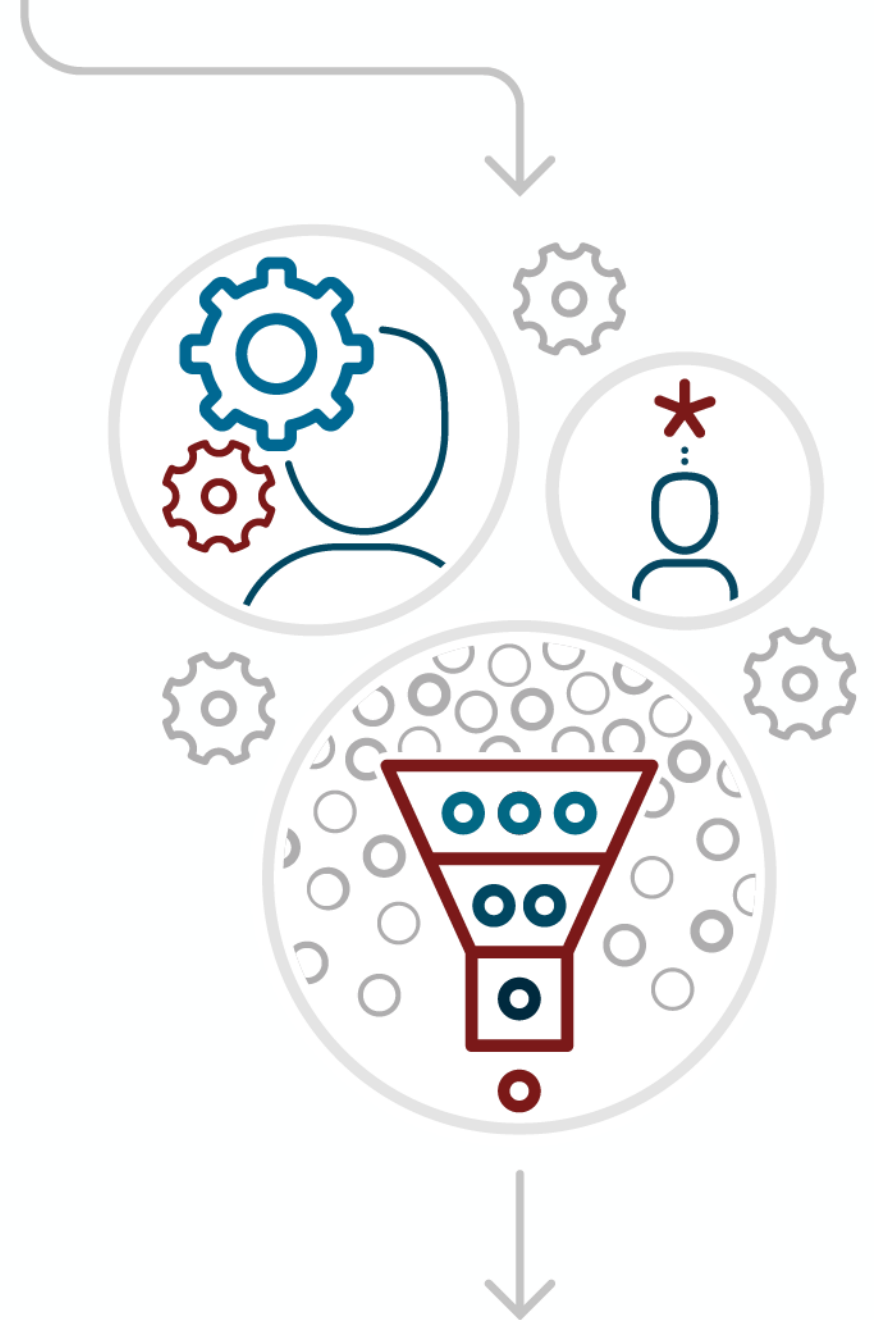


FSOL-302B-1:
**Flash Solutions
for AI/ML**

Jillian Coffin | VP & Publisher

August 8, 2019



Jillian Coffin

VP & Publisher, Storage, Cloud & Data Center

- Oversees the editorial, audience development, and sales and consulting efforts across website communities including **SearchStorage**, **SearchCloudComputing**, and **SearchITChannel**
- Jillian has been working in the **data storage community** for **12+ years** sharing purchase intent data with both established and emerging storage vendors who need to better understand changing market dynamics and maximize growth opportunities
- TechTarget is the leading source of independent enterprise storage and flash technology content on the web and helped make it into a trusted resource to aid IT and business leaders in making informed decisions.



Session Panelists



VR Satish

Founder & Chief
Technology Officer



Ramnath Sai Sagar

Product Marketing Lead,
AI & Deep Learning



Tom Lyon

Founder and Chief
Scientist



Mat Gruen

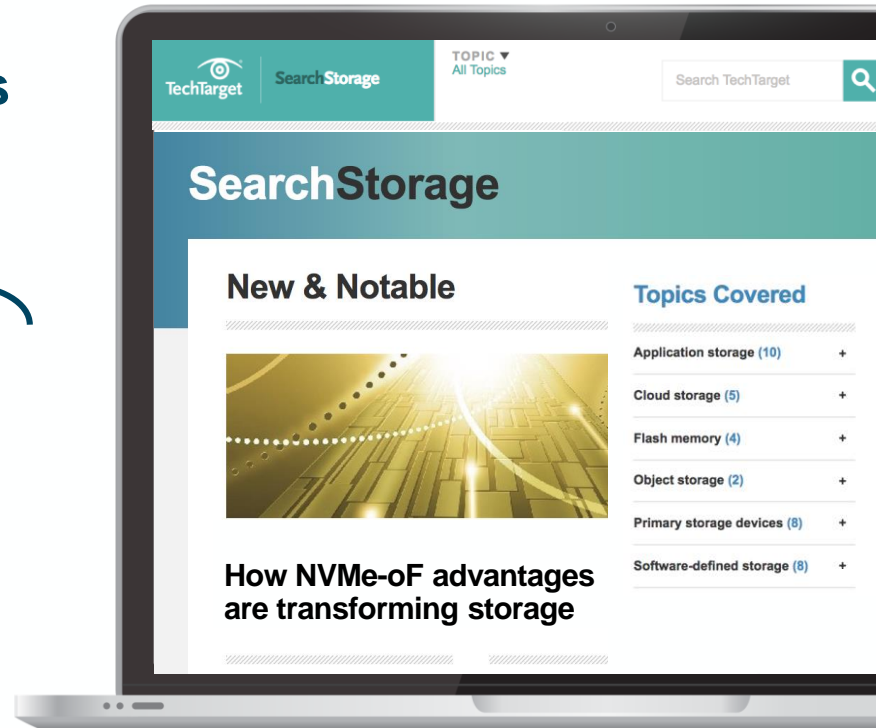
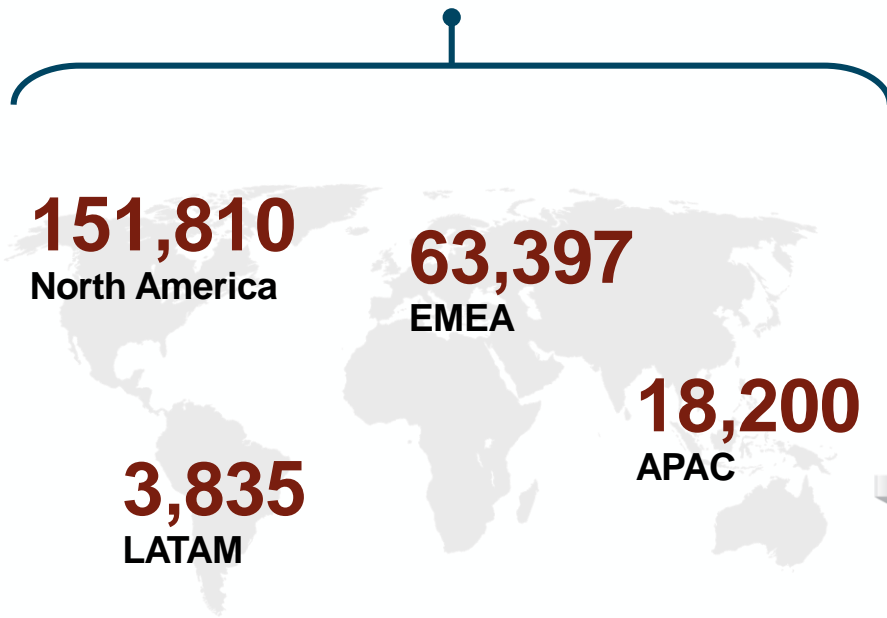
Senior Director
Channels



TechTarget's Storage audience

1.3 million Storage members globally

Storage and infrastructure buyers active in the last 90 days¹



650K+ SearchStorage.com monthly page views

NVMe & NVMe-oF appetites increasing

2.6M+

Activities taken around Flash & NVMe in the past year² (up 24% YoY)

90%

Increase in NVMe/ NVMe-oF activities since last year²

580+

Flash and NVMe related pieces of content published on the TechTarget network in the last year alone

TechTarget's AI/ML audience

1.7 million+ page views in the 1st year post site launch

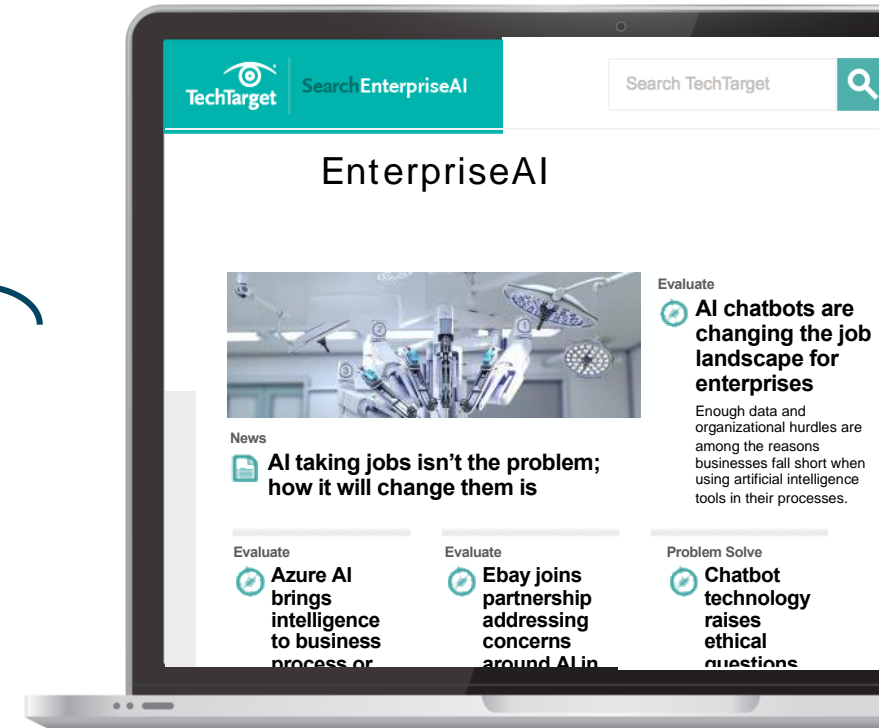
AI/ML Total Addressable Market in the last 90 days¹

112,000+
North America

62,100+
EMEA

35,400+
APAC

2,400+
LATAM



142K+ SearchEnterpriseAI.com monthly page views

55%

increase in page views across AI-related content in the past 3 months

11,800+

accounts active around AI/ML in the last 90 days (NA)

82%

Net new researchers on SearchEnterpriseAI since last year

About TechTarget Research & Data

We sit on a vast amount of research and purchase Intent Data that allows us to analyze the latest trends, behavior and insights from our wide range of audiences

- **Annual IT Priorities Survey** is fielded to 4000+ global technology and LOB buyers to gather market insights on broad initiatives, technology adoption, budgets, and plans for the upcoming year
 - *Regions surveyed 35% NA; 30% EMEA; 30% APAC; 5% LATAM*
 - *Company sizes range from large enterprise to SMB (50% from \$10M+ annual revenue)*
- **Quarterly Pulse Surveys** are fielded to 300+ respondents across targeted markets to better understand emerging techs, market disruption and key areas of change
 - *Recent Pulse Surveys include: AI/ML, SAP, MSP, Flash & NVMe, DevOps)*
- **Qualified Sales Opportunities Data** taken from 32K projects over the last 12 months across 80 technology markets
- **Priority Engine intent data** garnered from 200+ topically focused segments that represent the most active organizations week over week

20 years

of publishing technology-specific content

150+

global B2B websites covering over 5,000 technology topics

19.7M

IT and Business professionals opted-in and **GDPR compliant**

#1

B2B Marketing Data Provider (Forrester Wave 2018)



AI/ML State of the Union

AI unlocks the value of data to transform business in totally new ways

- AI is about Automation, Optimization, Prediction, Efficiency and Re-Imagination
- AI is gaining fast tracking, but still early innings...
 - Most orgs have yet to feel the full effect of AI, still determining where/how it can be most effective.
 - There's still a lot that algorithms don't know (training data limitation, algorithmic bias, ambiguity in how to apply results)
- Has led to a narrower “think big, but start small” project mindset
 - Further emphasis placed on aligning projects with improving business goals.
- Looking ahead to 2H 2019, topical areas of focus include:
 - Digging further into deep learning technology and use cases
 - Machine learning frameworks – platforms, uses, do's and don't
 - AI in robotics and process automation
 - General coverage of AI tech advances, new uses in business

>50%

of Fortune 500 CEOs say their company is using AI

60%

Use AI to **improve efficiency and reduce costs**

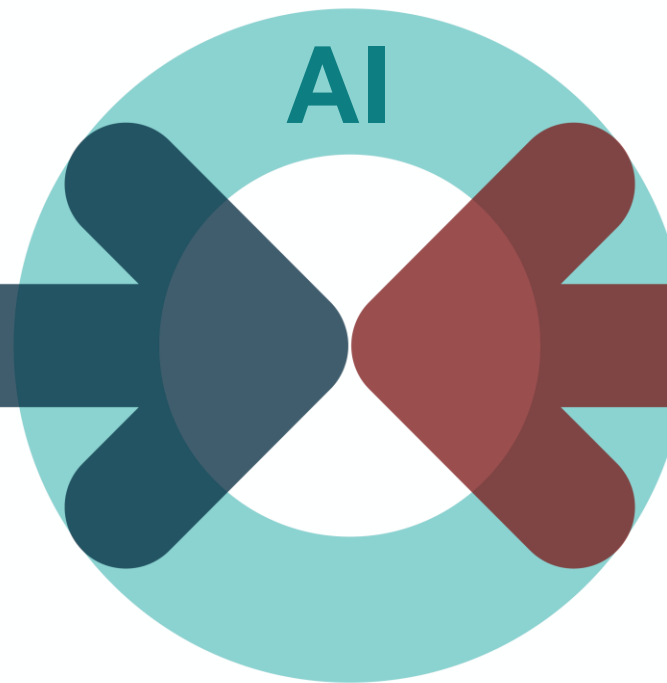
22%

use AI to **create new products and services**

Entry Point #1

AI that better enables enterprise IT

- Adding AI as a feature of existing technology to automate/improve the efficiency of IT systems, software and development efforts
- Key technologies with AI functionality:
 - Systems Management & Monitoring
 - Application Performance Management
 - Security Analytics/Threat detection
 - Predictive Storage
 - Networking/CDN
 - Business Apps (CRM, ECM, HR, ERP)



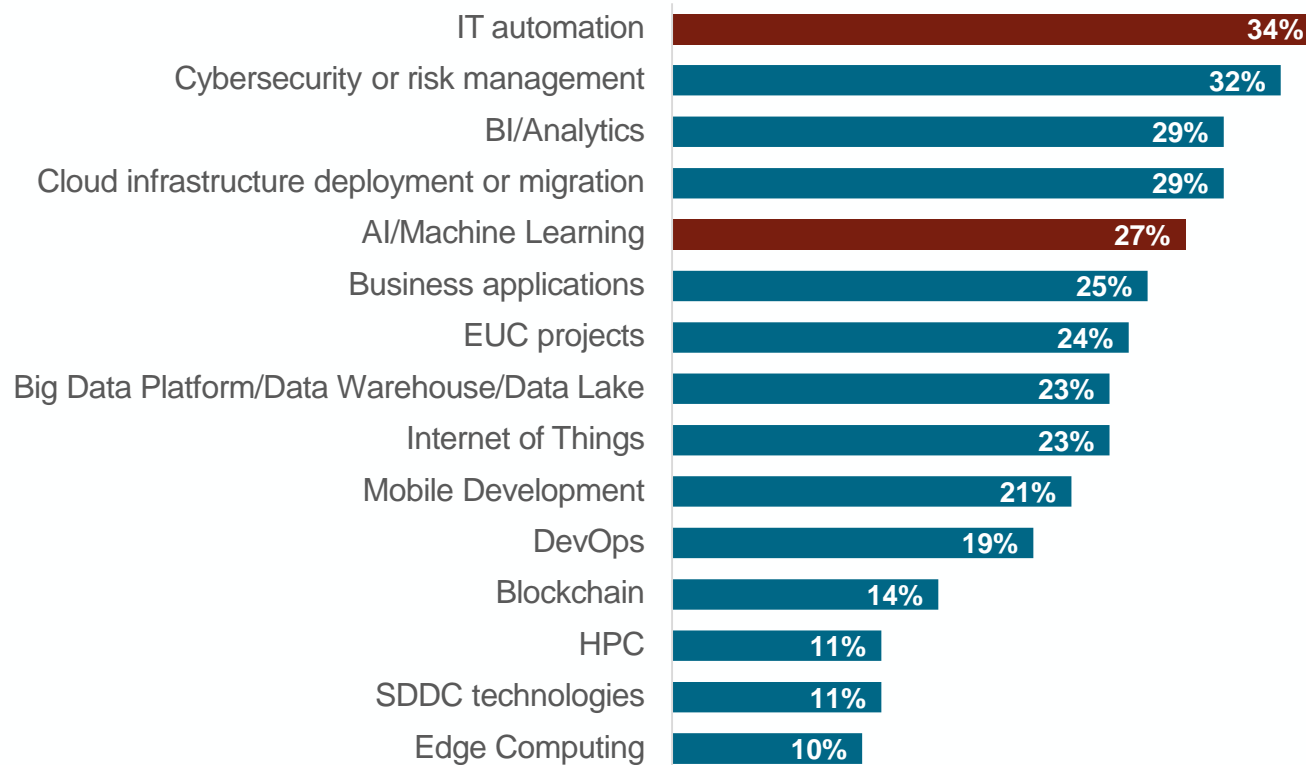
Entry Point #2

AI that creates new business opportunities, revenue streams

- AI's impact on business operations, AI strategies, use cases, (online search, HC, self-driving cars, HR)
- Natural Language Processing – (industry-specific use cases, building a chatbot strategy)
- Data Science Platforms – software for analytical insight, predicting supply/demand, fraud detection
- Machine Learning Platforms, algorithm training & modeling, supervised learning
- Building versus buying AI, vendor landscape, OS tools
- Facial/audio/voice recognition (Apple, crime prevention)

IT Automation & AI/Machine Learning both make the top 5

Which of these **broad initiatives** will your company implement in 2019?

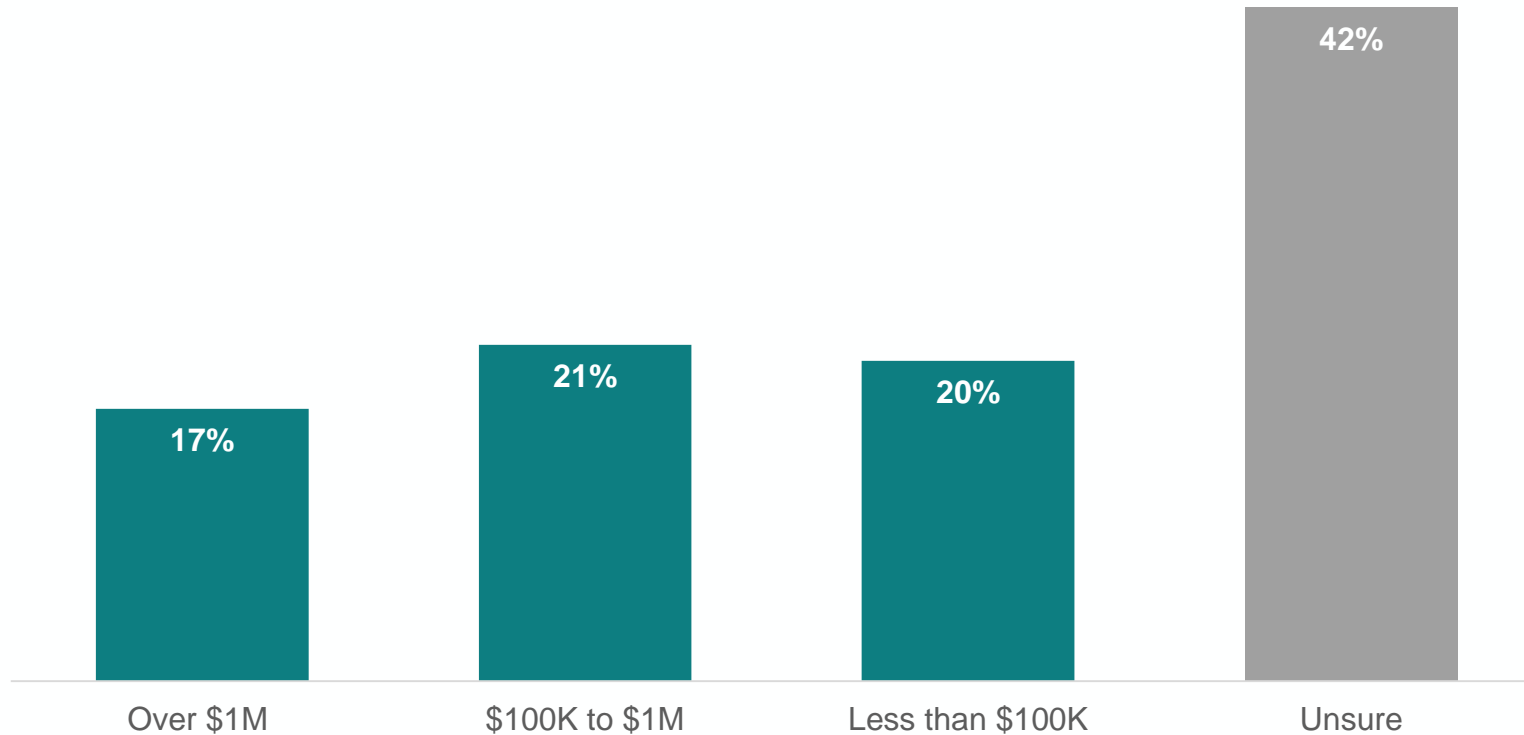


AI/Machine Learning

was the #1 Growth Initiative in 2018 and continues to be the **most widespread feature driving interest in software application upgrades, supplanting cloud**

Budgets for AI are Increasing

How much budget do you plan to spend on AI this year?

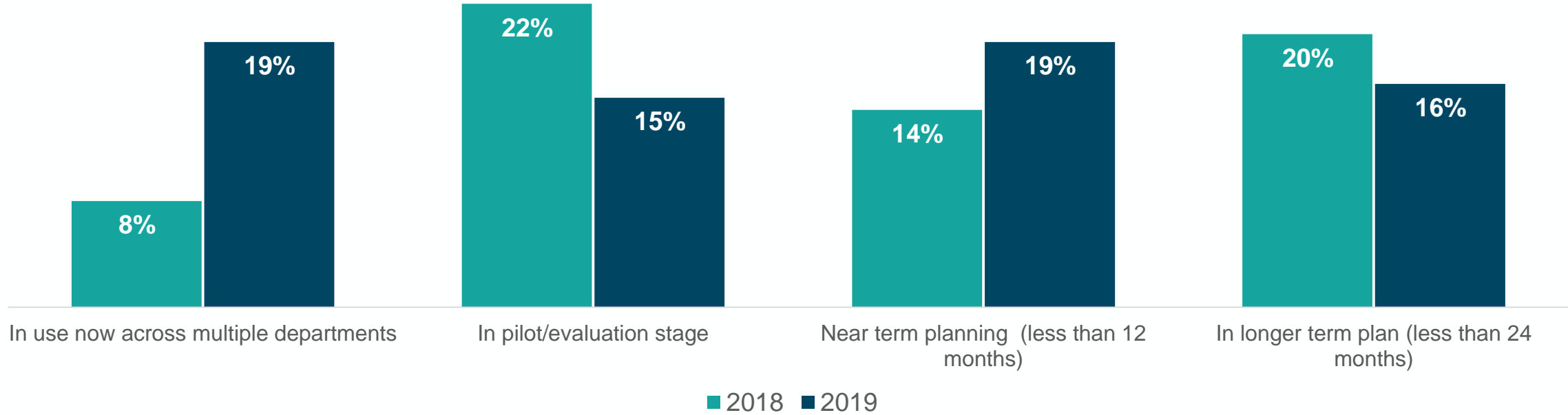


25%

companies plan to spend **over \$500K** on AI this year, compared to only **12% in 2018.**≈

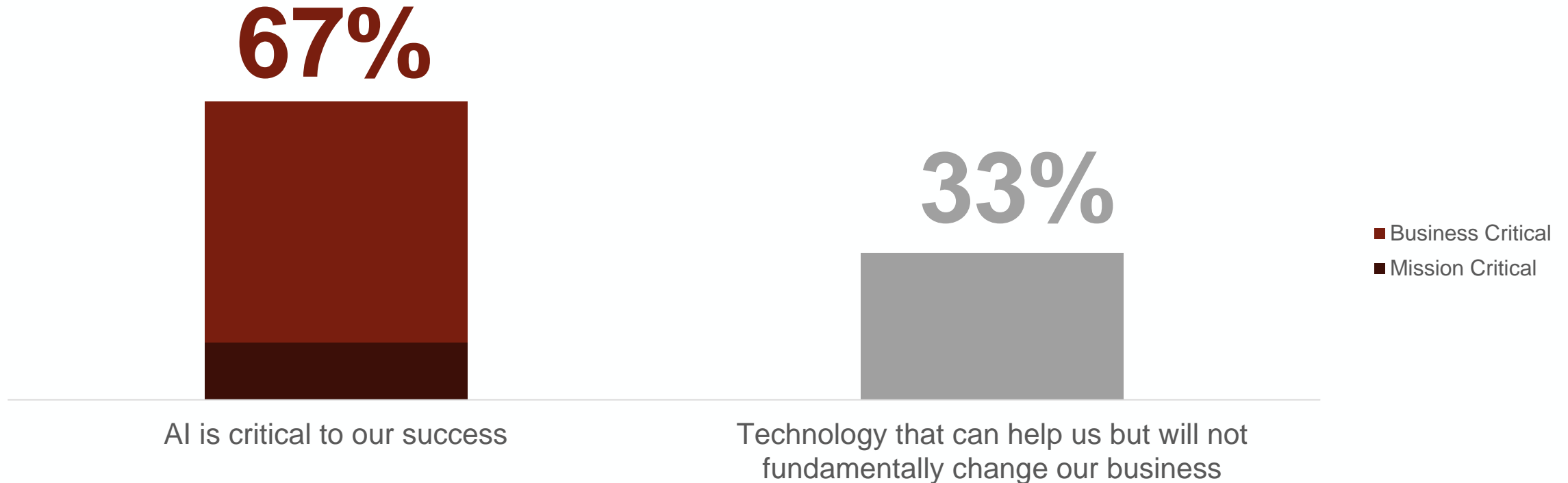
Status of AI/Machine Learning adoption

Which of the following best describes your organization's level of AI/Machine learning adoption?



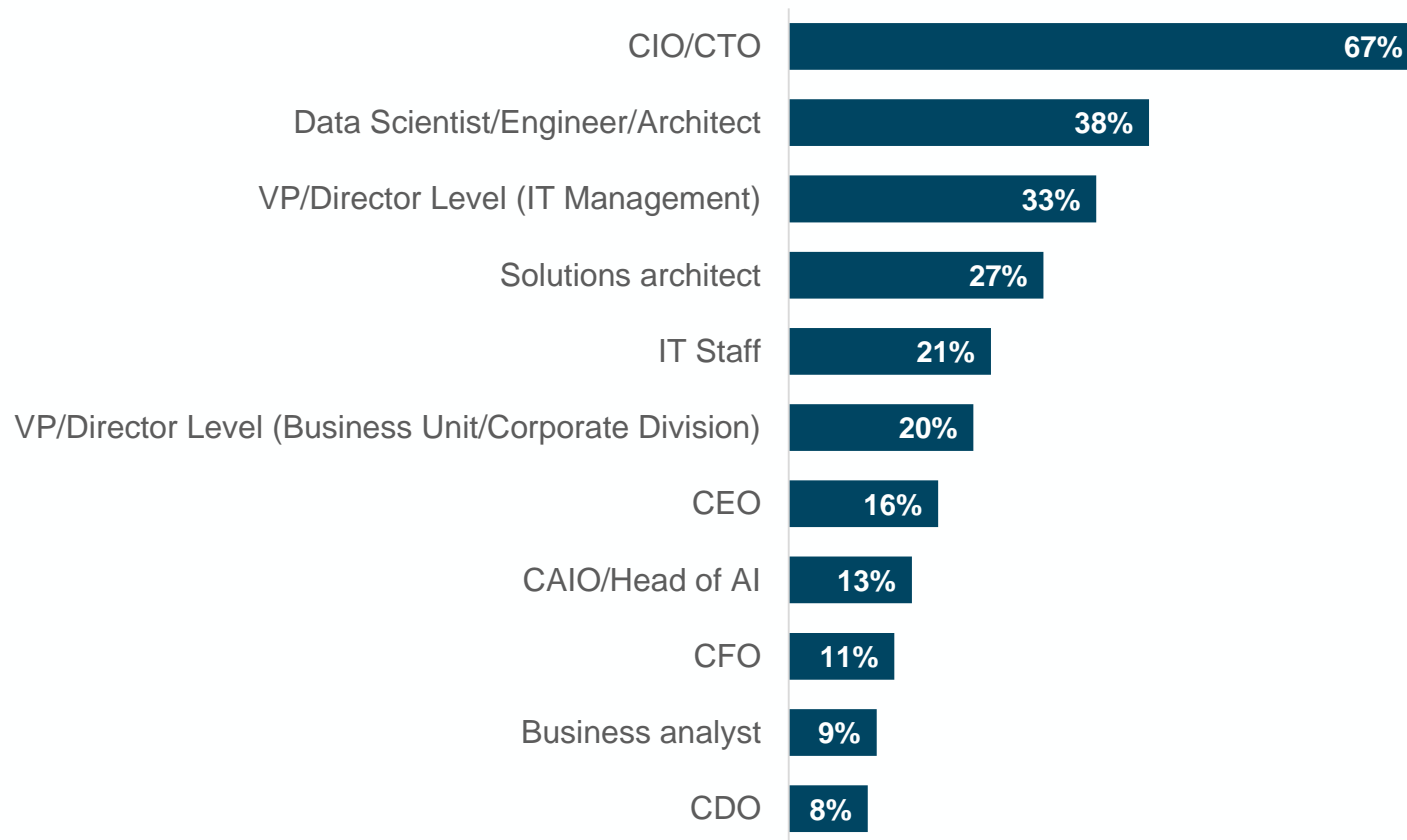
AI's Perceived Importance to the Business has Increased

Which of the following statements best describes the importance of AI to your organization as a whole?



The AI Tech Buying Team looks Technical

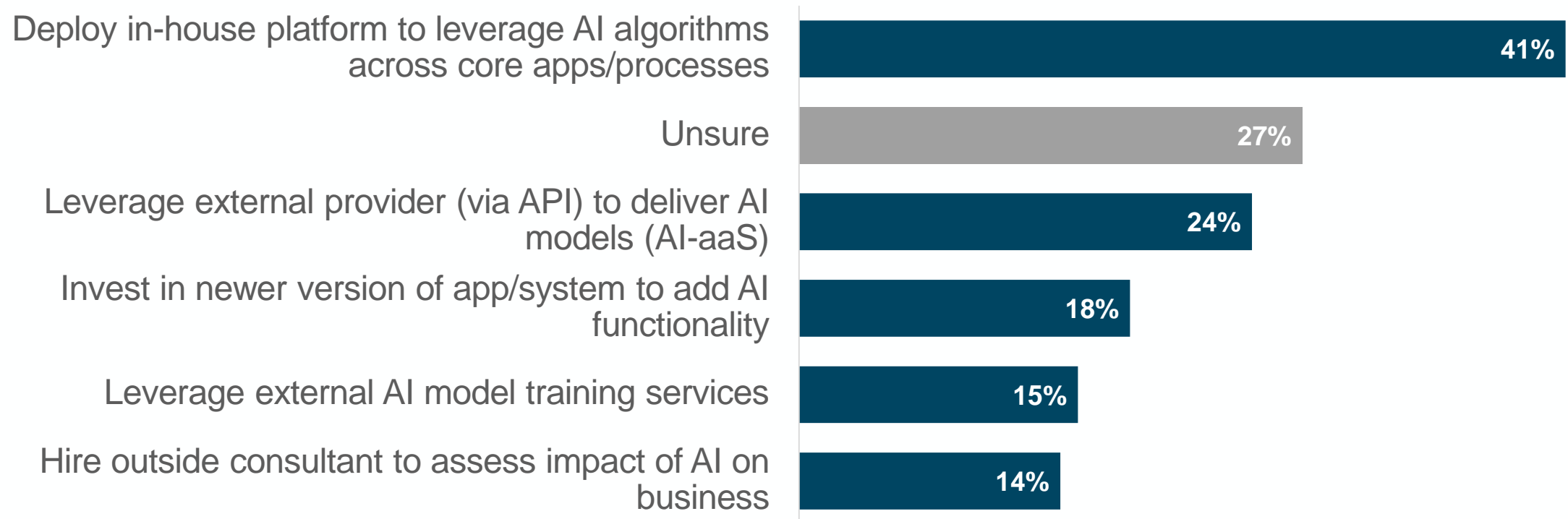
Who's involved in the tech purchase decision making process for AI-related solutions?



- NA respondents regard the CIO/CTO as leading the charge for AI projects
- While AI is a horizontal endeavor, with strong input/visibility/influence from corporate LOB teams, not unlike cloud, it is ultimately technical pros who are deciding which solutions are purchased..

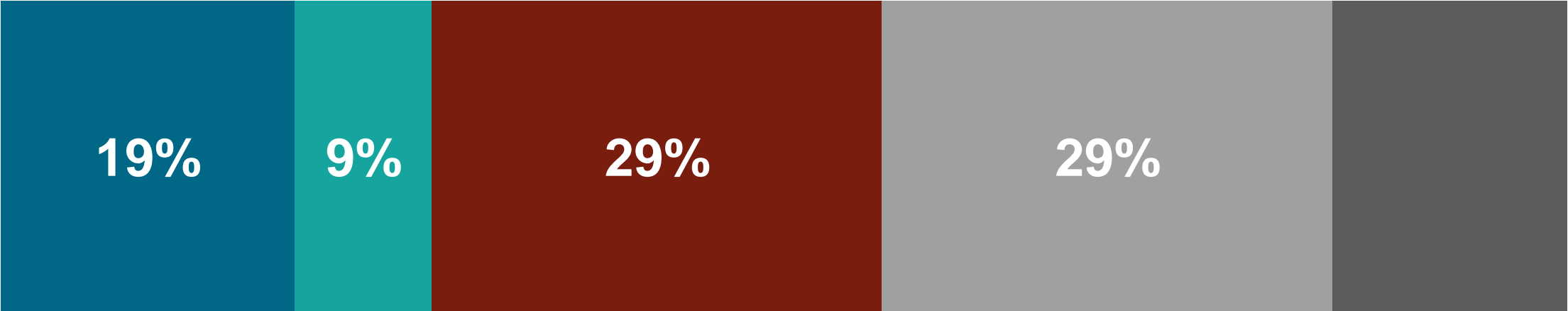
AI will be deployed via in-house platform but many will turn to external providers for services

How do you plan to access/deliver AI across your organization?



North America

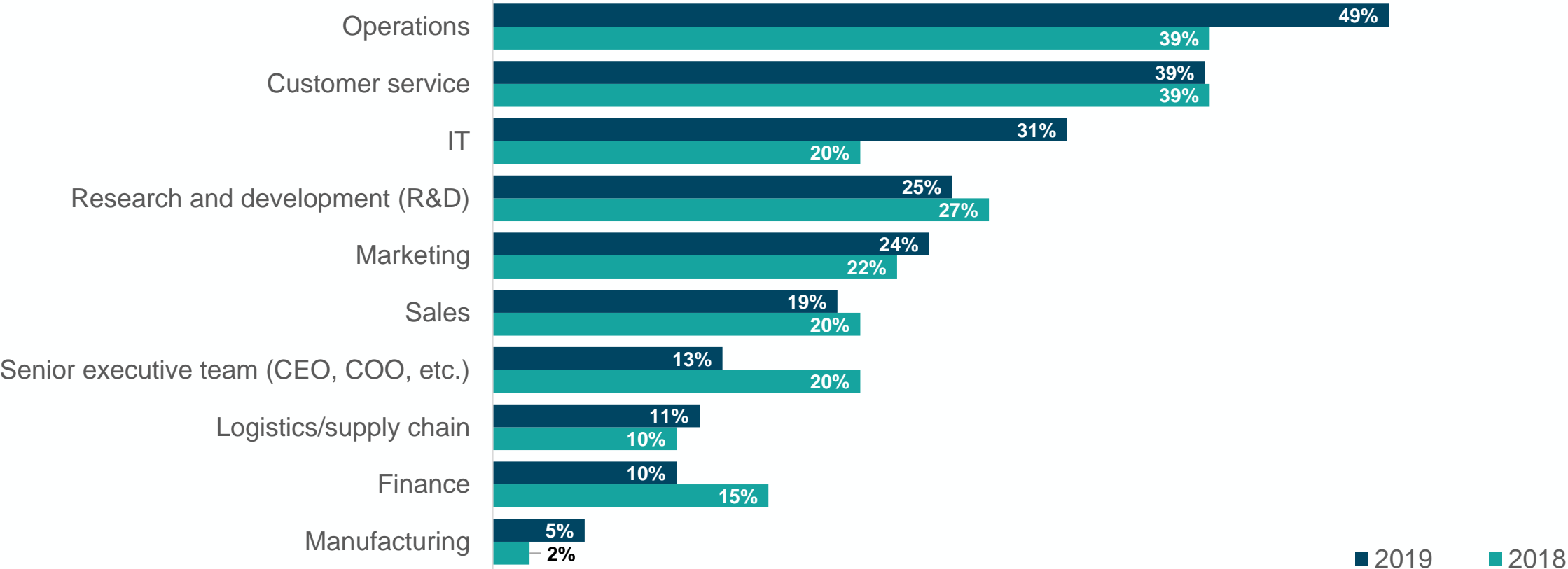
Current status of AI Hardware/Infrastructure Adoption



■ In Use (not including pilots) ■ In Pilot (budget approved) ■ In Near-Term Plan (<12 months) ■ In Long-Term Plan (12-24 months) ■ Not in Plan

Who benefits most from AI / Machine Learning?

Which of the following depts/business units will benefit most from your planned AI/ML investment?



Top barriers to adoption shift for 2019 Skills takes new foothold

What are the top barriers to achieving true value from AI adoption at your organization? (Choose up to 3)

45%

lack of talent/
skills/expertise

33%

complexity/
advanced data
management

23%

lack of internal
IT infrastructure

Top Four AI / ML investment drivers

What are the drivers prompting your decision to invest in AI/machine learning technologies?
(Choose up to 3)

40%

Improve
customer
experience

34%

Enhance
operational
efficiency

29%

Reduce
operating costs
through
digitization

29%

deliver new
products/
services

AI and data analytics grow in importance among primary storage buyers

Hyper-converged Infrastructure

+200%



1H 2018 2H 2018

Buyers citing the need for **embedded AI-powered/machine learning-based algorithms** as a desired purchase feature

Converged Infrastructure

+167%



1H 2018 2H 2018

Buyers citing the need for **embedded AI-powered/machine learning-based algorithms** as a desired purchase feature

Object Storage

+63%

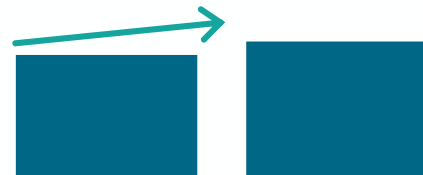


1H 2018 2H 2018

Buyers citing the need for **data analytics capabilities** as a desired purchase feature

All-Flash Arrays

+11%

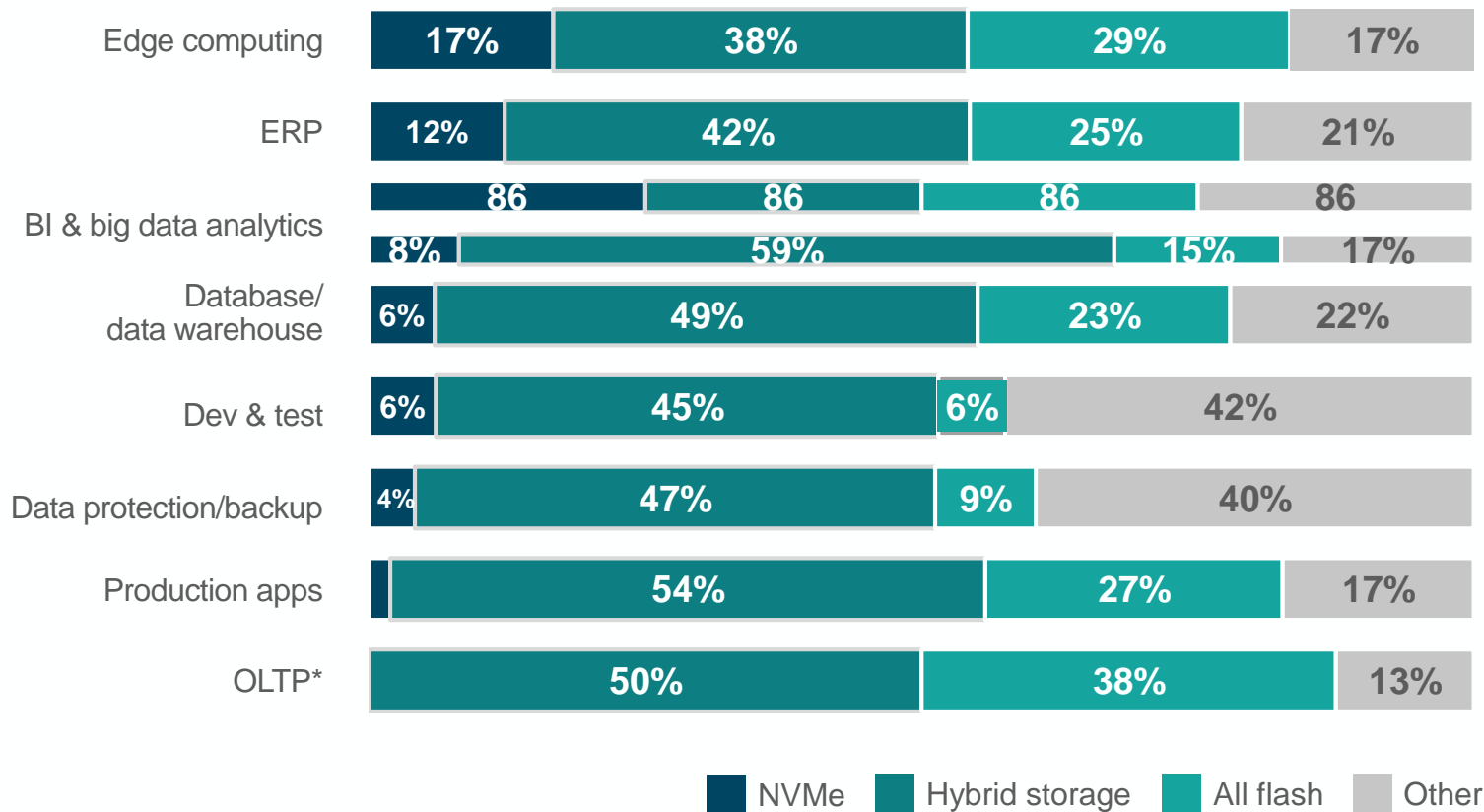


1H 2018 2H 2018

Buyers citing the need for **built-in storage analytics** as a desired purchase feature

NVMe scoring higher with Edge, ERP and Big Data Analytics

For these workload(s), which of the following is primary storage.



Key Takeaways

- 47% of NVMe adopters plan to implement through storage array vs DAS



Thank you.

Jillian Coffin
VP & Publisher, Storage