



Storage Study: Wave 18

Storage Wave 18: 1H2014

Prepared for 2014 Flash Memory Summit

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TheInfoPro Business Overview

Fundamental, “**voice of the customer**” research on key Information Technology (IT) sectors.

Since 2002, the **unbiased** alternative. No analyst spin just direct, factual results provided to our clients.

Source: Extensive one-on-one interviews with thousands of pre-screened senior level IT professionals.

Representing a variety of verticals, majority of **Network Members’ organizations** gross more \$1B annually.

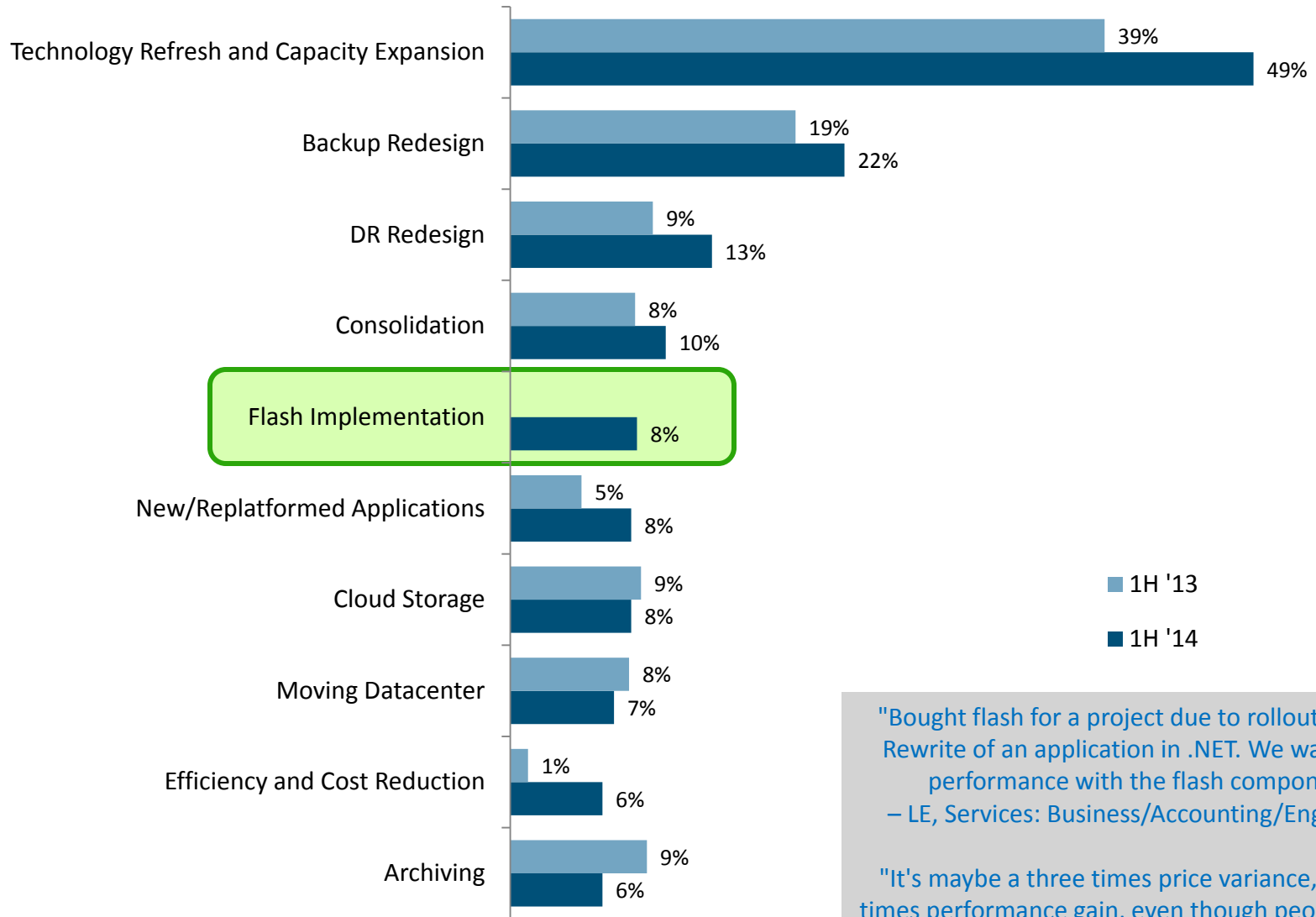
Focus is IT Infrastructure spanning: Storage, Servers, Networking, Information Security, and Cloud Computing.

Quantitative and qualitative data includes: customer spending, vendor shortlists, vendor performance and technology roadmaps.



Storage Projects – Time Series of Top Categories

For first time, flash makes top ten storage projects



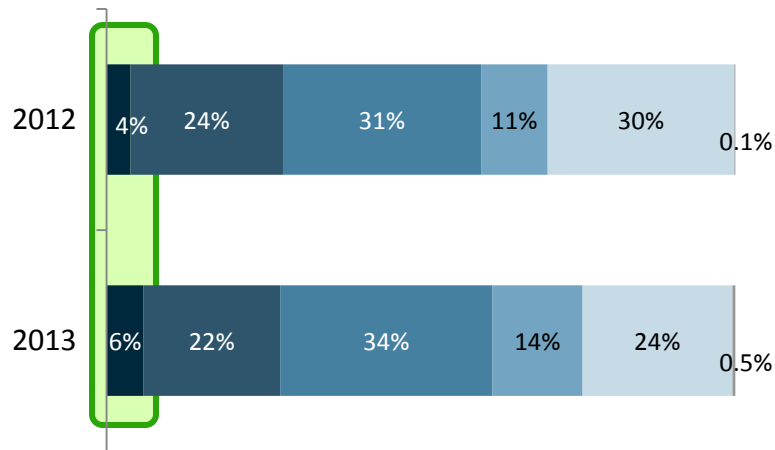
"Bought flash for a project due to rollout this year. Rewrite of an application in .NET. We want better performance with the flash component."
– LE, Services: Business/Accounting/Engineering

"It's maybe a three times price variance, but a ten times performance gain, even though people say that it's more expensive."
– LE, Transportation

Capacity Purchased in 2012 and 2013 Growth by Drive Type – Time Series

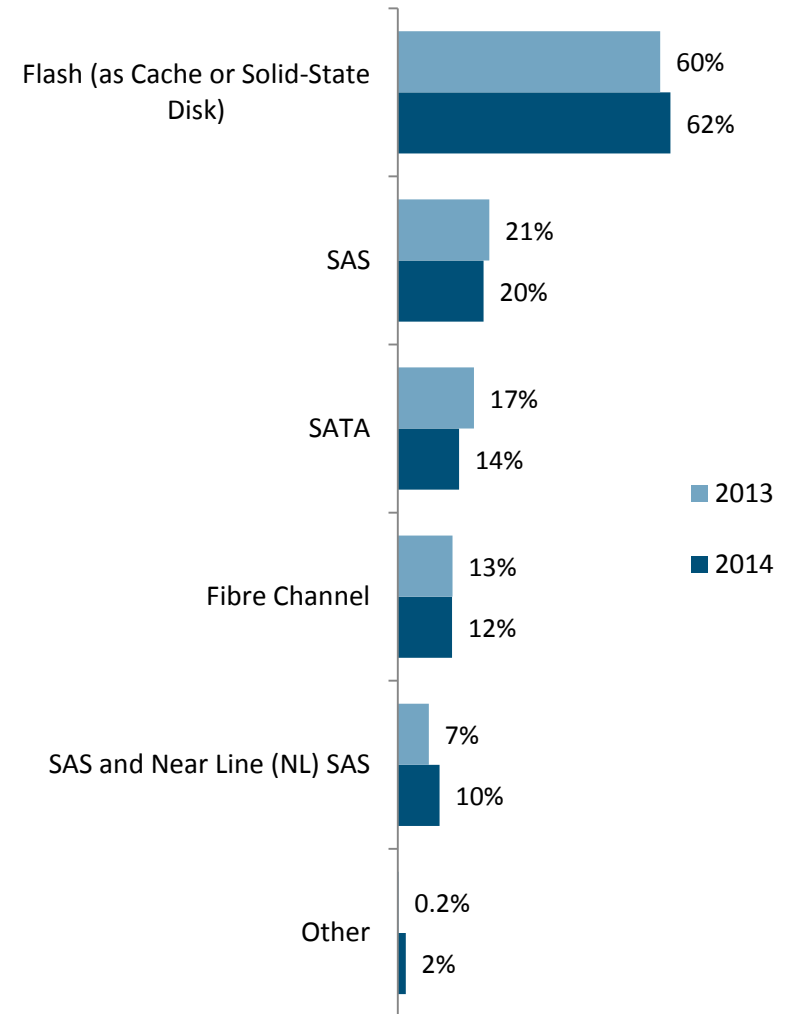
Flash has a way to go compared to overall enterprise capacity

Disk Storage Purchased



■ Flash (as Cache or Solid-State Disk)
 ■ Fibre Channel
■ SAS
 ■ SAS and Near Line (NL) SAS
■ SATA
 ■ Other

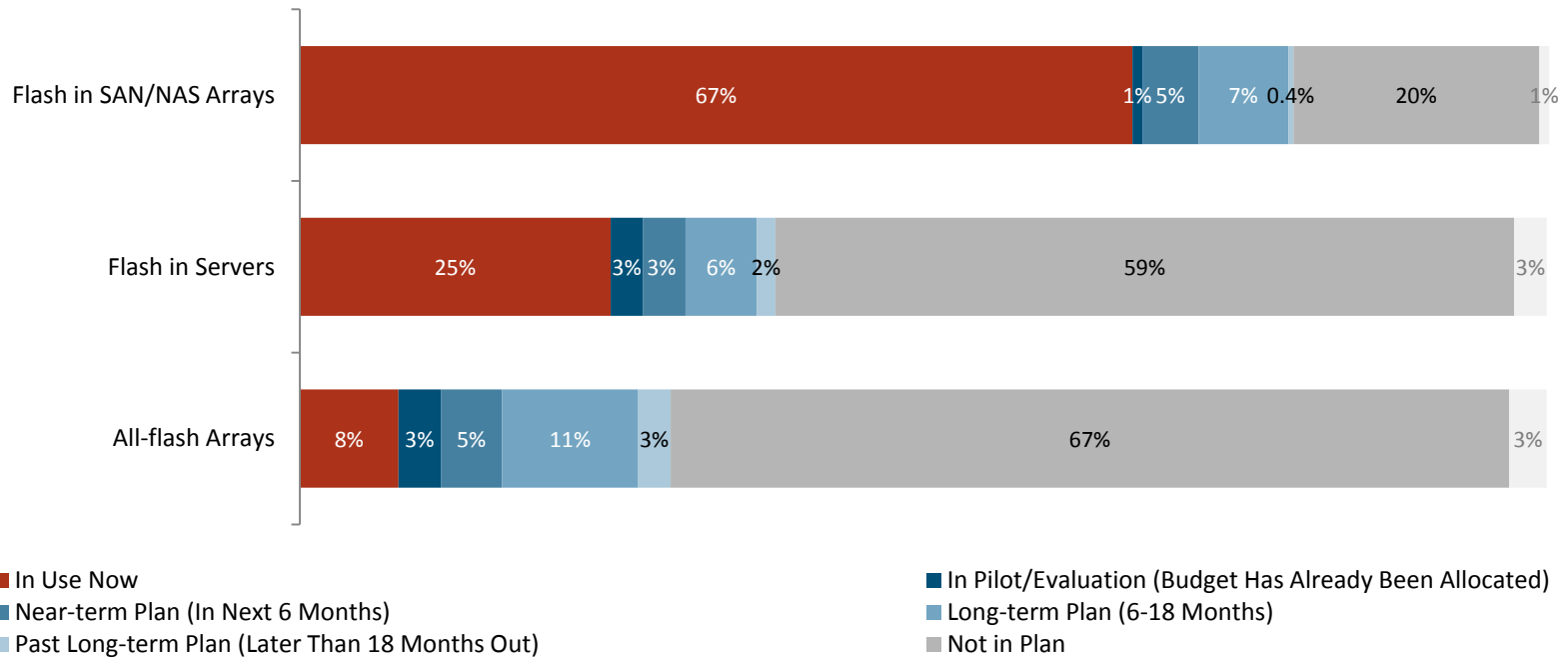
Growth Rate



Storage Heat Index[®] and Flash Storage Technology Roadmap

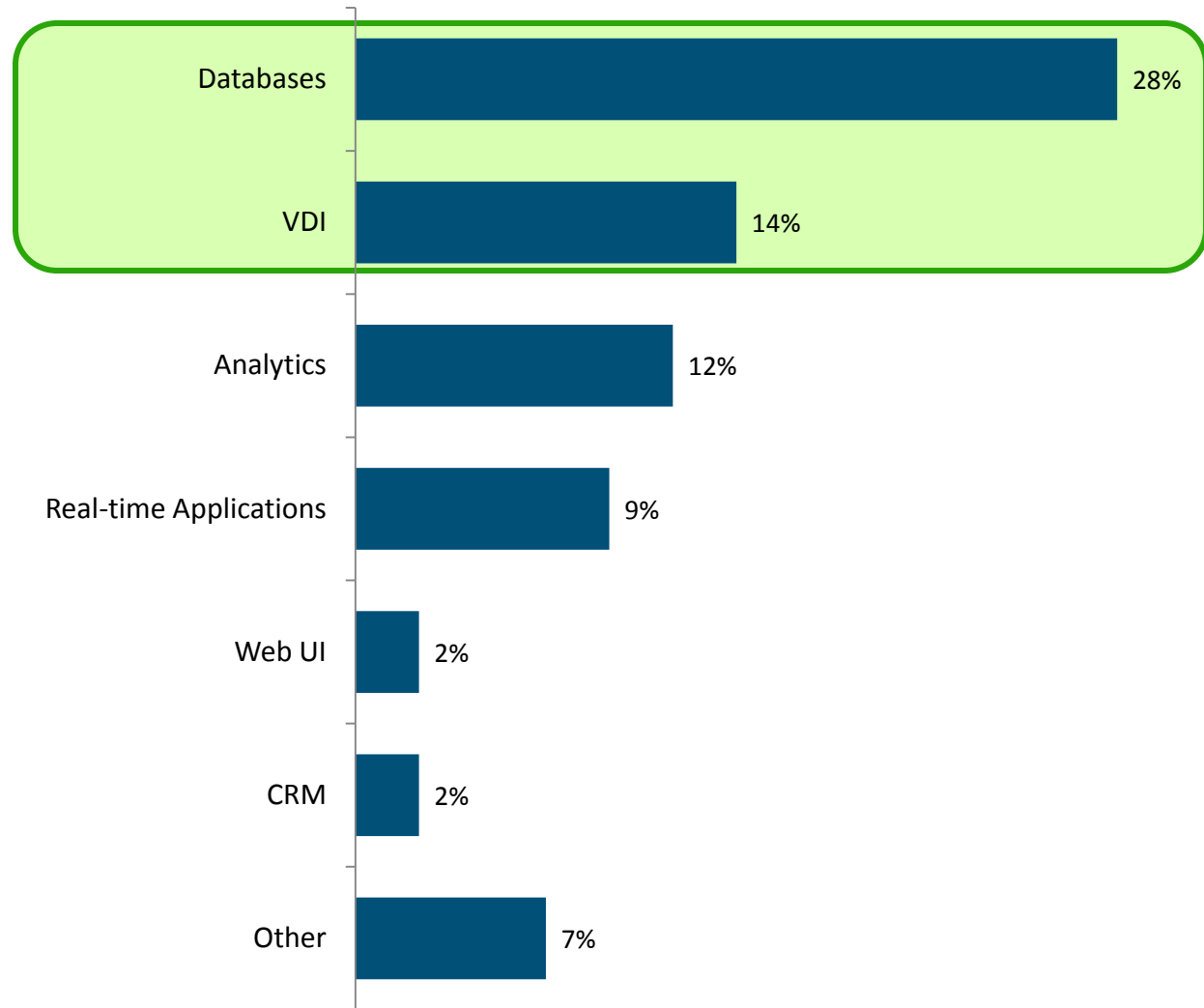
2014 is year of AFA

| Heat Rank Wave 18 | Heat Rank Wave 17 | Change | Technology |
|-------------------|-------------------|--------|--|
| 1 | 17 | +16 | All-flash Arrays |
| 2 | | | |
| 3 | 4 | +1 | Flash in SAN/NAS Arrays |
| 4 | 6 | +2 | Flash in Servers |
| 5 | 23 | +17 | Storage Virtualization (External to Array) |



Applications Moving Onto Flash Today

Databases main use case for flash (after autotiering)





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Each individual report summarizes interesting portions of TheInfoPro's Wave 18 Storage Study and does not comprehensively review the hundreds of pages of research that form the full study. **For access to TheInfoPro's reports and services, please contact sales@451research.com.** Methodology questions may be addressed to client.services@451research.com.

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