All Flash iSCSI SSD Systems
2014 Brand Leader Report

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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 100 respondents.**

- **The All Flash iSCSI SSD Systems survey was conducted in June, 2014 and published in July, 2014.**
  - Respondents were solicited from over 1,000,000 members of 100+ online IT groups, and from the IT Brand Pulse IT professional database.
  - One hundred and fifty-nine IT Pros completed this survey.
  - Responses were collected using an online survey engine.

- **In each part, respondents were provided with a product category description, list of 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 iSCSI SSD Systems **market** leader?
  2. Who do you perceive as the All Flash iSCSI SSD Systems **price** leader?
  3. Who do you perceive as the All Flash iSCSI SSD Systems **performance** leader?
  4. Who do you perceive as the All Flash iSCSI SSD Systems **reliability** leader?
  5. Who do you perceive as the All Flash iSCSI SSD Systems **service & support** leader?
  6. Who do you perceive as the All Flash iSCSI SSD Systems **innovation** leader?

Selected Organizations Represented

Accident Fund
Ace Info Solutions
AHCCCS
AHIP
Alliant Techsystems
AOL
APAC Customer Services
Aramco
Assurant
Astoria Bank
ATPCO
Attorneys Title Fund Services
BAAQMD
Bank of America
Baylor College of Medicine
Bellin
Biotek
Booz Allen Hamilton
Boston Dynamics
Brotman Medical
C.R. Bard Inc.
CA Department of Insurance
CA Traffic Safety Institute
Chapman University
Christus Health
Chubb
Criminal Justice Institute
Colliers L&A

Cubic Corporation
Dealogic
Defense Advanced Research Projects Agency (DARPA)
Delta Airlines
Department of Defense
Department of the Navy
Duke University
Duquesne University
EBS
Entercom
Ernst and Young
Expedia
Exxon Mobil
Fermilab
Ford Motor
Fluor
General Motors
Gulfstream Aerospace
IGPP (UCSD)
Intuitive Surgical (ISRG)
ITG
Jamaica Hospital
JP Morgan Chase
Kaspersky Lab
Kingston Technology
LA Department of Transportation
Lockheed Martin Space Systems

MDO
MESSA
Morgan Stanley
NASA Ames Research Center
National Institute of Health
Nationwide Insurance
Navistar
NAVMISSA
New York Life
New York State (ITS)
New York University
Nielsen
NYSE
Oceaneering International
Omnicom
Orbital Sciences Corp
Oshkosh Corporation
Owens Corning
Philips
Planar Systems, inc.
Polycom, Inc.
Pratt & Whitney
Providence Health
Prudential
Purdue University
Reallusion
REI
Sandia National Labs

Sabre
Simplicity Pattern
Social Security Administration
Sony Online Entertainment
St. Luke's Hospital
State of South Dakota
State of PA (Security)
TD Bank
The Children's Hospital of Philadelphia
The Forum Corporation
The Idea Travel Company
The University of Chicago
T-Mobile
Transamerica
UBS
United Airlines
United Health Services
United Nations Federal Credit Union
Universal Parks and Resorts
University of Notre Dame
US Air Force Academy
USC Marshall School of Business
USC Viterbi School of Engineering
UT Southwestern Medical Center
Verizon
Virginia Tech
Wajax
Yale University

All Flash iSCSI SSD Systems

During the last five years, enterprise-class storage arrays have evolved from all-HDD, to Hybrid HDD/SSD, to all-flash media inside. Leading storage vendors also offer NAS, SAN and unified versions of each. Until this year, the array portfolio of leading storage vendors included only all-HDD arrays with an option to add some flash. The breakthrough year for the industry came in 2014—highlighted by the introduction of all-flash storage arrays from leading vendors Dell, EMC and HP.

The importance of all-flash storage is only expected to increase as distributed computing migrates from hyperscale environments to the enterprise. In these environments, low-latency data center infrastructure is needed; including low latency storage I/O. Demand for all-flash storage will accelerate as big data analytics become a standard component of business applications, the price/GB of flash memory continues to decline, and supply meets market demand.

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Summary Analysis

- **Dell Chosen by IT Pros as the Market Leader for All Flash iSCSI SSD Systems**
  - In the first annual brand leader survey focused on All Flash iSCSI SSD Systems, 60% of the respondents chose Dell as the Market Leader — more than 40% above the company who received the second most votes. In past brand leader surveys covering other types of enterprise-class iSCSI storage products, IT Pros demonstrated a similar strong preference for the Dell EqualLogic brand.
- **Dell Sweeps all Six Brand Leader categories**
  - IT professionals selected Dell as the Market, Performance, Reliability, Innovation, Service & Support and Price Leader for All Flash iSCSI SSD Systems. In each of the six brand categories, over 50% of respondents named Dell as the leader.
- **Service and Support Stands Out for IT Pros and for Dell**
  - The highest score received by any vendor was in the Service and Support category where Dell captured almost two thirds of the votes. The results in this category indicate that leadership in Service and Support is closely related to Market Leadership for All Flash iSCSI SSD Systems.
- **SolidFire Places Second in Every Category**
  - Pure-play All Flash iSCSI SSD System vendor SolidFire took second in every category of brand leadership with votes ranging from 16.6% for Service and Support, to 24.1% for Innovation Leader.
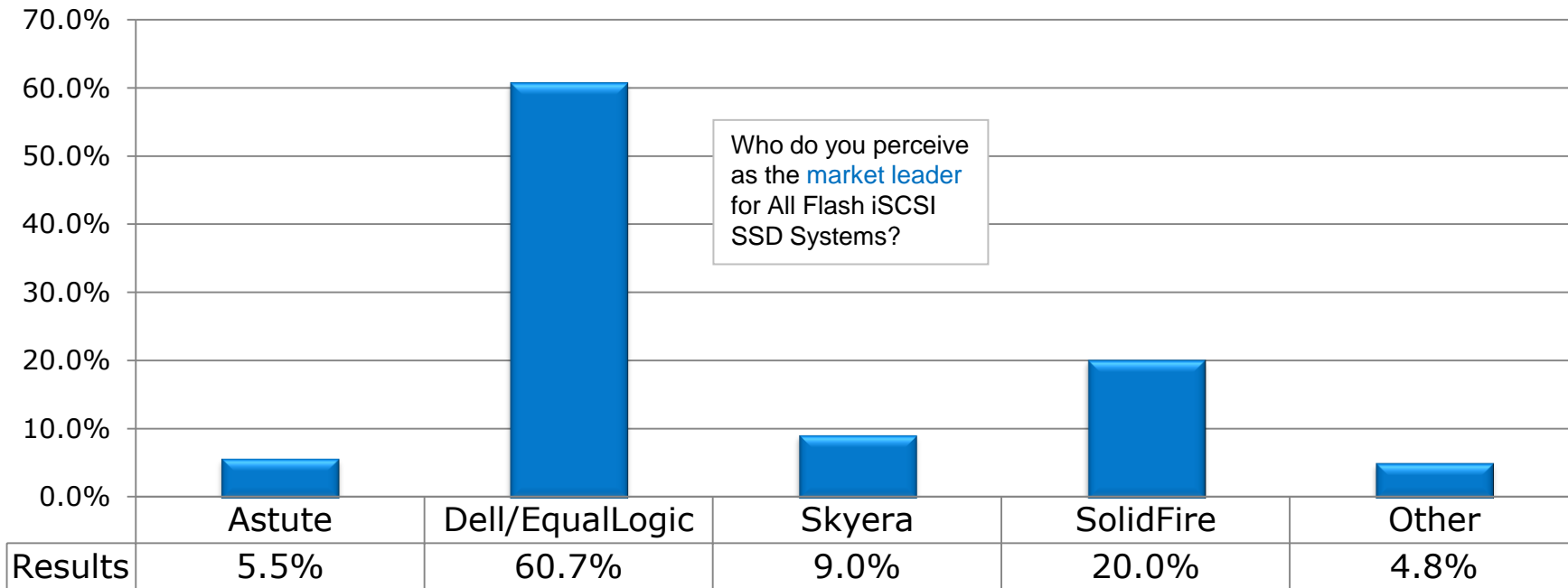
Market Leader
2014 All Flash iSCSI SSD Systems Brand Leader Survey

Who do you perceive as the market leader for All Flash iSCSI SSD Systems?

Results	Astute	Dell/EqualLogic	Skyera	SolidFire	Other
	5.5%	60.7%	9.0%	20.0%	4.8%

Price Leader
2014 All Flash iSCSI SSD Systems Brand Leader Survey

Who do you perceive as the price leader for All Flash iSCSI SSD Systems?

Results	Astute	Dell/EqualLogic	Skyera	SolidFire	Other
	4.8%	62.8%	10.3%	18.6%	3.5%

Performance Leader
2014 All Flash iSCSI SSD Systems Brand Leader Survey

Who do you perceive as the performance leader for All Flash iSCSI SSD Systems?

Results	Astute	Dell/EqualLogic	Skyera	SolidFire	Other
Results	7.6%	53.8%	14.5%	20.0%	4.1%
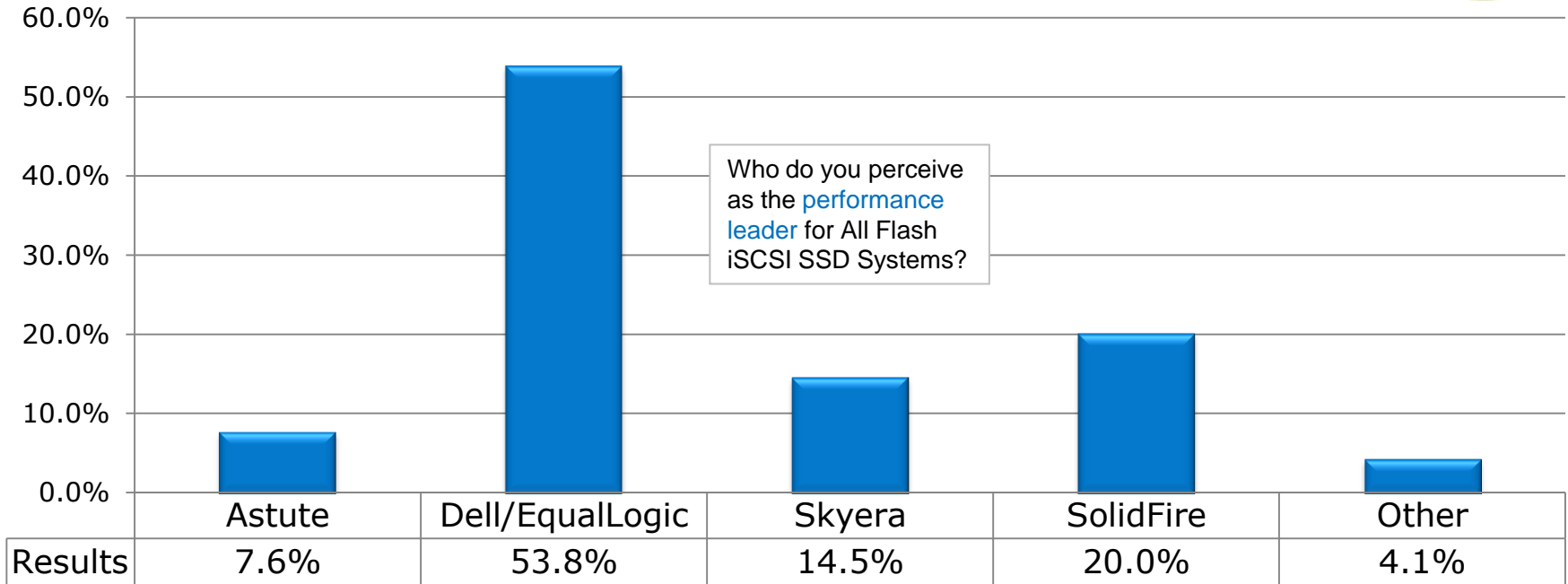
Reliability Leader
2014 All Flash iSCSI SSD Systems Brand Leader Survey

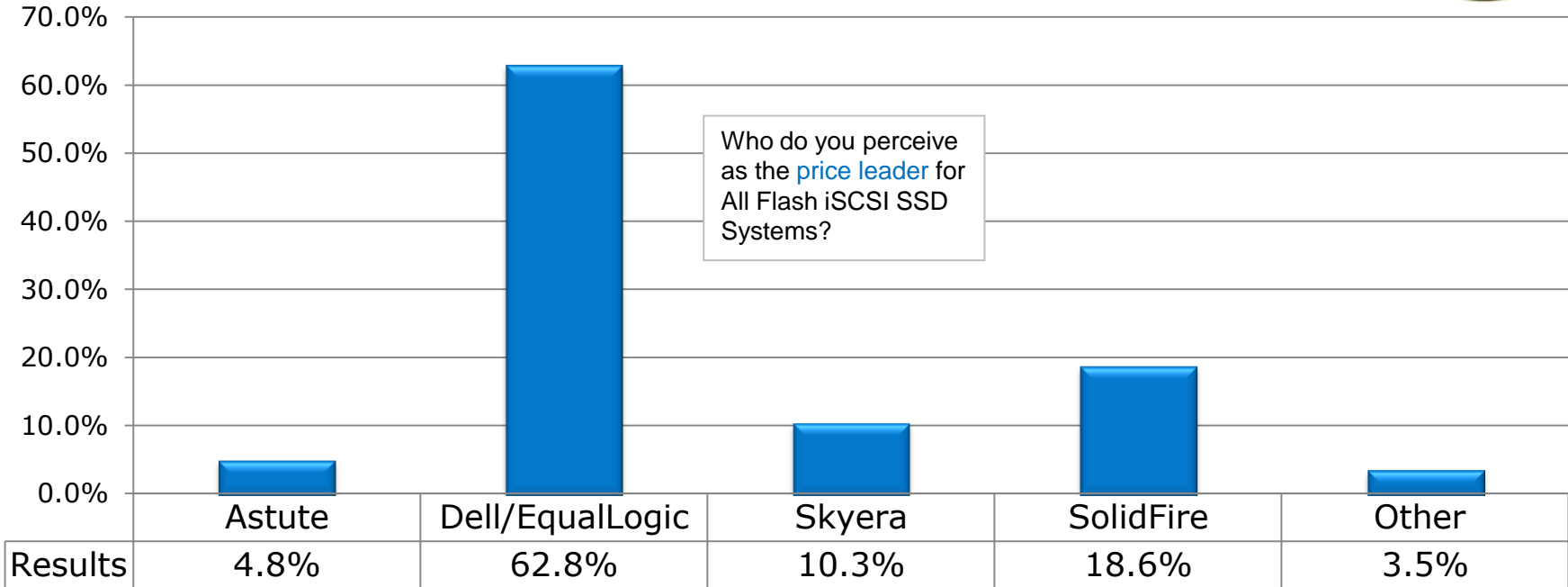Who do you perceive as the reliability leader for All Flash iSCSI SSD Systems?

Results	Astute	Dell/EqualLogic	Skyera	SolidFire	Other
	4.1%	62.1%	10.3%	19.3%	4.1%
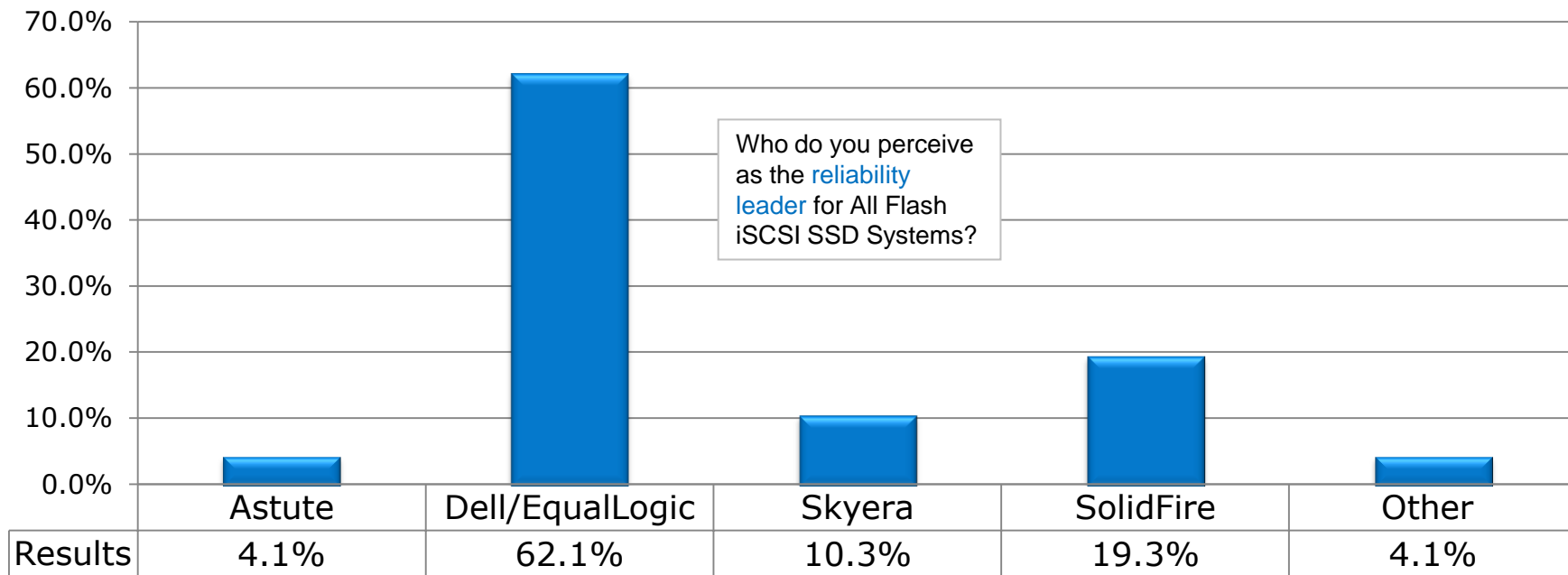
Service and Support Leader
2014 All Flash iSCSI SSD Systems Brand Leader Survey

Who do you perceive as the service and support leader for All Flash iSCSI SSD Systems?

Results	Astute	Dell/EqualLogic	Skyera	SolidFire	Other
	8.3%	64.8%	6.2%	16.6%	4.1%
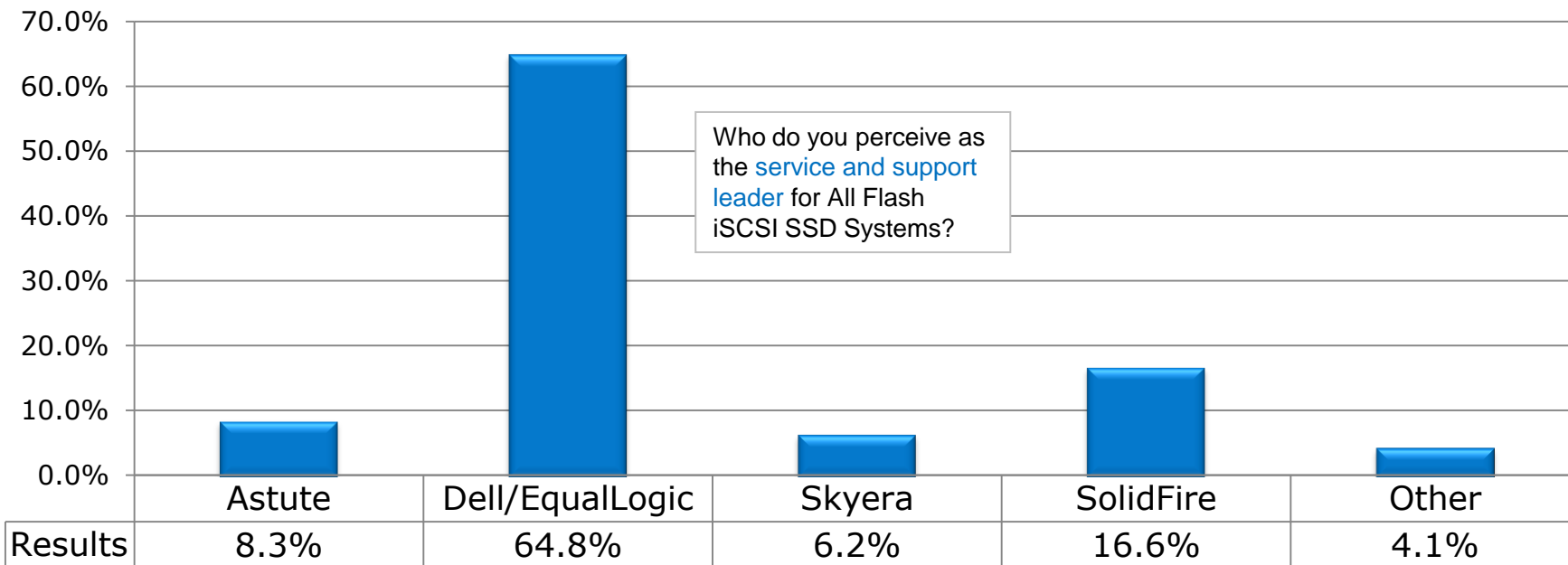
Innovation Leader
2014 All Flash iSCSI SSD Systems Brand Leader Survey

Who do you perceive as the innovation leader in All Flash iSCSI SSD Systems?

	Astute	Dell/EqualLogic	Skyera	SolidFire	Other
Results	9.0%	51.7%	11.0%	24.1%	4.1%
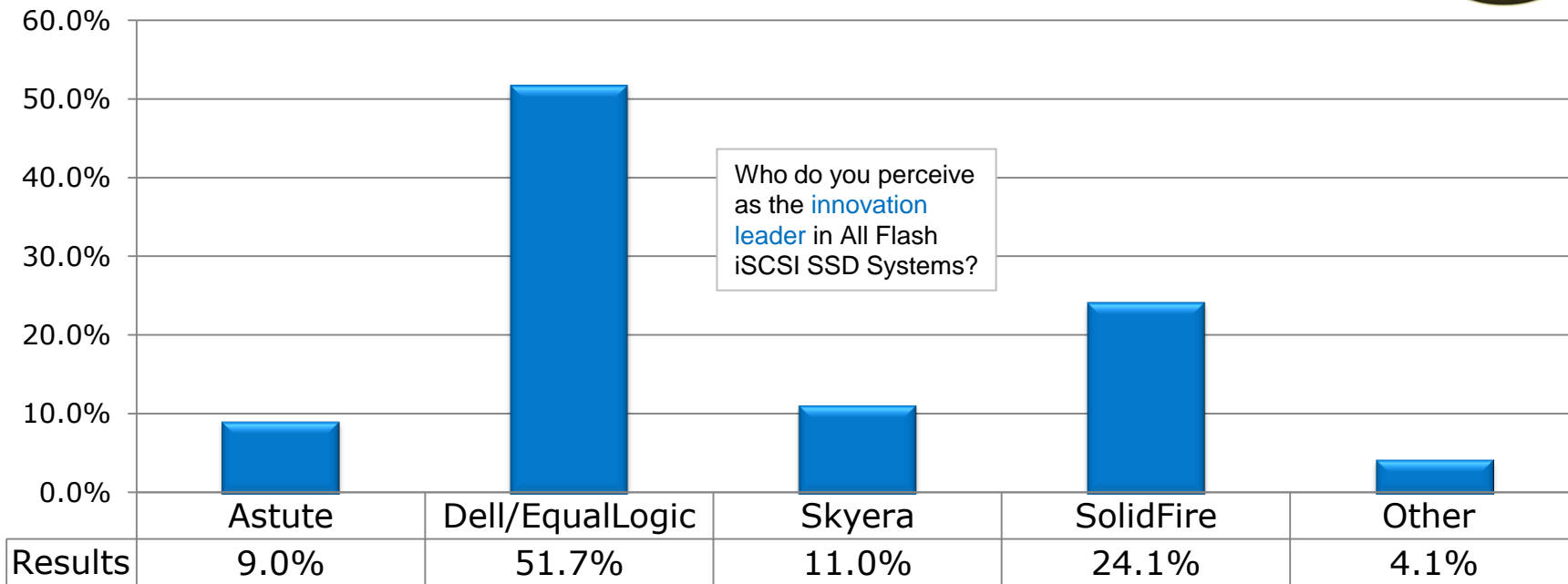
All Flash iSCSI SSD Systems
2014 Brand Leader Survey Data

All Flash iSCSI SSD Systems	Astute	Dell/ EqualLogic	Skyera	SolidFire	Other	Total
2014						
Market Leader	5.5%	**60.7%**	9.0%	20.0%	4.8%	100%
Price Leader	4.8%	**62.8%**	10.3%	18.6%	3.5%	100%
Performance Leader	7.6%	**53.8%**	14.5%	20.0%	4.1%	100%
Reliability Leader	4.1%	**62.1%**	10.3%	19.3%	4.1%	100%
Service & Support Leader	8.3%	**64.8%**	6.2%	16.6%	4.1%	100%
Innovation Leader	9.0%	**51.7%**	11.0%	24.1%	4.1%	100%

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