SSD Adoption Trends

August 2013 frank.berry@itbrandpulse.com







Flash Memory IT Brand Pulse



Flash Memory One Year Ago



Flash Memory 2013 SSD Brand Leaders

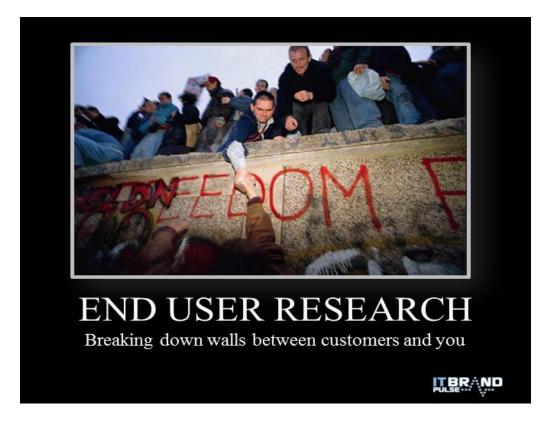


Flash Memory 2013 SSD Adoption Trends





A trusted source of product testing, IT pro research, and analysis about data center infrastructure





Selected IT Brand Pulse Customers







































Flash Memory IT Brand Pulse



Flash Memory One Year Ago



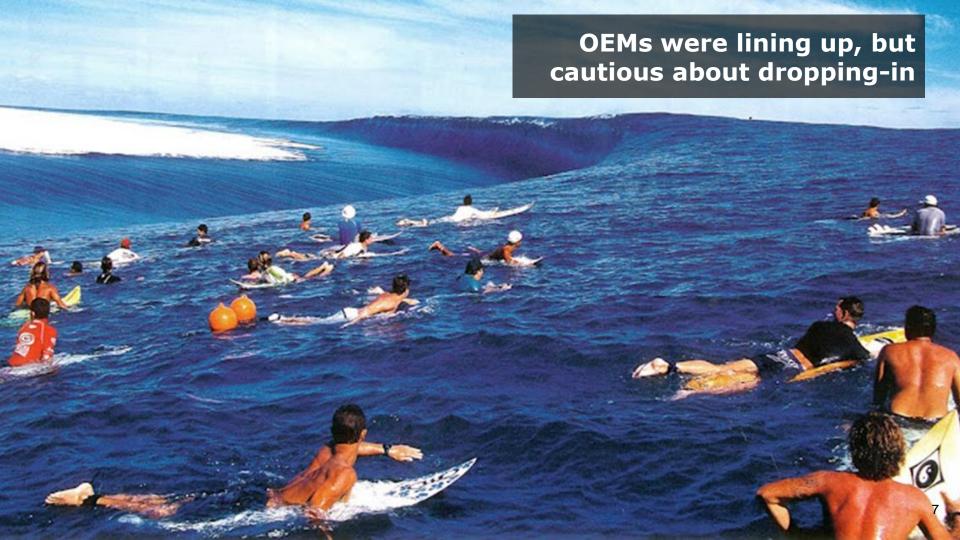
Flash Memory 2013 SSD Brand Leaders



Flash Memory 2013 SSD Adoption Trends

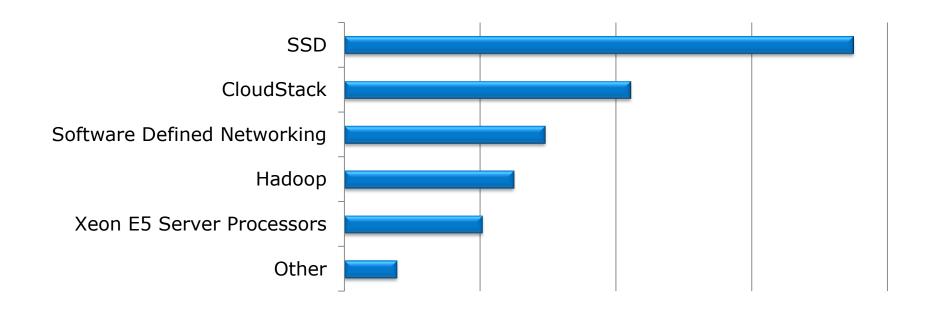






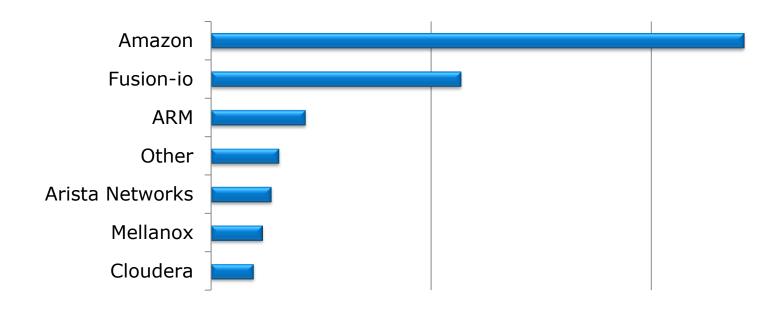


What do you perceive as the MOST GAME-CHANGING ENTERPRISE IT TECHNOLOGY of 2012?





Who do you perceive as the HOTTEST ENTERPRISE IT COMPANY in 2012?





Flash Memory IT Brand Pulse



Flash Memory One Year Ago



Flash Memory 2013 SSD Brand Leaders



Flash Memory 2013 SSD Adoption Trends

IT Brand Leader Program

- Annual surveys covering enterprise infrastructure
- Non-sponsored
- Respondents are IT professionals from large enterprise, SMB and HPC environments

The symbols for IT brand leadership



ITBR ND

LEADER

Voted by IT Pros











2013 SSD Brand Leader Survey Respondents

Acadient ACCi

Accident Fund Insurance Co.

Acendex

Alba Health Argonne National Labs

ARI Fleet Management

Artesian Water Co (DE State water utility)

AT&T

AWC

AXA Rosenberg Global Services

LLC

Baylor College of Medicine Berkshire Capital Securities

Boeing

Case Western Reserve University

Chevron Phillips Chemical

City of Mount Prospect, IL City of Sun Prairie, WI CitySquare, Dallas Collette Vacations

CT Economic Resource Ctr (CERC)

Daimler AG

Dallas Nursing Institute

Delmont Laboratories

Deloitte Services LP

Deutsche Telekom NA

Disney Interactive

DT Productions
Duke University
Duquesne University
El Paso County Sheriff

e-Miles

Fairfield Residential Company LLC

GE Global Research General Motors

Hire-Ability

Hormel Foods Corporation Houghton Mifflin Harcourt

IDS Raytheon Imagitas

Independence Blue Cross (IBX)
Institute of Geophysics and Planetary

Physics InterNexus

J. B. Hunt Transportation Jamaica Hospital Medical Center

Kawasaki KLA-Tencor

LA Dept. of Transportation

Lockheed Martin

Marriott International

Mimeo Monsanto NASA

Nat. Ctr for Atmospheric Research

(NCAR/UCAR)

National Institute of Health (NIH)

National Institute of Standards and

Technology

NAVMISSA - URS Federal Services

NBC Universal

New York Life Insurance Company

New York Stock Exchange

Northrop Grumman Ogilvy and Mather Owens Corning

PA Office of Administration

Pacific Northwest National Laboratory

(PNNL)

Paramount Consulting LLC

Pitney Bowes
Purdue University
Raytheon
Reader's Digest

Rutgers Univ. Brain Imaging Center

S.F. Public Utilities Commission

Sonic Healthcare USA

Sony Online Entertainment

Sony Pictures

South Dakota Board of Regents

St. Luke's Hospital

Stanford University

Symcor Inc

Temco Service Industries

Transamerica

Unisys

United Health Services Credit Union

University of Florida Health

University of Minnesota Medical School

University of Virginia
University of Washington
UQM Technologies
Urban Retail Properties

USAN

Utah State Office of Education

Verizon Wireless Virginia Tech WC Bradley Yale University

Zions Bancorporation





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SOLUTIONS ...



SUPPORT [1]

PARTNERS [





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GABOR KALI Head of Systems Administration for Digic Pictures















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Do IT Professionals care what's under the covers when it comes to their equipment?



Yes they do! IT Pros know what drive brands are spinning inside their equipment. OEMs may want all of us drive guys to be strictly vanilla but to IT pros, there is a difference ... especially when it comes to enterprise storage. Each month IT Brand Pulse selects a handful of product categories and asks IT professionals who they perceive as the leader in these particular enterprise categories in 5 critically important areas including:

About the Author



Barbara Craig Senior Product Marketing Manager

Do IT Professionals care what's under the covers when it comes to their equipment?

Big Foot Sighted in Germany (with Constellation ES.2 3TB Drives in tow)

Busy Bees in Minnesota - Seagate **Enterprise Stings the Competition!**

Cisco Systems Innovation Leader

Network Operating Systems WLAN Controllers/Switches Firewalls

FC Network Monitoring Low Latency Switches Ethernet Switches





Claudio DeSanti Fellow Cisco Systems Data Center Business Group















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HP Enterprise Servers

HP Enterprise Servers voted Market Leader in the April 2011 IT Brand Pulse study. Also topped the Performance Leader, Reliability Leader, Services & Support Leader and Innovation Leader categories

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2013 SSD Leaders - IT Brand Pulse

This is a Press Release edited by StorageNewsletter.com on Thu, August 1st, 2013

Submit News

IBM in DRAM SAN SSD systems, Nimbus Data in NAS and unified SSD systems, etc.

IT Brand Pulse, a source of data and analysis about IT infrastructure, announced the results of the recent 2013 SSD Brand Leader Survey, as voted by IT pros.

Survey respondents were asked which vendors they perceive as the leader in eleven SSD product categories: All Flash SAN SSD Systems, All Flash NAS SSD Systems, All DRAM SAN SSD Systems, All Flash Unified SSD Systems, PCle SSD DAS Adapters,

PCIe SSD SAN Adapters, SAS/SATA SSD Modules, SSD DAS/SAN

Cache, SSD NAS Cache Appliance, SSD Controller Chips, Hybrid

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Award-winning HGST Enterprise Storage
 Drives – Listed below are but a few of the
 accolades that HGST Ultrastar™ storage drives
 have received to date.



Ultrastar 7K3000 Editor's Choice Award August 2011



Ultrastar SSD400S.B SSD
"Well-rounded offering ready for heavy enterprise use"
April 2012



IT Brand Pulse Market Leader Award May 2012



IT Brand Pulse Reliability Leader Award May 2012



IT Brand Pulse Performance Leader Award May 2012

2012 SSD Brand Leaders







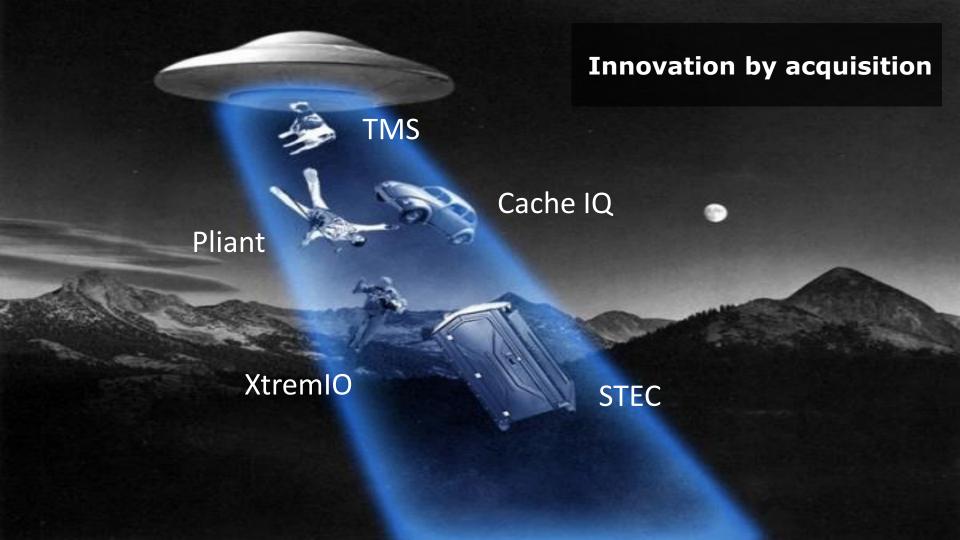






All Flash SAN SSDs	TMS	TMS & NextIO	TMS	TMS	TMS	Pure Storage, Violin Memory & TMS
All Flash NAS SSDs	Nimbus	Nimbus	Nimbus	Nimbus	Nimbus	Nimbus
All DRAM SAN SSDs	TMS	TMS	TMS	TMS	TMS	TMS
All Flash Unified SSDs	Nimbus	Nimbus	Nimbus	Nimbus	Nimbus	Nimbus
PCIe Adapter SSDs	Fusion-io	Intel	Fusion-io	Intel	Intel	Fusion-io
SAS/SATA SSDs	Intel	Intel	Intel	Intel	Intel	Intel
Cache SSDs	EMC	EMC	EMC	EMC	EMC	Fusion-io
NAS Cache Appliances	Cache IQ	Cache IQ	Violin Memory	Cache IQ	Cache IQ	Violin Memory
SSD Controller Chips	LSI	LSI	Intel	Intel	Intel	LSI
Hybrid HDD/SSD Systems	EMC	EMC	EMC	EMC	IBM	IBM







2013 SSD Brand Leaders







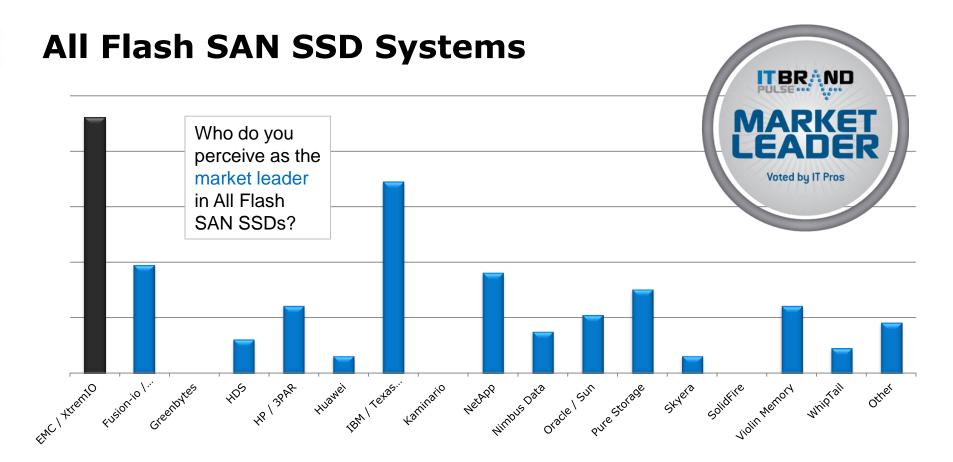




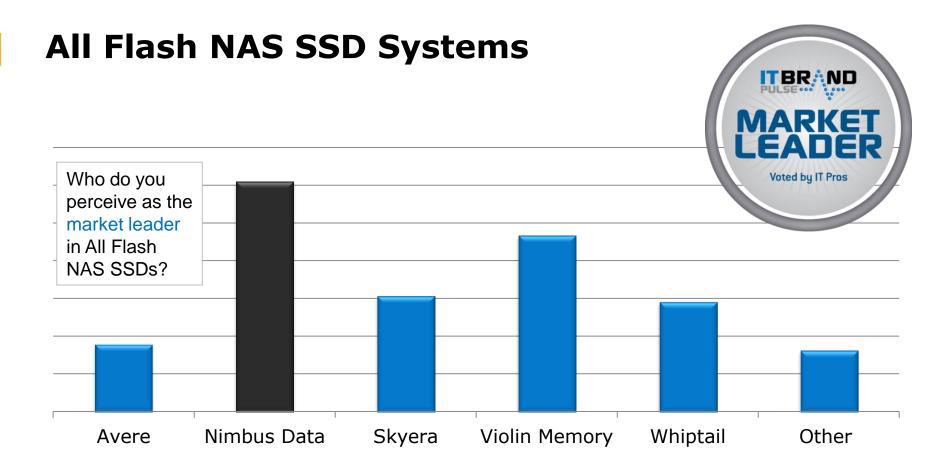


All Flash SAN SSD Systems	EMC/ XtremIO	NetApp	EMC/ XtremIO	EMC/ XtremIO	EMC/ XtremIO	EMC/ XtremIO
All Flash NAS SSD Systems	Nimbus Data	Nimbus Data	Nimbus Data	Nimbus Data	Nimbus Data	Nimbus Data
All DRAM SAN SSD Systems	IBM / TMS	IBM / TMS	IBM / TMS	IBM / TMS	IBM / TMS	IBM / TMS
All Flash Unified SSD System	Nimbus Data	Nimbus Data	Nimbus Data	Nimbus Data	Nimbus Data	Nimbus Data
PCIe SSD DAS Adapters	Fusion-io	Fusion-io, Intel, SanDisk	Fusion-io	Fusion-io	Intel	Fusion-io
PCIe SSD SAN Adapters	QLogic	QLogic	QLogic	QLogic	EMC	QLogic
SAS/SATA SSD Modules	Seagate	Western Digital	Samsung	Intel	Intel & Seagate (tie)	Samsung
SSD DAS/SAN Cache	NetApp	NetApp, SanDisk, FlashSoft	Fusion-io/ IO Turbine	Fusion-io/ IO Turbine	EMC, NetApp	Fusion-io/ IO Turbine
SSD NAS Cache Appliance	NetApp / Cache IQ	NetApp / Cache IQ	NetApp / Cache IQ	NetApp / Cache IQ	NetApp / Cache IQ	NetApp / Cache IQ
SSD Controller Chips	LSI/SandForce	LSI/SandForce	LSI/SandForce	LSI/SandForce	LSI /SandForce	LSI/SandForce

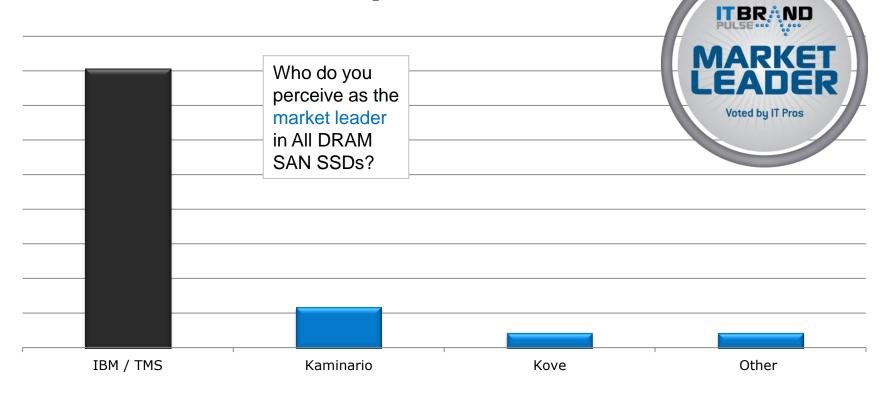








All DRAM SAN SSD Systems

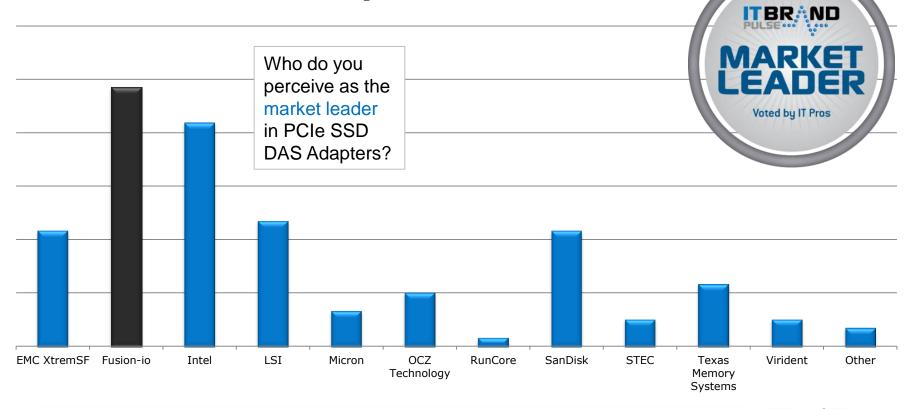




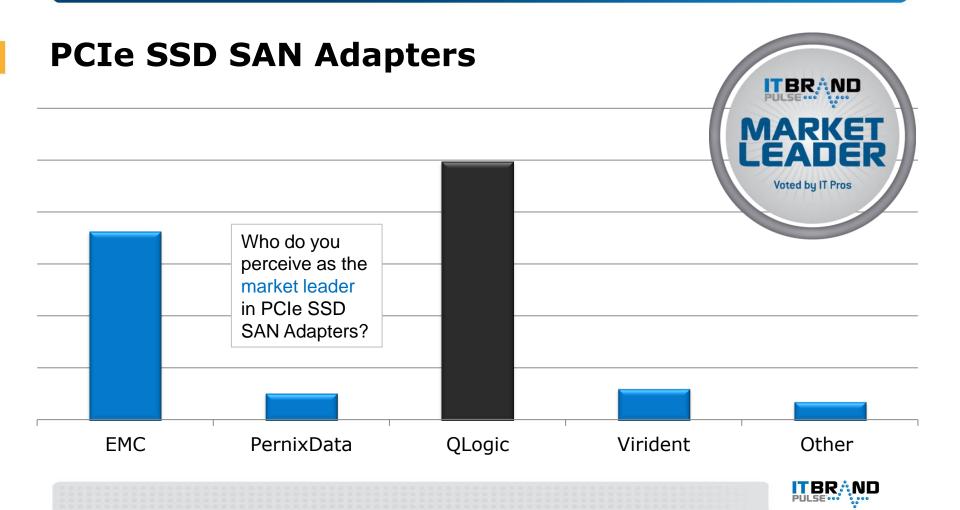
All Flash Unified SSD System Who do you LEADER perceive as the Voted by IT Pros market leader in Unified Flash SSD? Nimbus Data Skyera Whiptail Other

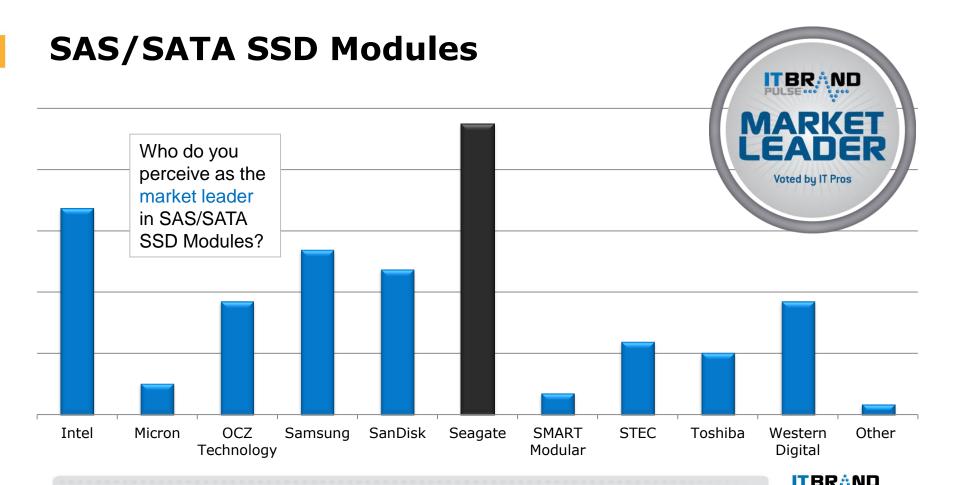


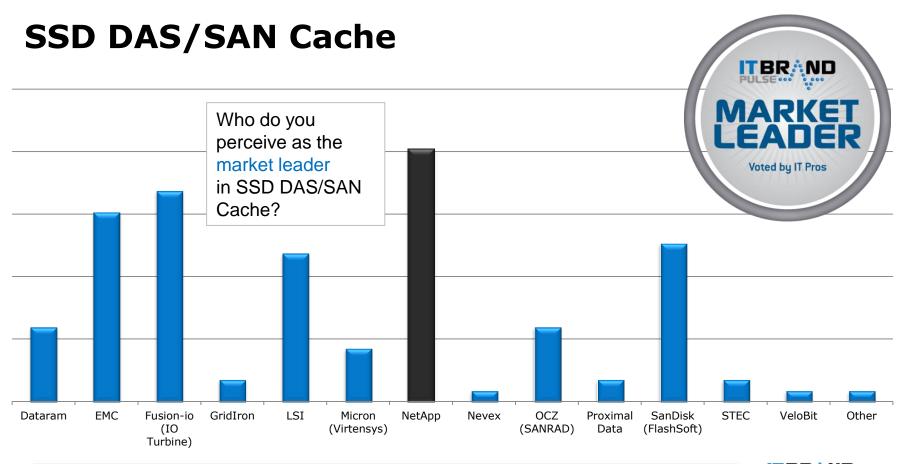
PCIe SSD DAS Adapters



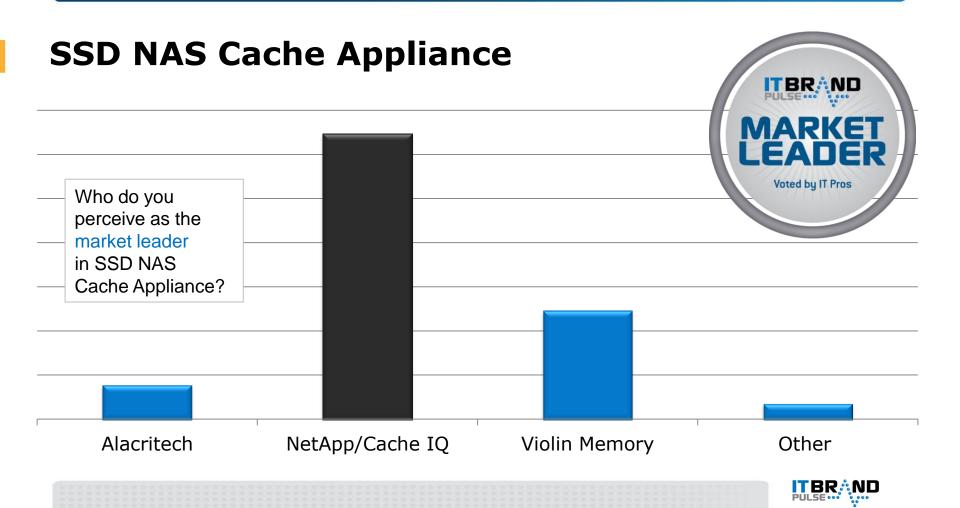


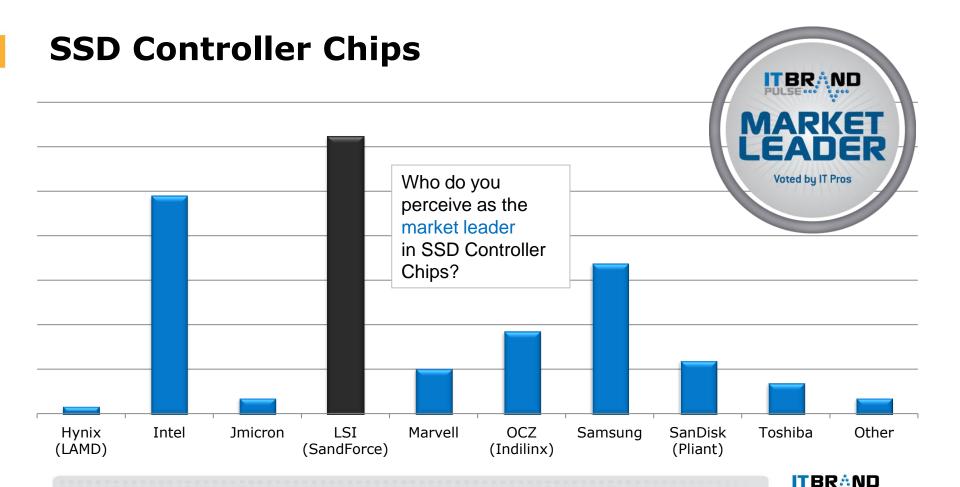


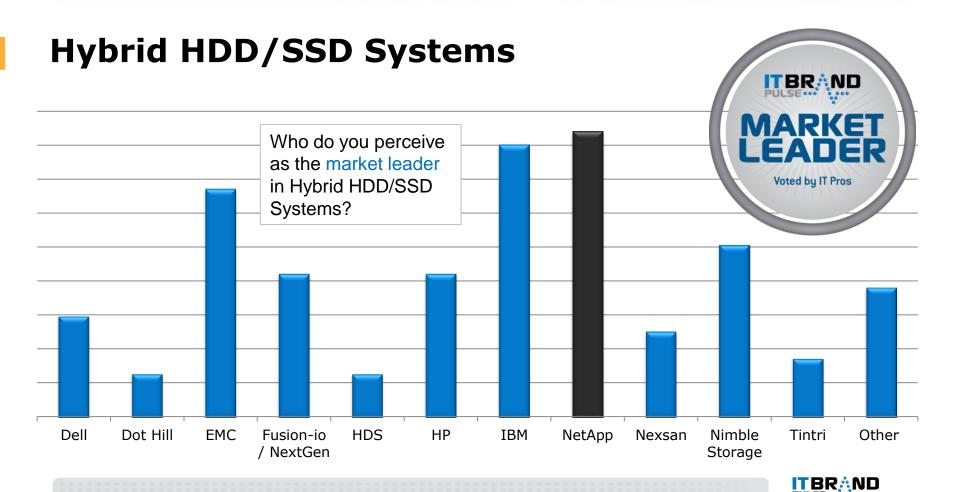














Flash Memory IT Brand Pulse



Flash Memory One Year Ago



2013 SSD Brand Leaders



Flash Memory 2013 SSD Adoption Trends

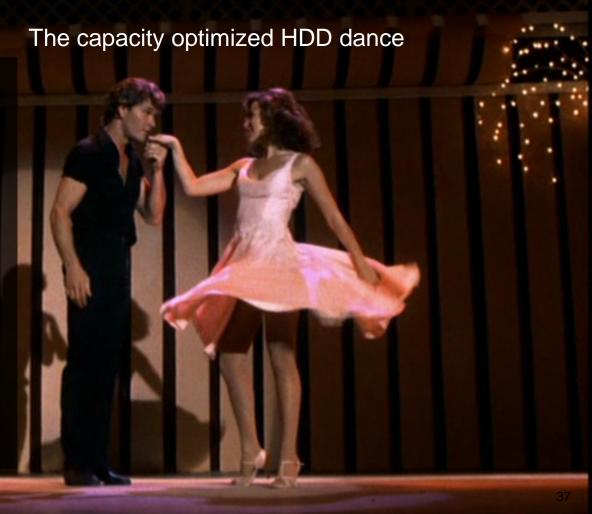


SOMETIMES YOU CAN'T

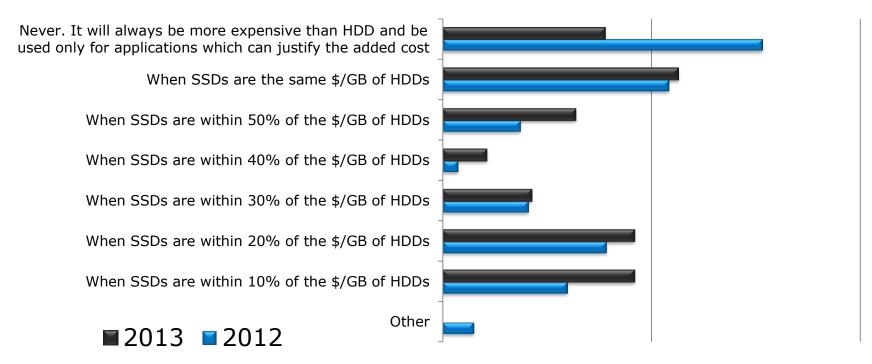
If there is not enough supply

"If you can't get rid of the skeleton in your closet, you'd best teach it to dance."

George Bernard Shaw

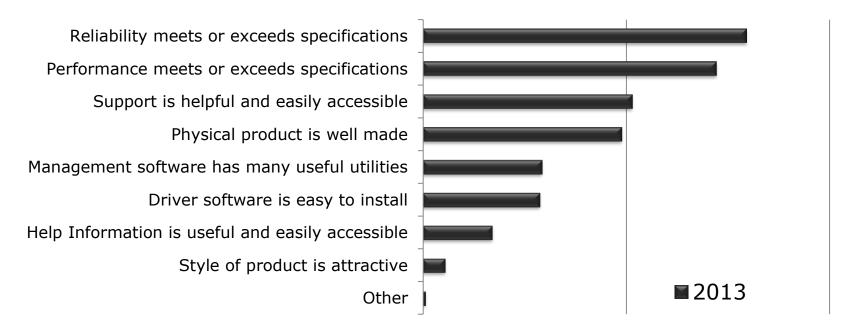


My organization plans to completely replace HDDs and deploy SSD as primary storage:



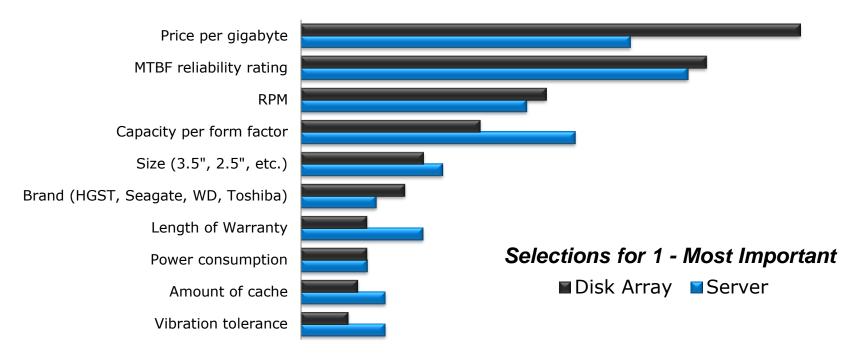


If QUALITY is defined as the ability to meet or exceed its intended purpose, which of these features are metrics for ENTERPRISE HDD QUALITY (select all that apply):





Rank the importance of these features when you select an Enterprise HDD:

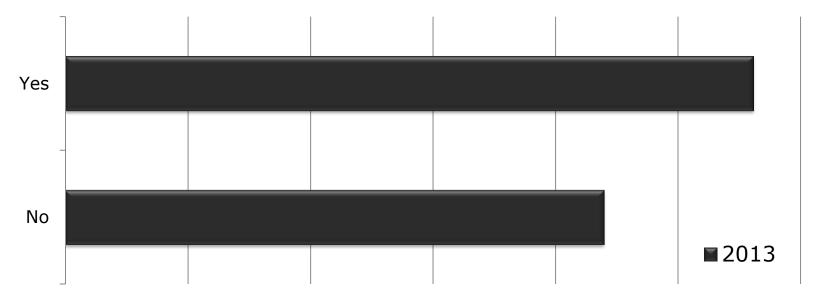




HDDs inside my organization's DISK ARRAYS were selected by:

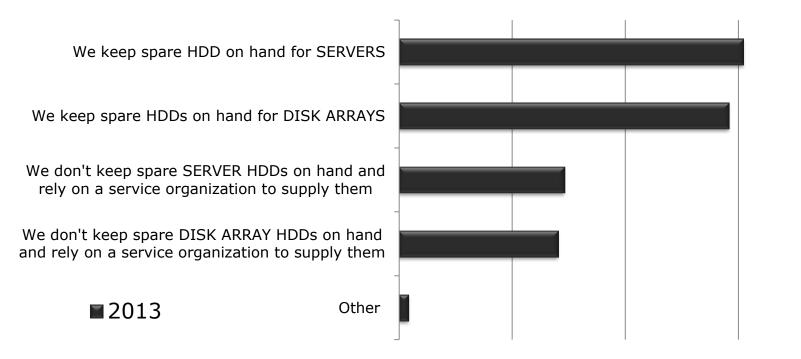


My organization mixes different types of disk drives in our disk arrays in order to achieve the best cost for the reliability, capacity and performance we require:



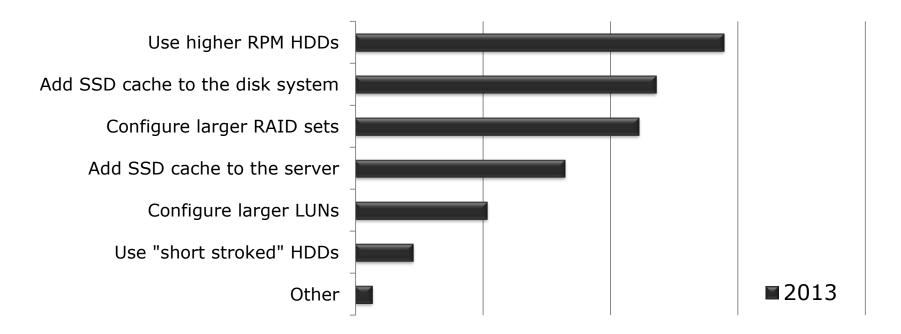


We use the following strategies for maintaining spare Enterprise HDDs (select all that apply):





What I do to increase the performance of my disk arrays is (select all that apply):







My organization uses the following SSD strategies (select all that apply):

Use disk-based storage because SSD is too expensive

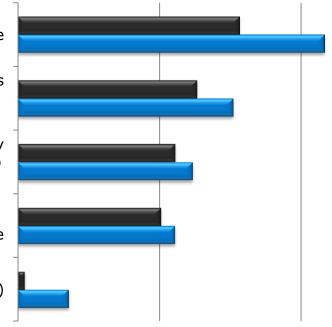
Use SAN based SSD arrays because the performance is much better than disk-based SAN arrays and it can be shared by all servers

Add SSD to disk arrays because we trust our disk array products and vendors, and we are familiar with how to deploy and manage them

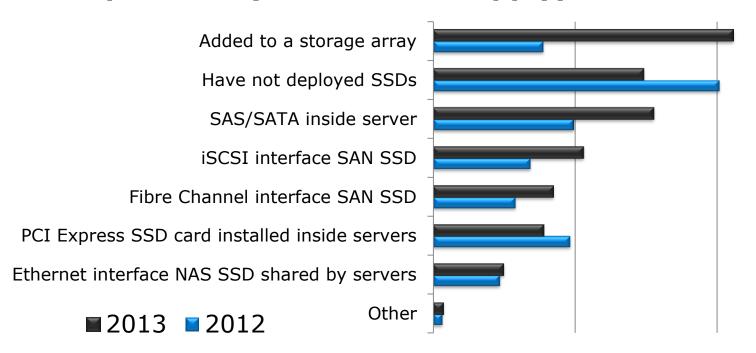
Use server based SSD because it is closest to the processor thus offering the absolute best performance

■2013 **■**2012

Other (don't know)

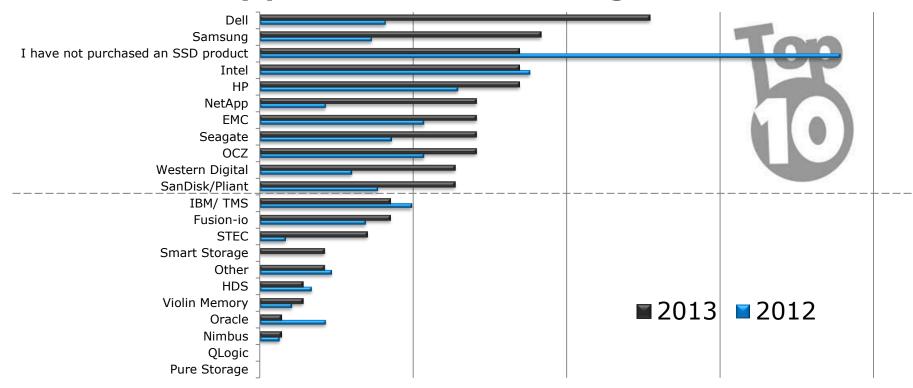


My organization has deployed the following types of SSD products (select all that apply):



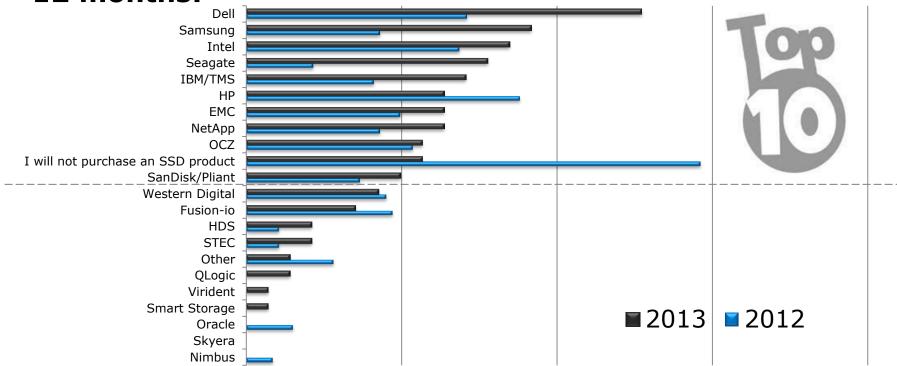


I have already purchased the following brands of SSD:



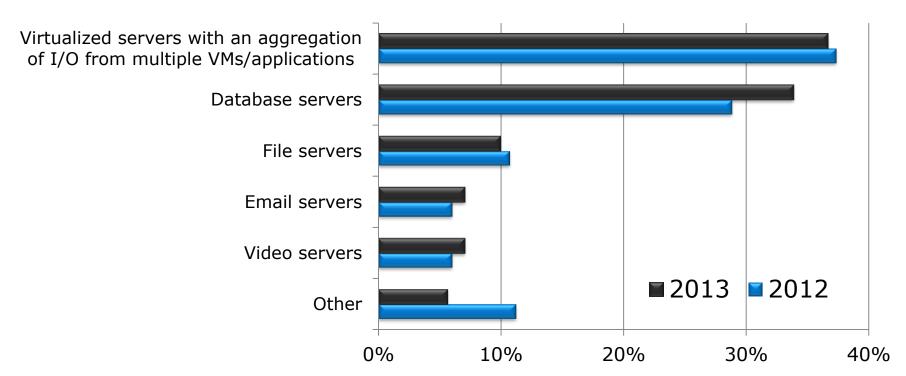


I will purchase the following brands of SSD in the next 12 months:



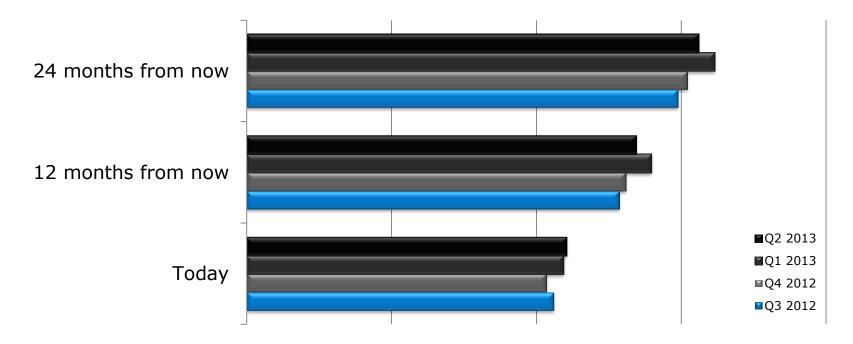


The following type of server most driving the adoption of SSD in my environment is:



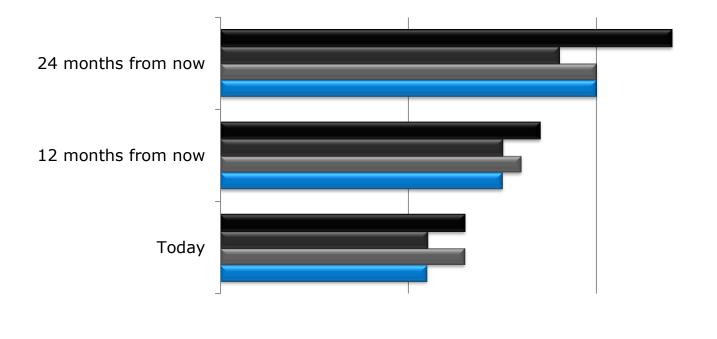


The percent of physical servers in my environment which are virtualized:





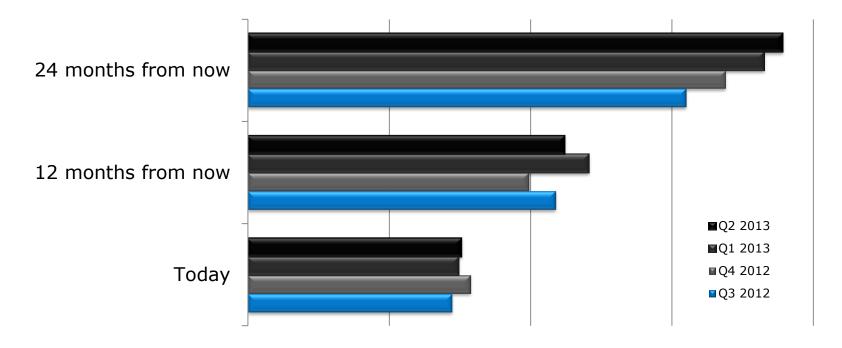
The average number of VMs per server in my environment:



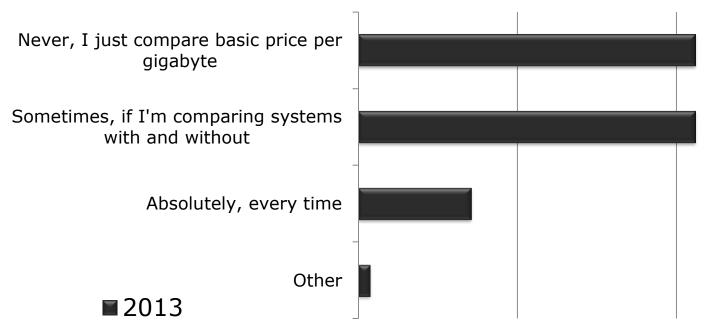
■Q2 2013 ■Q1 2013 ■Q4 2012 ■Q3 2012



The percent of clients in my organization using virtual desktops:

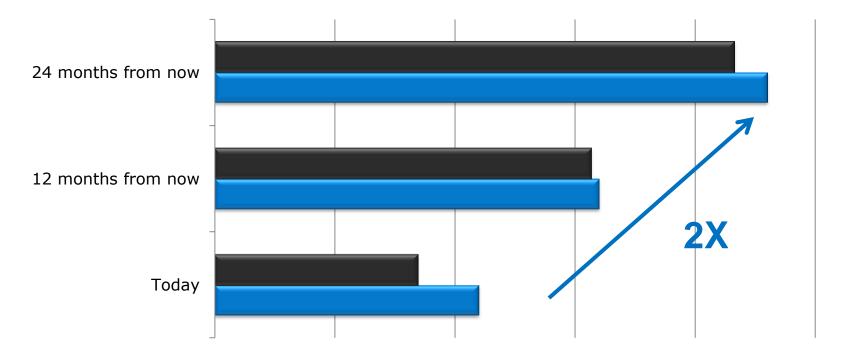


When I purchase HDD and SSD storage, I factor in compression, de-duplication and thin-provisioning to calculate my price per "usable" gigabyte:



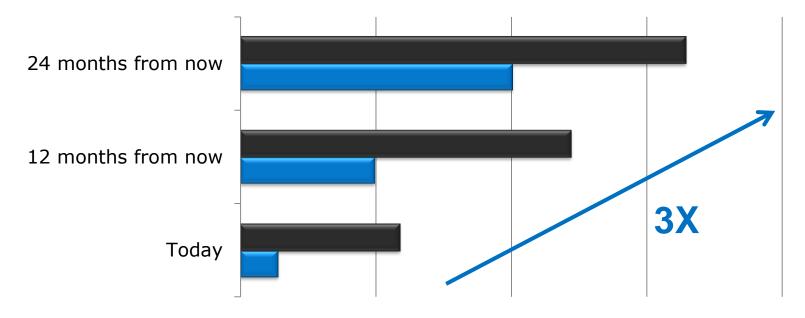


Percent of servers in my environment accessing some type of SSD storage:





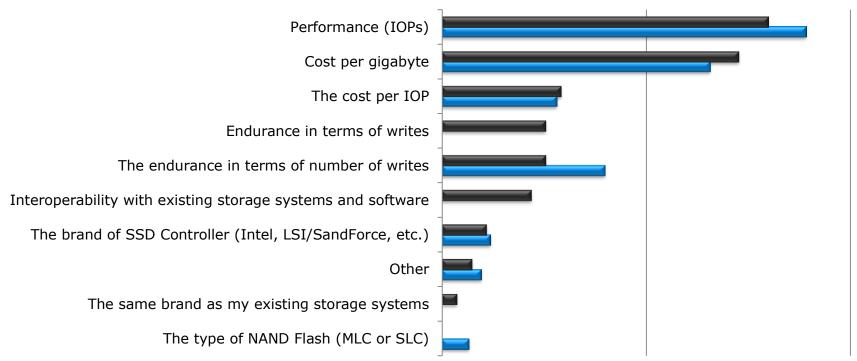
SSD will comprise approximately this percentage of my organization's combined SSD and HDD disk capacity:





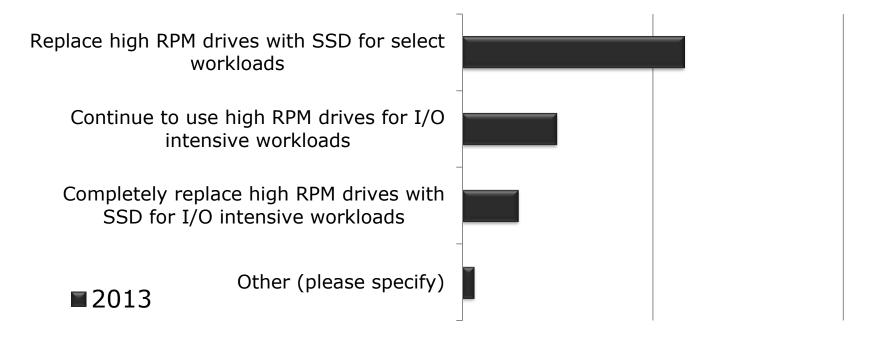


The most important feature of an SSD for my environment is:



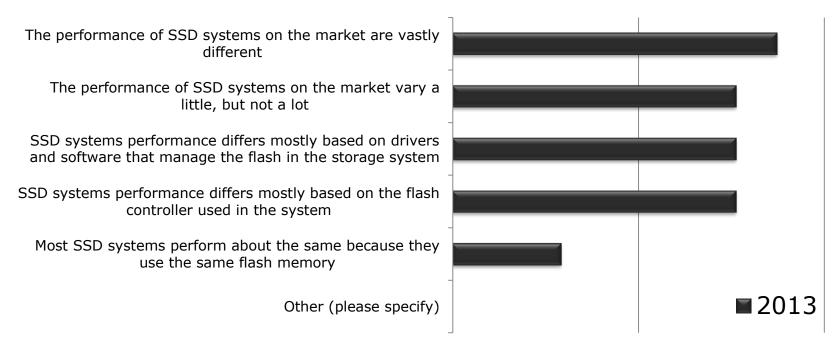


My organization's strategy for SSDs vs. High RPM Drives:





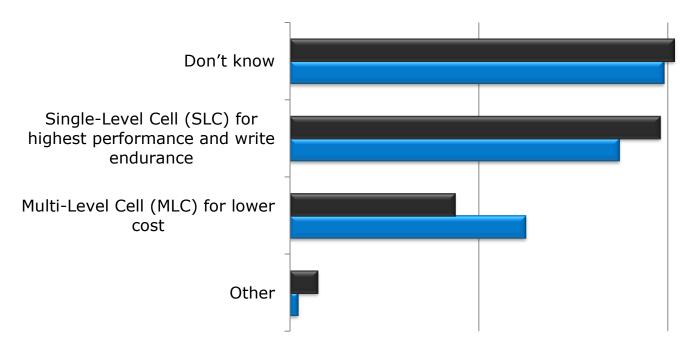
Regarding the performance of SSD systems, I believe (select all that apply):





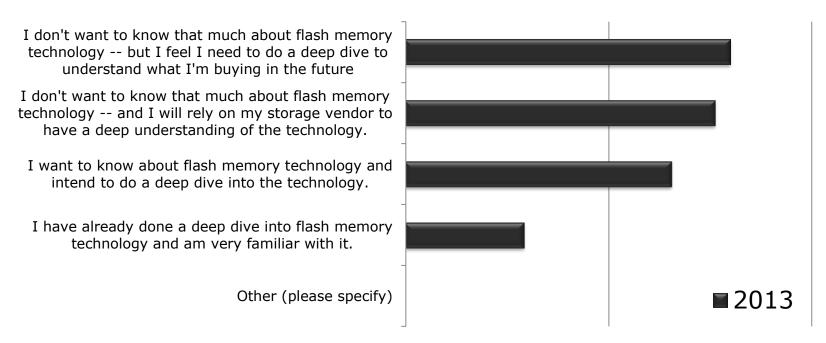


SSDs with the following type of NAND Flash are best suited for my environment:



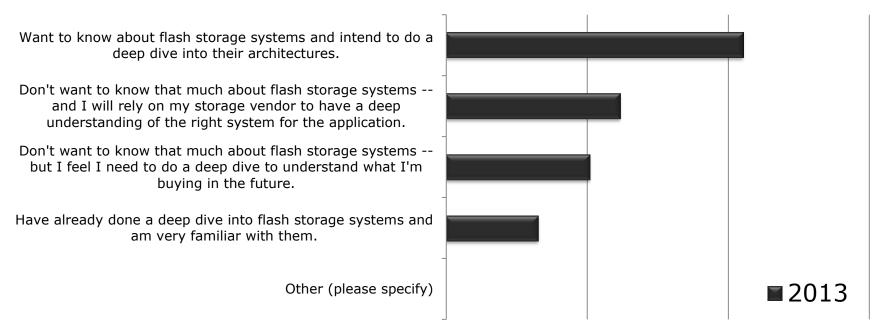


There are different types of Flash Memory (MLC, SLC, TLC, etc.) with new characteristics that define how it works in the data center (wear leveling, write endurance, etc.):





There are different types of Flash Storage systems (All Flash Arrays, Hybrid Arrays, PCIe cards, etc.) with new characteristics that define how they work in the data center (software defined vs. plug-and-play SSD, captive PCIe vs. shared PCIe SSD, permanent storage vs. cache, etc.). I:



The most strategic (irreplaceable) component of a complete SSD storage solution is the:

System availability applications such as snap-shot, replication and path management (failover). Storage management applications such as autotiering, de-duplication and thin provisioning. SSD hardware system The SSD controller within the hardware system. SSD driver and device management software Other (please specify) **2013**





I see Software Defined Storage as a technology that:

Will emerge as a class of storage
virtualization software separate from the
storage hardware--and more important than
the commodity storage hardware.

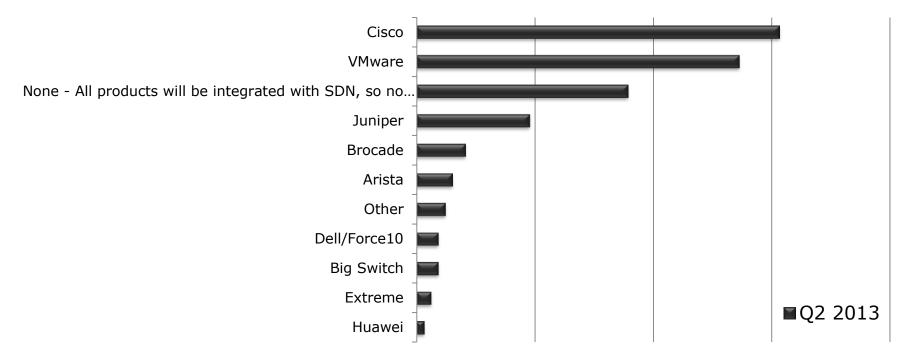
Is an inseparable feature of an enterprise
storage "solution"

Other (please specify)

2013

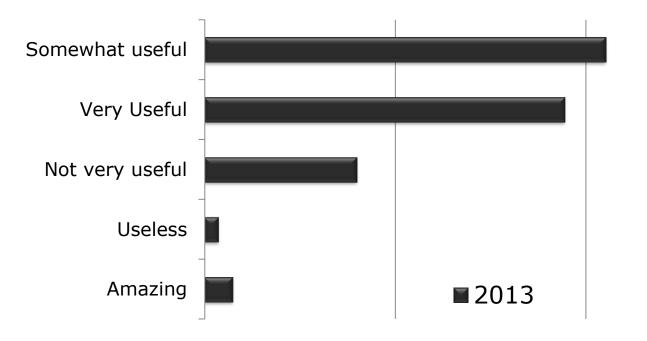


The following company is most likely to gain significant market share as a result of the transition to software defined networking (SDN):



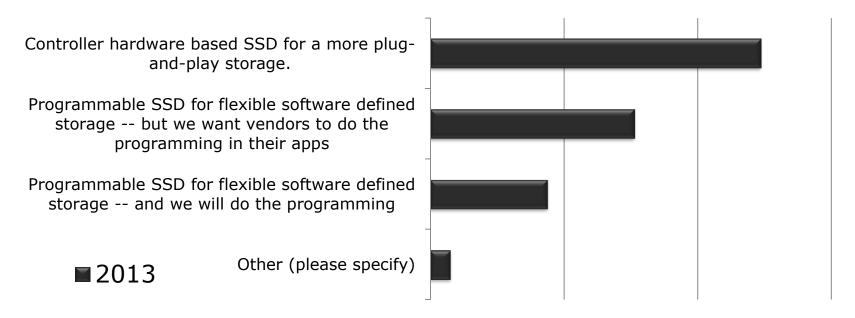


Technology is emerging which allows cache across PCIe SSD cards in different servers to be pooled in a SAN, and provisioned as needed in LUNs. Pooling PCIe SSD cache across servers. I consider this technology:



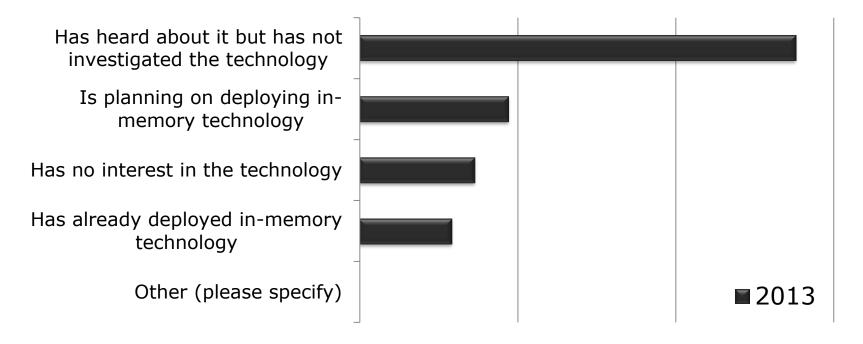


Some SSD products are "programmable" so they fit into a software defined storage environment. Other SSD products have most functions embedded in the controller hardware. What is best for my organization in the future is:



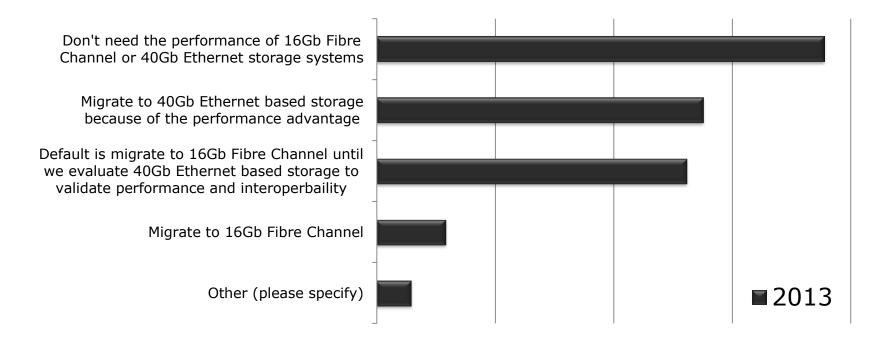


In-memory processing is where data is loaded into DRAM (or flash memory) instead of hard disks so IT spends less time on data modeling, query analysis, cube building and table design. My organization:





Storage system network interfaces are making speed jumps in the next year to 16Gb Fibre Channel and 40Gb Ethernet (NAS, iSCSI and FCoE). I would describe my organization's strategy for next generation storage to be:





Enterprise Market Tectonics

Left the premises and quickly replacing the PC as enterprise client.

Laying fiber in Kansas City and Austin.
Using inexpensive HS, SW & service model.

Content/ Apps SONY

Cloud Data Centers Enterprise
Data Centers

Mobile Clients



Hyper-Scale Google



Carriers

Cloud computing services a high priority



Building private clouds.

Expensive HW, SW, and service model.

Talking to Enterprise CEOs and CFOs about replacing their "legacy on-premises infrastructure". Using inexpensive HW, SW & service model.

IT sees they're paying a higher toll



Mature Global Industries







Enterprise IT Industry









Inflection Point

Business goes on the new heights

ICT Cloud Big Data Globalization

10x change in an element of the business. What worked before doesn't work now. The executives are the last to know.

Source: Only the Paranoid Survive, by Andy Grove

Business declines

Wanted: A New Class of Enterprise Infrastructure

Traditional Enterprise IT





Private Cloud IT



Enterprise Ready Cost Competitive Forward Looking

<Your name here>

Public Cloud Open-Source





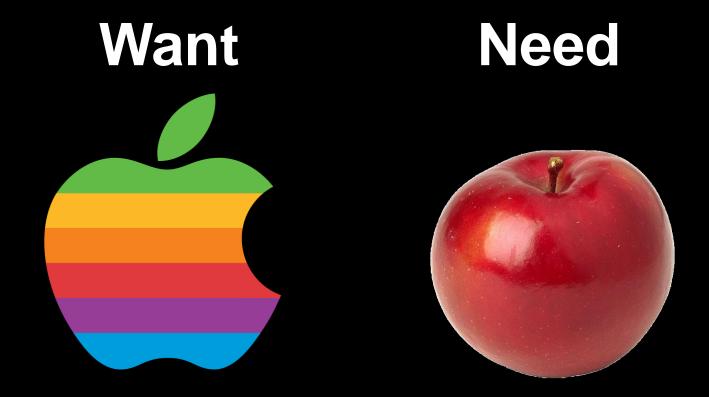








The bottom line



Media player customers recognize the added value of solid-state and pay a premium up to 10x (1,000%)

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Sony DEJ011 CD Walkman« Portable CD Player by Sony

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******* № (131)

Eligible for FREE Super Saver Shipping.

Electronics: See all 17,594 items

Solid State Media Player (~\$400)



iPod shuffle \$49



iPod nano From \$129-\$149

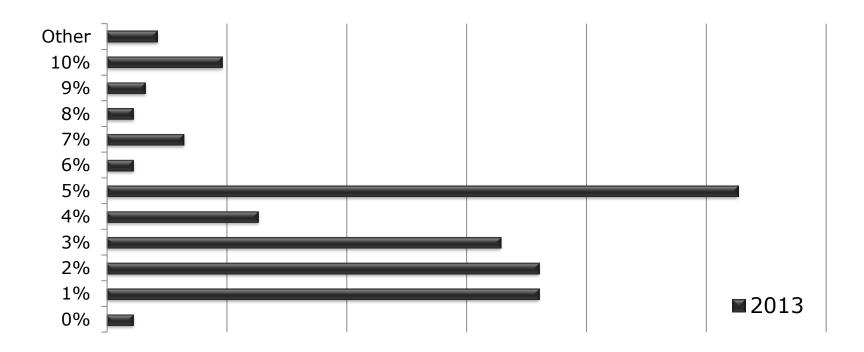


iPod classic \$249



iPod touch From \$199-\$399

I estimate approximately this percentage of Enterprise HDDs in my organization's SAN arrays and servers will FAIL every year:





Describe the "perfect" HDD for your Enterprise server and storage systems:

- One that doesn't fail in say 8 10 years and create less heat for the server room.
- 24 hour up time, low heat, highest throughput
- high rpm, medium capacity (so i can get more read-write h
- Both high capacity capacity SSDs.
- **NEVER FAILS** cheap, fast, good. to only two of thes
- zero latency, low power, high mtbf, low cost, high capacity.
- Reliable, ease to manage and price sensitive
- Included in a server or a SAN
- Free, fast, and big
- All SSD's!
- Low cost/GB
- High MTBF Small form factor
- Low power consumption"
- Highest reliability in a high temp environment with a cost effective deployment
- fast, huge, power thrifty and reliable
- High MTBF, low price, state of art capacity
- Fast, reliable, inexpensive
- Reasonable price and fast that can be used for tiering data on storage arrays
- Very reliable
- Inexpensive
- high capacity, large cache, low power, great reliability, medium speed
- High rpm, high mttf and low cost
- Fast, reliable, inexpensive per GB
- full SSD san and nas
- Fast, reliable, cheap
- Fast, Reliable and Inexpensive

- All 100% SSD when the prices are reasonable.
- Fast, large and reliable.
- High performance SSD for those applications that would benefit the most. HDD for those applications that are not disk heavy and can do very well with slower low cost

ailures and longer warranty ity, low power consumption, like SATA - good luck

- It should be scalable and sustainable
- Reliable with good warranty.
- High performance, high MTBF.
- Good performance, high capacity, never crashes
- Fast, reliable, and cheap.
- None
- **NEVER CRASHES**
- HDD
- No comment
- Fast, cheap and reliable.
- Don't know
- ultra fast, high capacity, extremely high throughput
- The perfect HDD would be fast, reliable, and selfmonitoring to allow for proactive maintenance.
- "Infinite space, infinite reliability,
- My concerns are really SMART predictive drive failure. low power, medium high performance, medium high reliability. My systems are redundant, so a blown drive is not a big hiccup, as long as I don't lose to many at once. Predicative failure via SMART has really changed how I feel about drives and drive maintenance."
- Low cost, high capacity, low MTF
- high rpm. lots of cache
- Meets the criteria listed above.
- Low cost, high cap, SSD
- Integrates with our current storage architecture.
- one that is fast and never fails

- 10K 900GB SAS 2.5"
- Large SSD, Low Price
- Reliable and self-healing.
- Largest capacity, fastest, highest cache, lowest price,
- Cheap and lasts forever.
- One that is donated, and support is provided as well, and works well for us.
- WD has a high reliability for us and is a solid brand that our vendor carries.
- Fast, reliable and inexpensive
- One that you put into the device and never have to worry about.
- Faster
 - SSD drive form factor 2.5 inch. low power

, highest IOPS, largest

nd price with a long MTBF.

- Replace all HDD with SSD high performance and low price
- Long lasting, inexpensive, fast, stable.
- Fast, cool, reliable

High tolerance

Reliable, adequate performance (seek time and transfer

- Lasts forever and then some while giving me constant performance.
- big fast and cheap:)
- Reliable
- High performance, Low cost, No failure
- two builds,: 1 based on capacity & 1 on performance
- cheap and fast
- Fast and reliable
- Fast, reliable, cheap
- Low cost/GB and high reliability
- Fast data throughput and high MTBF.
- reliable and cheap
- High reliability and capacity at a quality price.
- Very reliable, fast RPM, high capacity, low latency
- fast, reliable and cheap
- Reliable / MTBF high, Excellent support / maintenance, cost, security / encryption features, ease of use
- Low cost, SSD high capacity
- MTTF of 10 years.
- 7200 RPM or greater.
- 2.5"" form factor.
- 3+ TB "
- Huge capacity, fast speed, large cache, never breaks. uses very little power, quiet operation.
- An HDD that delivers the performance and reliability our organization requires.

NEVER HAVE TO WORRY

st of a spinning

- Fast and reliable.
- Not sure
- high performance
- Fast, large, reliable, inexpensive application to allow for my department to acquire the five (9's).
- reliable and cheap
- Fast I/O, cheap price per GB, reliability

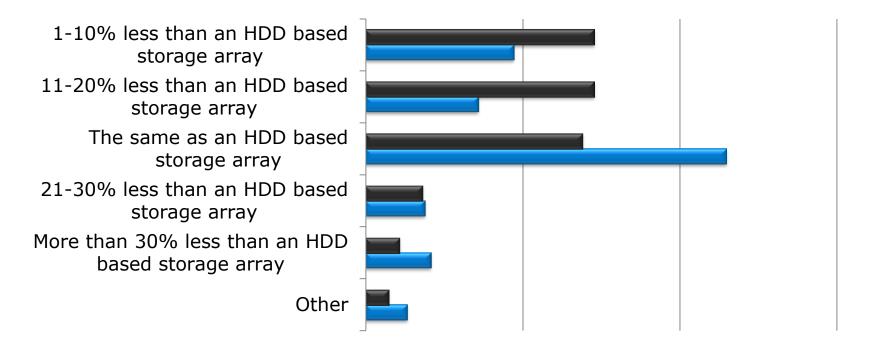
A low cost, high capacity SSD

Adaptable hybrid

- None.
- fast and reliable!
- 15k RPM, 2.5" form factor, 900G, 16G cache
- NA
- Cheap and never fails, no latency, 25K RPM
- High bandwidth, IOPS and MTBF

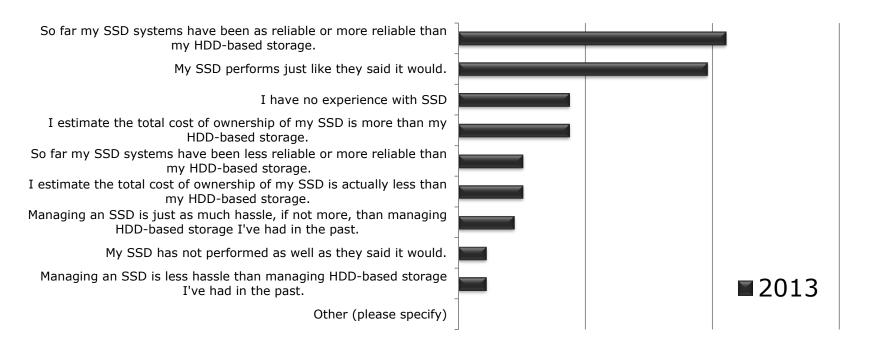


By eliminating HDD crashes, I expect the operating costs of SSD based storage arrays to be:



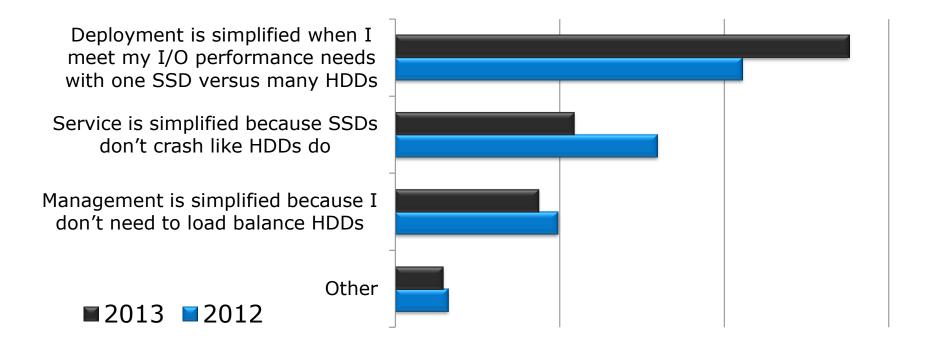


My experience with SSD so far (all that apply):



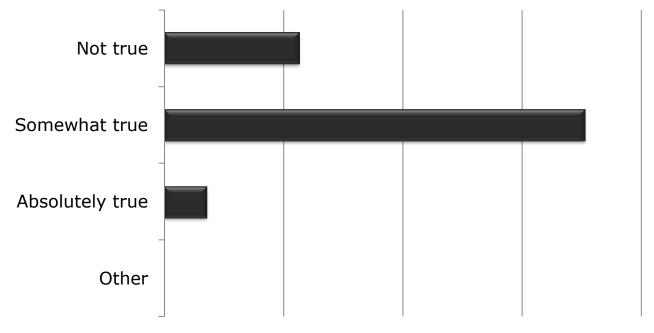


What I value most from SSDs is:





A substantially longer warranty period for SSD storage systems is a strong indicator that SSD technology is more reliable than HDD storage systems. I believe this is:









This report includes charts without numbers. The report with numbers is available for \$1,500. Contact cheryl.parker@itbrandpulse.com to order.



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