

Storage Research Report

Key Finding

All-flash momentum carries AFA sales past hybrid sales

People in the storage world predict it's a matter of time until all-flash arrays (AFAs) dominate the market, pushing hybrids that combine flash and hard disk drives into a minor role.

TechTarget Research Post-Purchase data shows that trend is well under way.

TechTarget Research Post-Purchase data tracks the shortlist, winning vendor, price paid, concessions, motivators and inhibitors for storage purchases. The data comes from interviews with large enterprises, MSE and SMBs.

Post-Purchase data uncovered one more all-flash deal than hybrid deals in the third quarter of 2015, and the preference for all-flash increased in the fourth quarter. There were 100 all-flash deals and 99 hybrid deals found in third-quarter Post-Purchase surveys, while AFAs dominated the fourth quarter, 91-62.

The average selling price for all-flash systems is more than twice the amount of hybrids. The average deal size for all-flash systems was \$712,000 in the third quarter and \$1.632 million in the fourth quarter. The average for hybrids came in at \$297,647 in the third quarter and \$754,744 in the fourth.

Among vendors who sell hybrids and AFAs, EMC's sales weighed most heavily on the all-flash side. EMC ran up 56 all-flash deals, with 31 hybrid deals in the third quarter and 25 in the fourth quarter. Hewlett Packard Enterprise buyers had the biggest preference for hybrids, with 39 deals in the two quarters compared to 12 all-flash buys.

See data on next page

TechTarget All-Flash Arrays Transaction Index™

Vendor	Wins	Shortlisted	Shortlist conversion	Shortlist share	Overall transaction share
EMC	25	59	42%	29%	27%
Pure Storage	18	42	43%	21%	20%
IBM	9	22	41%	11%	10%
NetApp	8	21	38%	10%	9%
Tegile	6	7	86%	3%	7%
HPE	6	21	29%	10%	7%
Violin Memory	5	5	100%	2%	5%
Kaminario	4	4	100%	2%	4%
SolidFire	3	5	60%	2%	3%
Other	7	17	41%	8%	8%

n=91

TechTarget All-Flash Arrays Deal Share Index™

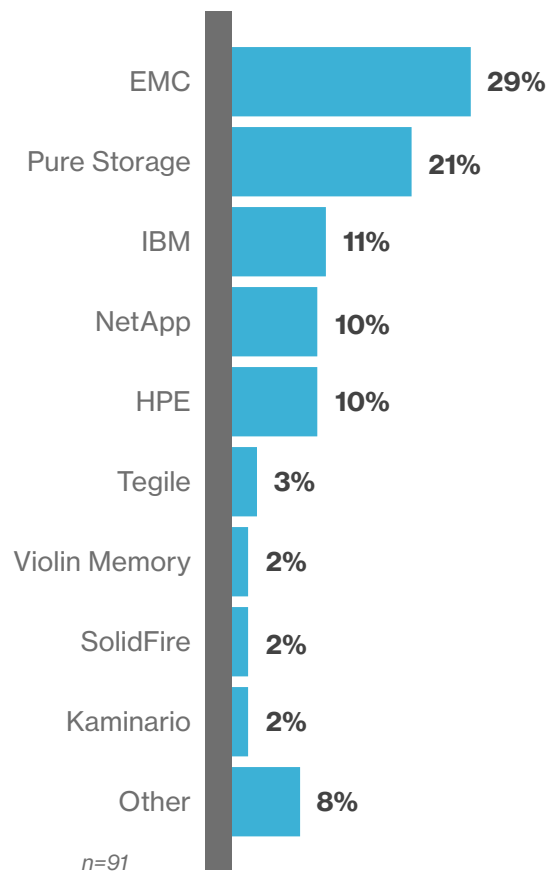
Boundary conditions

Number of deals	Total market value	Average Sale Price
63	\$102,830,625	\$1,632,232

n=63 (represents those who provided a purchase price)

Vendor	Deal Share Index (distribution of total spend)	Transaction Index for Deal Share (distribution of deals)
Pure Storage	34%	24%
IBM	21%	11%
EMC	21%	27%
Kaminario	17%	2%
NetApp	5%	11%
HPE	2%	6%
Violin Memory	<1%	3%
Tegile	<1%	6%
Solidfire	<1%	2%

Top vendors on the Shortlist



n=91

TechTarget Hybrid Arrays Transaction Index™

Vendor	Wins	Shortlisted	Shortlist conversion	Shortlist share	Overall transaction share
HPE	24	32	75%	28%	39%
Nimble	15	18	83%	16%	24%
EMC	6	18	33%	16%	10%
Dell	5	19	26%	16%	8%
NetApp	3	12	25%	10%	5%
NexGen	2	4	50%	3%	3%
Other	7	13	54%	11%	11%

n=62

TechTarget Hybrid Arrays Deal Share Index™

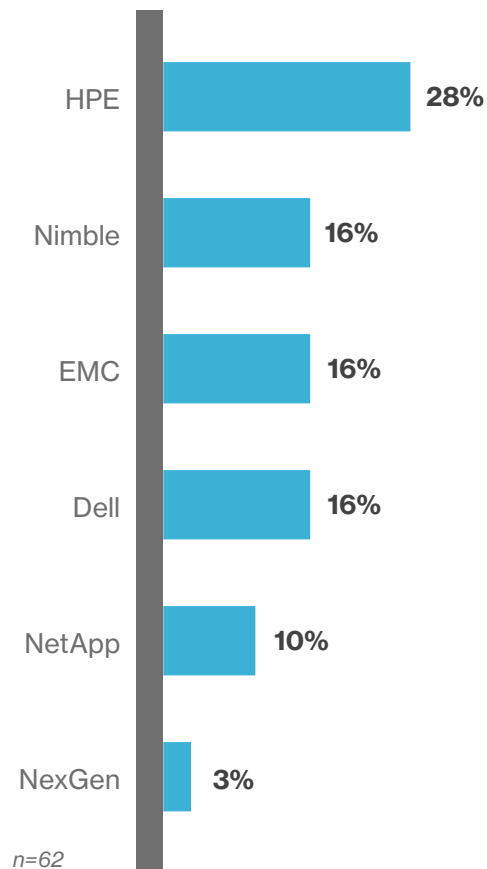
Boundary conditions

Number of deals	Total market value	Average Sale Price
39	\$29,435,000	\$754,744

n=39 (represents those who provided a purchase price)

Vendor	Deal Share Index (distribution of total spend)	Transaction Index for Deal Share (distribution of deals)
HP	74%	42%
Nimble	14%	24%
EMC	8%	11%
Nexsan	1%	3%
NexGen	1%	5%
NetApp	1%	5%
Dell	1%	8%
Oracle	<1%	3%

Top vendors on the Shortlist





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