

Forrester Opportunity Snapshot: A Custom Study Commissioned By IBM | November 2017

Agility, Efficiency, Flexibility

Mid-Market Businesses Take Advantage Of Flash Storage

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Agility, Efficiency, Flexibility: Mid-Market Businesses Take Advantage Of Flash Storage

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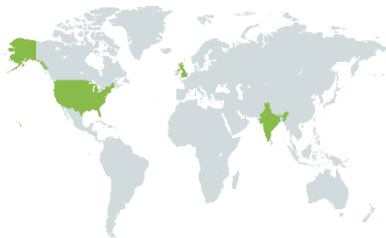
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Flash Storage: The Mid-Market Business View

We know that flash storage can provide significant benefits and deliver needed agility for large businesses, but what about medium-sized businesses (MMB = 500 to 999 employees)? IBM asked Forrester Consulting to look into adoption and use of flash storage technologies by mid-market organizations. A snapshot survey of 106 MMB IT professionals found the following:

- › MMBs are actively adopting flash storage as a part of their storage strategy.
- › The results of this adoption are exceeding expectations.
- › A majority of respondents expect to continue their investments, with almost half aspiring to an all-flash storage environment.



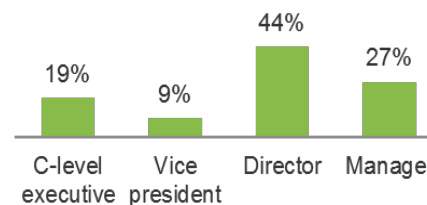
Geographies

- › 41% US
- › 29% UK
- › 30% India

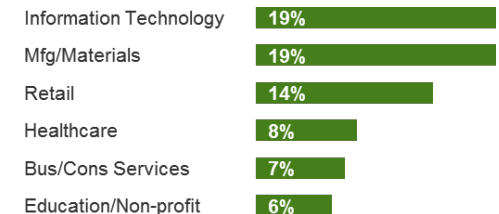


Company size

500 to 999 employees



Level of responsibility



Industries

Showing top six

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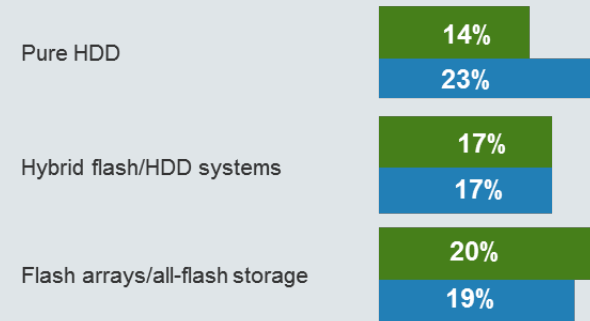
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MMBs Making Flash Part Of The Storage Mix

MMB IT professionals in this survey shared their storage environment mix: a hybrid ecosystem that uses both cloud and on-premises storage. The average storage ecosystem of respondents shows a fairly even mix of flash, pure HDD, and hybrid across both cloud and on-premises. This mix means that IT teams are managing and balancing their cloud and on-premises architectures carefully. What is driving that storage profile, and how will it change over the next 12 months? Click on the “2” button on this page to find out the features and business reasons medium-sized firms considered when making their flash storage investments.



Using your best estimate, what percent of your organization's data storage is allocated to the following storage environments?



Base: Variable; percentages are the calculated mean of response inputs by survey takers

Source: A commissioned study conducted by Forrester Consulting on behalf of IBM, October 2017

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What Are MMBs Trying To Achieve With Flash Storage?

IT professionals in this survey are clearly balancing technical performance and business efficiency with their flash storage initiatives. As their world becomes more complex with cloud, data growth, and more complex applications, they are looking to flash to help drive speed, flexibility, and efficiency.

Click on the “RESULTS” tab above to find out whether flash has met their expectations.

What features are you using/planning to use with flash storage?

Cloud management	51%
Storage virtualization	51%
Flexibility	50%
Security — encryption	46%
Storage data reduction	40%

Base: 106 IT professionals in MMBs

Source: A commissioned study conducted by Forrester Consulting on behalf of IBM, October 2017

What were you initially planning to achieve with your flash storage implementation?

Faster access and response	70%
Improve cost efficiency	60%
Improve data security	53%
Manage growth in storage	52%
Be more flexible to business change	50%
Work better with key applications	45%

Base: 106 IT professionals in MMBs

Source: A commissioned study conducted by Forrester Consulting on behalf of IBM, October 2017

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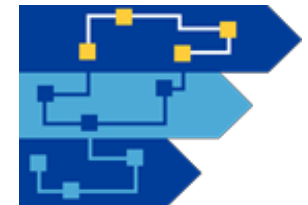
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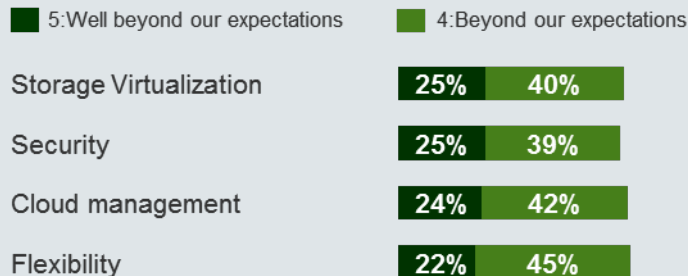
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Flash Storage Is Exceeding Expectations

The investments in flash storage appear to be paying off for the IT leaders in this survey. Most felt that flash storage performed better than expected in almost all major areas, but they were especially pleased with the results in virtualization, security, cloud, and flexibility. And the performance of flash storage contributed to improvements in key operational and business goals, like responsiveness, managing changes in the business, and interacting better with key applications. Does this mean they will continue to invest in flash storage? Click on the OPPORTUNITY tab to find out.

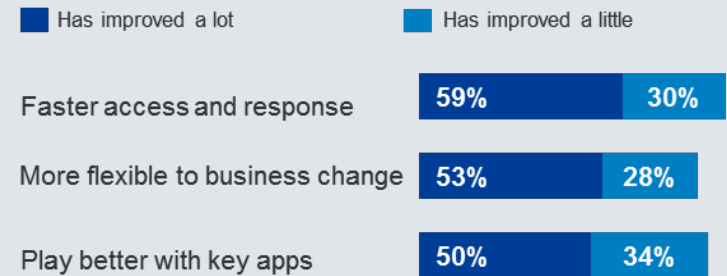


How well are these capabilities performing for you?
Please rate on a scale of 1 to 5.



Base: 106 IT professionals in MMBs
Source: A commissioned study conducted by Forrester Consulting on behalf of IBM, October 2017

How has flash storage helped you achieve or improve on the following business or operational goals?



Base: 106 IT professionals in MMBs
Source: A commissioned study conducted by Forrester Consulting on behalf of IBM, October 2017

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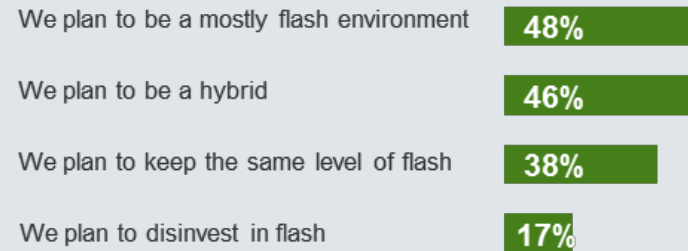
Most Mid-Market Firms Plan To Continue Flash Investments

Whether their optimal storage ecosystem calls for all-flash or a hybrid approach, the vast majority of MMBs in this survey plan to maintain or expand their investment in flash. Not surprising, given that investments in flash to date have exceeded their expectations and driven both technical and business improvements. It's clear that flash has found a home in many medium-sized organizations.

Over half of respondents plan to invest more in flash, and 48% plan to be a mostly flash environment.



What are your plans for continuing investment in flash storage?



Base: 106 IT professionals in MMBs

Source: A commissioned study conducted by Forrester Consulting on behalf of IBM, October 2017

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MMB Investment In Flash Continues

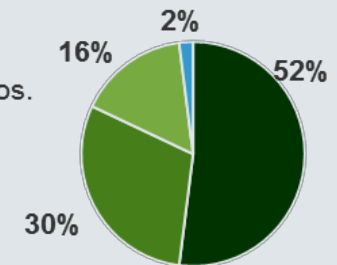
When asked about near-term investment plans for flash, over half of the IT professionals in this survey said they were already expanding or upgrading flash. Another 30% plan to implement in the next 12 months. Only 16% felt they were at the right level or mix of flash, and a tiny 2% felt they needed to decrease flash in their storage mix. Medium-sized businesses are clearly taking advantage of steadily decreasing prices and the coming of age of flash storage technology, with more to come as they seek to optimize agility, efficiency, and flexibility.

MMB IT professionals in this survey are continuing their investment in flash — 82% are either planning or already implementing/upgrading their flash storage.



What are your organization's plans when it comes to flash storage?

- Expanding or upgrading
- Plan to implement in next 12 mos.
- Implemented, not expanding
- Decreasing



Base: 106 IT professionals in MMBs

Source: A commissioned study conducted by Forrester Consulting on behalf of IBM, October 2017

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Flash Storage — In The Mid-Market Game To Stay

From this survey, we gained a valuable snapshot of what MMBs are currently doing with their flash storage strategies:

- › Mid-market organizations are actively adopting flash storage as a part of their storage strategy.
- › The results of this adoption are exceeding expectations.
- › A majority of respondents expect to continue their investments, with almost half aspiring to an all-flash storage environment.

MMBs are clearly seeing a return on their investment and reaping the benefits of speed, flexibility, and efficiency in their quickly evolving storage environments.

METHODOLOGY:

Forrester Consulting surveyed 106 IT professionals in MMBs who were key decision makers or influencers in their company's storage architecture. The respondents were asked about current environment, what features and business factors drove their investment in flash storage, and future plans for investment in flash storage. The online survey was conducted in October 2017.

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- *Many MMBs have already invested in flash storage.*
- *They are seeing better than expected results from their implementations.*
- *Most will invest more in the next year.*



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