

2002 Market Positioning and Brand Awareness Study

Overview

After years of rapid growth, the storage market slowed dramatically during the recent economic downturn. Today's competitive market has put a premium on vendors' ability to meet demands for high-value solutions to their clients' most urgent storage challenges. Vendors have responded by offering increasingly sophisticated hardware, software, and services, along with integrated capabilities to design, build, monitor and maintain complete storage solutions.

ITSMA's new report, *Storage Solutions: 2002 Market Positioning and Brand Awareness Study*, provides a detailed assessment of buyer perceptions of today's top providers of storage solutions. Based on interviews with 300 decision makers from large enterprises and government agencies, the report presents extensive data and analysis on such critical marketing and sales questions as:

- Which storage services and solutions firms do buyers identify as market leaders?
- How much do buyers know about the leading firms?
- What criteria are buyers using to evaluate potential providers of storage solutions?
- What are the top data and storage concerns for buyers in different vertical markets?
- How have specific brands fared in the economic slowdown?
- How are storage firms competitively positioned on specific solutions and services competencies?
- How do marketing messages affect buyer perception?

Key findings in the report include the following:

- Buyers' likelihood of making significant changes in their storage environment in the next 12 months
- Unaided and aided awareness of storage services and solutions firms
- Firms that buyers are most likely to call for storage services and solutions
- Familiarity with specific firms' storage services and solutions
- Favorability of specific firms' storage services and solutions
- Market positioning of leading storage solutions firms
- Importance ratings of storage firms' attributes
- Key sources of information about storage solutions firms
- Influence of business unit executives on storage purchase decisions

Report Benefits

The report is designed to help storage solutions providers plan marketing initiatives, shape market perceptions, and track the effectiveness of marketing programs on an ongoing basis. Specifically, marketers can use the report data and analysis to:

- **Craft** marketing and sales messages to match current market needs and buyer selection criteria
- **Communicate** perceived strengths versus competitors more effectively
- **Validate** perceived weaknesses and identify critical areas for marketing investment
- **Track** decision criteria in a changing market
- **Justify** marketing investment to corporate management
- **Gain competitive advantage**

(Continued)

Companies Covered

Companies covered in the report include:

- Brocade Communications
- CNT
- Cisco Systems
- Dell
- EMC
- Hewlett-Packard
- Hitachi Data Systems
- IBM Global Services
- Inrange Technologies
- McData
- Microsoft
- Network Appliance
- StorageTek
- Sun Microsystems
- Veritas

Report Methodology

ITSMA conducted telephone interviews between July and September 2002, with 300 U.S.-based decision makers from Fortune 1000 companies, government entities, and other large enterprises.

Vertical Market Segments

- Financial services
- Government and public sector
- Health care delivery
- Manufacturing: industrial products
- Manufacturing: consumer products
- Communications/energy/utilities
- Retail

Respondent Titles

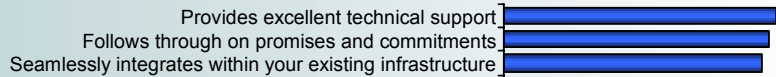
- IT Directors (72%)
- IT VPs and above (28%)

Storage Environments

- Network Attached Storage (14%)
- Storage Area Network (26%)
- Both NAS and SAN (60%)

Sample Positioning and Selection Criteria Data

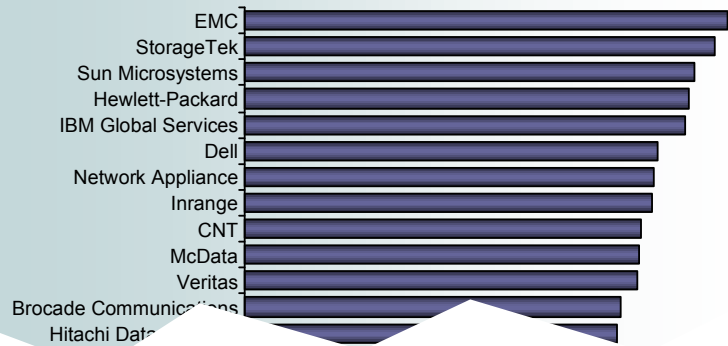
Mean Importance Ratings of IT Storage Services and Solutions Firms' Attributes



Strongly Positioned Services Firms by Market Positioning

Storage consultant with strong planning and design capabilities	EMC IBM Global Services Cisco Systems
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Knowledge That Firms Provide Storage Services and Solutions



Optional Custom Briefing

Complement the report with a special, customized, phone and Web briefing. ITSMA analysts can provide a one-hour briefing of key findings and recommendations for a modest add-on fee. If your firm is included in the report, the briefing will include special competitive assessments of your firm and other key competitors covered in the study.

(Continued)

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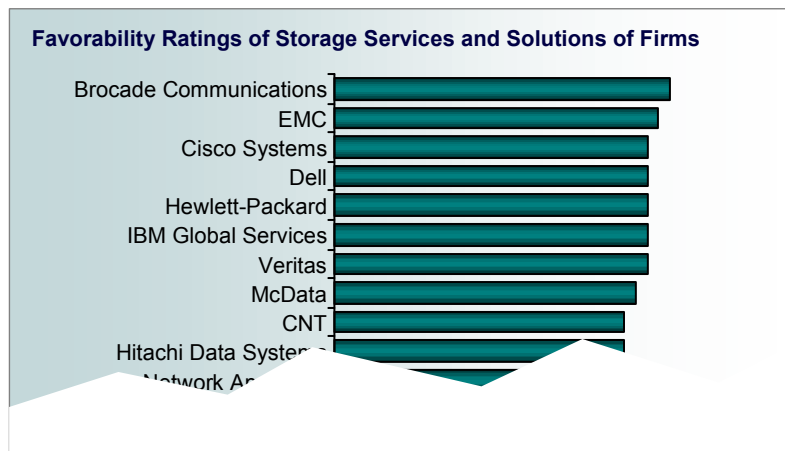
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2002 Market Positioning and Brand Awareness Study

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