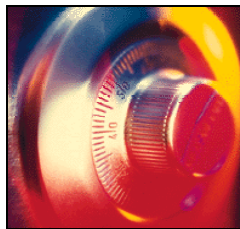


Preferences and Priorities for Storage Services



2004 Brand Tracking Study

ITSMA's annual brand tracking study on how large company buyers perceive the brand and competitive positioning of leading providers of IT storage services and solutions.

REPORT HIGHLIGHTS

OVERVIEW

In a modestly growing market, the ability of storage firms to provide services and integrated solutions is increasingly important. Most buyers weigh equally the hardware, software, and services when making a purchase decision. Building brand awareness, knowledge, and preference for services and solutions is therefore essential to successful positioning in the storage market.

Preferences and Priorities for Storage Services provides a detailed analysis of how IT executives from large enterprises and government agencies assess leading providers of storage services and the market as a whole. Based on interviews with 300 U.S.-based IT decision makers from large companies and organizations in four major industries, the report is designed to help providers of storage services and solutions plan marketing initiatives, shape market perceptions, and track the effectiveness of marketing programs on an ongoing basis.

Key findings in the report include:

- Unaided and aided awareness of IT storage services and solutions firms
- Familiarity with, favorability toward, and preference for doing business with storage services and solutions firms
- Competitive positioning of storage services and solutions firms
- Importance of different attributes in when buyers select services and solutions firms
- Comparison of the relative strength of brand attributes of primary sponsors and specified peers
- Sources of information about IT storage services and solutions providers
- Awareness and recall of advertising venues

The report includes analysis by respondent title, buyer responsibility, industry, and organizational revenue.

COMPANIES COVERED

Companies covered in detail in the study include: Brocade Communications, Cisco Systems, CNT, Computer Associates, Dell, EDS, EMC, Hewlett-Packard, Hitachi Data Systems, IBM Global Services, LEGATO, McDATA, Network Appliance, StorageTek, Sun Microsystems, Tivoli, and VERITAS.

A number of other firms are also included in ratings and discussions of brand awareness.

STUDY METHODOLOGY

From December 2003-February 2004, ITSMA conducted interviews with 300 IT executives involved in the purchase of storage services to assess the brand awareness and market positioning of the major storage and storage services firms. The study respondents held director-level positions or higher and represented organizations in four major industry groups and with annual revenue ranging from \$200 million to more than \$20 billion.

RESPONDENT DEMOGRAPHICS

Respondent titles

C-level executives	20.7%
IT vice presidents	24.0%
IT directors	55.3%

Company size

\$200-999 million	25.0%
\$1-4.9 billion	25.3%
\$5-20 billion	17.0%
More than \$20 billion	32.7%

Industry Groups

Government/public sector	26.0%
Financial services	25.3%
Manufacturing	25.3%
Communications	23.4%

MORE INFORMATION

To learn more about the report, contact Rob Leavitt, Senior Director, Marketing and Member Advocacy, at +1-781-862-8500, ext. 45, or rleavitt@itsma.com.

Figure 4.1 Unaided Awareness of IT Storage Services Firms

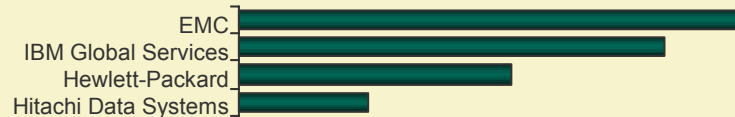


Figure 1.3 Likelihood to Take Actions Affecting Storage Systems

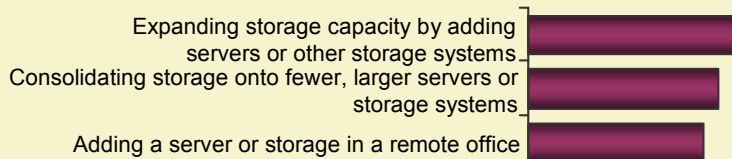


Figure 7.1 Mean Importance Ratings of IT Storage Services and Solutions Firms' Attributes

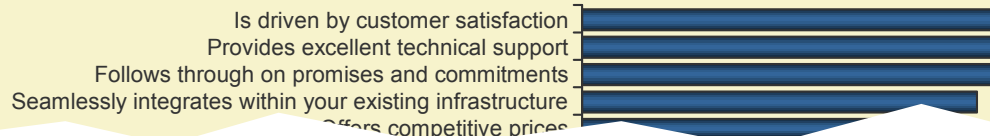


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