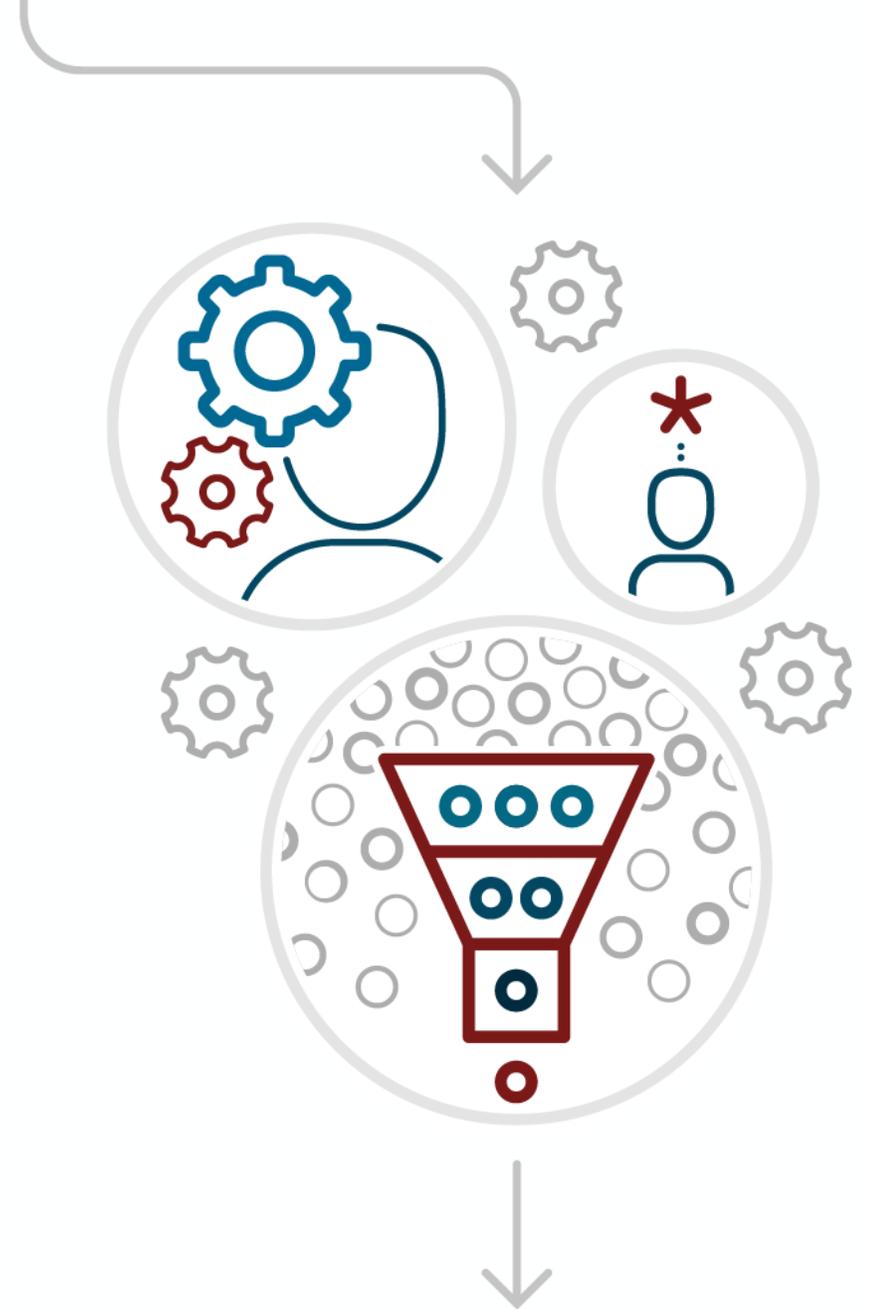




FSOL-302B-1:  
**Flash Solutions  
for AI/ML**

Jillian Coffin | VP & Publisher

August 8, 2019



# Jillian Coffin

VP & Publisher, Storage, Cloud & Data Center

- Oversees the editorial, audience development, and sales and consulting efforts across website communities including **SearchStorage**, **SearchCloudComputing**, and **SearchITChannel**
- Jillian has been working in the **data storage community** for **12+ years** sharing purchase intent data with both established and emerging storage vendors who need to better understand changing market dynamics and maximize growth opportunities
- TechTarget is the leading source of independent enterprise storage and flash technology content on the web and helped make it into a trusted resource to aid IT and business leaders in making informed decisions.



# Session Panelists



**VR Satish**

Founder & Chief  
Technology Officer



**Ramnath Sai Sagar**

Product Marketing Lead,  
AI & Deep Learning



**Tom Lyon**

Founder and Chief  
Scientist



**Mat Gruen**

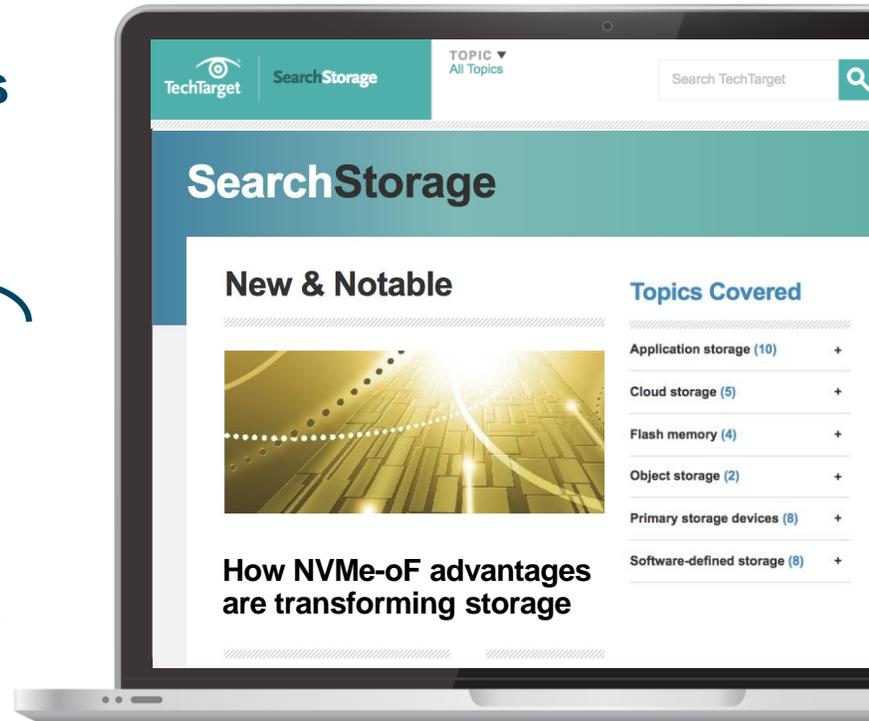
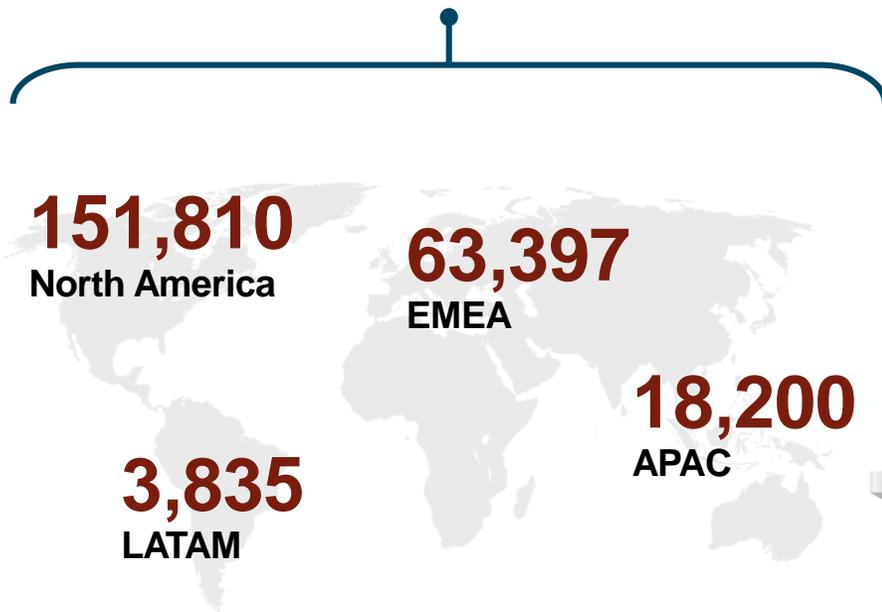
Senior Director  
Channels



# TechTarget's Storage audience

1.3 million Storage members globally

Storage and infrastructure buyers active in the last 90 days<sup>1</sup>



**650K+** SearchStorage.com monthly page views

NVMe & NVMe-oF appetites increasing

**2.6M+**

Activities taken around Flash & NVMe in the past year<sup>2</sup> (up 24% YoY)

**90%**

Increase in NVMe/ NVMe-oF activities since last year<sup>2</sup>

**580+**

Flash and NVMe related pieces of content published on the TechTarget network in the last year alone

# TechTarget's AI/ML audience

1.7 million+ page views in the 1<sup>st</sup> year post site launch

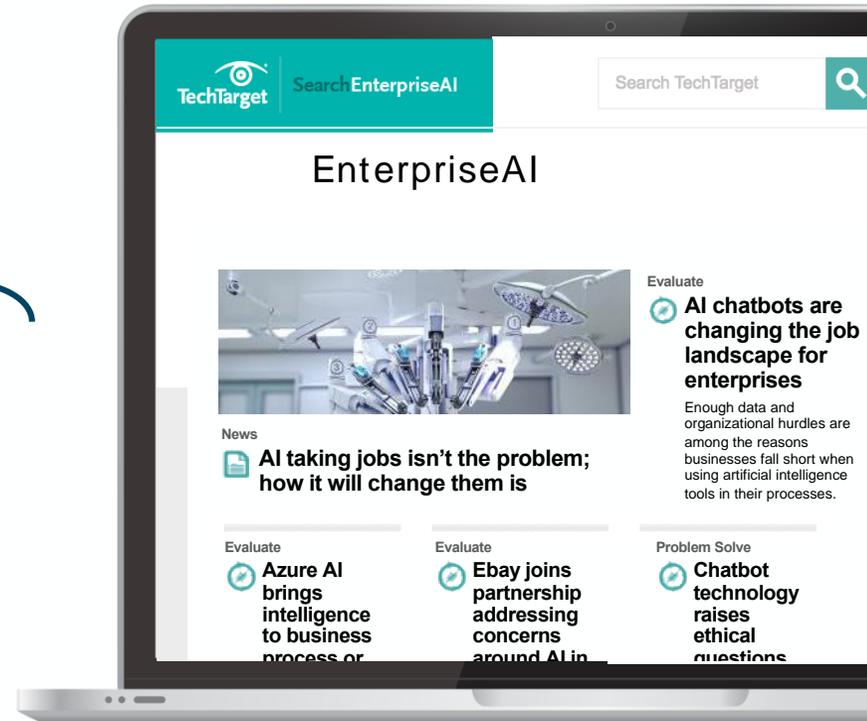
AI/ML Total Addressable Market in the last 90 days<sup>1</sup>

112,000+  
North America

62,100+  
EMEA

35,400+  
APAC

2,400+  
LATAM



142K+ SearchEnterpriseAI.com monthly page views

55%

increase in page views across AI-related content in the past 3 months

11,800+

accounts active around AI/ML in the last 90 days (NA)

82%

Net new researchers on SearchEnterpriseAI since last year

# About TechTarget Research & Data

We sit on a vast amount of research and purchase Intent Data that allows us to analyze the latest trends, behavior and insights from our wide range of audiences

- **Annual IT Priorities Survey** is fielded to 4000+ global technology and LOB buyers to gather market insights on broad initiatives, technology adoption, budgets, and plans for the upcoming year
  - *Regions surveyed 35% NA; 30% EMEA; 30% APAC; 5% LATAM*
  - *Company sizes range from large enterprise to SMB (50% from \$10M+ annual revenue)*
- **Quarterly Pulse Surveys** are fielded to 300+ respondents across targeted markets to better understand emerging techs, market disruption and key areas of change
  - *Recent Pulse Surveys include: AI/ML, SAP, MSP, Flash & NVMe, DevOps)*
- **Qualified Sales Opportunities Data** taken from 32K projects over the last 12 months across 80 technology markets
- **Priority Engine intent data** garnered from 200+ topically focused segments that represent the most active organizations week over week

## 20 years

of publishing technology-specific content

## 150+

global B2B websites covering over 5,000 technology topics

## 19.7M

IT and Business professionals opted-in and **GDPR compliant**

## #1

**B2B Marketing Data Provider** (Forrester Wave 2018)



# AI/ML State of the Union

## AI unlocks the value of data to transform business in totally new ways

- AI is about Automation, Optimization, Prediction, Efficiency and Re-Imagination
- AI is gaining fast tracking, but still early innings...
  - Most orgs have yet to feel the full effect of AI, still determining where/how it can be most effective.
  - There's still a lot that algorithms don't know (training data limitation, algorithmic bias, ambiguity in how to apply results)
- Has led to a narrower “think big, but start small” project mindset
  - Further emphasis placed on aligning projects with improving business goals.
- Looking ahead to 2H 2019, topical areas of focus include:
  - Digging further into deep learning technology and use cases
  - Machine learning frameworks – platforms, uses, do's and don't
  - AI in robotics and process automation
  - General coverage of AI tech advances, new uses in business

**>50%**

of Fortune 500 CEOs say their company is using AI

**60%**

Use AI to **improve efficiency and reduce costs**

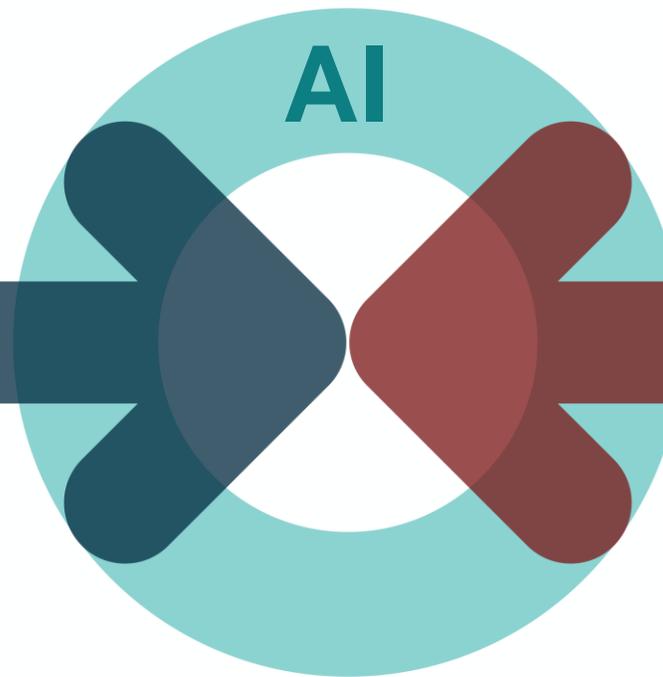
**22%**

use AI to **create new products and services**

## Entry Point #1

### AI that better enables enterprise IT

- Adding AI as a feature of existing technology to automate/improve the efficiency of IT systems, software and development efforts
- Key technologies with AI functionality:
  - Systems Management & Monitoring
  - Application Performance Management
  - Security Analytics/Threat detection
  - Predictive Storage
  - Networking/CDN
  - Business Apps (CRM, ECM, HR, ERP)



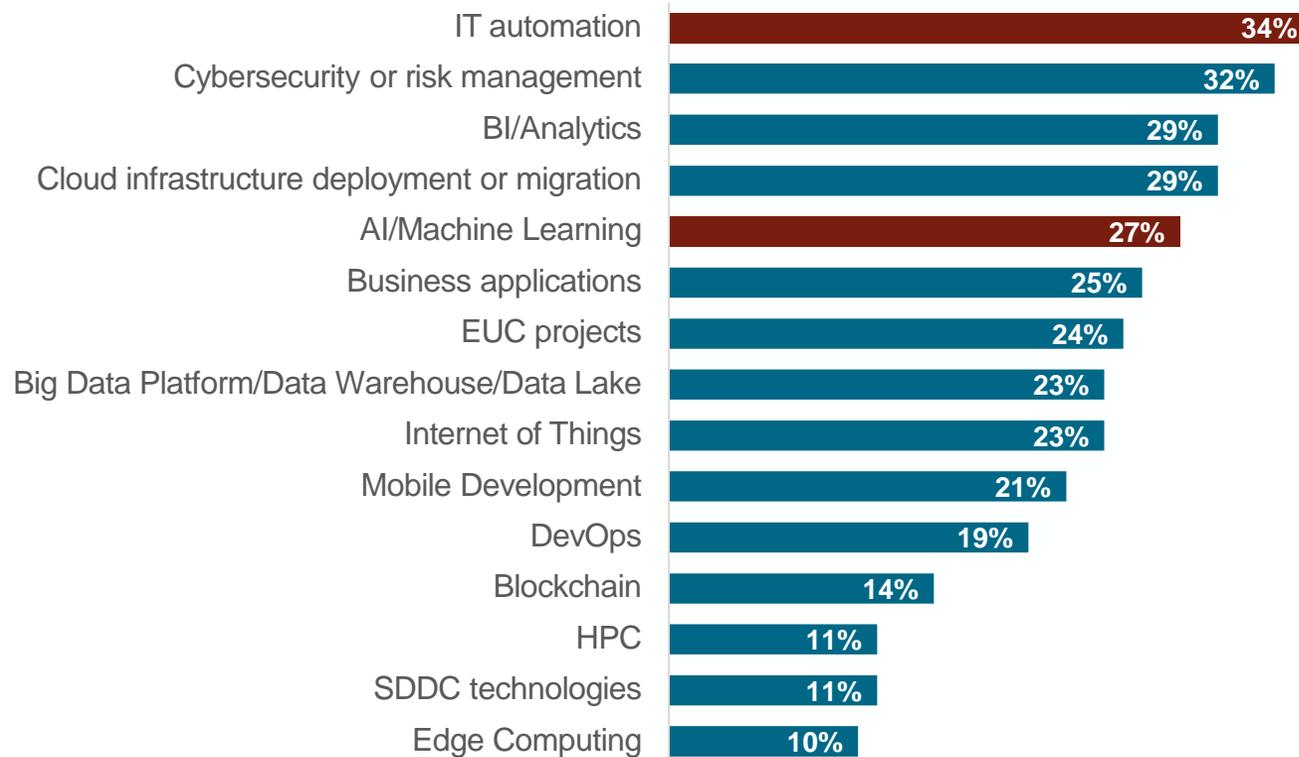
## Entry Point #2

### AI that creates new business opportunities, revenue streams

- AI's impact on business operations, AI strategies, use cases, (online search, HC, self-driving cars, HR)
- Natural Language Processing – (industry-specific use cases, building a chatbot strategy)
- Data Science Platforms – software for analytical insight, predicting supply/demand, fraud detection
- Machine Learning Platforms, algorithm training & modeling, supervised learning
- Building versus buying AI, vendor landscape, OS tools
- Facial/audio/voice recognition (Apple, crime prevention)

# IT Automation & AI/Machine Learning both make the top 5

Which of these **broad initiatives** will your company implement in 2019?

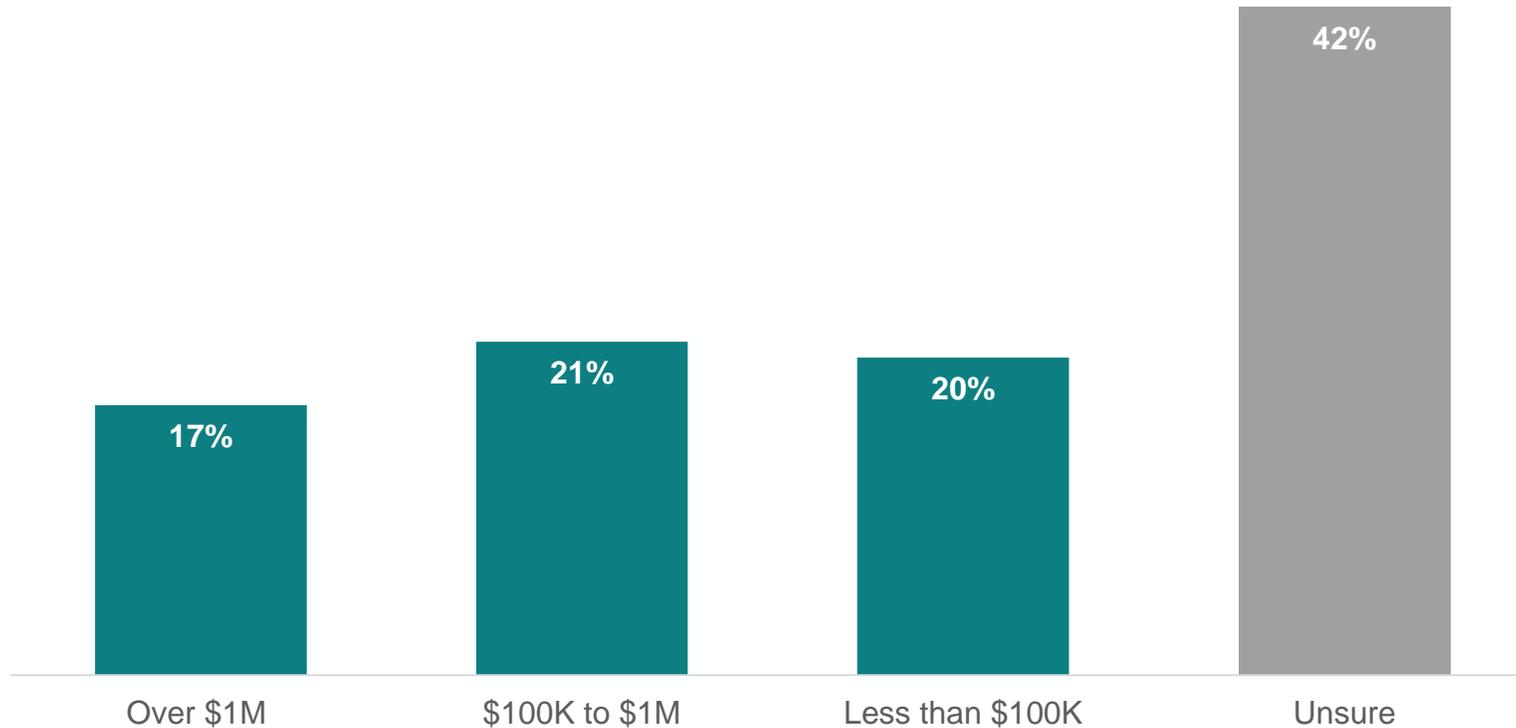


## AI/Machine Learning

was the #1 Growth Initiative in 2018 and continues to be the **most widespread feature driving interest in software application upgrades, supplanting cloud**

# Budgets for AI are Increasing

How much budget do you plan to spend on AI this year?

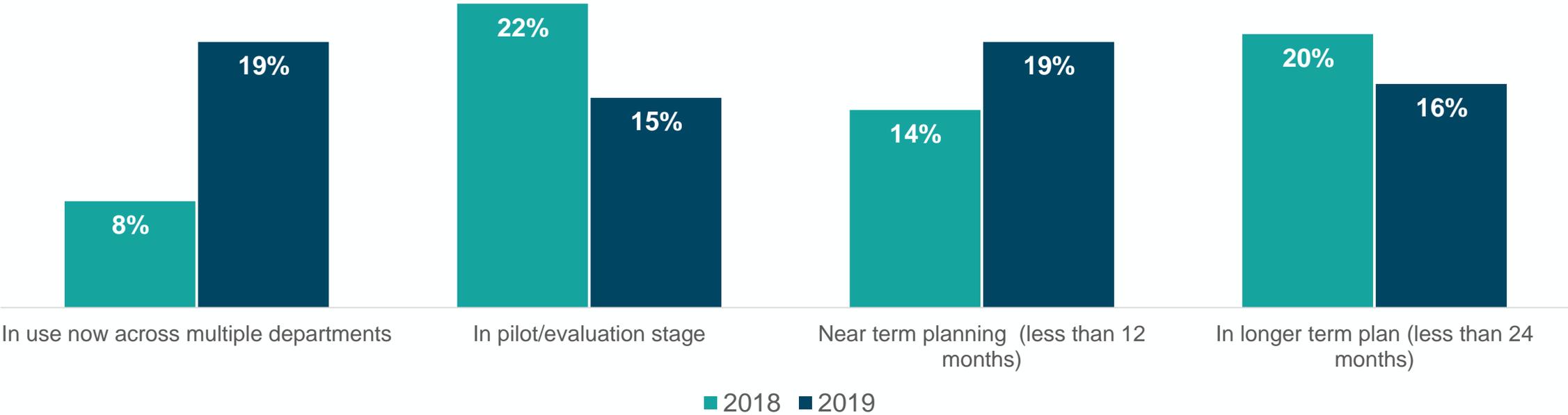


## 25%

companies plan to spend **over \$500K** on AI this year, compared to only **12%** in 2018.≈

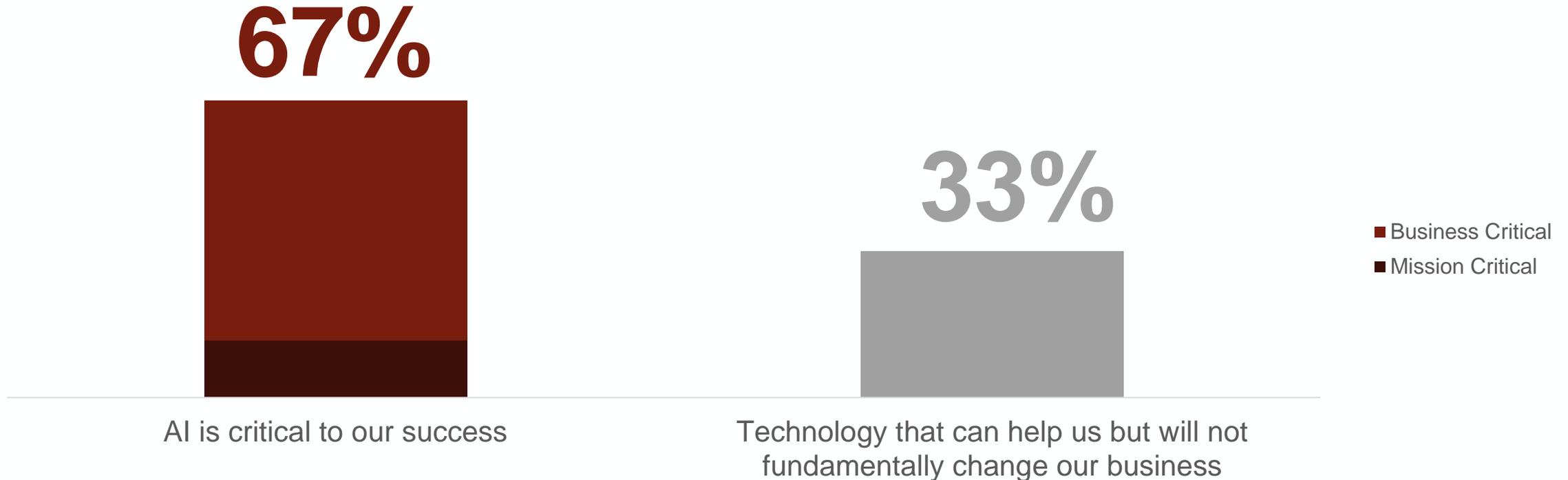
# Status of AI/Machine Learning adoption

Which of the following best describes your organization's level of AI/Machine learning adoption?



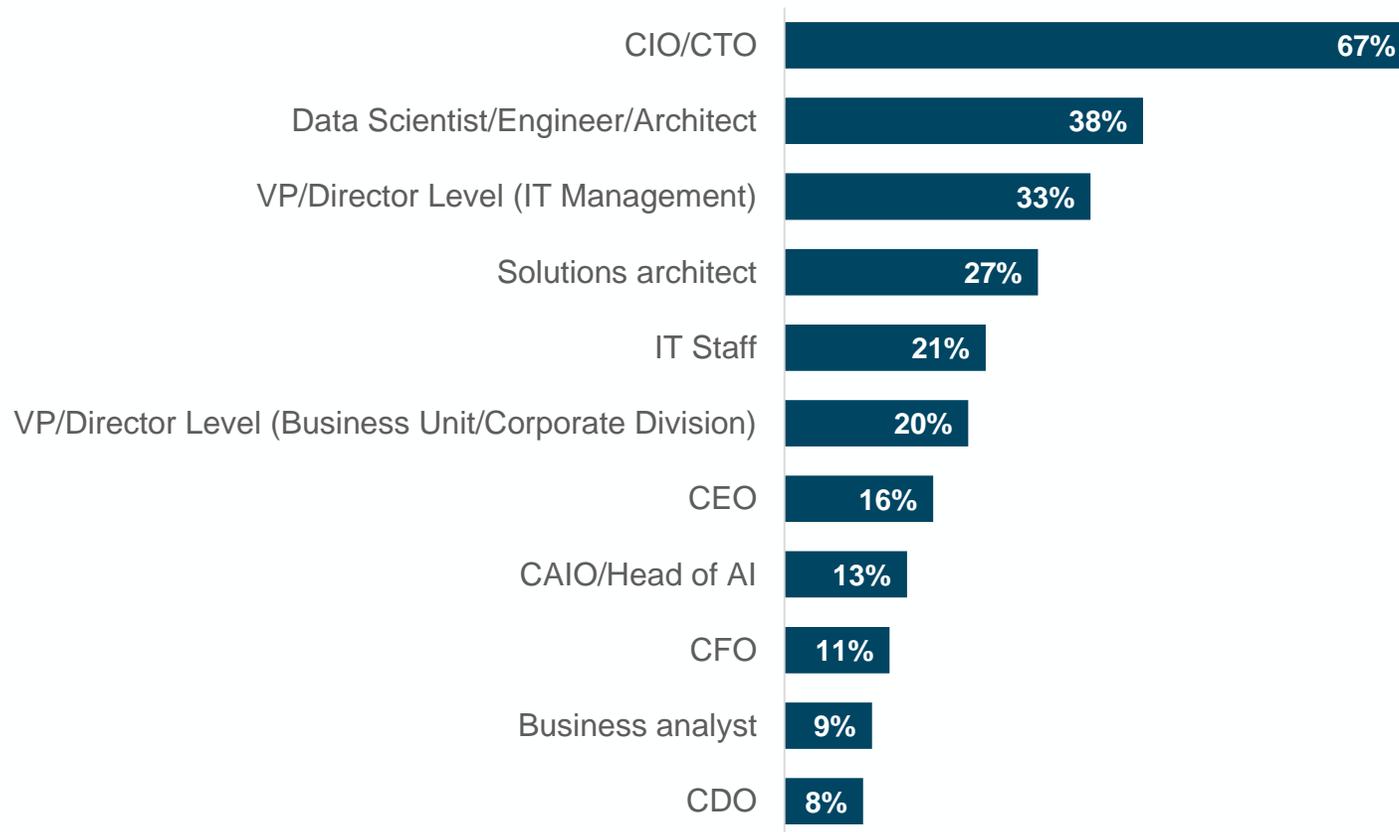
# AI's Perceived Importance to the Business has Increased

Which of the following statements best describes the importance of AI to your organization as a whole?



# The AI Tech Buying Team looks Technical

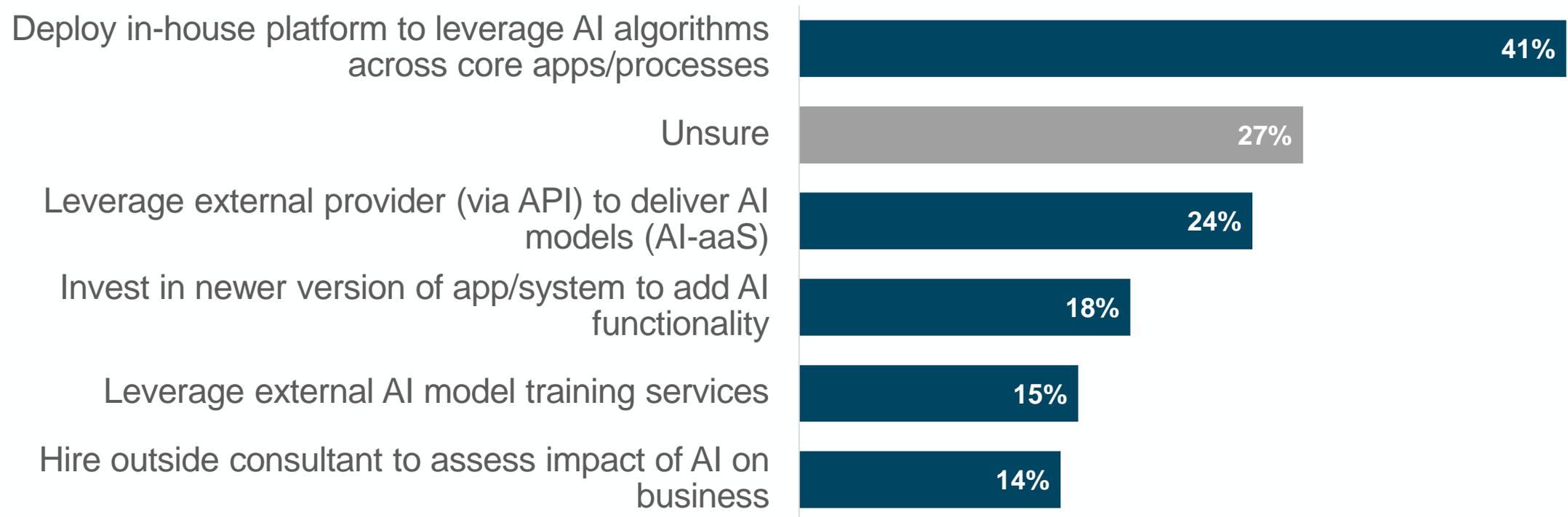
Who's involved in the tech purchase decision making process for AI-related solutions?



- NA respondents regard the CIO/CTO as leading the charge for AI projects
- While AI is a horizontal endeavor, with strong input/visibility/influence from corporate LOB teams, not unlike cloud, it is ultimately technical pros who are deciding which solutions are purchased..

# AI will be deployed via in-house platform but many will turn to external providers for services

How do you plan to access/deliver AI across your organization?



North America

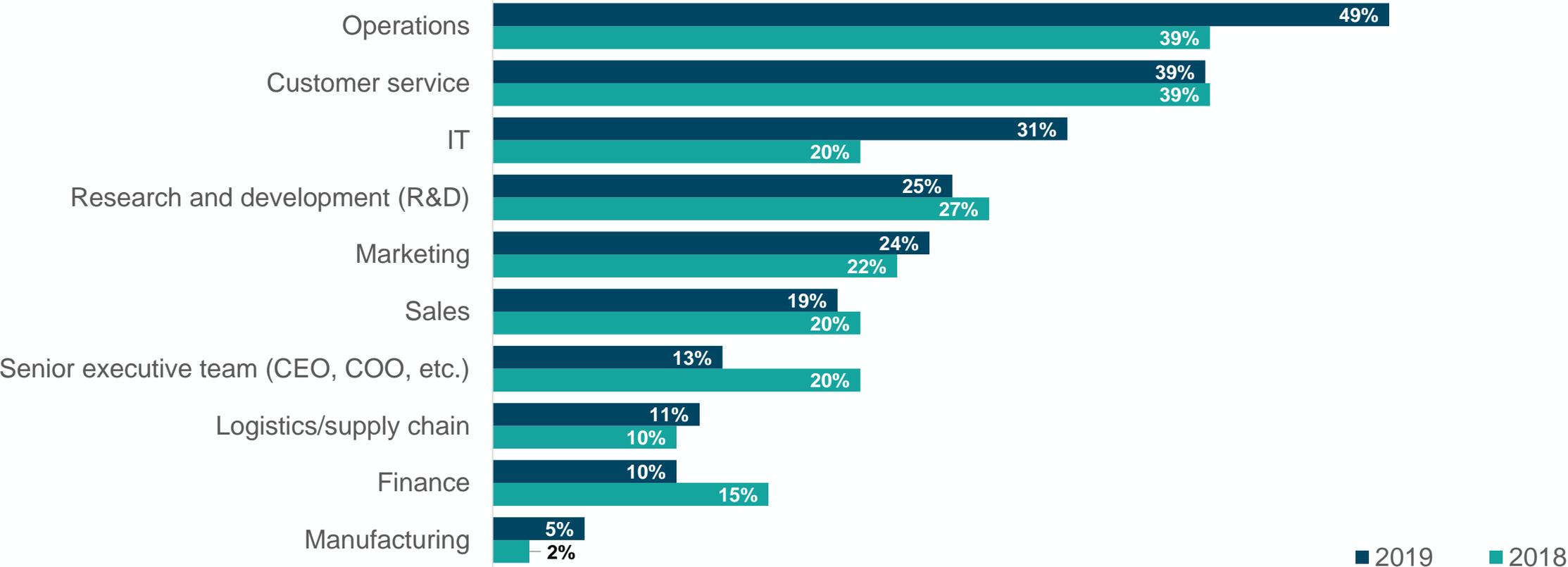
# Current status of AI Hardware/Infrastructure Adoption



■ In Use (not including pilots)   ■ In Pilot (budget approved)   ■ In Near-Term Plan (<12 months)   ■ In Long-Term Plan (12-24 months)   ■ Not in Plan

# Who benefits most from AI / Machine Learning?

Which of the following depts/business units will benefit most from your planned AI/ML investment?



# Top barriers to adoption shift for 2019 Skills takes new foothold

What are the top barriers to achieving true value from AI adoption at your organization? (Choose up to 3)

**45%**

lack of talent/  
skills/expertise

**33%**

complexity/  
advanced data  
management

**23%**

lack of internal  
IT infrastructure

# Top Four AI / ML investment drivers

What are the drivers prompting your decision to invest in AI/machine learning technologies?  
(Choose up to 3)

**40%**

Improve  
customer  
experience

**34%**

Enhance  
operational  
efficiency

**29%**

Reduce  
operating costs  
through  
digitization

**29%**

deliver new  
products/  
services

# AI and data analytics grow in importance among primary storage buyers

## Hyper-converged Infrastructure

+200%



1H 2018 2H 2018

Buyers citing the need for **embedded AI-powered/machine learning-based algorithms** as a desired purchase feature

## Converged Infrastructure

+167%



1H 2018 2H 2018

Buyers citing the need for **embedded AI-powered/machine learning-based algorithms** as a desired purchase feature

## Object Storage

+63%



1H 2018 2H 2018

Buyers citing the need for **data analytics capabilities** as a desired purchase feature

## All-Flash Arrays

+11%

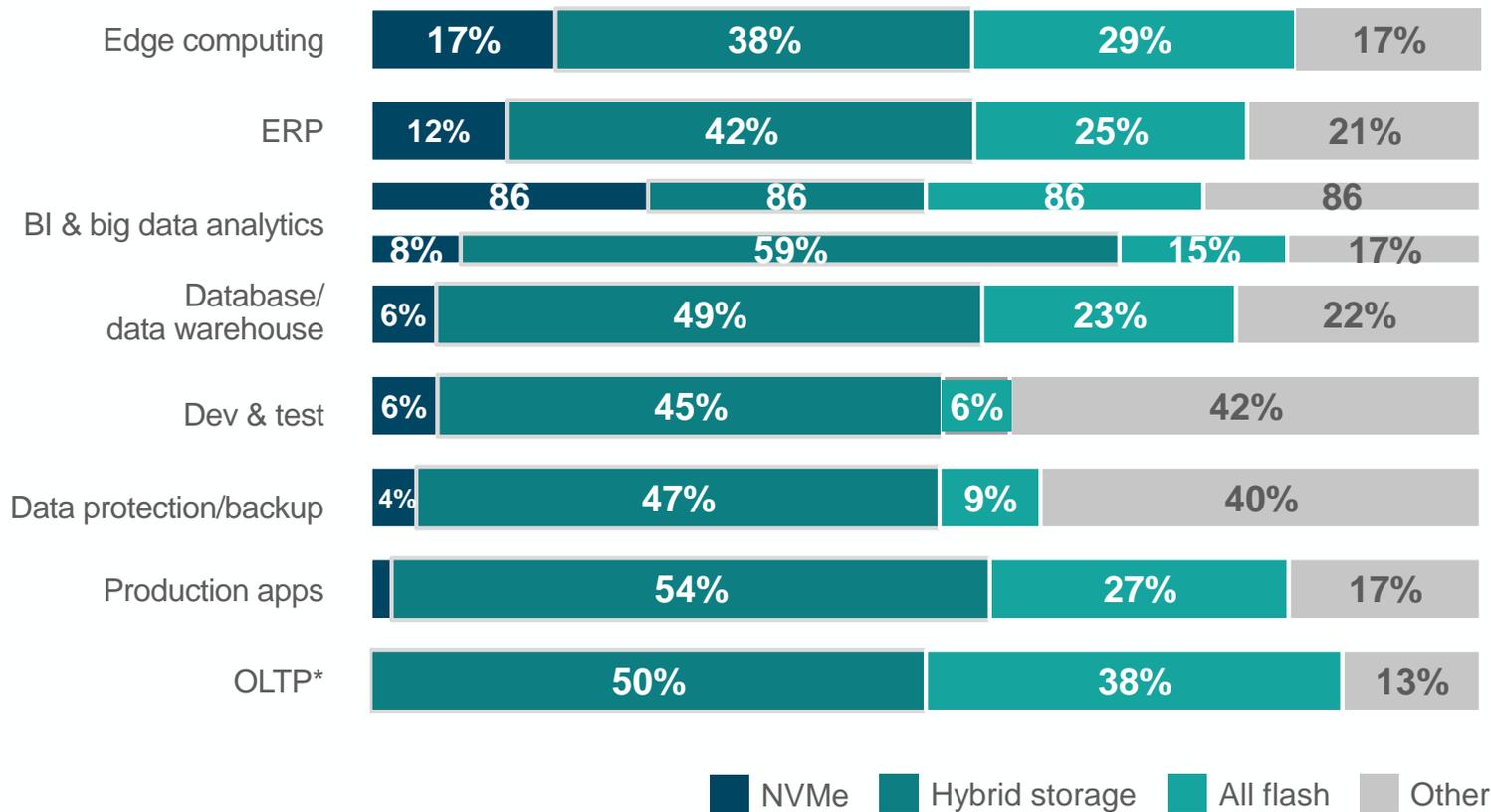


1H 2018 2H 2018

Buyers citing the need for **built-in storage analytics** as a desired purchase feature

# NVMe scoring higher with Edge, ERP and Big Data Analytics

For these workload(s), which of the following is primary storage.



## Key Takeaways

- 47% of NVMe adopters plan to implement through storage array vs DAS



Thank you.

**Jillian Coffin**  
VP & Publisher, Storage