Containers: Real Adoption And Use Cases In 2017

Application Container Usage Is On the Rise As Companies Seek To Improve Efficiency And Agility
Table Of Contents

1 Executive Summary
2 Containers Are Breaking Out Of The Test/Dev Environment
5 Organizations Are Modernizing Applications — Or Are They?
7 Containerization Will Grow As Organizations Seek To Improve Efficiency And Scalability
9 Key Recommendations
10 Appendix

ABOUT FORRESTER CONSULTING

Forrester Consulting provides independent and objective research-based consulting to help leaders succeed in their organizations. Ranging in scope from a short strategy session to custom projects, Forrester’s Consulting services connect you directly with research analysts who apply expert insight to your specific business challenges. For more information, visit forrester.com/consulting.

© 2017, Forrester Research, Inc. All rights reserved. Unauthorized reproduction is strictly prohibited. Information is based on best available resources. Opinions reflect judgment at the time and are subject to change. Forrester®, Technographics®, Forrester Wave, RoleView, TechRadar, and Total Economic Impact are trademarks of Forrester Research, Inc. All other trademarks are the property of their respective companies. For additional information, go to forrester.com. [1-12XKVEK]
Executive Summary

As excited as forward-looking developers have been to incorporate containers into their application development and deployment strategies, enterprises have been equally conservative in their adoption. Until recently, concerns over security and technology immaturity have mostly relegated containerization to test/dev environments, with very little use in production. Now, in 2017, almost all major cloud providers offer their services in containers, and the container management technology marketplace is exploding. As organizations push to increase their application agility and efficiency, containerization is growing into production environments and facilitating new application transformation efforts.

Containerization is an operating system-level virtualization method that simplifies application deployment and requires fewer resources than virtual machines. Containers bundle applications with the software libraries that they depend on, allowing developers to create “build once, run anywhere” code making applications very portable. Containers do not require a hypervisor, rather they isolate application resources in a small package that can be rapidly scaled dynamically based on usage. Furthermore, containers are very often a foundational component in new “Devops” based application development and delivery processes.

In January 2017, Dell EMC, Intel, and Red Hat commissioned Forrester Consulting to evaluate how enterprises are currently using containers and what challenges and benefits they are experiencing. Forrester tested the hypothesis that containers are being rapidly adopted by the developer community but often limited to test/dev Linux-based workloads. To evaluate this trend, Forrester surveyed 195 manager-level and above IT decision makers at North American and European enterprises that have adopted containers.

KEY FINDINGS

› Containers are used to modernize existing apps and create new cloud-native ones. Containers are indeed exploding in popularity, and companies are using them outside of testing and development environments as they gain trust in this rapidly developing technology. Containers are viewed by IT decision makers as critical to cloud, DevOps, and will help solve application portability challenges.

› Application transformation is still in its infancy. Despite their efforts to increase agility and efficiency, many companies are slow to re their monolithic legacy applications to make them more modular. Adoption of microservices is lagging compared with adoption of containers, and this may impede the realization of the benefits of container adoption. While expressing concerns about security of containers today, as decision makers gain experience and trust in the security of containerized microservices a significant uplift in the deployment of mission-critical applications in anticipated.

› Organizations are realizing the benefits of containers. Those that have adopted containers were driven to do so with expectations of secure, fast, and portable infrastructure that increases development efficiency and creates a consistent deployment process. These companies report that they have actually experienced each of these benefits and more.
Containers Are Breaking Out Of The Test/Dev Environment

Container use started as a way for developers to quickly code and test new applications while minimizing (or at least delaying) any focus on infrastructure configuration. But due to technology limitations and security concerns, these testing and development environments are where container usage ends for many companies. As containers gain popularity and the marketplace of management tools grows, more enterprises are expanding their use of containers to full production applications, both in the form of net-new cloud-native apps and modernized legacy software. Our study found that:

› **Container volume is growing.** Containers have exploded in popularity as organizations recognize benefits to both time and resource efficiency. Sixty-three percent of enterprises using containers have over 100 deployed, and 82% expect to have more than 100 containers deployed within the next two years. In a similar vein, respondents reported that they now have an average of 165 different containerized applications, a number that they project will rise by 80% in the next two years (see Figure 1).

Figure 1

“How many containerized applications are you aware of that your enterprise has deployed/will deploy . . .?”

<table>
<thead>
<tr>
<th>Container Volume</th>
<th>Today</th>
<th>In Two Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 to 5</td>
<td>8%</td>
<td>1%</td>
</tr>
<tr>
<td>6 to 10</td>
<td>14%</td>
<td>5%</td>
</tr>
<tr>
<td>11 to 20</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td>21 to 50</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>51 to 100</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>101 to 200</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>201 to 500</td>
<td>10%</td>
<td>17%</td>
</tr>
<tr>
<td>501 to 1,000</td>
<td>7%</td>
<td>14%</td>
</tr>
<tr>
<td>1,000+</td>
<td>4%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Organizations expect that their number of containerized applications will rise by **80%** in the next two years

Base: 195 US and European manager+ IT decision makers responsible for public/private cloud decisions at enterprises that have adopted containers
(percentages may not total 100 because of rounding)
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell EMC, Intel, and Red Hat, January 2017
Container environments are not islands in the data center. Containers aren’t exclusively being used in a single-cloud deployment type. In fact, there’s adoption cross-platform, with respondents claiming container usage across private (82%), public (53%), and traditional on-premises infrastructure (36%) (see Figure 2). Respondents also dispel the belief that enterprises are choosing between containers and private platform-as-a-service (PaaS) offerings. Over half provision containers on private PaaS. Specifically, 62% of container users leverage private PaaS today. Of those that do use private PaaS, over three-fourths (78%) are provisioning containers to that environment today, with another 14% planning to do so. In PaaS environments, containers are supported with pre-assembled enterprise capabilities that are less customizable but relatively simpler to set up and consume, thus easing the learning curve.

Containers are used for an expanding variety of applications. As more organizations gain trust in containers, they are extending their use beyond development and testing environments. Forty-seven percent of respondents are using containers in production — and those that do are rapidly increasing their number of deployments for various application types (see Figure 3). A lot of this early production usage serves net-new workloads, with 44% using containers for net mobility applications and cloud-native applications. However, this is not the limit to their production usage. Many enterprises also use containers for traditional workloads like collaboration software, enterprise content management (ECM), and enterprise resource planning (ERP).

Figure 2
“On which types of platforms do you use containers today?”
(Select all that apply)

- Private cloud 82%
- Public cloud 53%
- Traditional infrastructure 36%

Base: 195 US and European manager+ IT decision makers responsible for public/private cloud decisions at enterprises that have adopted containers
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell EMC, Intel, and Red Hat, January 2017

Figure 3
“For which of the following do you use containers today?”

- Production 47%
- Net new “mobility” applications 44%
- Net-new “cloud native” applications 44%
- Systems of record migration 41%

Base: 195 US and European manager+ IT decision makers responsible for public/private cloud decisions at enterprises that have adopted containers (percentages reflect only respondents who have deployed each type of application)
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell EMC, Intel, and Red Hat, January 2017

Containers are used to deploy a range of new and traditional application types, with the most popular including internal web business apps, back-end management tools, collaboration software, ECM, and ERP.
Containers facilitate application modernization. Older, core applications tend to be monolithic and interdependent on layers of architecture and do not fit with a DevOps strategy that values quick, agile iterations enabled by a microservice-based architecture. In order to build in new capabilities and keep their core applications technologically relevant, organizations are undergoing application modernization. Fifty-eight percent of organizations surveyed claimed that they have at least started the process of modernizing their applications, which largely includes increasing modularity and improving APIs (see Figure 5). The ability to break down applications into containerized microservices greatly improves agility and implementation flexibility.

Surprisingly, fewer than half (48%) of our respondents said that they use microservices today (see Figure 4), which is a key indicator that organizations are still tentative about dramatically transforming their applications despite their stated priorities. This may also indicate that those surveyed may not yet understand the significance of the transformations in applications that are currently taking place.

Figure 4
“Do you use microservices today?”

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>48%</td>
</tr>
<tr>
<td>No</td>
<td>50%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2%</td>
</tr>
</tbody>
</table>

Base: 195 US and European manager+ IT decision makers responsible for public/private cloud decisions at enterprises that have adopted containers

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell EMC, Intel, and Red Hat, January 2017

Figure 5
“What are your organization’s plans when it comes to modernizing its existing applications?”

- Are actively expanding our application modernization efforts: 29%
- Have already modernized the applications that we plan to: 29%
- Planning to start this in the next 12 months: 30%
- Interested but have not started and have no plans in the next year: 10%

Base: 195 US and European manager+ IT decision makers responsible for public/private cloud decisions at enterprises that have adopted containers

(Percentages may not total 100 because of rounding)

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell EMC, Intel, and Red Hat, January 2017
Organizations Are Modernizing Applications — Or Are They?

Evolving container technologies gained significant momentum over the past two to three years, earning popularity through adoption by many well-known cloud providers. Similar to the past adoption curve of virtualization, the majority of enterprises have been conservative, allowing the container technology marketplace to develop. Now that every major public and private cloud platform has integrated container support capabilities already in place or on their road map, infrastructure and operations (I&O) teams will start to be more aggressive in their approaches to both containerization and application transformation. To do so, they must tackle the biggest container challenges, which are two-fold:

› **Security remains a key concern.** The biggest issue with a “build once, run everywhere” application is the pervasive concern that an infected kernel can affect many containers, as opposed to virtual machines, which are fully isolated from each other. Security is always an expected concern with developing technologies, and it unsurprisingly ranks as the biggest roadblock to container deployment, followed by data management concerns (see Figure 6). Cloud platform providers are at work addressing this challenge as they improve their overall security features, including cloud workload security management and bring-your-own-keys (BYOK) encryption schemes. Cloud security gateways (CSGs) will also come of age to better monitor external traffic for public cloud container usage. I&O teams are taking precautions such as backing up container data (44%), performing regular security audits (43%), and restricting file permissions (39%). Our study found that many organizations sacrifice efficiency for security by running containers on top of VMs. Fifty-four percent of IT pros use hypervisors as part of their current container management strategy, presumably to provide improved security for containers via isolation provided by VMs.

**Figure 6**

“What were the biggest roadblocks/challenges that you experienced when deploying container technology?”
(Select all that apply)

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security</td>
<td>37%</td>
</tr>
<tr>
<td>Data Management</td>
<td>35%</td>
</tr>
<tr>
<td>Costs</td>
<td>33%</td>
</tr>
<tr>
<td>Reliability</td>
<td>32%</td>
</tr>
<tr>
<td>Scalability</td>
<td>31%</td>
</tr>
</tbody>
</table>

Base: 195 US and European manager+ IT decision makers responsible for public/private cloud decisions at enterprises that have adopted containers

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell EMC, Intel, and Red Hat, January 2017
Microservices are still in the “cool concept” category rather than an organizational imperative. Microservices and containers should go hand in hand, yet many microservices strategies lag behind. Only 48% of organizations using containers also leverage a microservices-based architecture. Forrester measured sentiment across containers and microservices to see if respondents felt differently about one versus the other. Our sentiment analysis found that while most respondents perceive many virtues of microservices — citing that they are a key open source technology (23%), really easy to use (22%) and the hypervisor replacement for new workloads (23%) — 24% still consider microservices to be “a cool concept, but future unknown” (see Figure 7). These results are highly alarming given that a microservices architecture — which involves breaking down bulky applications into packaged chunks — is a critical component of moving containers to production environments. The 24% of decision makers who foresee a brighter future and more positive outlook for containers than they do microservices-based architectures may be further behind in their application modernization efforts than they readily admit.

Figure 7
“Which sentiments describe your organization’s stance on microservices?” (Select all that apply)

- Cool concept, but future unknown: 24%
- A key open source technology to use: 23%
- Will solve application portability challenges: 23%
- The hypervisor replacement for our new workloads: 23%
- A way to minimize software licensing fees: 22%
- Really easy to use: 22%
- A key component of our DevOps strategy: 19%

Base: 195 US and European manager+ IT decision makers responsible for public/private cloud decisions at enterprises that have adopted containers
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell EMC, Intel, and Red Hat, January 2017

24% still consider microservices to be “a cool concept, but future unknown”
Containerization Will Grow As Organizations Seek To Improve Efficiency And Scalability

As speed and efficiency both become increasingly paramount, the time for being cautious about containers is coming to an end. Containers offer the potential to help contain hypervisor licensing costs. At a fraction of the size of a VM and with libraries and dependencies bundled in, containers have too much to offer both in terms of simplicity for developers and higher server efficiency and scalability for technology managers. Our study found that IT departments are already getting real results that align to the promised benefits of containerization

› **Scalability, developer efficiency, and application modernization.** Despite security concerns by some, others cited security as a key driver of containerization, along with other well-known benefits such as lower costs and increased speed, portability, and developer efficiency. When we inquired about the extent to which organizations have actually experienced those benefits, we found that 75% have moderately or significantly experienced increased speed, 67% increased security, 73% developed a more consistent deployment process, and 66% increased developer efficiency, among other benefits (see Figure 8). The contradiction of security as both a top concern and a stated benefit may be that containers are viewed as less isolated than virtual machines but more isolated than running applications on their own. Decision makers use various tactics to maximize the security of their containerized applications, including utilizing name spaces (which limit the ability for malware to identify other containers), running containers on top of hypervisors, and utilizing automation to keep their kernels and host systems up to date with the latest security packages.

› **Support for critical DevOps, cloud, and agile software development initiatives.** Modern service delivery entails using technology to engage customers, and to achieve this, organizations must break down silos to connect developers with business stakeholders. DevOps, cloud, and agile software development are all key IT initiatives designed to reduce friction and increase speed, portability, and communication between developers, operations teams, and other parts of the business. Our sentiment analysis showed that this is where containers really shine. The most popular stance on containers among our respondents is that they are a key component of their company’s DevOps strategy, in addition to being tightly tied to their private cloud story and a key component of their move to Agile (see Figure 9).

› **Reduced costs.** Containers are a full magnitude smaller than full virtual machines, which contain full guest operating systems and are therefore usually three to five times as large. Furthermore, they support iterative development approaches, as they are quicker to test and do not require infrastructure configuration. Forrester has found instances of organizations with heavy container use that have reduced their number of servers by as much as 80% and that anticipate 70% savings on dev/test costs and upwards of 40% on savings in production.¹
“To what extent have you actually experienced the following benefits from your adoption of container technology?”

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Significantly</th>
<th>Moderately</th>
<th>Slightly</th>
<th>Not at all</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased speed</td>
<td>32%</td>
<td>43%</td>
<td>16%</td>
<td>7%</td>
</tr>
<tr>
<td>Security</td>
<td>33%</td>
<td>34%</td>
<td>25%</td>
<td>6%</td>
</tr>
<tr>
<td>Consistent deployment process</td>
<td>24%</td>
<td>49%</td>
<td>20%</td>
<td>5%</td>
</tr>
<tr>
<td>Increased developer efficiency</td>
<td>24%</td>
<td>42%</td>
<td>28%</td>
<td>5%</td>
</tr>
<tr>
<td>Increased portability</td>
<td>23%</td>
<td>46%</td>
<td>23%</td>
<td>6%</td>
</tr>
<tr>
<td>Simplified packaging</td>
<td>23%</td>
<td>43%</td>
<td>26%</td>
<td>6%</td>
</tr>
<tr>
<td>Enabled applications to run on multiple cloud platforms</td>
<td>23%</td>
<td>45%</td>
<td>22%</td>
<td>6%</td>
</tr>
<tr>
<td>Reduced costs outside hypervisor costs</td>
<td>21%</td>
<td>41%</td>
<td>31%</td>
<td>6%</td>
</tr>
<tr>
<td>Eliminated future hypervisor licensing costs</td>
<td>24%</td>
<td>37%</td>
<td>26%</td>
<td>9%</td>
</tr>
<tr>
<td>Eliminated existing hypervisor licensing costs</td>
<td>20%</td>
<td>41%</td>
<td>29%</td>
<td>8%</td>
</tr>
<tr>
<td>Reduced vendor lock-in</td>
<td>19%</td>
<td>41%</td>
<td>29%</td>
<td>8%</td>
</tr>
<tr>
<td>Supported microservices architectures</td>
<td>19%</td>
<td>41%</td>
<td>27%</td>
<td>9%</td>
</tr>
</tbody>
</table>

The contradiction of security as both a top concern and a stated benefit may be that containers are viewed as less isolated than virtual machines but more isolated than running applications on their own.

Base: 195 US and European manager+ IT decision makers responsible for public/private cloud decisions at enterprises that have adopted containers
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell EMC, Intel, and Red Hat, January 2017

Figure 9

Which sentiments describe your organization’s stance on containers?" (Select up to five sentiments)

- A key component of our DevOps strategy: 32%
- Tightly tied to our private cloud story: 29%
- A key component of our move to Agile: 24%
- Will solve application portability challenges: 24%
- Tightly tied to our public cloud story: 24%
- A way to minimize software licensing fees: 22%
- The hypervisor replacement for our existing workloads: 22%

Base: 195 US and European manager+ IT decision makers responsible for public/private cloud decisions at enterprises that have adopted containers
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell EMC, Intel, and Red Hat, January 2017
Key Recommendations

Enterprises across industries recognize containers as a solution to help meet the ever-increasing demand for rapid application development. In order to deliver against your DevOps and application modernization agenda, you must break applications into smaller, more workable pieces that maximize speed, agility, and efficiency.

Forester’s in-depth survey of IT decision makers using containers yielded several important recommendations:

Accelerate your microservices strategy. Although container users claim to be modernizing applications, the apparent lack of interest and adoption of microservices architectures with containers is problematic. This indicates that much of current container usage fails to fully embrace and take advantage of high-scaling environments typical of containers and cloud services. It is critical to accelerate your adoption of microservices with containers if you are to realize the full value of your containerization efforts.

Start using containers in production. With organizations delivering ever higher volumes and varieties of business- and customer-facing applications, DevOps initiatives are paramount. The container technology marketplace has matured to a point where the majority of organizations now feel confident using containers in production environments, and the rest need to follow suit. Those still lagging behind will ultimately find their businesses at a competitive disadvantage as their peers capitalize on their new development capabilities.

Build an application modernization road map. While net-new applications are a no-brainer with containers, core systems are a different beast. Retooling and migrating an application is an expensive proposition and may not provide obvious value when it comes to systems-of-record apps that do not require frequent updates. Forrester recommends taking an app-by-app approach, beginning your modernization efforts with apps that are easier to work with and that will provide the most value. When assessing each app for containerization (and ultimately for cloud migration), consider the value versus cost, the migration approach, and the right team (internal or outsourced) to get the job done.
Appendix A: Methodology

In this study, Forrester conducted an online survey of 195 organizations in the US, Canada, Germany, and the UK to evaluate their adoption rates and attitudes toward containers. Survey participants included manager-level and above IT decision makers with responsibility for public and/or private cloud decisions at 500-plus-employee enterprises that have adopted containers. Respondents were offered a small incentive as a thank you for time spent on the survey. The study was conducted in January 2017.

Appendix B: Demographics/Data

Appendix C: Supplemental Material

RELATED FORRESTER RESEARCH


Appendix D: Endnotes