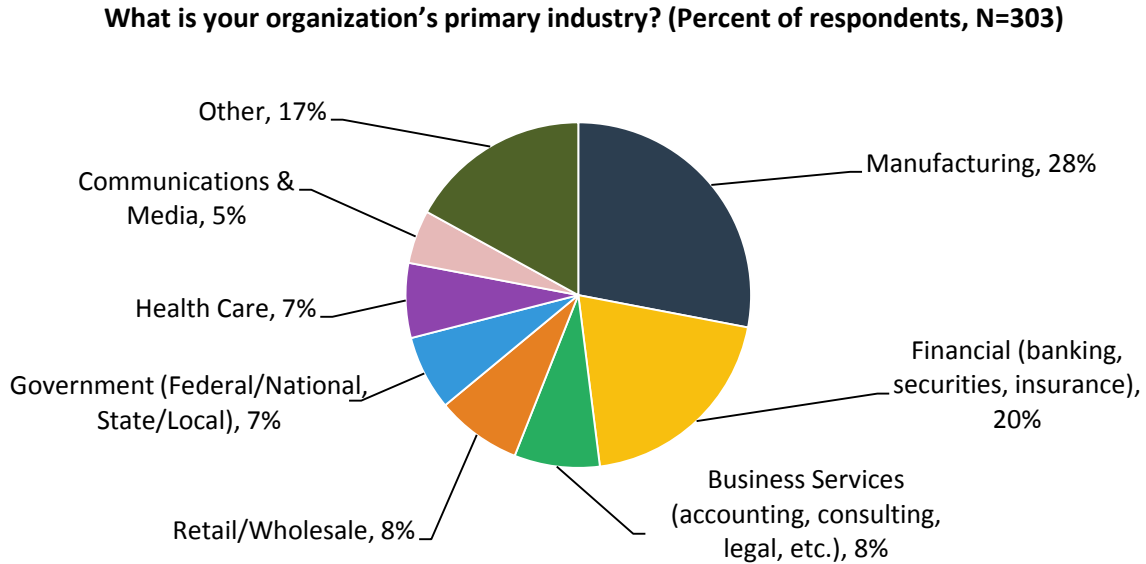


Source: Enterprise Strategy Group, 2017

### Respondents by Industry

Respondents were asked to identify their organization’s primary industry. In total, ESG received completed, qualified respondents from individuals in 19 distinct vertical industries, plus an “Other” category. Respondents were then grouped into the broader categories shown in Figure 3.

**Figure 3. Respondents by Industry**

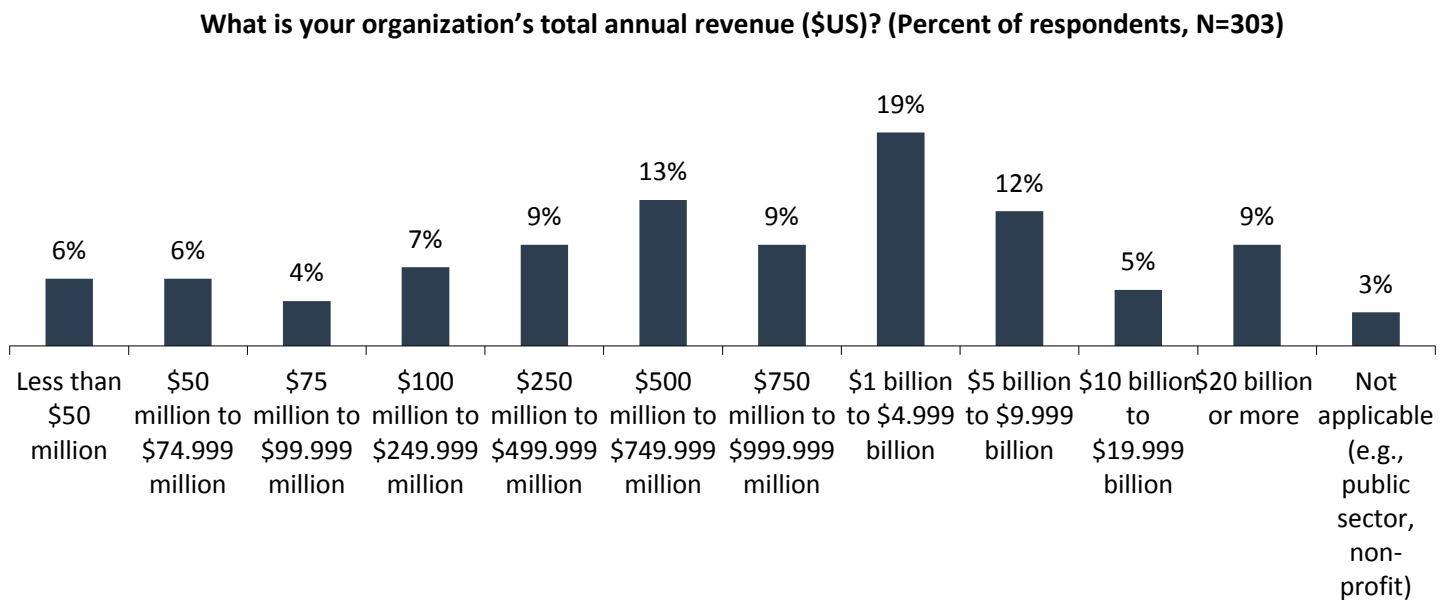


Source: Enterprise Strategy Group, 2017

### Respondents by Annual Revenue

Respondent organizations’ annual revenue is shown in Figure 4.

**Figure 4. Respondents by Annual Revenue**



Source: Enterprise Strategy Group, 2017



## Contents

List of Figures .....	3
List of Tables .....	3
Executive Summary.....	4
Report Conclusions .....	4
Introduction .....	5
Research Objectives.....	5
Research Findings .....	6
Software-defined Storage Has Yet to be Truly Defined, but Improved Storage Management Is Foundational .....	6
There Is No Clear Winner among SDS Implementation Strategies.....	10
SDS Competes Against the Old and New Worlds of Storage .....	13
Organizations Are Taking a Measured Approach to SDS.....	15
SDS Is Altering the Traditional Storage Purchase Process .....	17
SDS Is Bringing New Constituencies into the Storage Evaluation and Purchase Process.....	19
SDS Is Gaining Traction, but There Are Still Obstacles.....	21
Conclusion.....	23
Research Methodology .....	24
Respondent Demographics.....	25
Respondents by Current Responsibility .....	25
Respondents by Number of Employees.....	25
Respondents by Industry .....	26
Respondents by Annual Revenue .....	26

## List of Figures

Figure 1. Organizations’ Perspective on Software-defined Storage .....	7
Figure 2. SDS Value Props that Resonate Most with Respondents .....	7
Figure 3. Software-defined Storage Deployment Drivers .....	8
Figure 4. Realized Benefits of Software-defined Storage .....	9
Figure 5. Preferred Approach to Software-defined Storage .....	11
Figure 6. SDS Implementation Strategy .....	11
Figure 7. SDS Deployment Approach as Part of a Hyperconverged Solution .....	12
Figure 8. Storage Use Cases Most Likely to be Deployed via SDS Implementation.....	12
Figure 9. Impact of SDS on Traditional Data Storage Footprint.....	13
Figure 10. Types of Storage Systems Replaced by SDS.....	14
Figure 11. Other Types of Storage Technologies Organizations Considered During SDS Evaluation Process.....	14
Figure 12. Applications/Workloads Supported/to be Supported by SDS .....	15
Figure 13. Total Storage Capacity Deployed on and/or Managed by SDS .....	16
Figure 14. Percentage of Applications/Workloads Expected to Leverage SDS in the Next 36 Months .....	16
Figure 15. Preferred SDS Procurement Model .....	17
Figure 16. Preferred Payment Model for SDS.....	18
Figure 17. Hardware Infrastructure Leveraged to Support SDS .....	18
Figure 18. Storage Team’s Involvement with SDS Evaluation and Purchasing Process.....	19
Figure 19. Groups/Roles Involved in SDS Evaluation and Purchasing Process .....	20
Figure 20. Challenges and Concerns with SDS .....	21
Figure 21. Why Non-adopting Organizations Have No Interest in SDS .....	22
Figure 22. Respondents by Role.....	25
Figure 23. Respondents by Number of Employees Worldwide .....	25
Figure 24. Respondents by Industry .....	26
Figure 25. Respondents by Annual Revenue .....	26

## List of Tables

Table 1. Storage Team’s Involvement with SDS Evaluation and Purchasing Process, by SDS Usage Status .....	20
Table 2. Group/Role that Typically Makes SDS Purchase Decision, by SDS Usage Status .....	20
Table 3. Challenges and Concerns with SDS, by SDS Usage Status.....	22

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