



All Flash NVMeoF Storage

2017 Brand Leader Survey Report

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All Flash NVMeoF Storage

2017 Brand Leader Survey Methodology



- **Brand Leader Reports are designed to measure the pulse of brand leadership in specific product categories using independent, non-sponsored surveys with at least 200 respondents.**
- **The *All Flash NVMeoF Storage* brand leader survey was conducted in *June, 2017*.**
 - Respondents were solicited from over 1,000,000 members of 100+ online IT groups, and from the IT Brand Pulse IT professional database.
 - Two hundred and eight IT Pros responded to this survey.
 - Responses were collected using an online survey engine.
- **In each part, respondents were provided with a product category description, randomly-listed vendor choices (plus an “Other” answer choice to add a vendor, if applicable), and were asked six questions:**
 1. Who do you perceive as the All Flash NVMeoF Storage **market** leader?
 2. Who do you perceive as the All Flash NVMeoF Storage **price** leader?
 3. Who do you perceive as the All Flash NVMeoF Storage **performance** leader?
 4. Who do you perceive as the All Flash NVMeoF Storage **reliability** leader?
 5. Who do you perceive as the All Flash NVMeoF Storage **service & support** leader?
 6. Who do you perceive as the All Flash NVMeoF Storage **innovation** leader?

Brand Leader Definitions



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MARKET LEADER

Voted by IT Pros

The combination of innovation, performance, price, reliability and support, specific to a product category; making that product an overall market leader



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INNOVATION LEADER

Voted by IT Pros

The product that brings useful new features and benefits ahead of the competition

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PERFORMANCE LEADER

Voted by IT Pros

The product which is the fastest, and/or delivers the quickest user response time

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PRICE LEADER

Voted by IT Pros

The product with the most value for the price

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RELIABILITY LEADER

Voted by IT Pros

The product (component, software, or system) that most consistently performs its intended or required function or mission without degradation or failure

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SERVICE AND SUPPORT LEADER

Voted by IT Pros

The product with the most accessible, responsive, knowledgeable, and reasonably-priced service and support

All Flash NVMeoF Storage 2017 Brand Leader Survey





Respondent Profiles

All Flash NVMeoF Storage

2017 Brand Leader Survey

Selected Global Voting Organizations Represented in the Survey

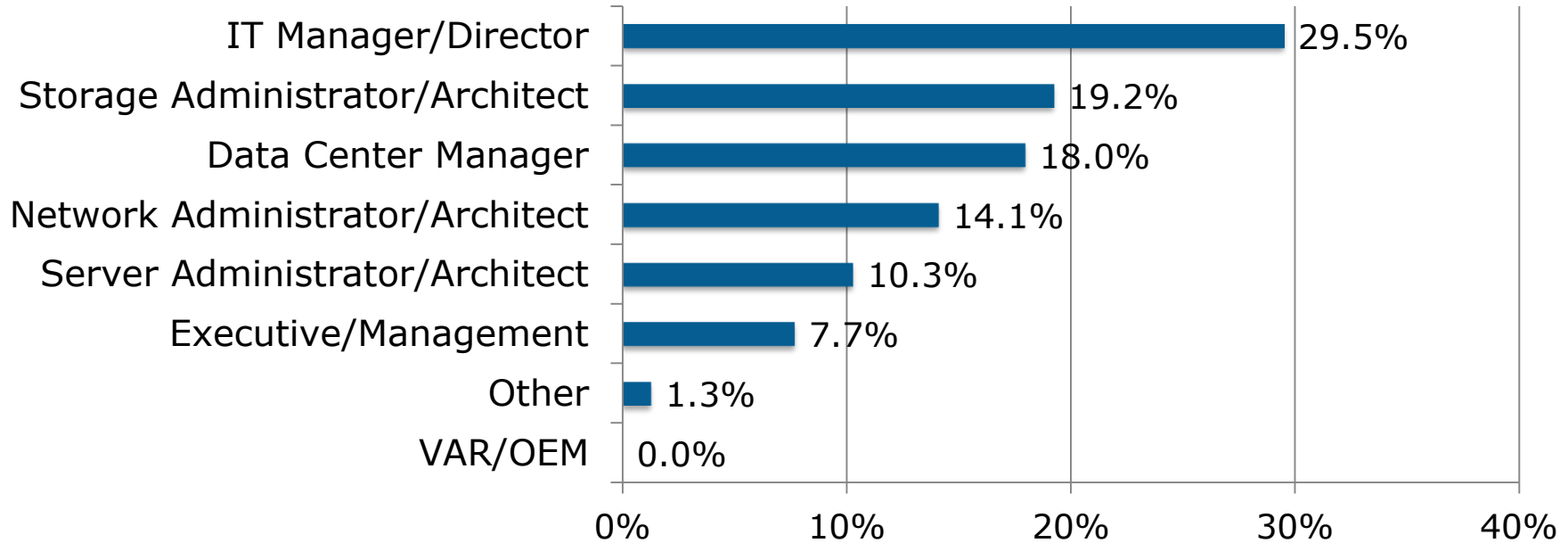
Aera Energy
Aetna
American Airlines
AT&T
Baird
Ball Aerospace
Banco Piano
Bank of America
Baylor College of Medicine
BC Liquor Distribution
BJ's Wholesale Club
Bosch
Boston University
BT Group
Capital Group
Capital Power Corporation
Chanel
Chrysler
City of Los Angeles
City of New York
Coca-Cola
Columbian Chemicals
Continental Tire
Cooper-Standard Automotive
Columbia University Med Ctr
Cox Enterprises

CSAA Insurance Group
Daybreak Game Co.
Diebold Nixdorf
DLL Group
Duke University
EnerCare
Expedia
ExxonMobil
EY
Fed Ex
Federal-Mogul
Fermilab
Flagstar Bank
General Electric
General Motors
Google
Hetero Drug
Intuitive Surgical
Kaiser Permanente
Kia Motors America
Kingston
Komatsu Limited
Kroger Co.
Kronos
Lawson Products
Library of Congress

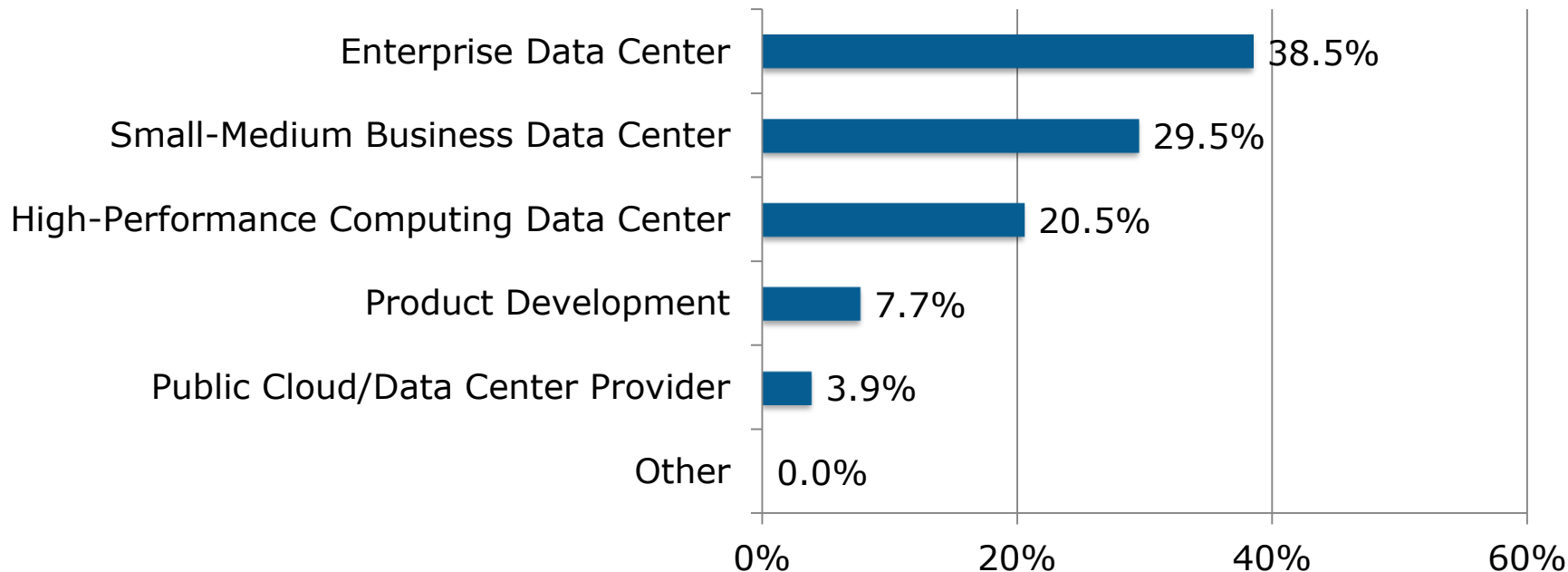
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Marriott
Marubeni America
McCann Erickson
McKesson Corporation
Memorial Sloan Kettering
Merck
Molex
Molina Health Care
Morningstar
Morgan Stanley
Nielsen
NASA Ames Research Center
NBC/Universal/Comcast
NOAA
Owens-Corning
Optum
PPG Industries
Quicken Loans
Raytheon
Ricoh
Perrigo
Saputo
Shaw Industries
Shell Oil
Sherwin Williams

Spectrum Brands
Stanford University
Staples
Starbucks
Swagelok
TDS Telecom
TE Connectivity (Tyco)
Telus
Thermo Fisher Scientific
Tiger Corporation
T-Mobile
Travelport
UCLA
United Health Group
U.S. Bank
U.S. Navy
Universal Parks and Resorts
UPS
Vantiv
Walmart
Waters Corporation
Wawanasa
WebMD
Western & Southern Financial
Xylem
Yahoo

Respondent Title/Job Description:



Your environment is best described as:





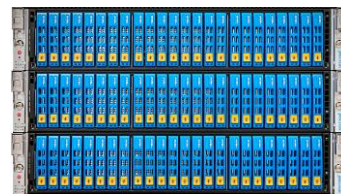
Summary Analysis

All Flash NVMeoF Storage 2017 Brand Leader Survey

About All Flash NVMeoF Storage

Low-latency NVMe SSD is fast replacing SAS/SATA SSD to become the basic storage building block inside server-based storage and inside all flash arrays. NVMe SSDs have a PCIe interface, so disaggregating storage is made possible with the NVMe over Fabrics protocol which extends PCIe over a network. With NVMeoF, flash storage can be placed anywhere and accessed with local storage performance. The benefit to IT organizations is their app servers now have ultra low-latency access to internal SSDs, SSDs in other app servers, and to SSDs in all flash arrays.

As of today, most storage system suppliers are in development, busily integrating the newly minted NVMeoF standard—and much higher performance—into their Fibre Channel and Ethernet-based products. In this race to market, a few vendors have broken away from the pack. Micron stands out among the leaders as the first major storage vendor to introduce an enterprise-class NVMeoF platform.



All Flash NVMeoF Storage 2017 Survey Summary Analysis



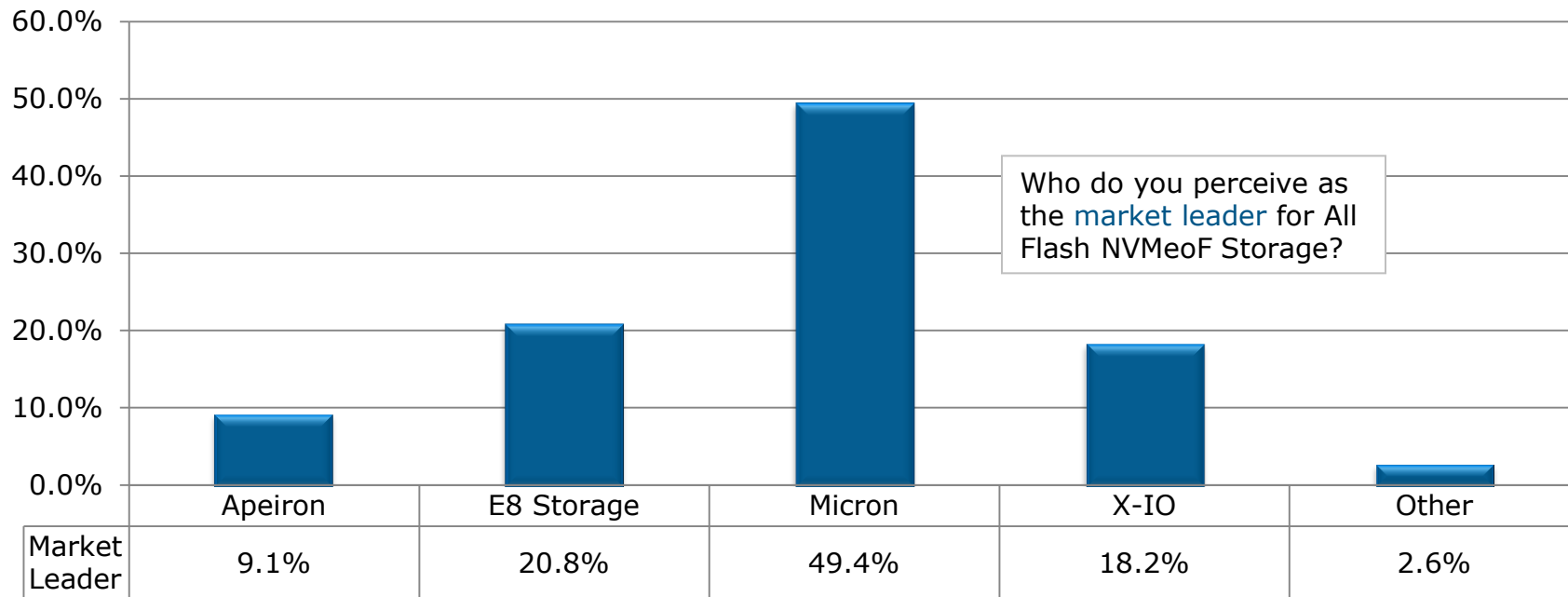
- **IT Pros Select Micron as NVMeoF Storage Market Leader**
 - In 2017, Micron changed the storage landscape with the introduction of the SolidScale™ Platform Architecture—scale-out storage infrastructure providing the benefits of centralized storage—with the performance of local in-server SSDs. Along the way, Micron leap-frogged the traditional enterprise storage leaders to deliver the industry’s first enterprise-class NVMeoF system. The IT professional community took notice and voted Micron to top all six categories of brand leadership for NVMeoF All Flash storage: Market, Performance, Reliability, Price, Service & Support and Innovation.
- **Micron Chosen in All Six Categories of Brand Leadership**
 - Market Leader turned out to be the brand leader category with the highest percentage of IT pros voting for Micron. Combine that result with Micron achieving a clean sweep of the Market, Price, Performance, Reliability, Service & Support and Innovation awards, and it suggests the breadth of Micron’s best-in-class capabilities stands out in this new enterprise storage product category.
- **E8 Storage Second in Every Category of Brand Leadership**
 - Micron received more than double the votes of NVMeoF pioneer and start-up, E8 Storage, which placed second in every category followed by X-IO, which was third all-around.
- **Dell EMC, HDS, HPE, NetApp and Pure Storage Not in the Game Yet**
 - Micron demonstrated newfound agility and established brand incumbency by beating a long list of traditional storage leaders to market with an enterprise-class NVMe storage system.



2017 Brand Leader Survey Results

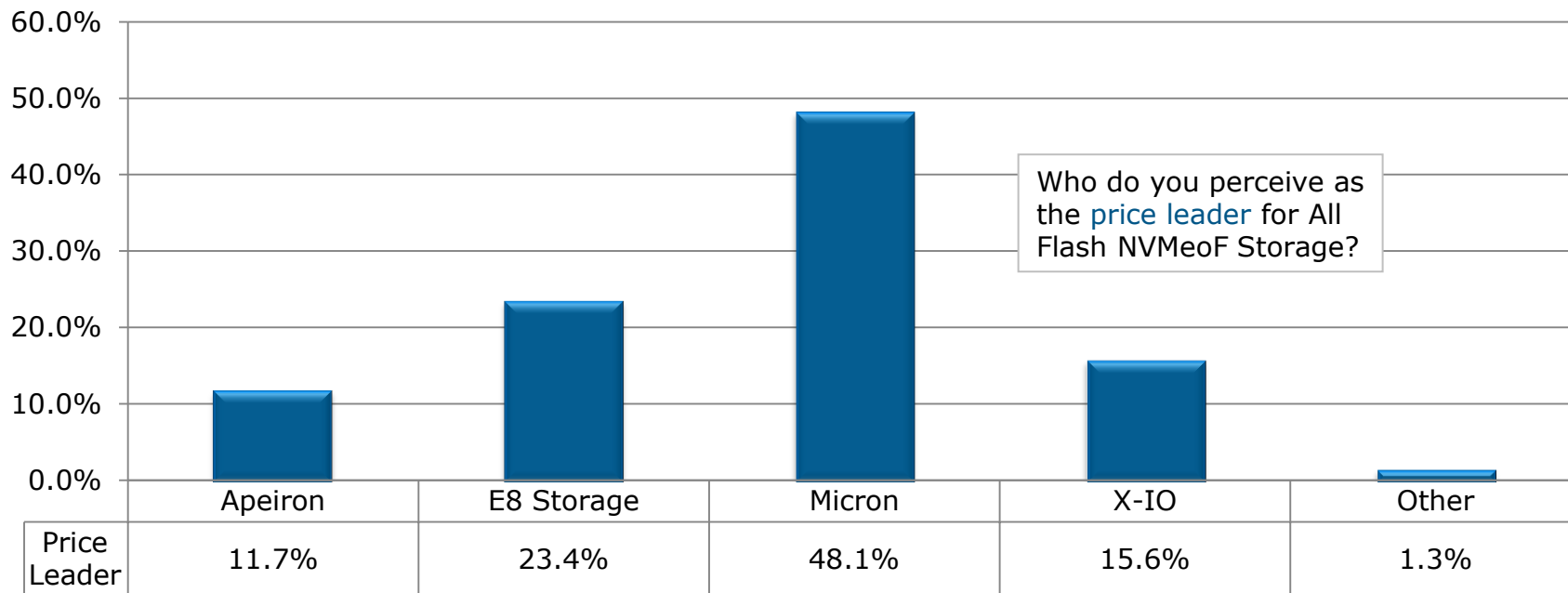
All Flash NVMeoF Storage

2017 Market Leader All Flash NVMeoF Storage



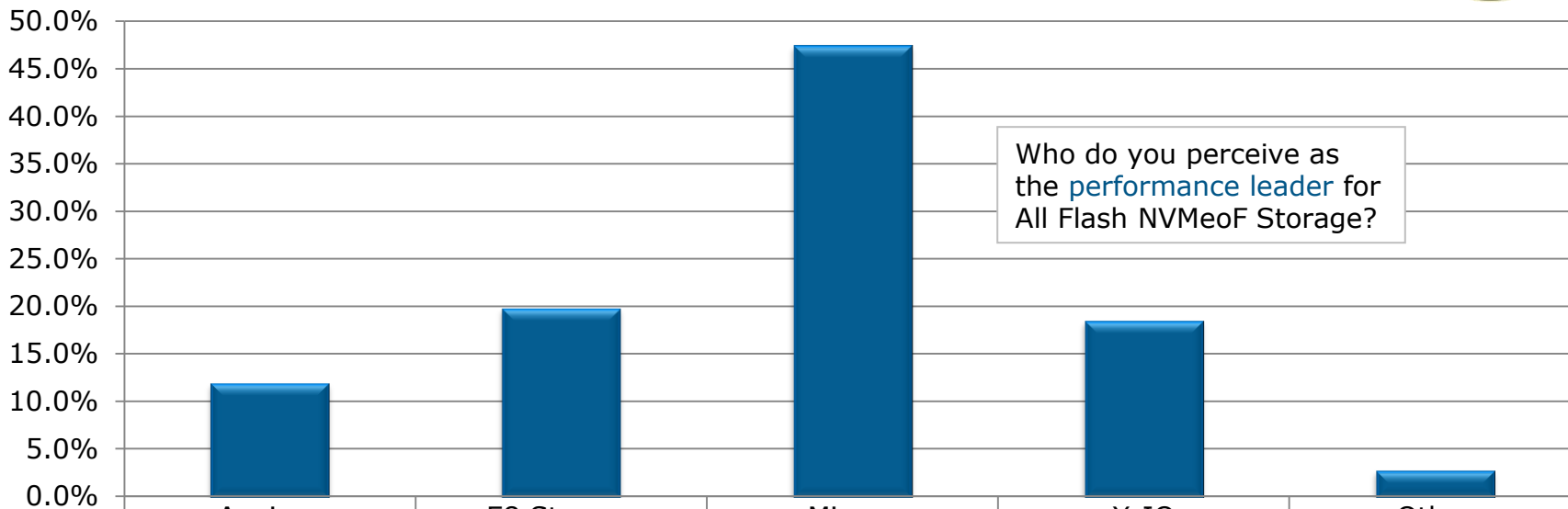
2017 Price Leader

All Flash NVMeoF Storage



June 2017 Brand Leader Survey

2017 Performance Leader All Flash NVMeoF Storage



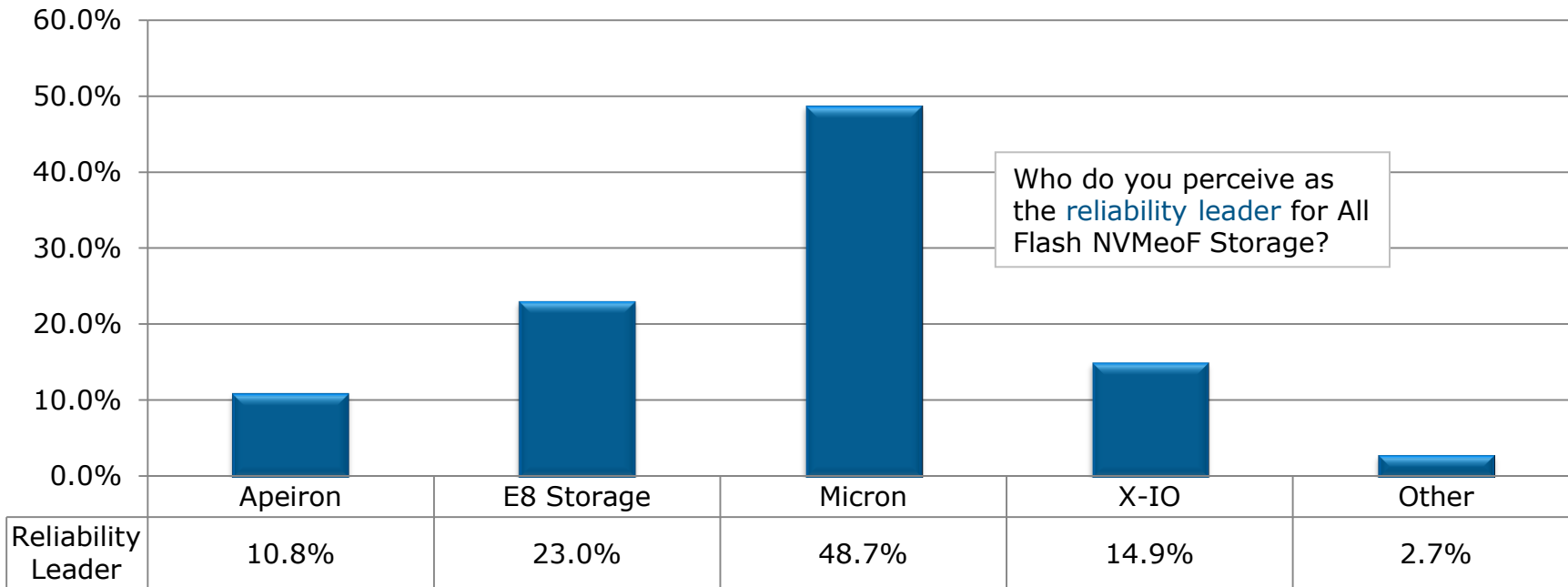
Performance
Leader

	Apeiron	E8 Storage	Micron	X-IO	Other
Performance Leader	11.8%	19.7%	47.4%	18.4%	2.6%

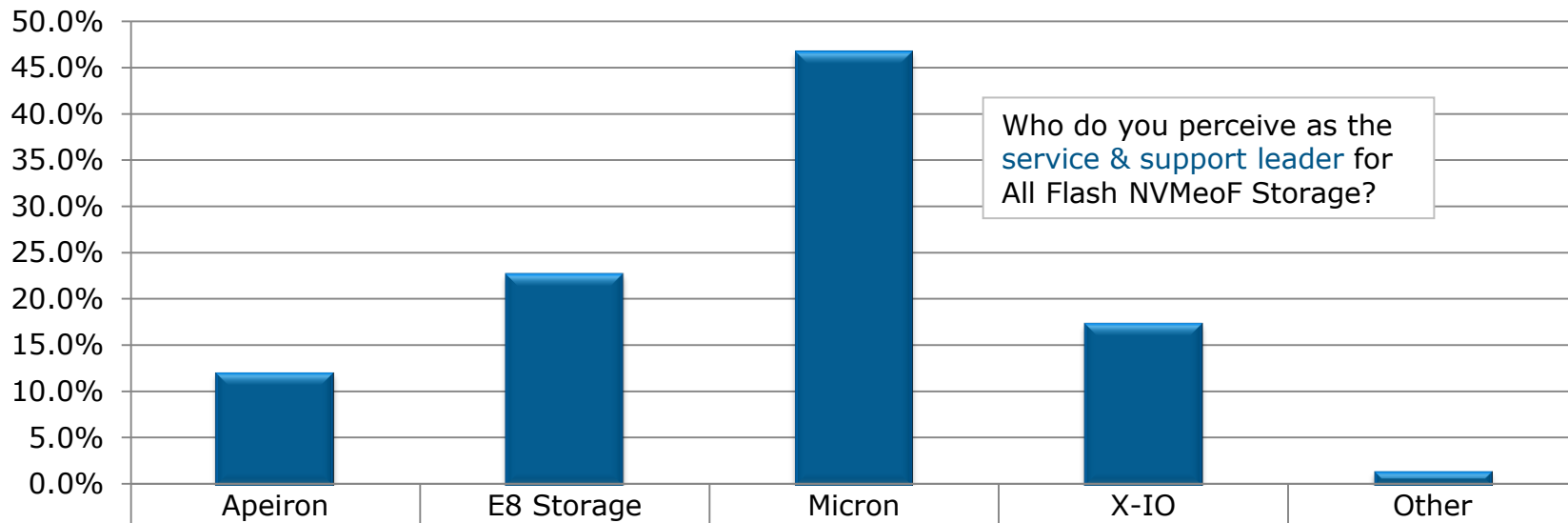
June 2017 Brand Leader Survey



2017 Reliability Leader All Flash NVMeoF Storage



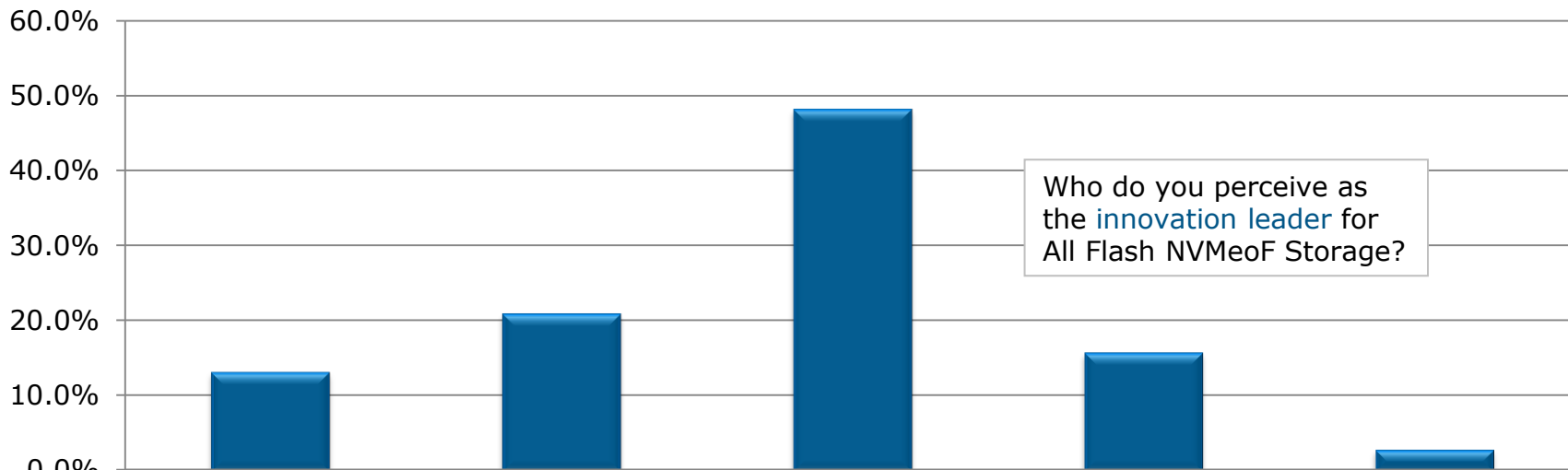
2017 Service and Support Leader All Flash NVMeoF Storage



Who do you perceive as the service & support leader for All Flash NVMeoF Storage?

Service & Support Leader	12.0%	22.7%	46.7%	17.3%	1.3%
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2017 Innovation Leader All Flash NVMeoF Storage



	Apeiron	E8 Storage	Micron	X-IO	Other
Innovation Leader	13.0%	20.8%	48.1%	15.6%	2.6%

June 2017 Brand Leader Survey



2017 Brand Leader Survey Chart

All Flash NVMeoF Storage

Brand Leader Survey Data: 2017



<i>All Flash NVMeoF Storage</i>	Apeiron	E8 Storage	Micron	X-IO	Other	Total
Market Leader	9.1%	20.8%	49.4%	18.2%	2.6%	100%
Price Leader	11.7%	23.4%	48.1%	15.6%	1.3%	100%
Performance Leader	11.8%	19.7%	47.4%	18.4%	2.6%	100%
Reliability Leader	10.8%	23.0%	48.7%	14.9%	2.7%	100%
Service & Support Leader	12.0%	22.7%	46.7%	17.3%	1.3%	100%
Innovation Leader	13.0%	20.8%	48.1%	15.6%	2.6%	100%

IT Brand Pulse

IT Brand Pulse, Inc. is an analyst firm and trusted source of product testing, IT Pro research, and analysis covering data center infrastructure including servers, storage, networking, operating platforms and applications. Learn more at ITBrandPulse.com.

The Author



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For the past seven years, Cheryl Parker has overseen the IT Pro Research practice for IT Brand Pulse. Cheryl and her team conduct IT Brand Leader, technology adoption, and customer satisfaction surveys, as well as focus groups and custom research. Cheryl has spent more than 25 years in communications, research, PR, marketing and sales, and is a former news and sports writer for the *Los Angeles Times*. cheryl.parker@itbrandpulse.com.

IT BRAND
PULSE™

The logo features the text "IT BRAND" in a bold, sans-serif font, with "IT" in a light blue color and "BRAND" in white. Below it, the word "PULSE" is written in a smaller, white, sans-serif font, followed by a trademark symbol (TM). A trail of approximately 15 grey, semi-transparent spheres starts from the end of "PULSE" and curves upwards and to the right, ending near the "ND" of "BRAND". The background is a solid dark blue with some lighter blue curved shapes.