

CLOUDFEST

State of the Cloud Report – Spring 2026

The Correction: Cloud Industry Pivots from AI Panic to Strategic Planning

March 2026



2026

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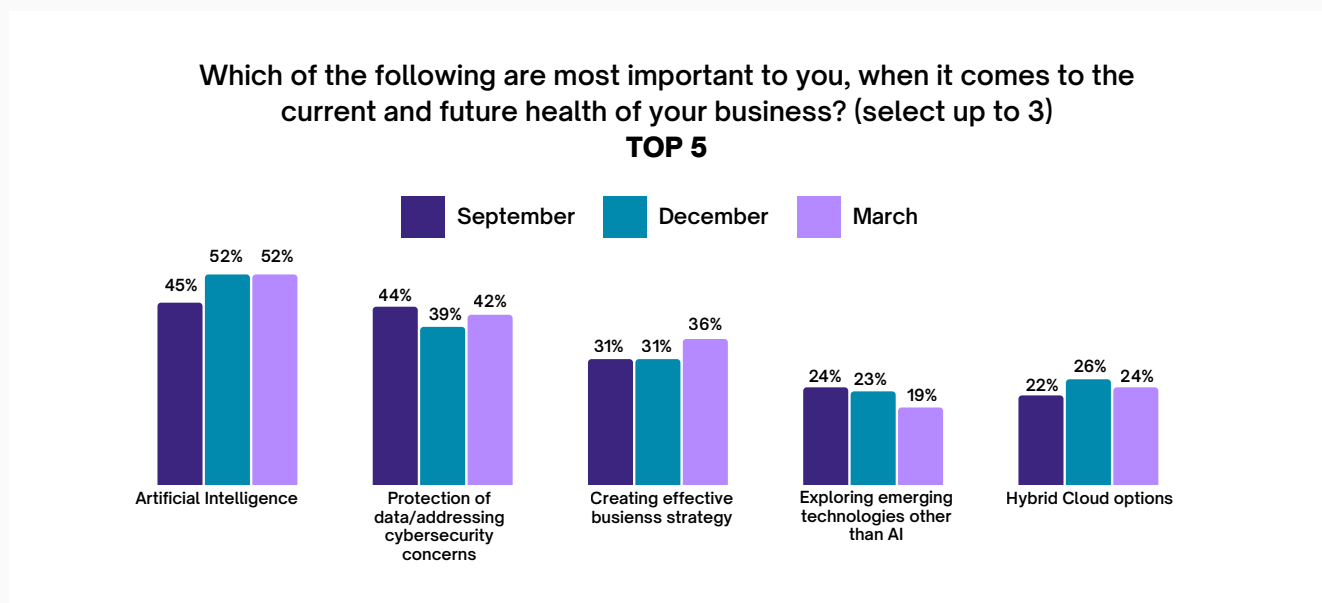


Executive Summary: State of the Cloud, Spring 2026

Key Takeaway: Three-wave survey data reveal an industry self-correcting from reactive AI adoption to strategic planning, though execution gaps and external pressures persist.

Our December 2025 State of the Cloud report documented the cloud industry at a critical inflection point—what we called "The AI Paradox." AI priority had surged 6.4 percentage points from September to December to become the clear number one concern, yet confidence in AI's benefits was declining, cybersecurity prioritization was falling despite continued risks, and sentiment was dropping across all measures. We captured peak anxiety-driven adoption: organizations pursuing transformation they increasingly doubted would succeed and potentially neglecting other needs in the meantime.

March 2026 data reveal what happened next: **the correction.**



CloudFest launched this survey series in order to fulfill its value promise of bringing unique insights to the Cloud-based tech industry. These benchmarking surveys focus on business concerns, goals, and needs, and enable professionals to track shifts in industry-wide sentiment and priorities moving forward. Our March 2026 report is co-sponsored by Blackwall, and enhanced by an interview with Cloud-based tech expert Rachel Sterling of Identity Digital.

This Spring 2026 report analyzes three quarterly waves (September 2025, December 2025, March 2026) representing 1,596 total responses to reveal an industry learning to balance innovation pressure with execution discipline. The data show organizations transitioning from competitive panic to thoughtful implementation planning, and point to key trends for eyeing in future study pulses.

Key Quotes

December (Peak Anxiety):

"Nobody wants to be the company that missed the AI revolution. So we're all investing in AI whether we think it makes sense or not. It's not strategic; it's survival instinct."

March (Strategic Awakening):

"What's genuinely exciting about 2026 is that we've finally moved past the 'move fast and break things' era. We're entering the Era of Architecture, where building a business is becoming a craft again."

Key Findings

- **The AI Paradox:** AI prioritization fell from +6.4% (Sept→Dec) to +1.2% (Dec→March). This indicates the FOMO surge is complete; the question has shifted from "should we AI?" to "how will we implement AI?"
- **The Strategy Explosion:** Business strategy surged +5.9%—the largest single-wave increase observed across all three waves, nearly matching AI's earlier rise. Organizations are transitioning from reactive adoption to execution planning.
- **The Security Rebalancing:** Cybersecurity rebounded from December's lowest priority score (39.4% → 42.1%, +2.6%), recovering toward September's baseline. Organizations are recognizing that AI and security are complementary priorities, not competing ones.
- **The Geopolitical Intensification:** Geopolitics surged +5.3% (third-largest increase in priority), rising from 11.9% to 17.2% as external pressures mounted. Data sovereignty, EU regulation, and trade tensions became impossible to ignore.
- **The Sentiment Stabilization:** After bottoming in December, sentiment partially recovered. Cloud optimism improved (3.92 → 3.96 on a 1-to-5 scale), and vitality rose (4.16 → 4.22). Sentiment follows strategy, not hype; confidence is returning as planning replaces panic.
- **The Execution Gap Persists:** Despite AI being a priority for 52% of respondents and strategy surging +5.9%, implementation rates remained unchanged at ~45%. Strategy is rising, but capability is not growing...yet. We'll keep an eye on this in coming pulses.

Introduction Message from Blackwall

The internet has always evolved in waves, each one redefining how infrastructure is built, secured, and monetized.

Today, we are entering the next phase: What we at Blackwall call "Traffic Management 3.0". This is not simply an upgrade to existing approaches, but a fundamental shift driven by the convergence of two powerful forces.

On one hand, a new generation of AI-powered threats - automated, adaptive, and increasingly indistinguishable from legitimate traffic - is challenging the assumptions that traditional security models were built on. On the other hand, cloud and hosting providers are recognizing a parallel opportunity: Traffic is no longer just something to manage or filter, it is something to understand, shape, and monetize using Adaptive Intent Analysis over static rule-matching.

Traffic Management 3.0 brings these realities together, transforming security from a defensive necessity into a strategic growth engine. As the cloud continues to mature, Blackwall - and others - will not only help protect hosting environments, but also help unlock new revenue streams, strengthen customer trust, and turn intelligent traffic control into a competitive advantage by benefiting from Adaptive Intent Analysis.

Nik Rozenberg

CEO, Blackwall

Methods

CloudFest partnered with Open Eye to author and field a series of quarterly surveys, launching in September 2025, sending the online questionnaire via email to CloudFest members worldwide. This regular pulse approach developed from prior annual surveys of the industry, conducted in 2023 and 2024.

This report synthesizes three waves, with a focus on learnings from the most recent dataset:

- September 2025: 548 responses
- December 2025: 606 responses
- March 2026: 547 responses

Total three-wave sample: 1,701 responses

As non-probability convenience samples, standard margin of error calculations do not apply. However, for directional guidance, if these were random samples, margins of error would be approximately $\pm 4\text{-}5\%$ at 95% confidence.

Statistical Significance Thresholds:

For wave-to-wave comparisons, changes of approximately 5.5 percentage points or greater are statistically significant at the 95% confidence level. We flag significant findings throughout this report.

Sample Consistency:

All three waves maintain similar demographic profiles: 76% EMEA-focused organizations, 64-67% in Technology or Business Strategy roles, and similar size distributions. This consistency enables meaningful trend analysis.

Key demographic breakdowns of respondents are in the appendix.

SECTION 1: Context—The Story So Far

For Readers of Our Prior Reports

This report continues CloudFest's quarterly State of the Cloud pulse series. For readers new to the series, this section provides essential context from our first two waves (please visit the CloudFest website for full prior reports).

September 2025: The Balanced Baseline

Our inaugural pulse in September 2025 captured the Cloud industry in equilibrium—managing multiple pressures with modest optimism and no single dominant panic.

Business Priorities (Top 5):

- Artificial Intelligence: 45.1%
- Cybersecurity/Data Protection: 43.8%
- Business Strategy: 31.2%
- Understanding Global Marketplace: 23.8%
- Hybrid Cloud: 22.5%

AI and cybersecurity were essentially tied for top priority, separated by just 1.3 percentage points. This balance characterized September: organizations juggling AI adoption, security concerns, strategic planning, and infrastructure decisions without any single issue consuming all attention.

September represented measured optimism: belief in Cloud's importance paired with reasonable uncertainty about execution and outcomes.

December 2025: The AI Surge and Confidence Crisis

Our December report documented what we termed "The AI Paradox"—the industry at peak anxiety, pursuing transformation it increasingly doubted would succeed.

The AI Explosion

AI surged 6.4 percentage points in priority (45.1% → 51.5%), the largest single-wave increase we measured. But simultaneously:

- Belief that 'AI is a tremendous opportunity' declined (3.85 → 3.71 on a scale of 1-to-5 [not at all agree to agree completely])
- Cloud optimism fell (4.05 → 3.92, -0.13)
- AI cost concerns rose (+0.14)
- AI security concerns rose (+0.12)
- ROI confidence weakened (3.21 → 3.16)

Priority rising while confidence falling indicated classic anxiety-driven adoption, not strategic conviction.

The Planning Gap Revealed

Cross-tabulation analysis exposed a significant execution gap. Among those who selected AI as a top priority:

- 39% also selected Cybersecurity (concerns)
- 31% also selected Business Strategy (high-level planning)
- Only 17% also selected Hybrid Cloud (infrastructure)

Most AI prioritizers weren't considering where or how they'd deploy workloads: 83% focused on the "what" and "why" without addressing the "how."

As put by Rachel Sterling of Identity Digital, it's a how vs. when situation: *"The how part, I think, is easily solved for. You hire a consultant, they do research with your team, you get an understanding about what your goals are, who your audiences are, what you're trying to accomplish, what are your risk, what are your mitigations, and then they come back and they give you the lay of the land, the recommended tools. It's the **when** that requires a real layer of subject matter expertise, thoughtfulness, and perhaps restraint."*

Sterling sees the true innovation and benefit for the industry and for individuals coming with that "when" stage, at the point when innovation can be paired with AI for quicker solutions still rooted in the human experience.

The Security Trade-Off

Cybersecurity declined as a priority (43.8% → 39.4%, -4.4%) despite security risk perception remaining constant at 3.90/5.0. AI's urgency was consuming attention from proven fundamentals.

Why Three Waves Matter

One wave shows status. Two waves show change. Three waves show pattern.

With March 2026 data, we can now distinguish temporary reactions from sustained trends, inflection points from new equilibria, and panic from strategic correction.

The three-wave arc detailed in the following pages tells the story of an industry learning and adapting in real-time.

SECTION 2: March 2026 – The Correction

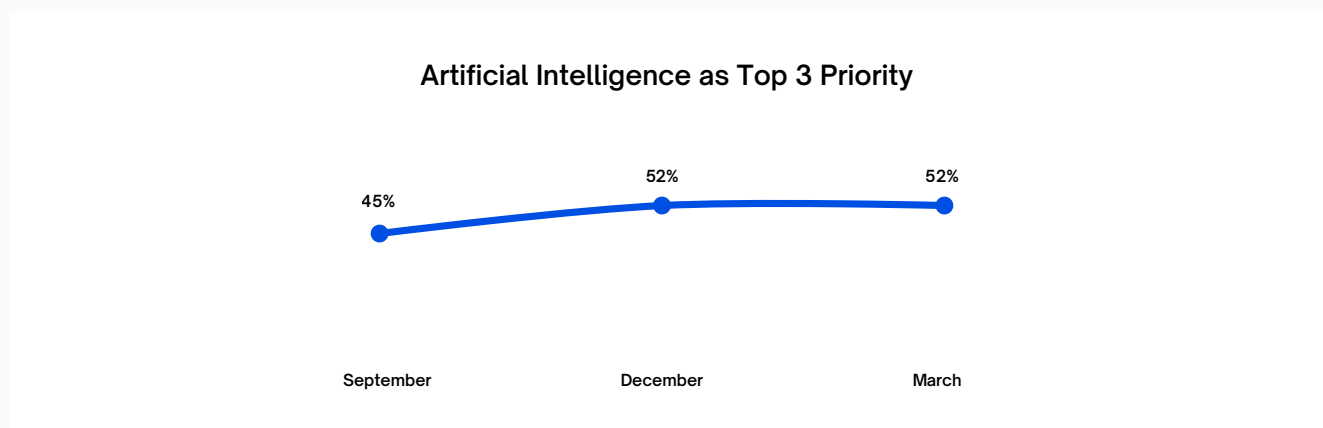
March 2026 data reveals an industry self-correcting from December's reactive panic toward strategic planning.

The AI Plateau: Surge Complete

September → December: +6.4% (significant surge)

December → March: +1.2% (plateau)

AI priority growth collapsed by 80%, and the audience for that prioritization has leveled. The FOMO surge is evolving into the execution phase.



In December, organizations asked: "Do we need AI?" (panicked YES). By March it's become: "How do we best implement AI?" This requires frameworks and execution capability, not just enthusiasm.

Beyond just prioritization, we see more time spent with AI alongside strategy is likely paying off in terms of confidence. We asked agreement on a 1-to-5 scale with the statement "I feel confident how to use AI to optimize my business"; in September and December this received tepid agreement at 3.37 and 3.39, but we saw a significant climb in March to 3.51. Still not overwhelming confidence, but a notable rise to keep an eye on in future pulses. Of note: this confidence was highest among Cloud Service Providers and Independent Software Vendors.

"I'm excited about how AI and automation are starting to land in real workflows, not just demos. The next step for me is tooling that's reliable, secure, and actually saves time day-to-day."

When it comes to actual usage, we see Cloud-based tech companies deploying AI for internal benefits. The top three selected points of opportunity for AI are optimization and allocation of company resources, opportunities for better product development, and streamlining work processes.

The Strategy Explosion: Planning Replacing Panic

Business Strategy: 30.5% → 36.4% (+5.9%)

This priority climb is significant. The strategy surge nearly matching AI's earlier rise (+6.4%) is not coincidence—it's correction.

The Symmetry:

- AI Surge (Sept→Dec): **+6.4%** driven by 'We need AI or we'll fall behind!'
- Strategy Surge (Dec→March): **+5.9%** driven by 'We need frameworks to implement AI!'

"When everybody wants to invest in AI, I think that's more from a fear of missing out point of view, as opposed to people really knowing what they're actually building...Nobody wants to be left behind by not investing in AI. As a leader, I'd rather invest in AI and fail, as opposed to fail without investing in AI. It's the safer option for most individuals to choose, as per the current trend path."

Within that overarching business strategy priority, the top three areas of interest are:

- Strategic change in an evolving industry (58%)
- How AI fits into business strategy (57%)
- Optimizing productivity (including DevOps) (54%)

Clearly, AI is still taking up significant time and mental space for leadership. It's part of a larger business success plan though, not the priority all on its own.

Organizations moved from reactive positioning to strategic consolidation. Reinforcing this, the planning gap is beginning to close—from 83% without infrastructure consideration (December) to 80% (March).

"What's genuinely exciting about 2026 is that we've finally moved past the 'move fast and break things' era. We're entering the Era of Architecture, where building a business is becoming a craft again."

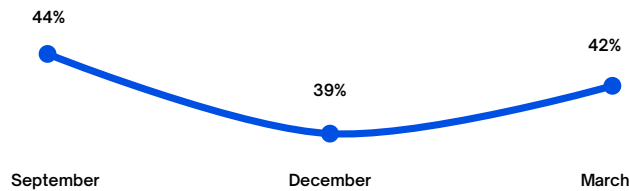
The Security Rebalancing: Fundamentals Restored

We see telling shifts in business priorities in March that reinforce the aforementioned recovery from panic to planning. It's not just that AI prioritization plateaued and business strategy soared, other priorities gained ground, indicating what else is important to that strategic planning.

Cybersecurity: 39.4% → 42.1% (+2.6%)

After declining 4.4 percentage points in December, cybersecurity rebounded, recovering more than half its Q4 losses. The V-shaped pattern shows December was overcorrection—AI consuming attention from fundamentals. March shows rebalancing: AI and security are complementary, not competing.

Protection of data/ addressing cybersecurity concerns as Top 3 Priority



When we dug into what's most important within that larger data protection priority, we saw concerns are diverse. Continuing the story of shifting focus beyond AI, data protection needs are focused on the nuts and bolts of protection: addressing threats as they arise, monitoring for network vulnerabilities, and educating customers and employees on risks. Concerns related to the security of AI, which used to top the cybersecurity worry list, now ranks third.

Geopolitics: 11.9% → 17.2% (+5.3%)

This stood out as third-largest single-wave increase (highest among companies with more than \$250 million in revenue). Between December and March, data sovereignty, EU AI Act implementation, and trade tensions became impossible to ignore. External environment now shapes vendor selection, infrastructure placement, and compliance strategy.

"In the coming years, I expect the geopolitical landscape to drive a significant shift toward data sovereignty and sovereign Cloud solutions. Organizations will likely prioritize providers that offer localized data residency to comply with tightening regional regulations."

"I think certainly the geopolitics has changed how countries and governments look at data, and that's obviously having an impact on infrastructure...there's numerous examples of [countries] talking about how local companies must keep their data within the country's borders. That obviously gives rise to infrastructure requirements all over the world."

We did, however, see agreement with the statement "International cooperation in Cloud investment is essential" fall steadily from September's high of 3.71 (on a scale of 1 to 5) to 3.57 in March. Open ended responses indicate this is predominately due to cratering trust in the United States government as a partner. This, together with increasing importance placed pulse-to-pulse on data sovereignty, indicates a global industry increasingly looking to protect its own.

The Sentiment Stabilization

After bottoming in December, sentiment partially recovered:

- Cloud optimism: 3.92 → 3.96 (+0.04)
- Cloud vitality: 4.16 → 4.22 (+0.06)
- International cooperation as essential: 3.57 → 3.62 (+0.05)

December was the trough. March shows stabilization as strategy provides clarity. Sentiment follows strategy, not hype, so we see confidence returning as execution pathways emerge.

"I'm excited about new development possibilities and the significant improvements in quality that AI agents can bring. They enable faster development, better consistency, and allow teams to focus more on architecture and high-level problem solving."

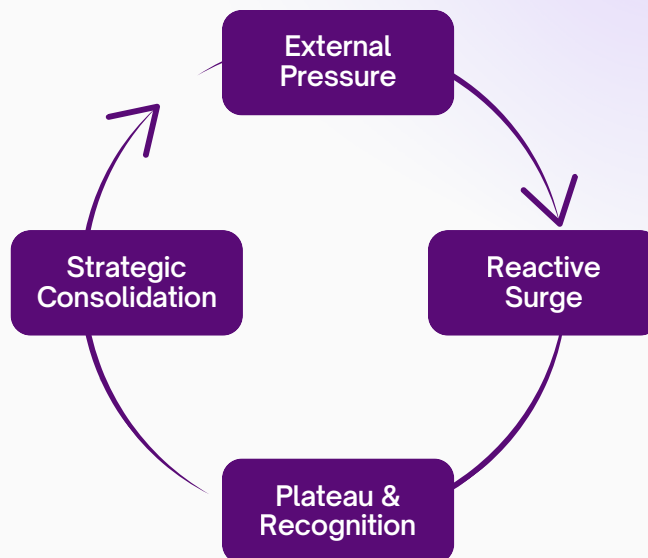
SECTION 3: What Three Waves Reveal

One wave shows status. Two waves show change. Three waves show pattern. This is why CloudFest has invested in taking the pulse of our dynamic industry quarterly.

The Transformation Cycle

Across three waves, we observed a clear sequence:

- External Pressure Creates Urgency: Competitive dynamics create 'must act' mentality
- Reactive Surge: AI +6.4% as everyone responds simultaneously (FOMO)
- Plateau & Recognition: Growth stops at ~52% saturation, implementation stalls
- Strategic Consolidation: Strategy +5.9% as organizations seek execution frameworks



This pattern likely applies to future technology surges. It reveals organizational learning in action, demonstrating that a reactive surge is temporary, followed by strategic consolidation.

The Planning Gap Lifecycle

December revealed that only 17% of AI prioritizers also selected Hybrid Cloud infrastructure, hinting at an 83% planning gap.

March shows improvement: that figure rose to 20%. Not dramatic—just 3 percentage points—but moving in the right direction. The gap is closing from 83% to 80%, and we'll keep an eye on this in future pulses.

"I'm excited about how AI and automation are starting to land in real workflows, not just demos. The next step for me is tooling that's reliable, secure, and actually saves time day-to-day."

What we hypothesize now is that the strategic minority from December (those 17-20% linking AI to infrastructure from the start) may see their approach becoming mainstream. Organizations are learning that AI enthusiasm without infrastructure planning leads to implementation bottlenecks.

The Security Pendulum

The three-wave security pattern reveals prioritization of cybersecurity as recovering from a quick dip:

September: 43.8% (balanced with AI)

December: 39.4% (overcorrection, AI consuming attention)

March: 42.1% (rebalancing toward baseline)

The V-shaped pattern demonstrates: December's -4.4% decline was unsustainable overcorrection. March's +2.6% rebound shows organizations recognizing that security and AI must advance together, not compete for attention.

DevOps: Success Through Invisibility

DevOps: 14.2% → 12.1% → 9.3% (overall -4.9%)

DevOps may be declining as a priority because it succeeded. It transitioned from 'strategic initiative' to 'embedded practice'; it's just how organizations work now. The best transformation eventually becomes invisible.

Later in the survey, we ask about the status of DevOps implementation. Since September, movement from “early planning stages” to “fully implemented” has been slow but steady. Integration is highest among CSPs and ISVs, with Corporate IT and MSP/VAR/System Integrators most likely to be earlier in their journey. Across industries, a significant predictor of integration was size of company, as larger revenue correlated with more advanced DevOps adoption.

This is the best view of dipping priority. DevOps priority declining while DevOps practices become standard operating procedure represents transformation success.

Sustainability: Stuck Between Aspiration and Action

Sustainability: 10.8% → 12.9% → 9.7% (net -1.0%)

Sustainability hovered around ~10% across all three waves. The pattern: important enough to recognize (~10% baseline), but never urgent enough to prioritize when competing against AI, security, and geopolitics.

We also routinely ask how current concerns over sustainability have changed since the prior year. While a quarter reliably respond “more concerned,” that share has not changed over three pulses. Neither has the more than half who say their concern level has not changed, or has dropped.

Sustainability appears to be stuck in the 'important but not urgent' trap. Until sustainability gets a regulatory mandate or clear ROI case, it stays perpetually deferred.

"I'd love for sustainability to show up [higher], given the energy-intensive nature of our industry, and it's also great marketing, but I don't know if today we are in the position, given the price-sensitive nature of the industry, to have sustainable solutions."

SECTION 4: Where We're Going

Taking the industry's temperature quarterly doesn't just yield storytelling abilities, it also enables forecasting based on developing trends.

Three Potential Scenarios Ahead for 2026

Scenario 1: Sustained Strategic Maturation (Most Likely)

- Strategy continues rising, implementation finally rises above 50%, security fully recovers toward 44% priority, sentiment returns to baseline (~4.05).
- The key test: Does the strategy surge translate to execution capability? If yes, expect bifurcation between strategic planners who invested in frameworks and reactive adopters stuck in checkbox mode.
- Indicators to watch in future pulse reports: Implementation rate crossing 50%, security reaching 44%, planning gap narrowing, sentiment recovering to 4.0+.

Scenario 2: External Pressures Emerge & Intensify (Moderate Risk)

- Geopolitics surges beyond 20% creating fresh urgency, new technology breakthrough triggers another FOMO cycle, regulatory burden overwhelms adaptation capacity, or economic pressures force cuts that stall transformation investment.
- This would be whiplash, sending us back to reactive mode just as correction was underway, with December's pattern repeating: new pressure, reactive surge, confidence erosion, attention displacement from fundamentals.
- Indicators to watch: Geopolitics exceeding 20% priority, industry sentiment declining below 3.90, new technology priority surging 5%+, security declining again.

Scenario 3: Stagnation (Lower Probability)

- All priorities staying stable, AI implementation stuck at ~45%, strategy rising but not translating to capability. Organizations perpetually 'planning to plan' without building execution muscle.
- This is gauged as unlikely because March showed clear movement and the industry demonstrated self-correction capability. But it's possible if execution proves harder than expected or resources prove insufficient.
- Indicators to watch: Implementation flat for 3+ quarters, strategy prioritization plateauing without capability improvement, sentiment stuck at trough levels.

Now, let's consider what this might mean for different facets of the broad Cloud-based tech industry.

For Cloud Service Providers:

Shift from feature competition to implementation enablement. Organizations need execution frameworks, not just capabilities. Opportunity in: integration services, deployment consulting, hybrid architecture design, regulatory compliance support. Concerns around hyperscalers and the cost of AI are significant.

For Enterprise IT Leaders:

Strategy surge validates investment in planning. Now translate frameworks to capability: upskill teams, establish clear governance, connect AI to infrastructure, build execution muscle. AI implementation rate is the metric that matters. Beyond AI, dominance of US-based hyperscalers is a major headache.

For Infrastructure Providers:

Planning gap closing (83% → 80%) creates opportunity, as organizations recognize that AI needs infrastructure. Position for strategic discussions about hybrid deployment, data sovereignty, security integration.

For Vendors and Solution Providers:

‘Era of Architecture’ means: frameworks over features, integration over innovation, meaningful execution over mere enthusiasm. Organizations want partners who can deliver for the long term, not just demonstrate in the moment. When it comes to concerns, this is the group most hassled by regulations and expenses regarding AI. However, these respondents were most likely to forecast a hiring expansion in the coming year.

For Everyone:

The transformation cycle (pressure → surge → plateau → consolidation) is likely to repeat for future technologies. Recognizing which phase you're in enables better strategic positioning.

CONCLUSION

Three quarterly waves reveal an industry learning curve:

- September 2025: Balanced baseline, modest optimism
- December 2025: AI surge, confidence crisis, planning gap revealed
- March 2026: Strategy surge, security rebound, sentiment recovery

The +5.9% strategy surge nearly equaling the +6.4% AI surge reveals an industry learning in real-time. Organizations moved from 'we need AI!' (reactive panic) to 'how do we implement AI?' (strategic planning). The planning gap identified in December is beginning to close.

"I am excited by the opportunity to help clients succeed in a period shaped by cloud, AI, and rapid digital change. As businesses look for trusted partners who can combine talent, technology understanding, and strategic support, we see strong potential for growth, deeper client relationships, and long-term impact."

But challenges remain: Implementation stuck at ~45% despite 52% priority. Strategy rising but capability not improving—yet. Whether organizations can translate strategic awareness into execution capability will determine winners over the next two quarters.

What makes this industry remarkable: December's imbalances were temporary, not structural. March proves the cloud industry capable of recognizing problems and self-correcting. Security rebounding, sentiment stabilizing, planning replacing FOMO. The story we're telling is not "industry in crisis." It's "industry growing up." Moving from reactive to strategic. From panic to planning. From checkbox adoption to thoughtful implementation.

December documented the crisis moment. March reveals the correction beginning. The next chapter depends on whether strategic awareness translates to execution capability.

That's the story we'll tell in our next report.

Connect with Us.

+ About CloudFest

Industry leaders make big moves at CloudFest. Whether you're a global hyperscale platform or an emerging service provider, your path to greater success starts at this event. As an attendee or partner, CloudFest is where you build your brand, form strategic partnerships, and set yourself on the path for greater growth in a one-of-a-kind environment.

Find out how to be part of the CloudFest community [here](#).

+ About Open Eye

Open Eye helps small businesses and non-profit leaders make greater impact in the world, using current data, insights, and great people to craft achievable change strategies together.

Learn more about Open Eye [here](#).

APPENDIX: SURVEY DEMOGRAPHICS AND EXTENDED CHARTS

Question: Which one of the following best describes your business?

Organization Type	Count	Percentage
Corporate IT	130	22%
Cloud service provider (CSP)	118	20%
Other	88	15%
MSP/VAR/System integrator	71	12%
Independent Software Vendor (ISV)	68	12%
Infrastructure provider/hardware/components	71	12%
ISP/Telecom	17	3%
Registrar/Registry/Domain Name System (DNS)	17	3%
Total	580	100%

Note: "Other" category includes IT consultants, web hosting providers, media publications, software developers, consulting companies, cybersecurity specialists, distributors, and various industry-specific organizations. Full list of "Other" responses available in raw data.

Question: Within your organization, which of the below best describes your primary role?

Role	Count	Percentage
Technology (including Data & AI Strategy)	189	33%
Business Strategy/Operations (including executive leadership)	146	25%
Product Development / Innovation	73	13%
Sales	78	14%
Other	32	6%
Marketing/Communications	38	7%
Legal/Compliance/Security	24	4%
Total	580	100%

Note: Other" category includes roles such as Professional Services, IT procurement, System Administrators, Project Management, and various hybrid roles.

Question: How long have you personally been working in an industry related to Cloud-based computing?

Experience Level	Count	Percentage
10+ years	184	46%
6-10 years	83	23%
1-5 years	105	26%
Less than a year	17	4%
Total	399	100%

Mean Experience: Highly experienced sample with 69% having 6+ years in cloud computing

Question: What would you estimate your company's revenue was in 2024?

Revenue Range	Count	Percentage
Less than \$5 million	100	25%
\$5-50 million	97	24%
\$51-250 million	43	11%
More than \$250 million	83	21%
I'm not sure	74	19%
Total	397	100%

Note: Significant "unsure" category suggests respondents may not have access to company-wide financial data.

Question: How large is your current business?

Company Size	Count	Percentage
Less than 10 employees	78	20%
10-50 employees	74	19%
51-100 employees	40	10%
101-250 employees	35	9%
250+ employees	160	40%
I'm not sure	12	3%
Total	399	100%

Question: Which of the following does your organization primarily work as?

Company Size	Count	Percentage
None of these	183	46%
Other supplier (e.g., Registrar)	62	16%
CSP with a reseller/agency program	37	9%
SaaS supplier to web agencies	22	6%
Closed-source platform provider	26	7%
Web agency	14	4%
Total	401	100%

Note: High "None of these" (51.54%) indicates diverse business models beyond web/agency-focused categories, aligning with broader Cloud industry representation.

Question: About how many client websites do you currently manage? **(Asked only of web agencies and digital agencies/consultancies, N=71)**

Number of Websites	Count	Percentage
Fewer than 100	39	55%
100-499	11	16%
1,000-4,999	3	4%
5,000+	3	4%
500-999	3	4%
I'm not sure	12	17%
Total	71	100%

Question: About how many web agencies do you serve through this channel? **(Asked only of CSPs with reseller/agency programs, N=37)**

Number of Agencies	Count	Percentage
I'm not sure	14	38%
Fewer than 50	8	22%
50-199	5	14%
200-499	2	5%
500+	8	22%
Total	37	100%

Note: High uncertainty may reflect distributed sales models where individual respondents don't track total agency counts.

Question: About how many websites are you currently maintaining? **(Asked only of Closed-source platform providers, N=25)**

Number of Websites	Count	Percentage
Fewer than 50	6	24%
50-199	2	8%
200-499	4	16%
500+	7	28%
I'm not sure	6	24%
Total	25	100%

Question: About how many active agency customers are you supporting? **(Asked only of SaaS suppliers to web agencies, N=22)**

Number of Customers	Count	Percentage
Fewer than 50	3	14%
50-199	4	18%
200-499	2	9%
500+	10	46%
I'm not sure	7	14%
Total	22	100%

Question: About how many domains or websites do you currently provide? (Asked only of Registrars/Other suppliers, N=62)

Volume	Count	Percentage
I'm not sure / Not applicable	26	42%
Fewer than 500	14	23%
500-1,999	3	5%
2,000-9,999	2	3%
10,000+	17	27%
Total	62	100%

Question: In what region does your organization primarily focus?

Region	Count	Percentage
Europe, Middle East & Africa (EMEA)	282	70%
Global reach, no regional focus	89	22%
North America (NA)	16	4%
Asia Pacific (APAC)	9	2%
Latin America (LATAM)	5	1%
Total	401	100%

Which of the following are most important to you, when it comes to the current and future health of your business? (select up to 3)

