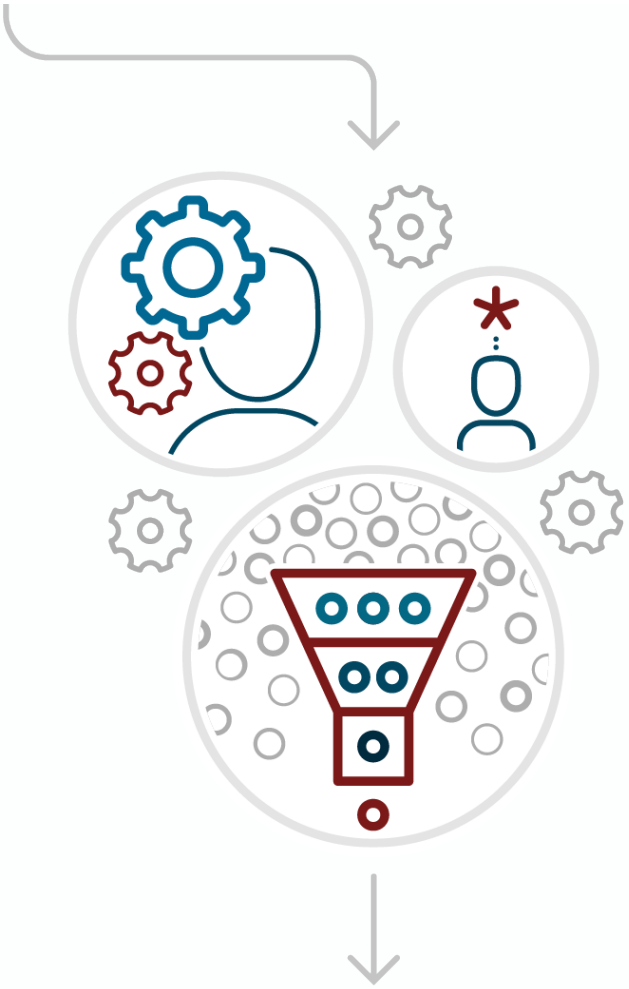
TechTarget

Flash Memory Summit

Know What the Flash Customer Wants and Needs

Dave Raffo
Editorial Director

August 8-10, 2017



Dave Raffo

Editorial Director at TechTarget

- Dave joined SearchStorage in 2007 after spending three-and-a-half years covering storage for Byte and Switch.
- As editorial director of the Storage Group, he leads TechTarget's coverage of storage, data protection and hyper-convergence.
- Dave also worked as managing editor of EdTech Magazine, as features and new products editor at Windows Magazine, and technology editor at eLearning company WatchIT.
- Before turning to technology, he was an editor and sports reporter for United Press International in New York for 12 years. A New Jersey native, Dave currently lives in northern Virginia.

Marc Staimer

President at Dragon Slayer Consulting

- Marc Staimer is the President at Dragon Slayer Consulting in Beaverton, Oregon
- The consulting practice has focused on the areas of strategic planning, product development and market development.
- With more than 30 years of marketing, sales and business experience in infrastructure, storage, server, software and virtualization, Marc is considered one of the industry's leading experts.

Matt Burr

VP of Americas Sales at Pure Storage

- As VP of Sales, Matt Burr is aggressively driving the company's domestic sales strategy and expansion. With more than 15 years of Sales and Sales Management experience, Matt excels at building teams and strategies that grow revenue at both early stage companies and large complex organizations.
- He has held leadership roles within Symantec (via the VERITAS Software acquisition) and most recently Matt led the growth of the Western Region for Limelight Networks yielding 100% growth in revenue during his time.
- While at Symantec/VERITAS, he held various roles in Direct Sales, OEM Sales and Field SalesManagement with a core focus on emerging products.

Andrew Fenselau

VP of Marketing at Elastifile

- Andrew is Elastifile's chief evangelist and market strategist, leading global marketing across product & solutions marketing, demand generation, brand, and field marketing.
- He works to delight customers and build hyper-growth businesses – delivering #1 market share and more than 100% annual growth four times in a row, most recently at EMC XtremIO, the fastest growing business in enterprise IT history.
- He holds a B.A. from Harvard University and an MBA from Stanford University.

Gavin Cohen

VP of Product and Solutions Marketing at HPE

- Gavin leads the Product and Solutions marketing team for Nimble Storage, a HPE Company. He has extensive experience and is responsible for defining the messaging and GTM strategy of the Nimble Predictive Cloud Platform and associated solutions.
- Prior to his roles at HPE and Nimble, Gavin was the APAC Director of Technology and Strategy at NetApp.
- Gavin has over 20 years of experience gained from roles in Australia and the U.S.A. spanning sales, marketing, product management and systems engineering.
- He has a Bachelor of Science (Hons) and a Masters of Business Administration.

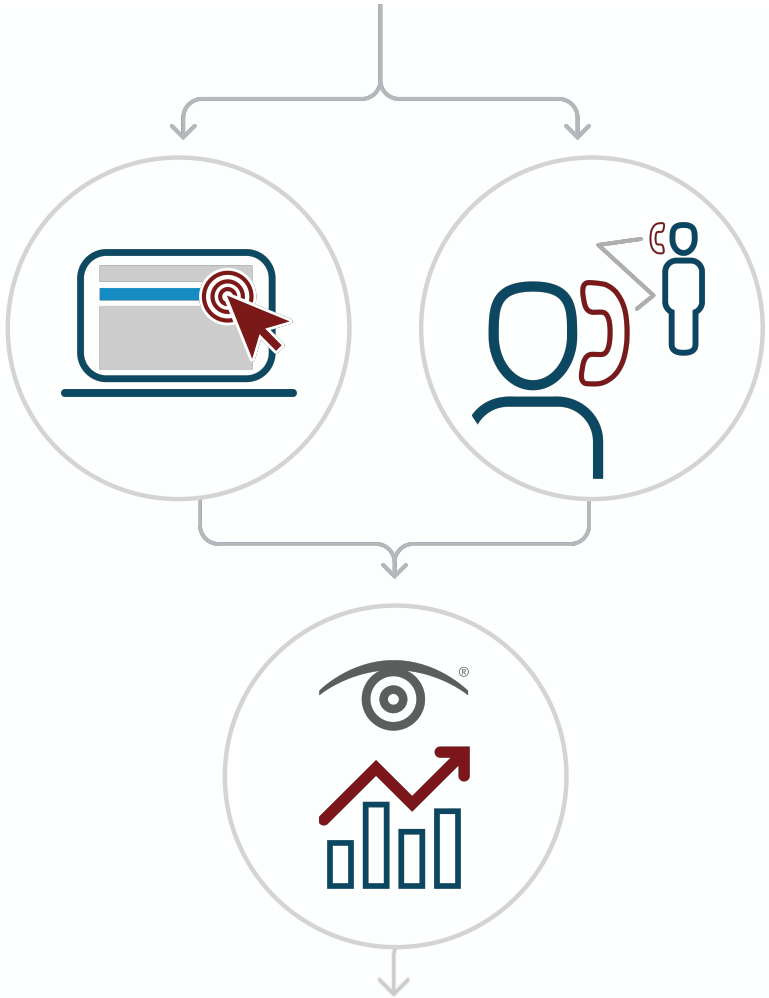
The TechTarget Research Audience

- **Active buyers** from our global audience of **15 million** technology pros who are researching solutions on our network of **140+** websites.
- Comprised of **decision makers** at organizations over $2B in revenue and under $2B in revenue, the professionals have been **TechTarget members, on average, for more than 5 years.**
- **Participation** is based on a reciprocal relationship with respondents, who share confidential information about their recent purchases, technology roadmaps, vendor relationships and forward-looking spending plans. In return they receive valuable research information and insights on an ongoing basis for benchmarking and vendor selection.

Methodology and Demographics

Storage Market Research Study

- **Who?** 419* Storage professionals that are part of the TechTarget Research Peer Network, including 113 respondents from companies with $2B or more revenue
- **When?** Q2 2017
- **How?** Phone and web surveys, using a quantitative survey instrument



What buyers are telling us about their next all-flash array purchase

Top Purchase Drivers

- **47%** Addressing performance needs of existing storage infrastructure
- **45%** Addressing performance needs of existing application(s)
- **31%** Project to optimize/consolidate/tier storage infrastructure
- **27%** New server virtualization project
- **22%** New application deployment

Top Features

64%
Scalability

38%
Storage virtualization

31%
Deduplication

25%
Replication

23%
Number of hosts supported

The migration to All-Flash is well underway

TechTarget Research **Exclusive Content**

33%

of respondents reported that in 24 months their total storage would be on all-flash arrays up from 12% today

Meanwhile, hybrid utilization growth projections in 24 months are

flat

(30% now vs. 31% in 24 mos.)

Decline

in spinning hard disk from the majority of capacity, at 58%, to 36% in 24 months.

The All-Flash Roadmap

TechTarget Research **Exclusive Content**

#1

technology in production reported our sample is all-flash arrays (42% currently using AFA and another 13% with firm plans to deploy)

NVMe

flash is still not widely planned for adoption, with | just 32% having plans for use in the next 24 months. We expect this will rise as the technology matures.

All-Flash Arrays Roadmap

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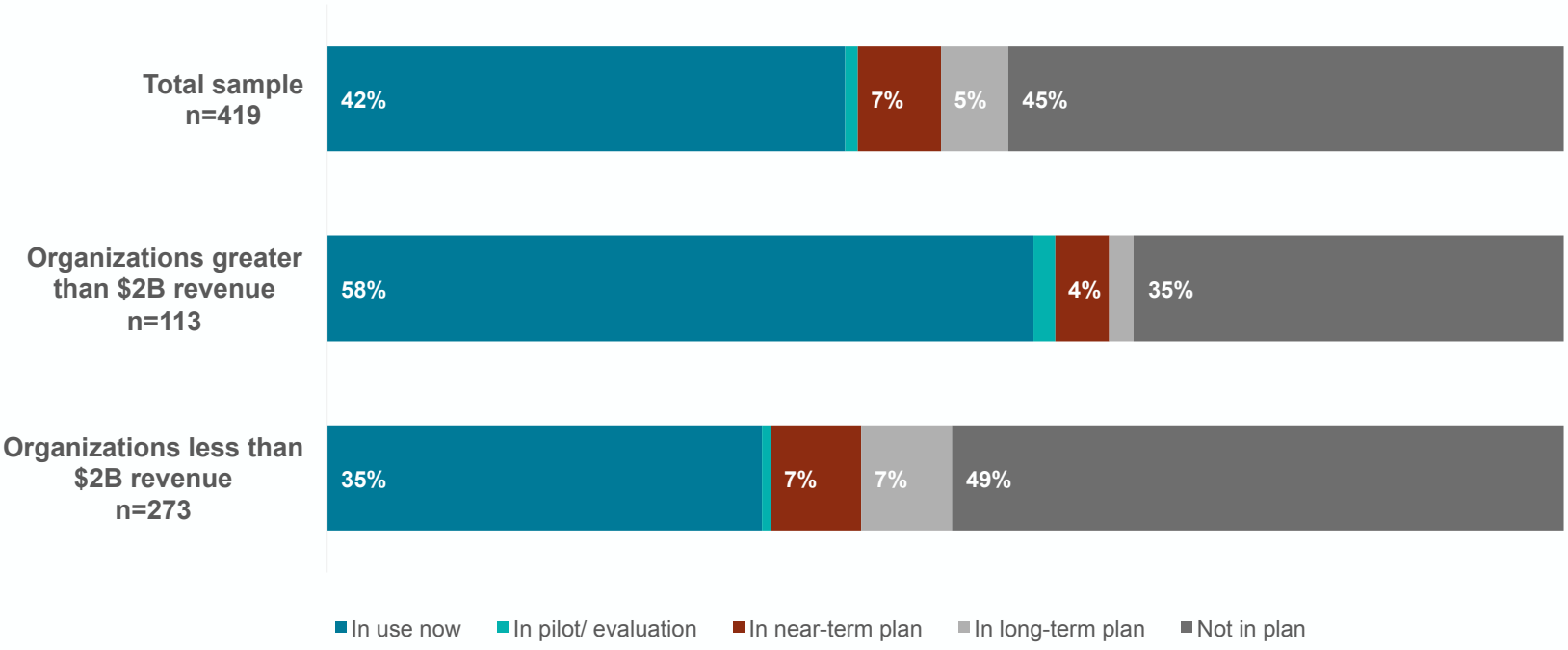

Distribution of Storage Capacity - Summary

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	Average % Today	Average % 2 years forward
Hard disk arrays	58%	**36%**
All-flash arrays	12%	**33%**
Hybrid arrays	30%	**31%**
Block storage	47%	**45%**
File storage	45%	**39%**
Object storage	8%	**16%**

All-Flash: What is it good for?

Top workloads users are planning to support with All-Flash Arrays in 2017

#1 Database/Data Warehouse

#2 Virtual Server Support

#3 App Servers (non ERP/email)

#4 ERP, OLTP, End User shares/files (tied at 34%)

#5 Dev Test and Collaboration Apps

The Journey to the All-Flash Data Center

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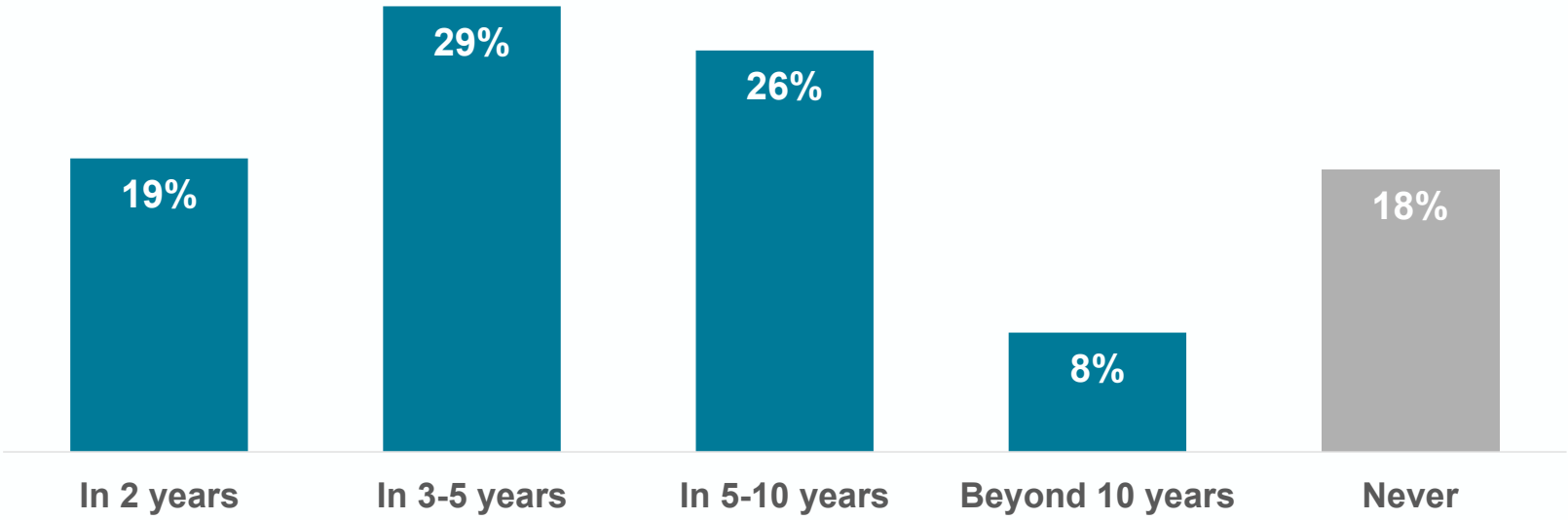

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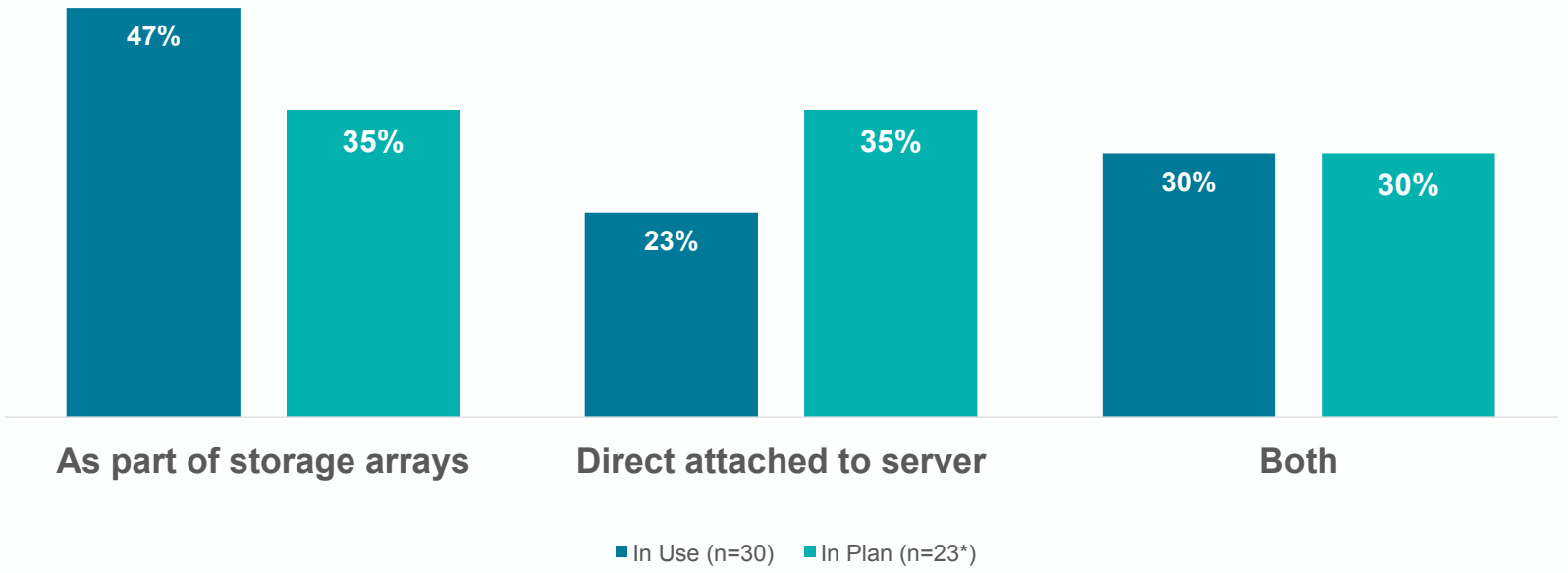
NVMe FLASH SPOTLIGHT

NVMe-based storage systems implementation



**Please note small sample size, use data directionally.*

NVMe FLASH SPOTLIGHT

Additive to or replacement for direct-attached or networked storage

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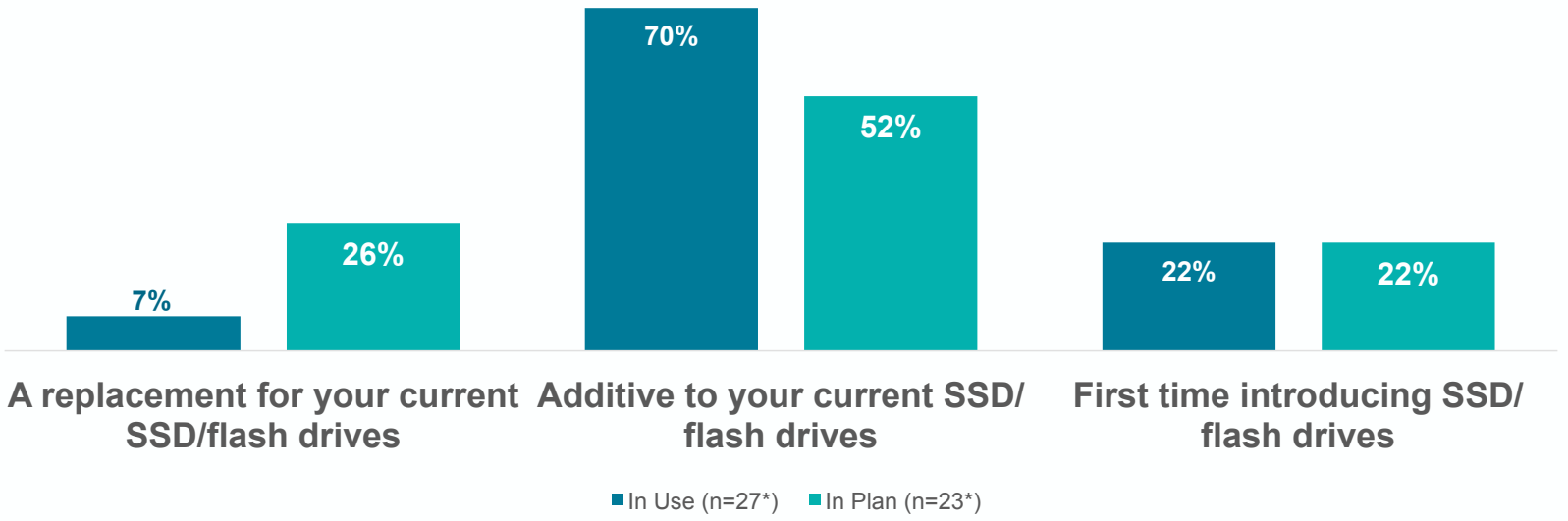

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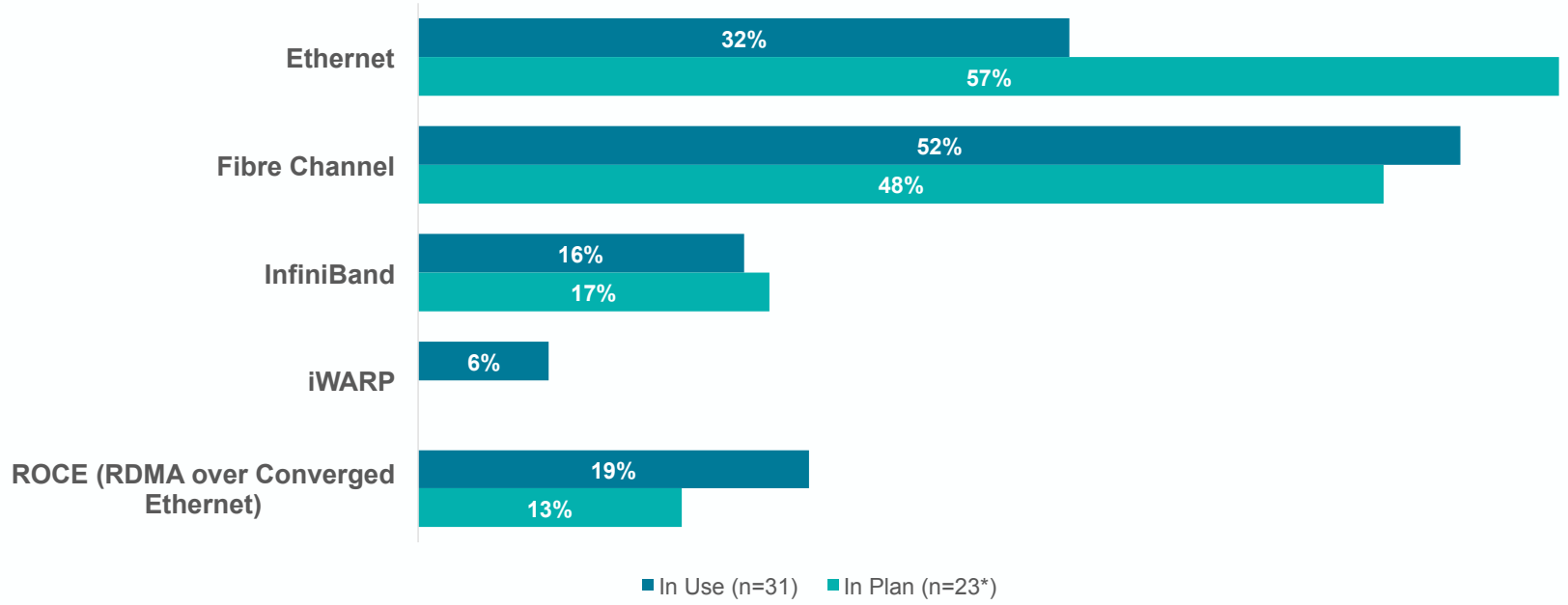
NVMe FLASH SPOTLIGHT

Fabric transport adoption when NVMe is available



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Thank you.

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