



The Voice of Kubernetes Report 2026

The Future of VM Workloads

The Voice of Kubernetes 2026 Report captures a structural shift in infrastructure trends. For years, Kubernetes was viewed as a specialized tool for cloud-native development. Today, it is emerging as the primary substrate for the modern data center.

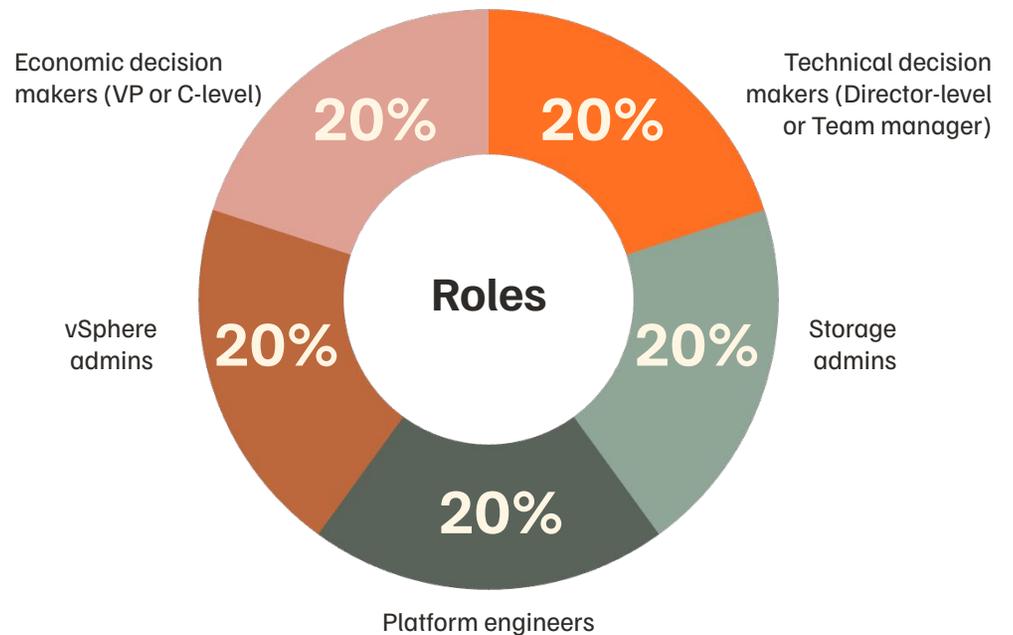
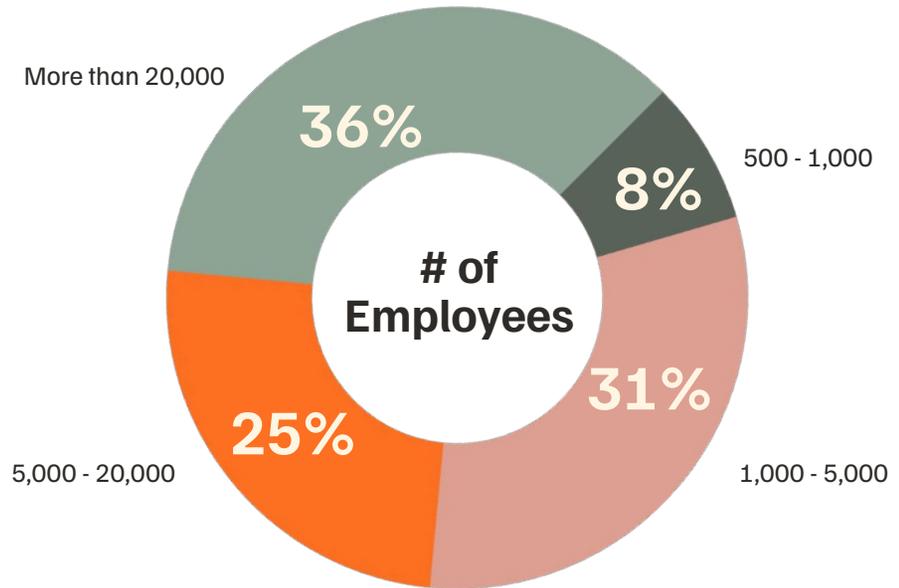
The convergence of three forces is accelerating this transition: aggressive virtualization cost increases following Broadcom's acquisition of VMware, the rapid rise of AI/ML workloads, and intensifying global data sovereignty requirements. Together, these pressures are forcing organizations to rethink their foundational architecture.

Enterprises are consolidating VMs and containers on to Kubernetes. But as they do, they are discovering a hard truth: success is no longer about orchestration alone. It is about data. The long-term success of this shift will depend on how effectively organizations modernize the way they manage, protect, and move their data.

Who did we survey?

Portworx by Everpure partnered with Dimensional Research to survey 519 qualified participants. All respondents were directly responsible (hands-on or management) for current or past use of VMware VMs and worked at companies with more than 500 employees that had made a significant investment in Kubernetes. Survey respondents represent a breadth of infrastructure roles, including platform engineers, storage and VMware admins, as well as execs and director-level managers.

In some instances, percentages may not add up to 100% due to rounding.



01

Kubernetes is the Future of Application Development

Kubernetes has crossed the chasm

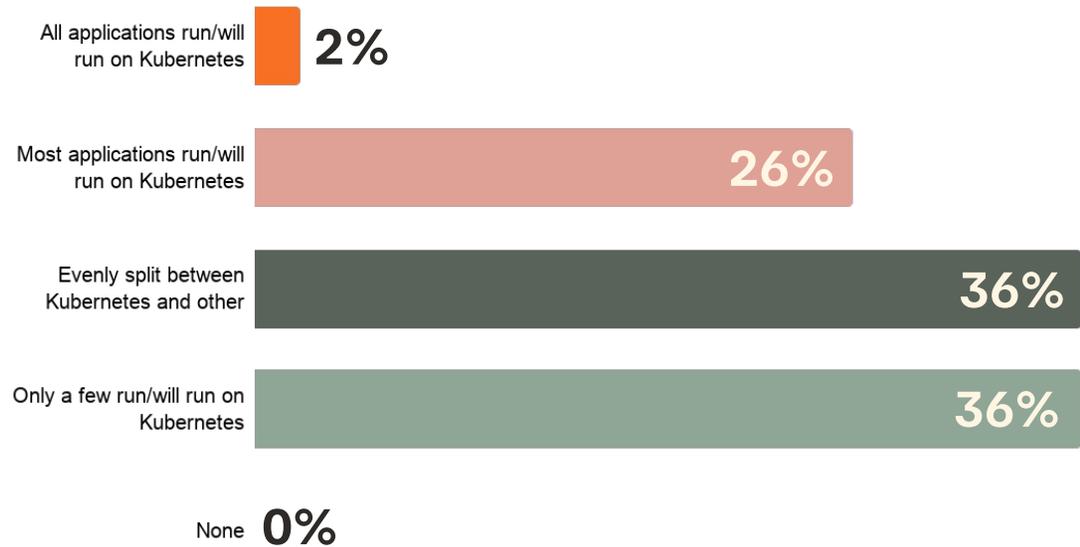
While only 28% of respondents describe their current footprint as being "all" or "mostly" on Kubernetes, investment plans for new applications show a massive shift. Over the next five years, 84% of organizations expect at least half of their new applications to be built on Kubernetes.

Organizations that have made the initial investment in Kubernetes are realizing its value. As a result, they are moving toward container-first deployment models and increasingly betting their businesses on Kubernetes as the strategic foundation.

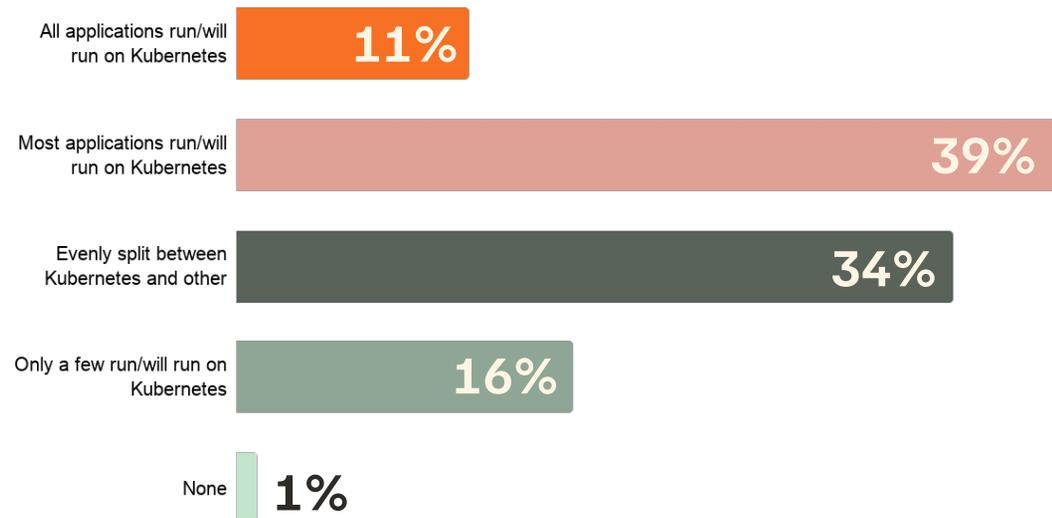
84%

of organizations expect at least half of their new applications to be built on Kubernetes over the next five years

How would you describe your company's CURRENT application footprint? Please answer this question for your entire company, not just your own team or organization.



How would you describe your company's investment plans for NEW applications in the next five years?



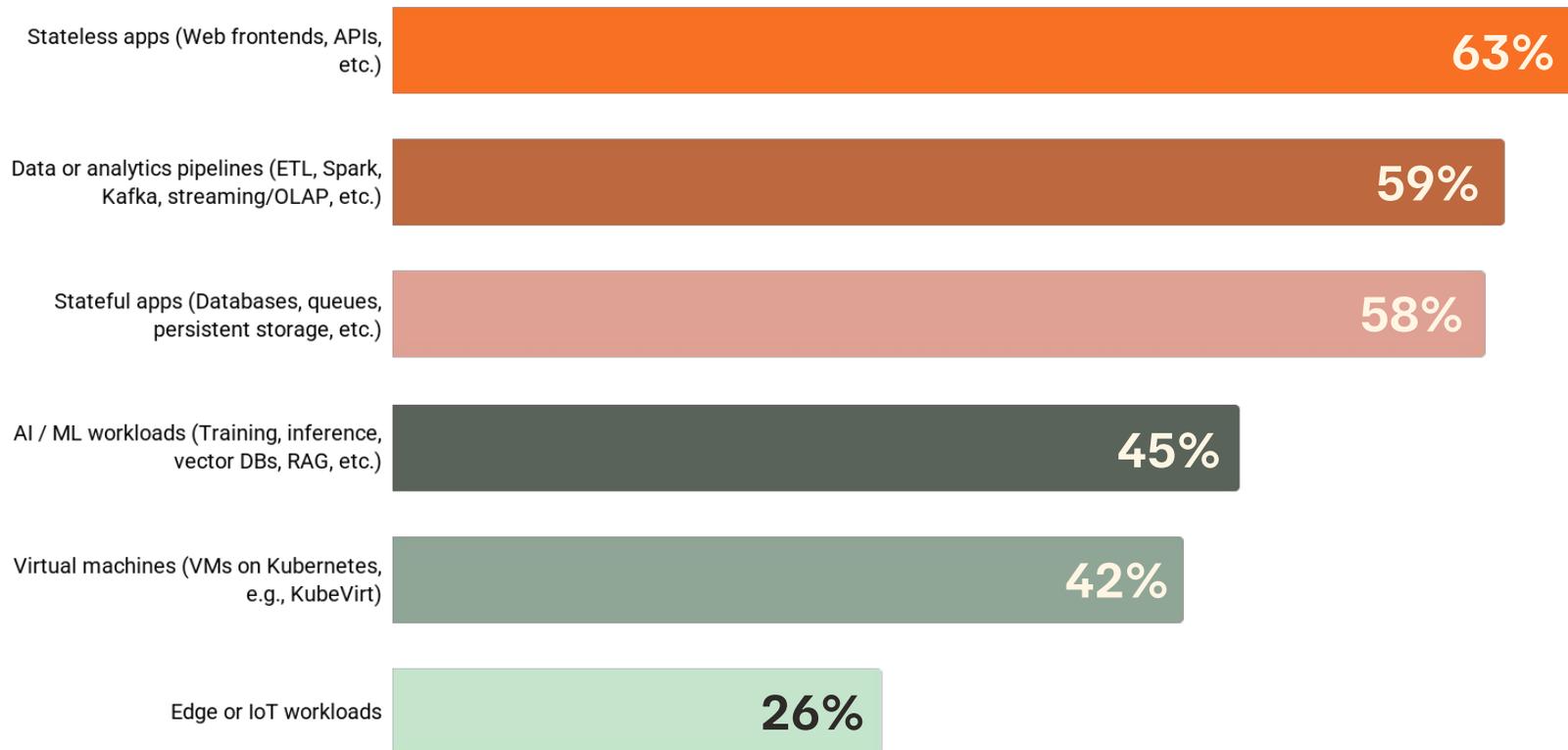
Critical workloads run on Kubernetes

The clearest signal of this shift is the types of applications organizations are running or planning to run on Kubernetes. Kubernetes was originally designed for ephemeral, stateless workloads. These still remain common (63%), but stateful applications have nearly reached parity (58%), underscoring the confidence in Kubernetes for critical workloads.

AI/ML workloads (45%) further reinforce this reality. Kubernetes' elasticity, scheduling intelligence, and integration with CI/CD and MLOps ecosystems make it the natural control plane for AI infrastructure.

The implication is significant: when both stateful data services and AI platforms converge on Kubernetes, it stops being optional. It becomes foundational.

What types of workloads is your company running or planning to run on kubernetes? Choose all that apply.

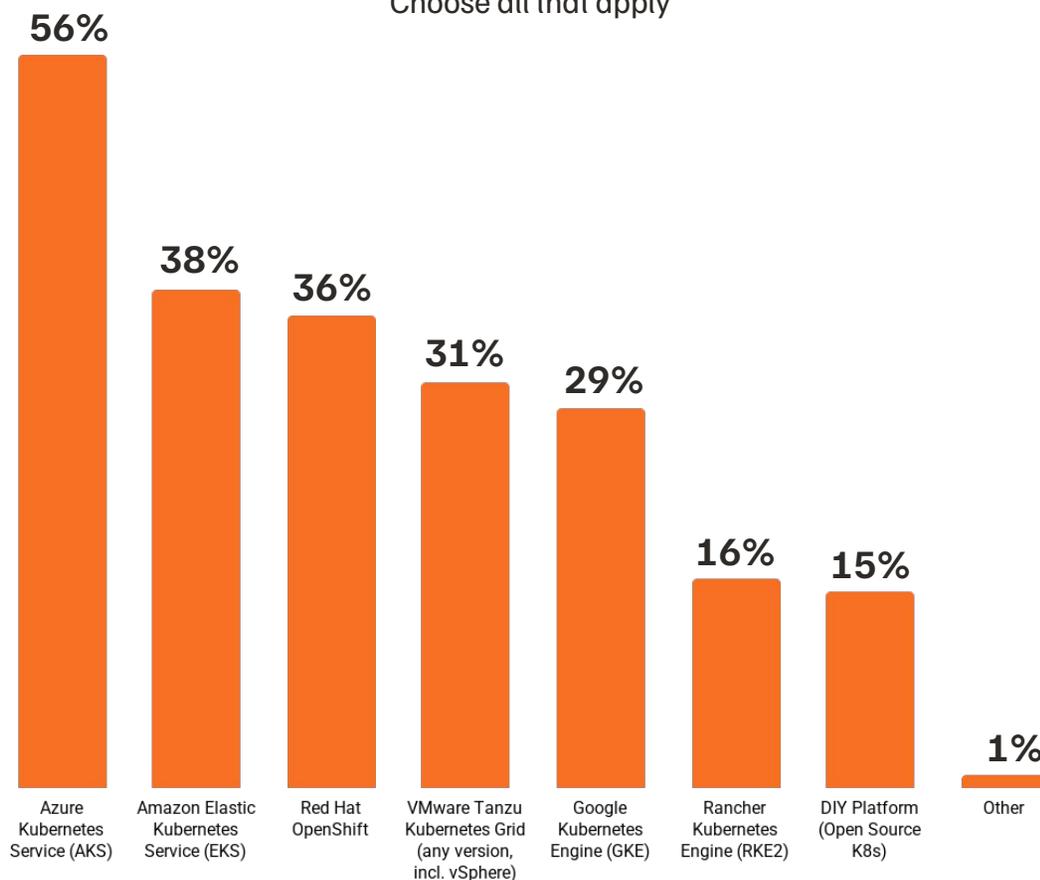


As the breadth of applications running on Kubernetes grows, so too does deployment complexity

Infrastructure teams face tightening IT budgets, while still being expected to meet critical SLAs for performance and reliability. In order to meet these needs, most (68%) are using a hybrid or multi cloud strategy. This adds flexibility but also increases operational complexity within their environments.

If Kubernetes is the platform of choice, then data services must be equally portable, policy-driven, and infrastructure-agnostic. Otherwise, operational complexity will erode the very agility Kubernetes promises.

Which Kubernetes distributions is your company using or planning to use?
Choose all that apply



Number of distributions selected

One
32%

Two
35%

Three
21%

Four +
12%

68%

using a hybrid/multi-cloud strategy for Kubernetes



02

The Landscape for Data Management Demands Change

Everyone is affected by data requirements

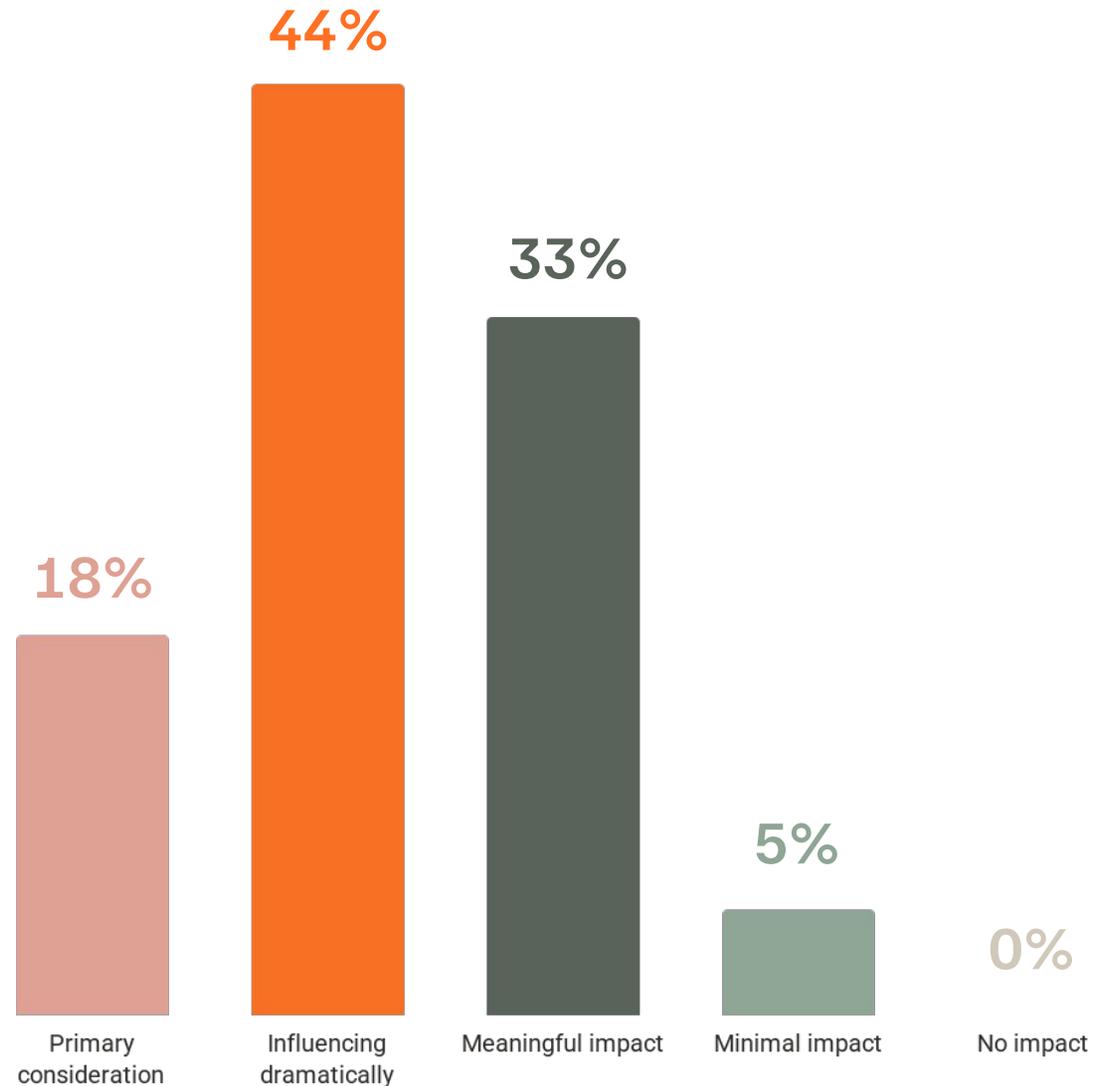
Today's world demands agility, and data management is no different. 100% of respondents said that regulatory, geopolitical, or customer data sovereignty requirements are influencing their data strategy. Only 5% reported it had a minimal impact.

Infrastructure decisions are increasingly driven by where data is allowed to live—not just where it's cheapest to run.

100%

are affected by data sovereignty requirements

To what extent are regulatory, geopolitical, or customer data-sovereignty requirements influencing your company's overall data strategy?

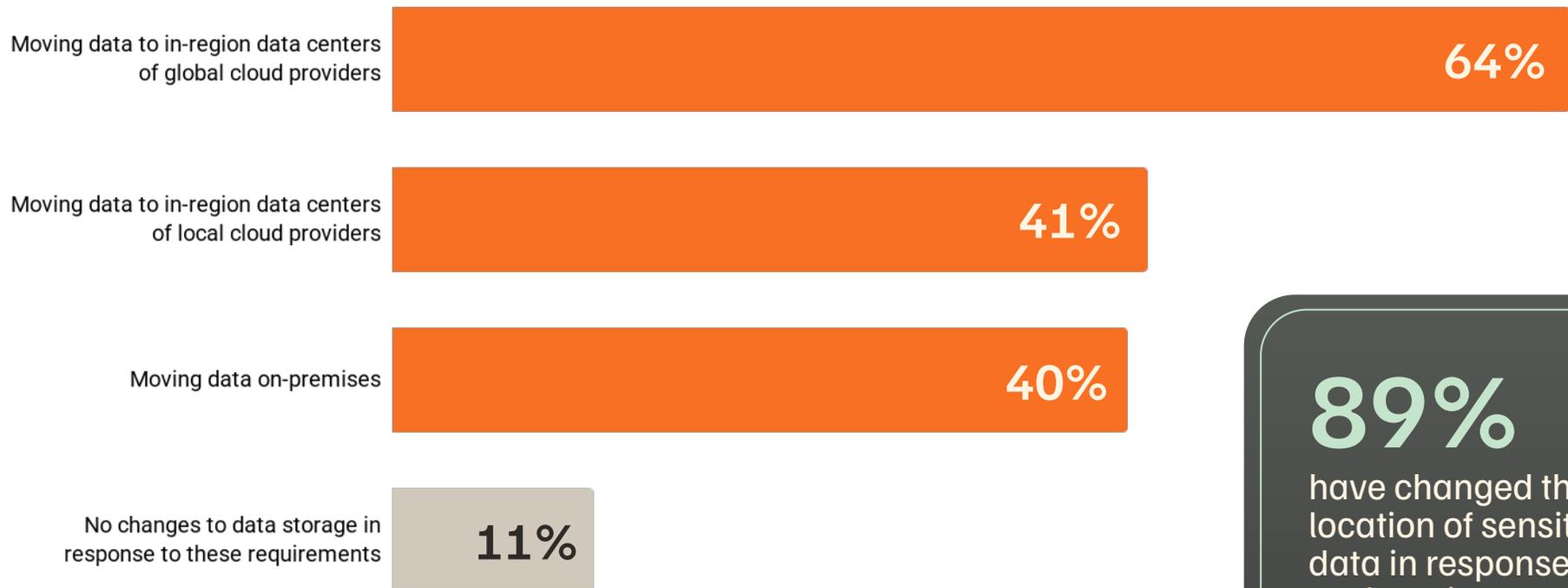


Organizations are responding by reevaluating where they store sensitive data

The most common approach is moving data to in-region data centers operated by global cloud providers (64%). Others are taking more significant steps: 41% are shifting data to in-region facilities run by local cloud providers, and 40% are repatriating data on-premises.

But moving data is only half the challenge.

In response to regulatory, geopolitical, or customer data-sovereignty requirements, how is your organization changing where it stores sensitive data? Choose all that apply.

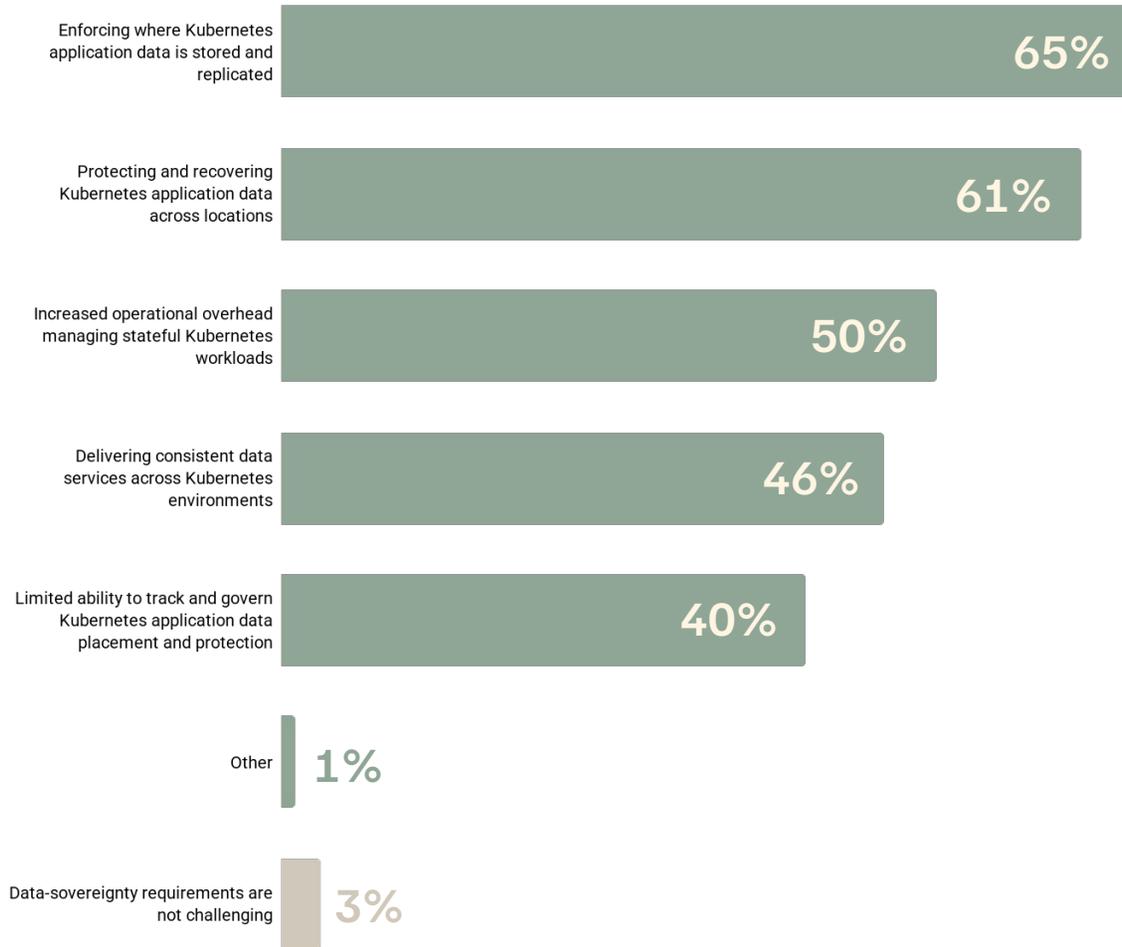


89%

have changed the location of sensitive data in response to changing requirements



What challenges have data-sovereignty requirements introduced for Kubernetes application data management? Choose all that apply.



97% report challenges with data sovereignty requirements

Data sovereignty requirements extend beyond location

They directly affect Kubernetes data management strategies. These challenges are substantial:

- 65% must enforce strict controls over where Kubernetes data is stored and replicated
- 61% must protect and recover data across multiple locations

Enterprises must enforce data placement with precision, ensure consistent protection policies across regions, and maintain performance guarantees regardless of where workloads run. Without policy-driven data placement and cross-environment resilience, migrations simply shift risk.



03

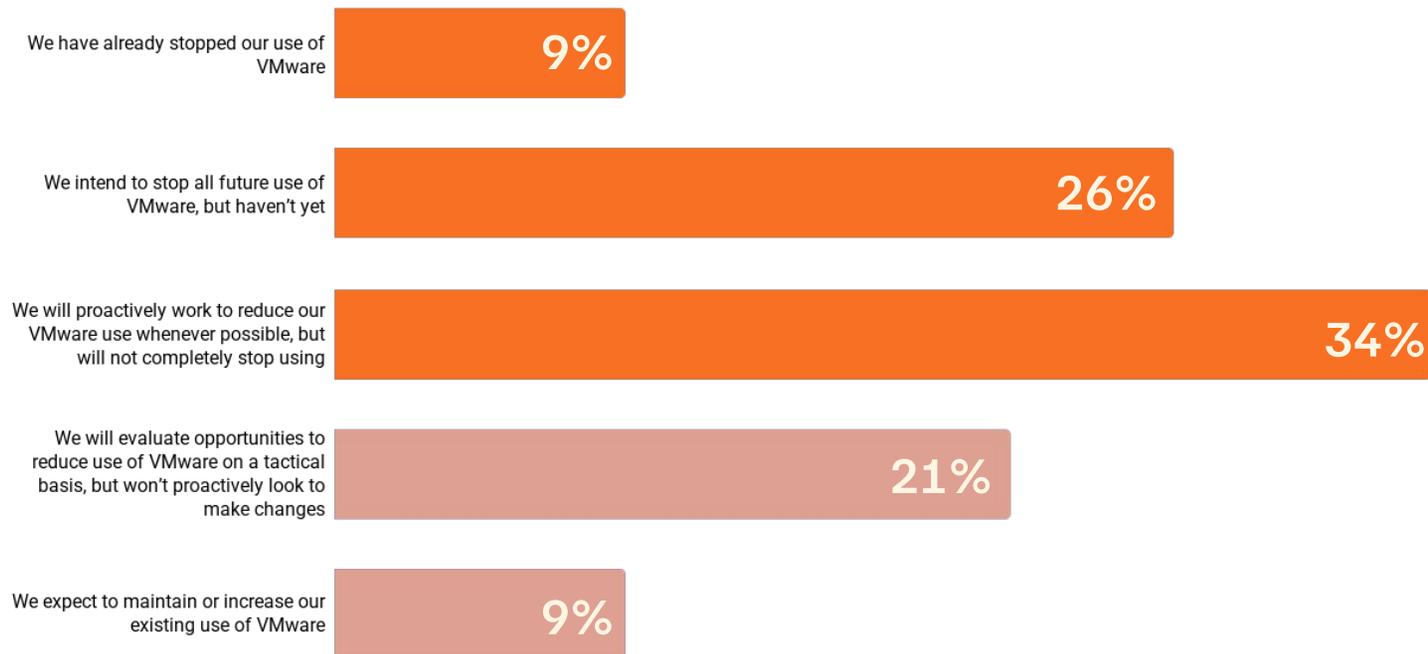
VMware customers are looking for alternatives

Enterprises are experiencing unprecedented **cost pressures**

Following Broadcom's acquisition of VMware, **97% of organizations who received a renewal saw an increase in their license cost.** This cost pressure has led nearly every organization (91%) to reduce VMware usage, with **69% looking to proactively reduce their usage.**

This is a structural reevaluation and represents a seismic shift for organizations that historically relied on VMware—and highlights the risk of deep dependency on a single vendor.

Which of the following statements best represents your company's overall strategy for future use of VMware?



97%
saw an increase in their VMware license cost renewal

69%
are proactively reducing their VMware usage



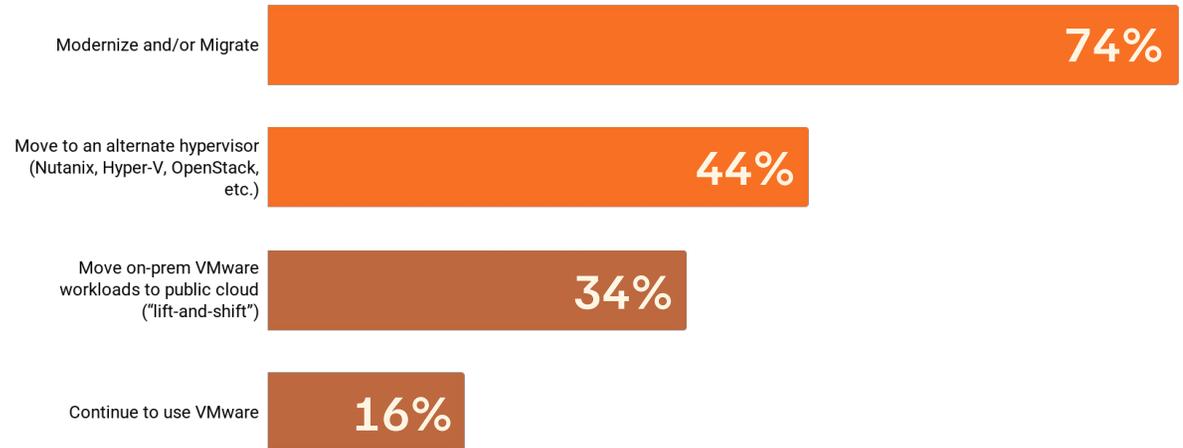
Large enterprises are most likely to modernize or migrate VMs to Kubernetes

As a result, most organizations are pursuing alternatives for VMware workloads. A significant majority (74%) plan to:

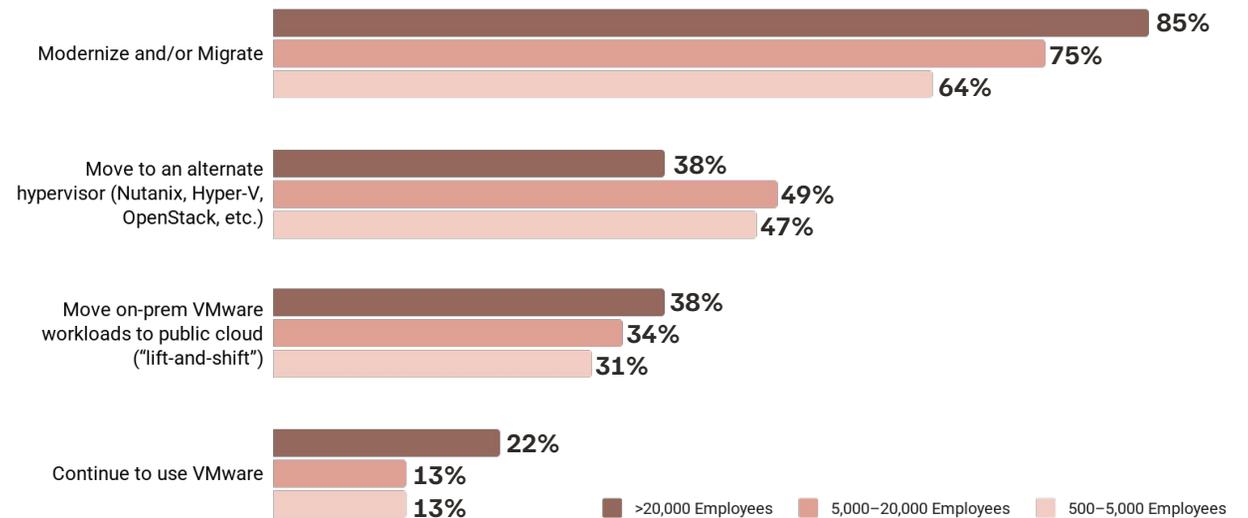
- Re-architect VM workloads as containers (49%), or
- Migrate VMware workloads to Kubernetes using platforms such as KubeVirt or Red Hat OpenShift Virtualization (53%)

Among large enterprises, this figure rises to 85%.

What has your company done, or has plans to do, with VMware workloads? Choose all that apply.



Responses by company size



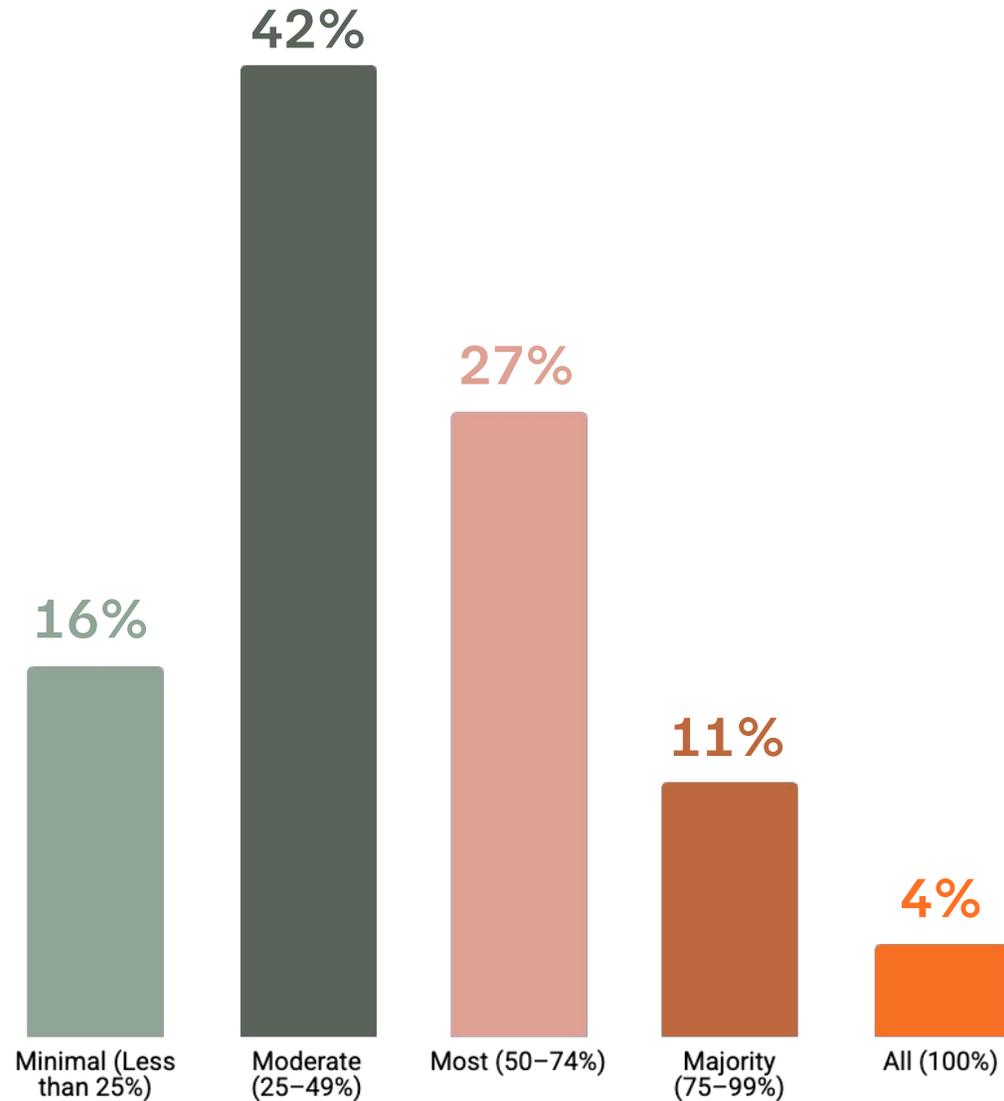
Kubernetes will be the unifying management plane

The shift becomes even clearer when considering that 42% plan to migrate or re-architect most of their VMware workloads to Kubernetes. External cost pressures have acted as a catalyst, accelerating efforts to break down infrastructure silos and unify VM and container workloads within Kubernetes.

42%

plan on migrating or re-architecting most of their VMware footprint to Kubernetes

What portion of your company's VMware footprint will be re-architected or migrated to Kubernetes? Choose the one answer that most closely applies.



VMware migrations take longer than expected

However, execution is proving more difficult than anticipated. The 2024 Voice of Kubernetes Experts Report showed that 31% of organizations expected to complete their planned changes for VMware workloads by 2025. In the 2025 report, that number dropped to 15% who expected to complete their changes by the end of the year.

Today, only 8% reported that they completed their planned changes. These migrations are incredibly complex—especially for enterprises with large VMware footprints. Most transitions occur in phases, and at every stage, the environment must meet the performance and resilience requirements of each application.

In 2024,

31%

expected to be done by 2025

In 2025,

15%

expected to be done by 2025

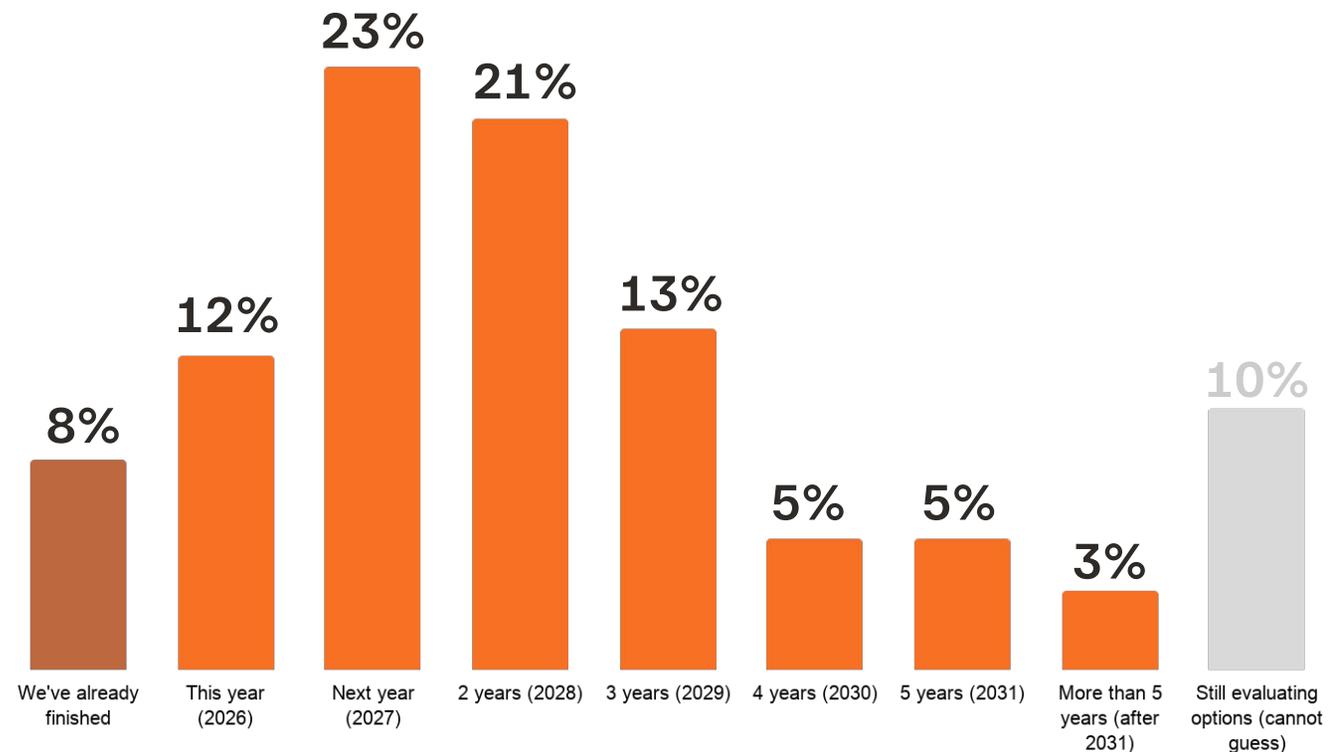
In 2026,

8%

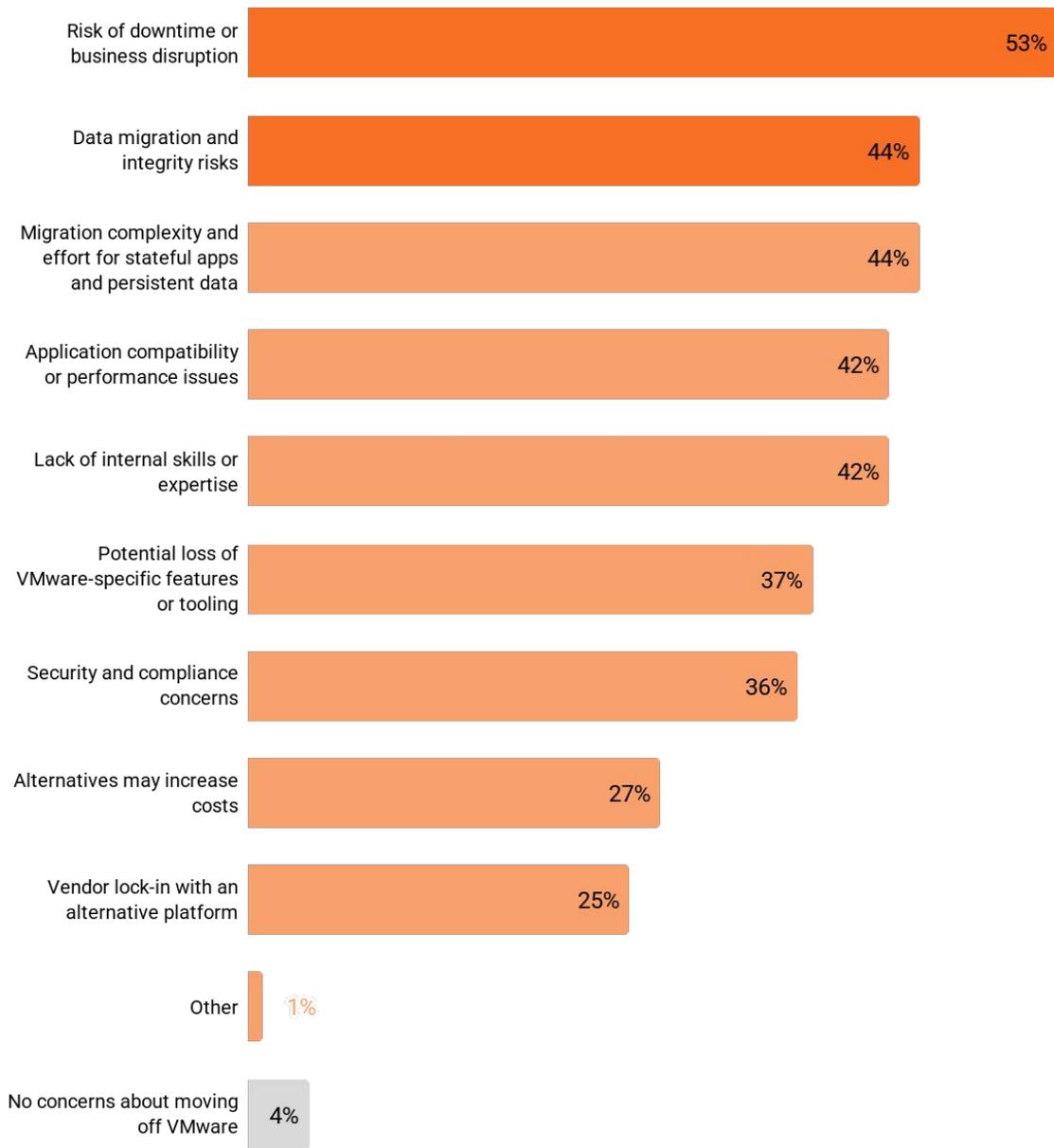
report they are already done.

What is your organization's most likely timeline for completing planned changes to VMware workloads?

n = 95%, will change VMware workloads



What concerns do you have about moving workloads off VMware? Choose all that apply.



Business disruption is the top concern for moving workloads off VMware

The risks of a poorly executed migration are significant. Over half of organizations (53%) feared downtime or business disruption from moving workloads off VMware. 44% reported fears of migration risks, particularly for stateful applications.

Organizations are approaching these migrations cautiously, prioritizing stability and resilience over speed.

95%

have concerns about moving VMware workloads



04

The Reality of Running VMs on Kubernetes

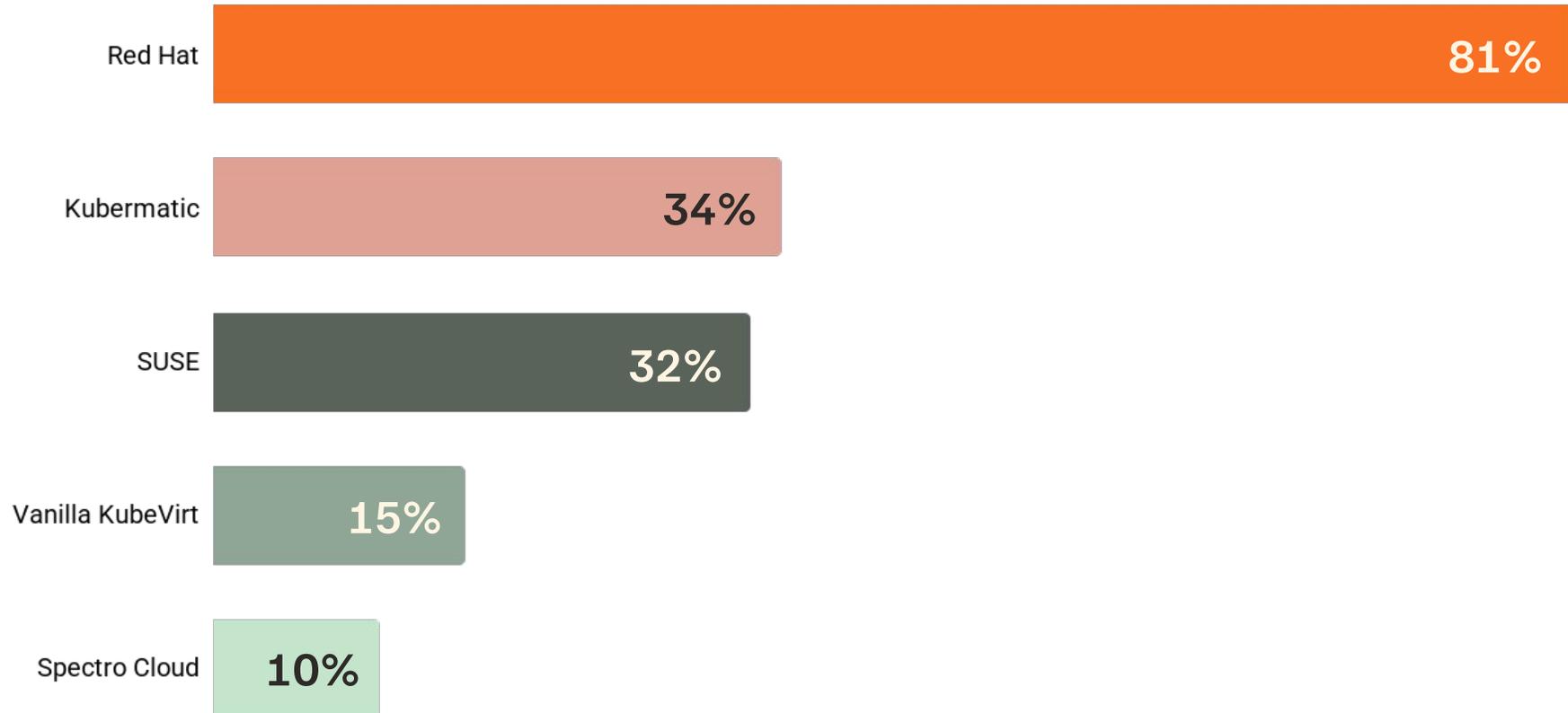
Red Hat more than twice as likely to be used for VMs on Kubernetes than any other platform

Among the 53% planning to migrate VM management to Kubernetes, Red Hat OpenShift Virtualization is the clear leader (84%), more than twice as likely to be selected as the next alternative.

Enterprises prefer an opinionated, enterprise-ready platform for managing VMs on Kubernetes. They seek unified management of VMs and containers while maintaining a clear path toward modernization.

Which Kubernetes platform will your company use for running VMs on Kubernetes? Choose all that apply.

n = 53%, will run VMs on K8s

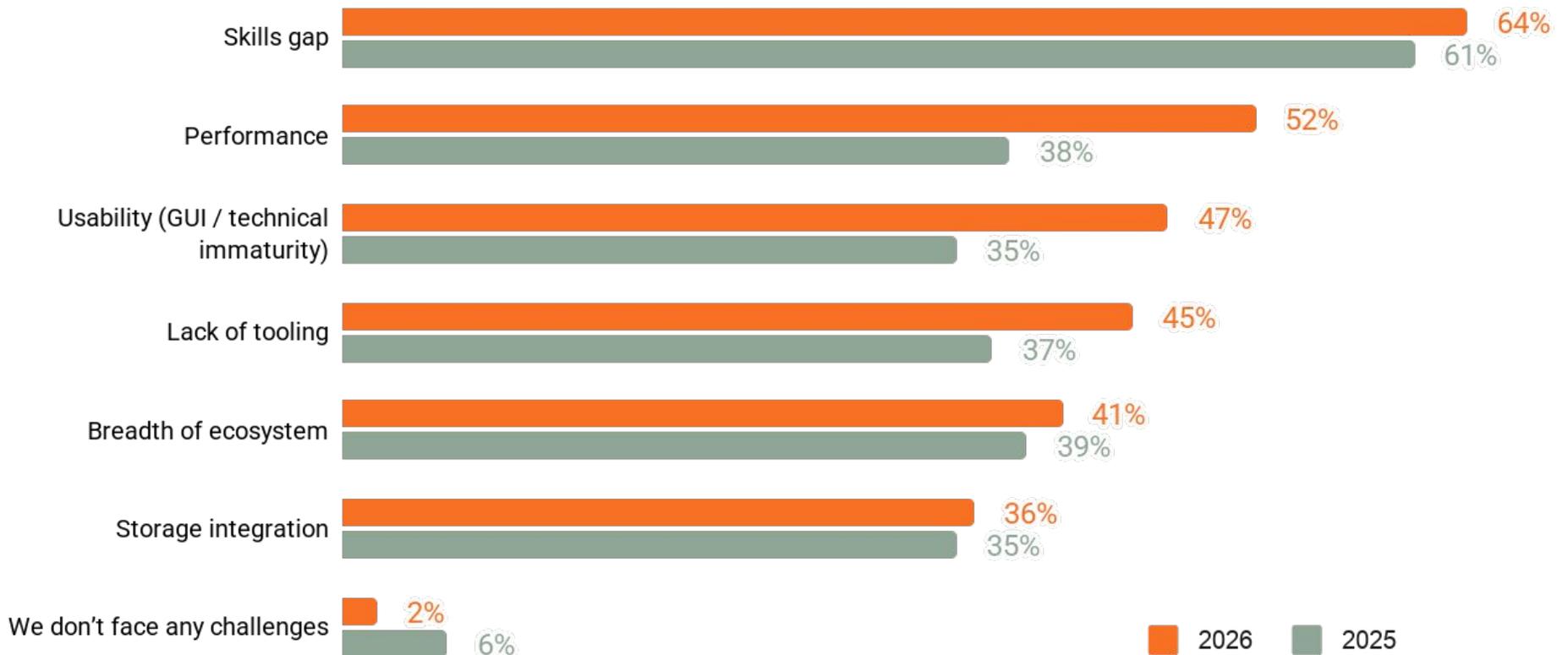


Performance issues become more apparent as VM on Kubernetes workloads mature

In the 2025 survey, only 38% of organizations anticipated performance issues. In 2026, that number rose to 52%. As organizations start these migrations from VMware to KubeVirt-based deployments, meeting SLAs around performance becomes more of a concern.

Modern data platforms must be able to deliver consistent performance across containers and VMs.

What challenges does your organization face, or expect to face, with running VMs on Kubernetes? Choose all that apply.

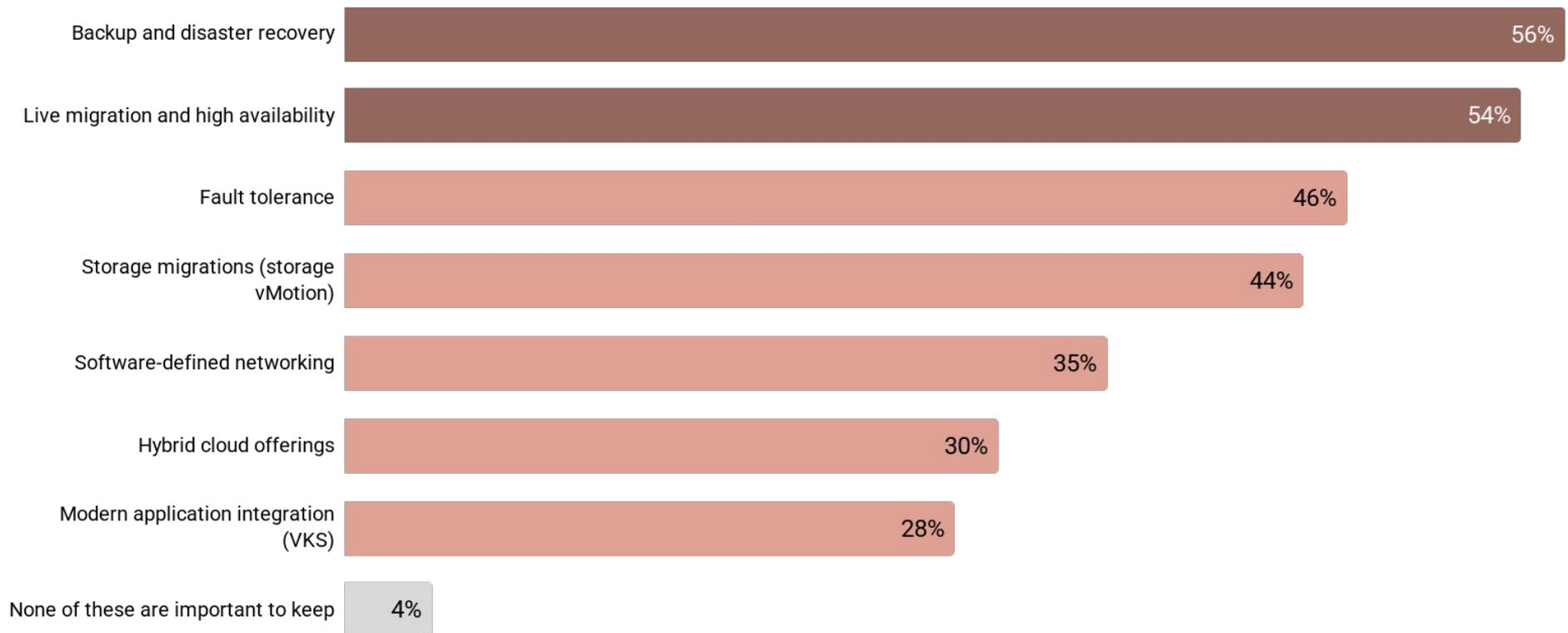


Data resilience and availability are the most critical data management capabilities to retain

This is further encapsulated by backup and disaster recovery (56%) being the most critical data management capability for organizations to retain as they move away from VMware.

This reinforces a key truth: the workloads being migrated are business-critical. Kubernetes must support enterprise-grade backup, cross-cluster failover, and application-consistent recovery.

Which of the following data management capabilities in your VMware stack are most critical for your team to retain as you move away from VMware? Choose all that apply.

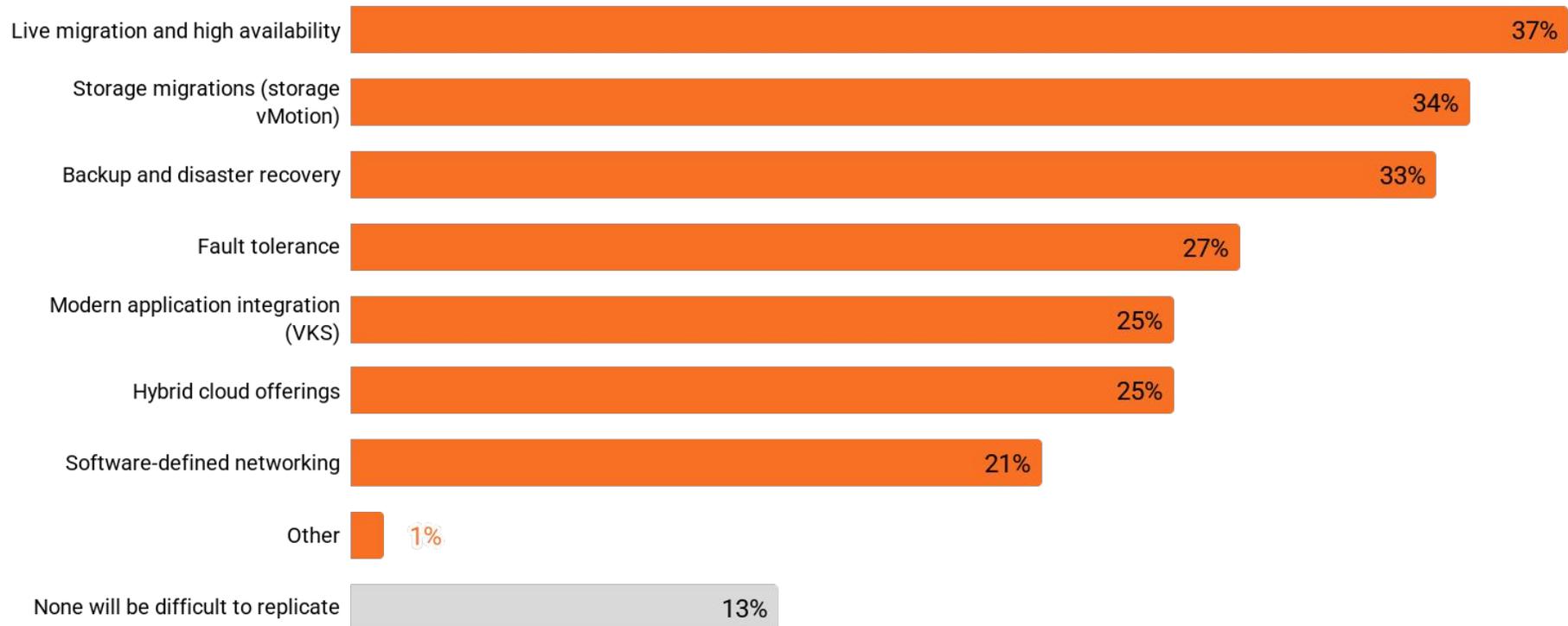


Enterprise standards for management capabilities must be retained outside of VMware

Most organizations (87%) are concerned that critical VMware capabilities will be difficult to replicate using alternative solutions. Live migration, storage migration, and robust data protection and disaster recovery policies are requirements.

The migration to Kubernetes is not just a shift in workload orchestration. It is a shift in the operational model, and enterprises must prepare for data resilience, mobility, protection, and performance in these new environments.

Which VMware capabilities do you anticipate will be the most difficult to replicate outside of VMware? Choose up to 3 of the following.



Conclusion

The 2026 survey results confirm that the "Kubernetes-first" enterprise is no longer a theoretical goal. The mass migration away from traditional virtualization is being fueled by a combination of aggressive vendor pricing and the necessity of supporting AI and stateful data workloads.

However, the "completion gap", where only 8% of planned migrations have been completed, highlights a critical reality: moving mission-critical VMs to Kubernetes is a marathon, not a sprint.

Success in this new era will depend on bridging the skills gap (64%) and adopting data management solutions that can replicate the resilience of traditional hypervisors within a cloud-native framework. As organizations break down the walls between containers and VMs, the focus must shift from simple migration to long-term operational excellence, ensuring that performance and security are never sacrificed for the sake of agility.

