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In April 2021, survey data was collected from over 800 SMB and independent developers in six different countries to understand the role of trust in selecting a cloud hosting provider. The survey asked developers to respond to a series of questions about the importance of trust in their decision-making process. Measures of trust ranged from questions on a provider’s functionality and performance to questions regarding how a provider stacked up against one’s values and ethics. This research specifically attempted to understand how developers thought about the Big 3 providers (AWS, GCP, Azure) and whether trust in these providers varied based on use and experience.

What we found indicates that trust does play a large role in a developer’s decision to choose a cloud provider. This finding holds true, regardless of one’s preference for hyperscalers or smaller providers. However, almost a quarter of respondents said they would choose a vendor that meets their needs regardless of values. This doesn’t necessarily negate the role of trust in this decision, but it does narrow its definition. At the end of the day, trust in a provider’s functionality and performance is prioritized over alignment with one’s personal ethics.

In general, it seems that trust in a Big 3 provider increases with use and experience. Almost 70% of SMB and independent developers who used one of the Big 3 vendors stated their level of trust has increased since they started using them. This trust mainly rests on their ability to provide industry-standard functionality, security, and performance that meets the needs of their customers.

However, a sizable share of developers - both those who hold a preference for smaller providers and those who prefer the hyperscalers - do not agree with the Big 3 on matters of values. Ethical standards that should be table stakes for vendors are called into question by developers, many of whom say they don’t trust the Big 3 to focus on their needs over shareholders, to not monetize their data for their own use, and to not compete against them and put them out of business. Such measures of trust in values show cracks in the reputations of the Big 3 providers.
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When we take a closer look at what developers with a preference for small cloud providers are saying about the role of trust in selecting a provider, we see similar trends. Developers who prefer small providers are still likely to prioritize a provider’s performance over other measures. Again, the Big 3 providers tend to receive high marks from these developers on performance and functionality, but on measures of values the Big 3 do not fare as well. In fact, about 20% of these developers say they don’t trust the Big 3 “not to work with companies or organizations I find morally objectionable,” and “not to monetize my data for their own use.” Over 30% say they don’t trust the Big 3 to “not leverage its brand power/influence to stifle competition,” and “focus on my needs over shareholders/investors.”

![Image of survey results]

In sum, the majority of SMB and independent developers place a high value on trust in a cloud provider, and in general trust in performance and functionality take precedence over trust in values. However, there are fairly large cracks in the moral reputations of the Big 3 providers that may create openings for a cloud hosting vendor with an excellent moral reputation as well as functionality, performance, and security on par with the Big 3 to get a foot in the door with developers who may be on the fence.