

Storage Research Report

Key Finding Unified Storage, FC-SAN take up most budget, Cloud Capacity spend happens most frequently

Storage technologies that generate the most spending usually aren't the most frequently purchased products. For instance, these charts show that the technologies that take up the highest amount of storage budget are Unified Storage at 16% and FC-SANs at 16%. Perhaps because these are usually large purchases, they are less likely to be purchased quarterly than technologies that command less budget.

Public Cloud Capacity – considered an elastic purchase – is most likely to be bought every quarter. Public Cloud Primary Storage and Public Cloud Backup Storage for backup and recovery top the list of storage purchased quarterly, followed by emerging All Flash Arrays. Yet Primary Cloud Storage (3%) and Public Cloud Storage for Backup and Recovery (5%) are near the bottom of the annual storage budget list. All Flash Arrays (6%) are in the middle of the budget pack.

See data on next two pages



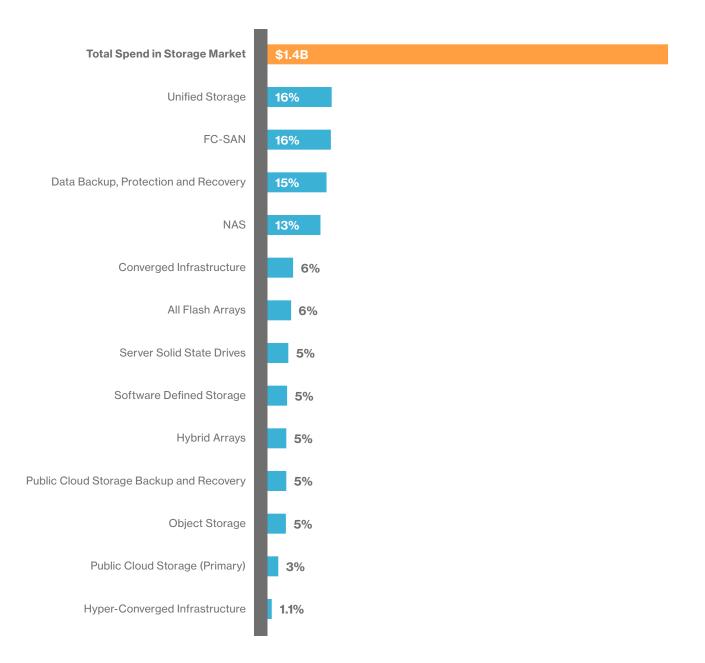
Storage technology frequency of purchase

| Quarterly Semi-Annu | | ally Annual | | ual | Not Every Year | | |
|--|-------------------|-------------|-------|-----|----------------|------|--|
| | | | | | | | |
| | | | | | | | |
| Public Cloud S | torage (Primary) | 19% | | 10% | 32% | 39% | |
| | | | | | | | |
| Public Cloud Storage Backup and Recovery | | 19% | | 12% | 28% | 41% | |
| | | | | | | | |
| | All Flash Arrays | 18% | | 12% | 32% | 38% | |
| | | | | | | | |
| Converge | ed Infrastructure | 16% | 19 | 9% | 24% | 41% | |
| Sorrier S | lid State Drives | 450/ | 12% | | 29% | 44% | |
| Server S | olid State Drives | 15% | 12 | % | 29% | 44% | |
| Hyper-Converge | ed Infrastructure | 14% | 19 | % | 21% | 45% | |
| | | | | | | | |
| Unified Storage Hybrid Arrays | | 13% | 13% | 6 | 25% | 49% | |
| | | | | | | | |
| | | 12% | 13% | 2 | 7% | 49% | |
| | | | | | | | |
| | FC-SAN | 10% | 10% | 27% | | 53% | |
| | | | | | | | |
| Data Backup, Protectio | on and Recovery | 10% | 10% | 31% | | 50% | |
| | Object Stevens | 00/ | 000/ | | 470/ | 500/ | |
| | Object Storage | 9% | 23% | | 17% | 50% | |
| | NAS | 7% | 18% | | 28% | 48% | |
| | | 7% | 10 70 | | 2070 | | |
| Software | Defined Storage | | 18% | | 23% | 53% | |
| | - | | | | | | |

Source: Storage Market Landscape Study 2H 2015



Total spend on Storage market breakdown



Source: Storage Market Landscape Study 2H 2015



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