Enterprise HDD
2017 Brand Leader Survey Report

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Enterprise HDD
Brand Leader Survey Methodology

- **Brand Leader Reports are designed to measure the pulse of brand leadership in specific product categories using independent, non-sponsored surveys with at least 200 respondents.**

- **The *Enterprise HDD* survey was conducted in *January, 2017*.**
  - Respondents were solicited from over 1,000,000 members of 100+ online IT groups, and from the IT Brand Pulse IT professional database.
  - Two hundred and three IT Pros responded to this survey.
  - Responses were collected using an online survey engine.

- **In each part, respondents were provided with a product category description, list of vendor choices (plus an "Other" answer choice to add a vendor, if applicable), and were asked six questions:**
  1. Who do you perceive as the Enterprise HDD **market** leader?
  2. Who do you perceive as the Enterprise HDD **price** leader?
  3. Who do you perceive as the Enterprise HDD **performance** leader?
  4. Who do you perceive as the Enterprise HDD **reliability** leader?
  5. Who do you perceive as the Enterprise HDD **service & support** leader?
  6. Who do you perceive as the Enterprise HDD **innovation** leader?

Brand Leader Definitions

MARKET LEADER — Voted by IT Pros

The combination of innovation, performance, price, reliability and support, specific to a product category; making that product an overall market leader

INNOVATION LEADER — Voted by IT Pros

The product that brings useful new features and benefits ahead of the competition

PERFORMANCE LEADER — Voted by IT Pros

The product which is the fastest, and/or delivers the quickest user response time

PRICE LEADER — Voted by IT Pros

The product with the most value for the price

RELIABILITY LEADER — Voted by IT Pros

The product (component, software, or system) that most consistently performs its intended or required function or mission without degradation or failure

SERVICE AND SUPPORT LEADER — Voted by IT Pros

The product with the most accessible, responsive, knowledgeable, and reasonably-priced service and support

2017 Enterprise HDD Brand Leader Survey

Respondent Profiles
2017 Survey Results

Selected Voting Organizations Represented in the Surveys

Air Liquide	CSC NASA Ames Research	Macys	QuikTrip
Alere	Daybreak Game Company	Marubeni America	Ricoh
American Airlines	Delta Airlines	McKesson Corporation	Servpro Industries, Inc.
Amerigas	Delta Dental	Mentor Graphics	Shell Oil
AT&T	Detroit Medical Center	Michael Kors	Siemens
Averitt Express	DLL Group	Milliman	Social Security Admin.
Bank of America	DOTD (State of LA)	Mimeo	Southwest Gas Corporation
Banner Bank	Duke University Libraries	MIT Media Lab	St. Luke's Hospital
Baylor College of Medicine	EDD (State of CA)	Mood Media Corporation	Staples
Beazley Group	Enercare	Morgan Stanley	Starbucks
Bosch	ExxonMobil	Mormon Church	State of Montana - DEQ
Boston Scientific	FDIC	NASA	Swagelok
BioTek	Ford Motor Company	National Bank Of Greece	TE Connectivity (Tyco)
Caesars Entertainment	Gannett	NAVNETWARCOM	TELUS
Capgemini	GeotabUsa	NCR	The Capital Group
Capital One	HDI Seguros	Nevada Supreme Court	The Mormon Church
CGI	Henry Ford Health System	NIH	Tiger Brands
City of Los Angeles	Hetero Drugs	NOAA	Universal Parks & Resorts
Comcast	ITG Inc	Norfolk Southern Corp	U.S. Navy
CoreLogic	Jockey International	NYC Dept. Of Corrections	UPS
Cox Communications	Johnson & Johnson	ON Semiconductor	Verisk Analytics
Cox Enterprises	Leidos	Optum (United Health)	Verizon
CPX Coastal Pacific Xpress	Lockheed Martin	PPG Industries	Vienna General Hospital
Crowe Horwath	London Life Insurance Co.	Perrigo	Viskase Companies

Respondent Title/Job Description:

Title	Percentage
IT Manager/Director	29.3%
Data Center Manager	20.0%
Storage Administrator/Architect	18.7%
Server Administrator/Architect	17.3%
Network Administrator/Architect	6.7%
Executive/Management	4.0%
Other	2.7%
VAR/OEM	1.3%
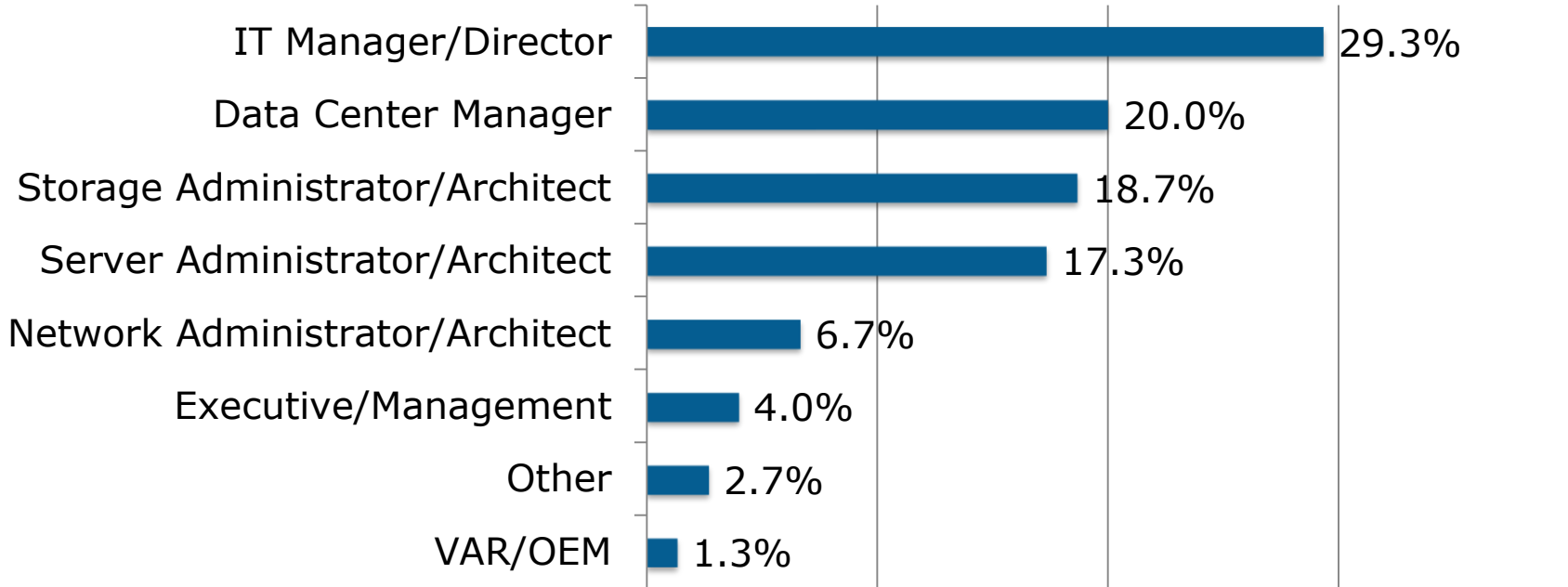
Your environment is best described as:

Environment	Percentage
Enterprise data center	41.5%
Small-medium business data center	33.3%
High performance computing data center	21.2%
Product Development	2.7%
Public Cloud/Data Center Provider	1.3%
Other	0.0%

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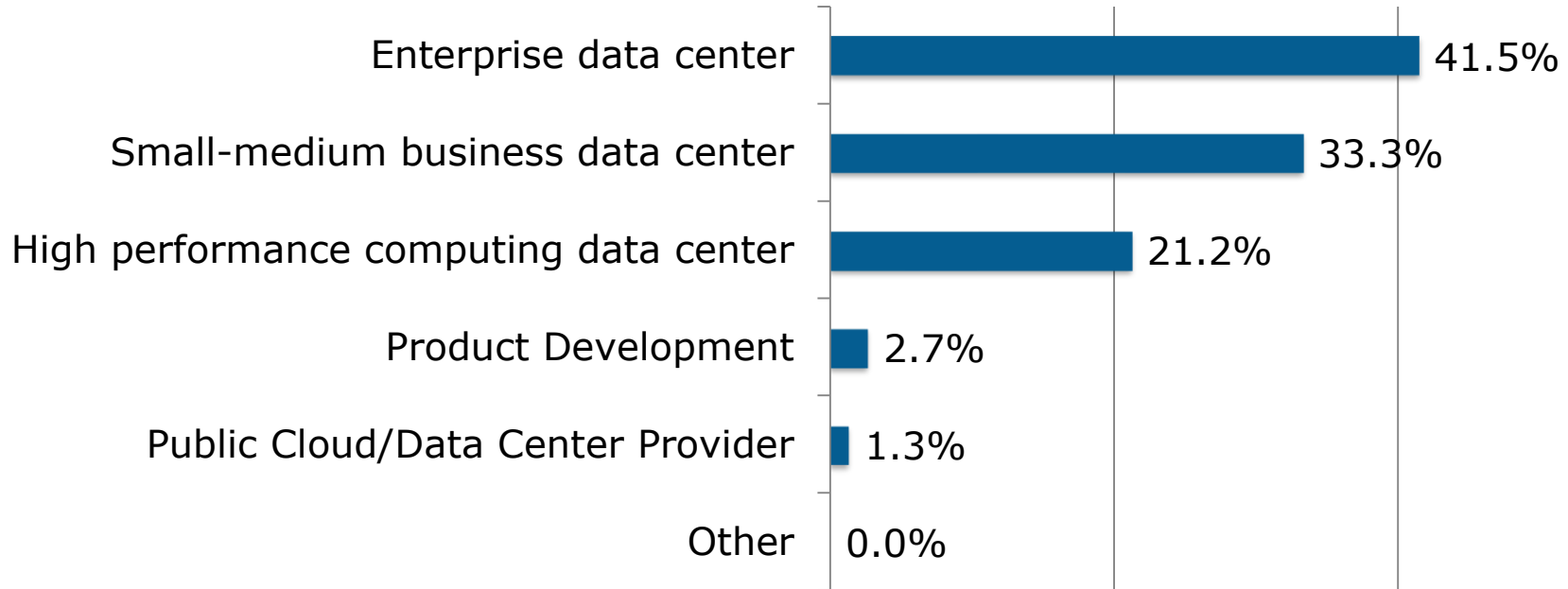
Summary Analysis
2017 Survey Results

About Enterprise HDDs

Enterprise HDDs are the highest performing and most reliable class of hard disk drives made. They have to be because they are used in business-critical enterprise applications. In these environments, users demand lightning fast response time and continuous application availability.

There are many types of enterprise workloads—ranging from banking transactions, to video-on-demand, to cloud storage—each with distinctive needs. That's why there are a variety of enterprise HDDs optimized for archive, performance and capacity.

Looking forward, the rise of cloud, mobility, IoT, social media, and analytics has created an explosion of new data. Almost 90% of all data was produced in the last two years, while approximately 60 exabytes of data was generated in 2016, over 500 exabytes are expected to be mainstream in 2020. With superior pricing and performance, enterprise HDDs will play a leading role in storing the world's data for decades to come.

Enterprise HDD Survey Summary Analysis

- **Seagate Selected as Market Leader for Enterprise HDDs**
  - Since 1980, when the company invented the first 5.25 inch HDD, Seagate has been recognized by IT professionals as the leading brand for enterprise HDDs. The company's brand dominance continues as IT pros voted Seagate the Enterprise HDD Market Leader for the fifth consecutive year.

- **Seagate Chosen as Innovation, Performance, Reliability and Service & Support Leader**
  - Across the board, Seagate enterprise HDD products deliver leading-edge performance, capacity and endurance. IT pros recognize this and picked Seagate as the leader in five out of six categories of brand leadership. Voting for Seagate particularly stood out in the performance category where the difference between first place and second place (Western Digital) was over 30 percent.

- **WD Voted Price Leader**
  - As WD chases the market share leader in enterprise HDDs, the company overtook 2016's price winner, Seagate, to be named Price Leader in 2017.

- **Toshiba and HGST Shut-out**
  - Toshiba and HGST placed third or fourth in every category, with each company only managing to garner more than 10% of the votes in two of the six brand leadership divisions.

Enterprise HDD
2017 Survey Results

2017 Market Leader
Enterprise HDDs

Who do you perceive as the market leader for Enterprise HDDs?
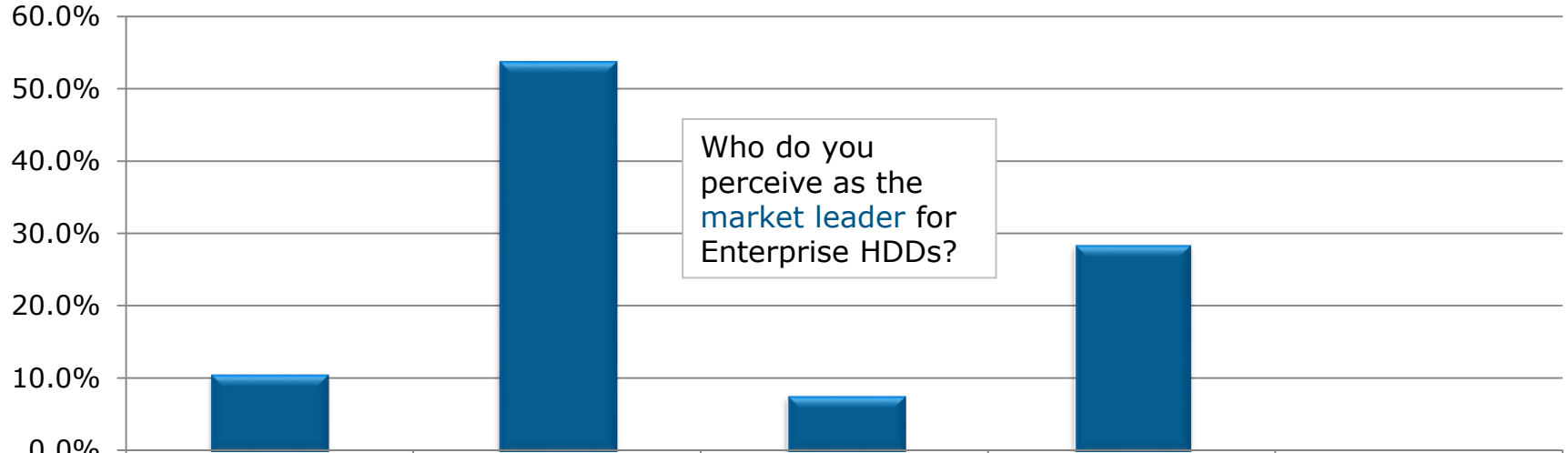
Market Leader	HGST	Seagate	Toshiba	Western Digital (WD)	Other
Market Leader	10.5%	53.7%	7.5%	28.4%	0.0%

Jan. 2017 Brand Leader Survey

2017 Price Leader
Enterprise HDDs
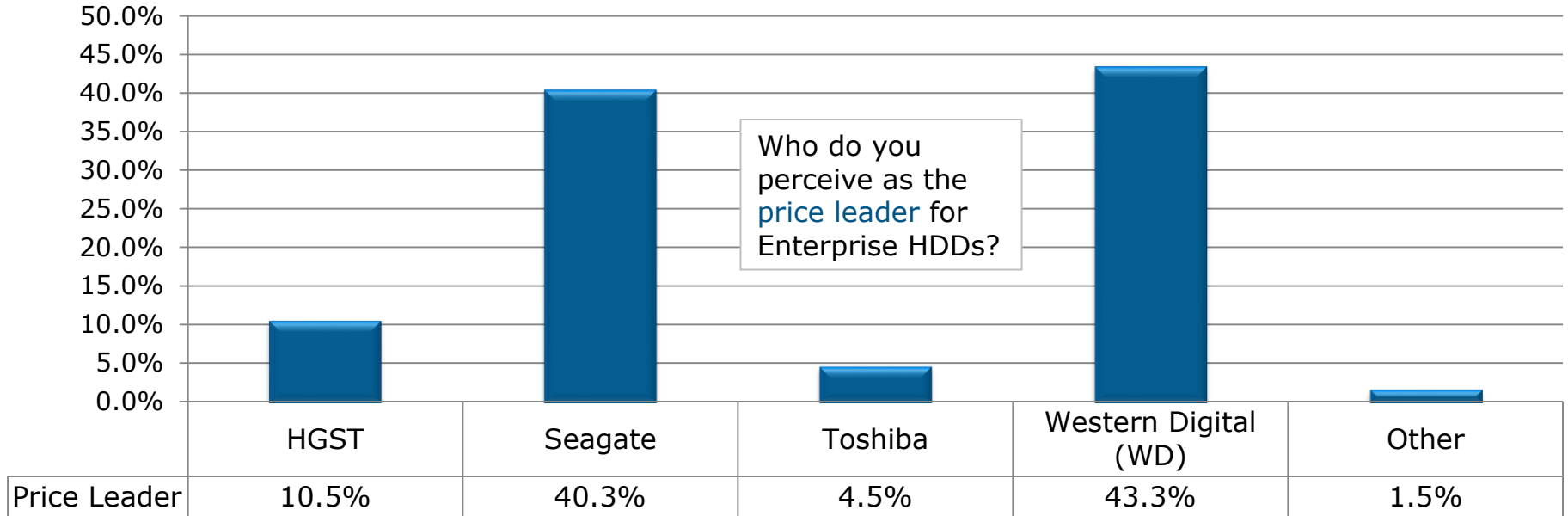
Who do you perceive as the price leader for Enterprise HDDs?

	HGST	Seagate	Toshiba	Western Digital (WD)	Other
Price Leader	10.5%	40.3%	4.5%	43.3%	1.5%

2017 Performance Leader
Enterprise HDDs

Who do you perceive as the performance leader for Enterprise HDDs?

Performance Leader	HGST	Seagate	Toshiba	Western Digital (WD)	Other
	7.6%	56.1%	12.1%	24.2%	0.0%

2017 Reliability Leader
Enterprise HDDs

Who do you perceive as the reliability leader for Enterprise HDDs?
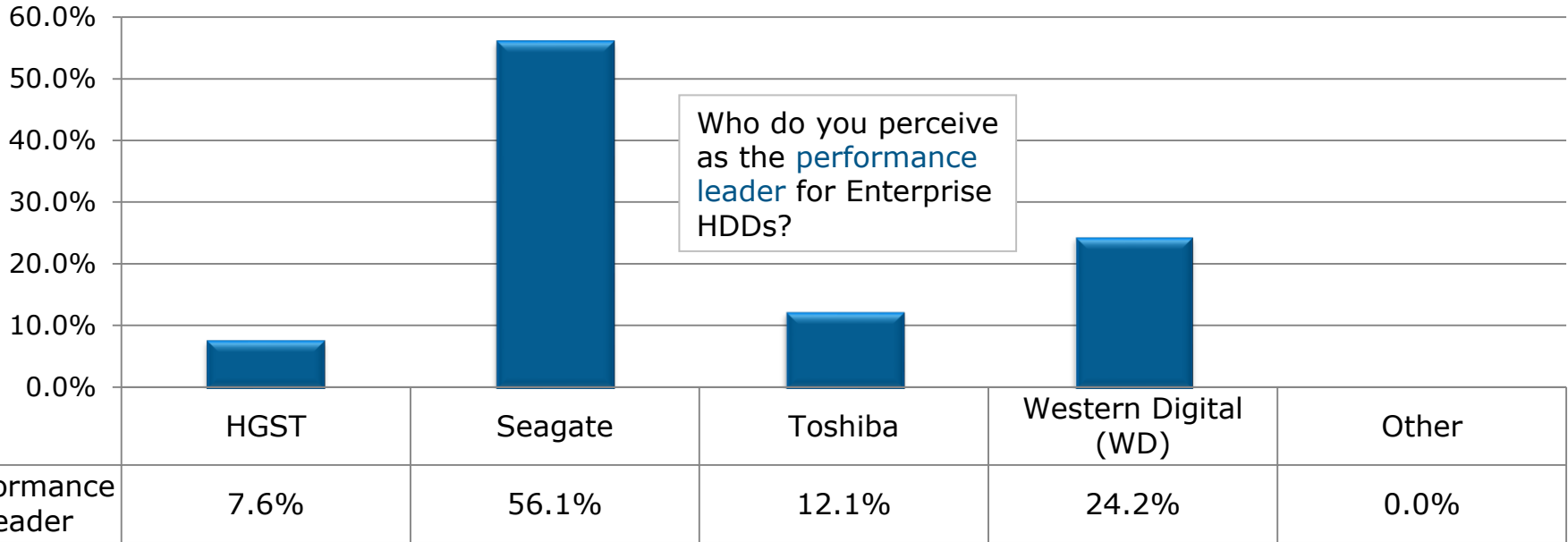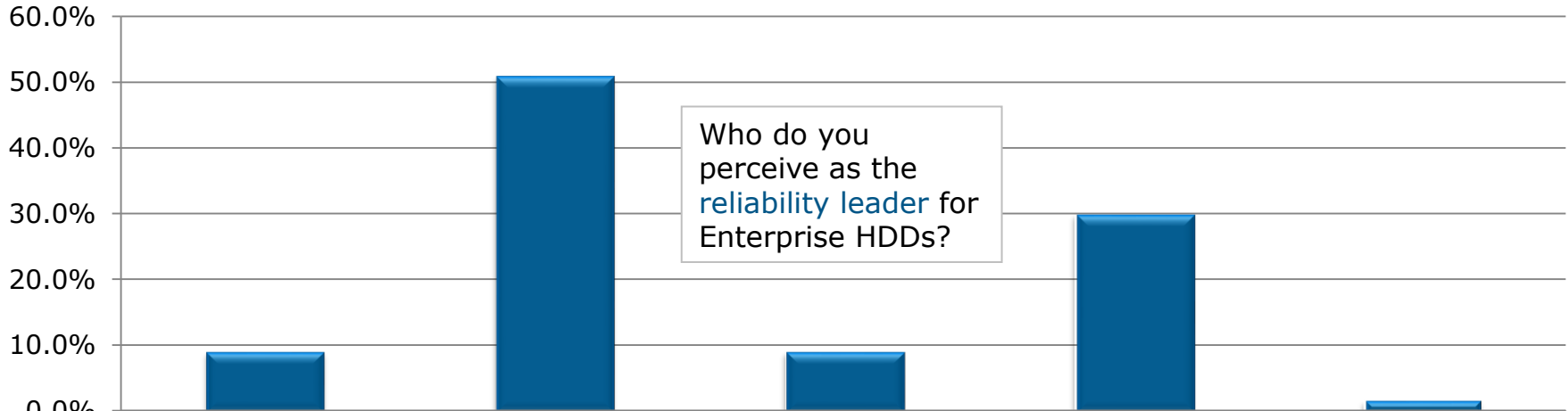
	HGST	Seagate	Toshiba	Western Digital (WD)	Other
Reliability Leader	9.0%	50.8%	9.0%	29.9%	1.5%

2017 Service and Support Leader
Enterprise HDDs
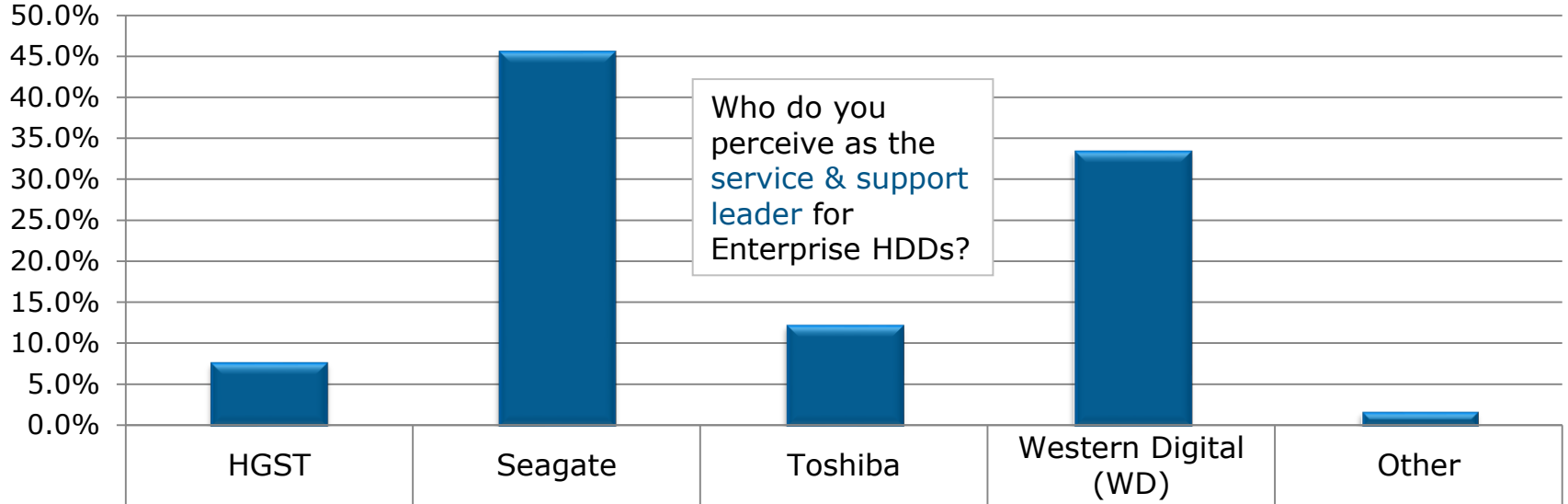
Who do you perceive as the service & support leader for Enterprise HDDs?

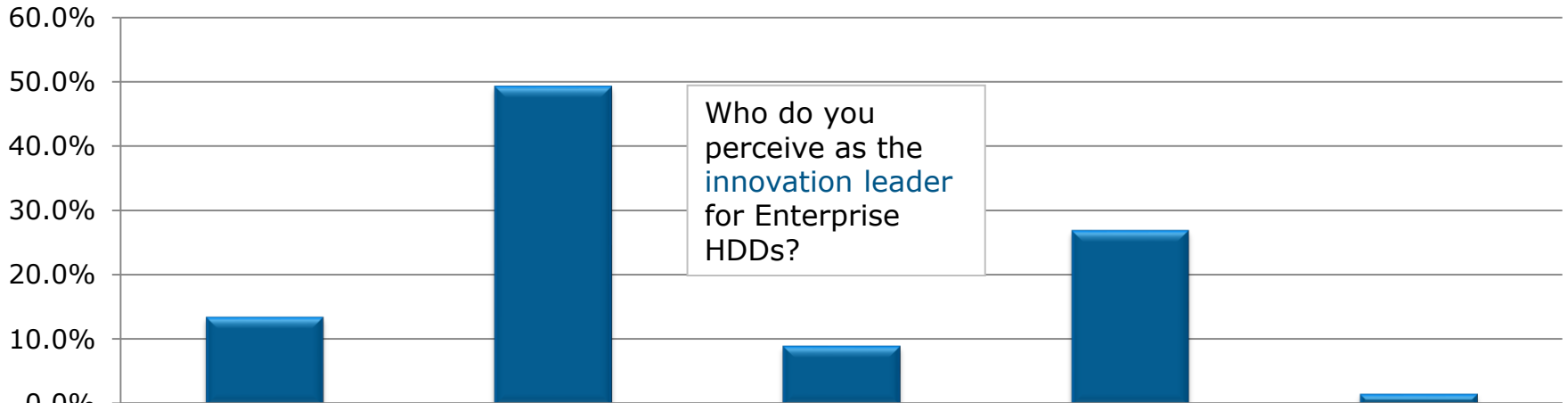|	HGST	Seagate	Toshiba	Western Digital (WD)	Other
Service & Support Leader	7.6%	45.5%	12.1%	33.3%	1.5%

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2017 Innovation Leader
Enterprise HDDs

Who do you perceive as the innovation leader for Enterprise HDDs?

	HGST	Seagate	Toshiba	Western Digital (WD)	Other
Innovation Leader	13.4%	49.3%	9.0%	26.9%	1.5%

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Enterprise HDD
2017 vs. 2016 Survey Results

Market Leader
Enterprise HDDs: 2017 vs 2016

Who do you perceive as the market leader for Enterprise HDDs?

	HGST	Seagate	Toshiba	Western Digital (WD)	Other
2016	11.4%	49.1%	8.8%	29.8%	0.9%
2017	10.5%	53.7%	7.5%	28.4%	0.0%
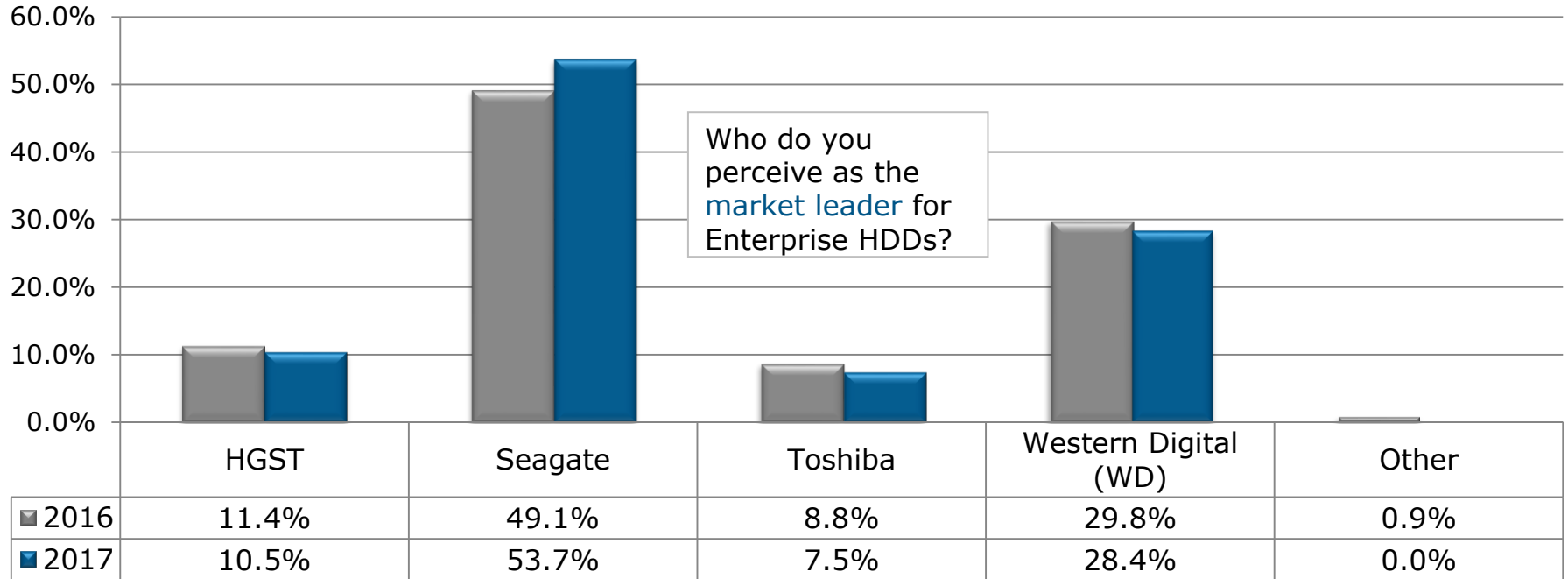
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Price Leader
Enterprise HDDs: 2017 vs 2016
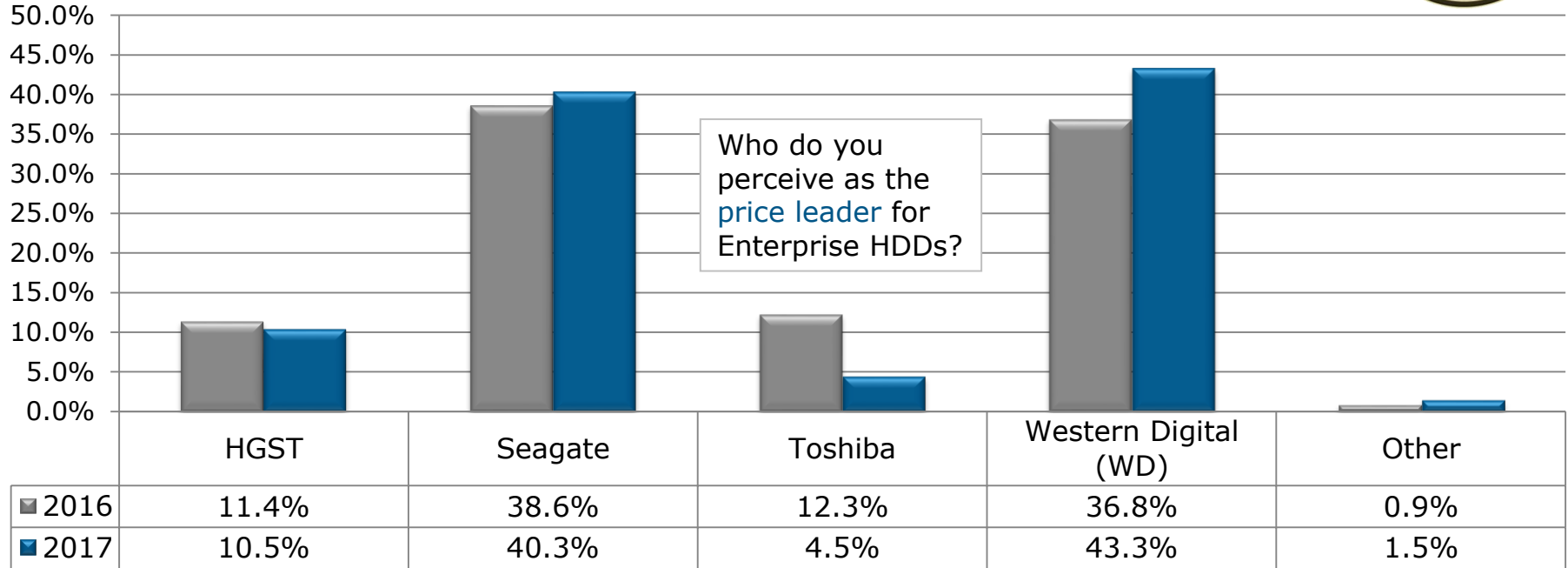
Who do you perceive as the price leader for Enterprise HDDs?

	HGST	Seagate	Toshiba	Western Digital (WD)	Other
2016	11.4%	38.6%	12.3%	36.8%	0.9%
2017	10.5%	40.3%	4.5%	43.3%	1.5%

Performance Leader
Enterprise HDDs: 2017 vs 2016

Who do you perceive as the performance leader for Enterprise HDDs?

	HGST	Seagate	Toshiba	Western Digital (WD)	Other
2016	14.0%	53.5%	7.9%	22.8%	1.8%
2017	7.6%	56.1%	12.1%	24.2%	0.0%

Reliability Leader
Enterprise HDDs: 2017 vs 2016

Who do you perceive as the reliability leader for Enterprise HDDs?

	HGST	Seagate	Toshiba	Western Digital (WD)	Other
2016	12.3%	43.9%	9.7%	32.5%	1.8%
2017	9.0%	50.8%	9.0%	29.9%	1.5%
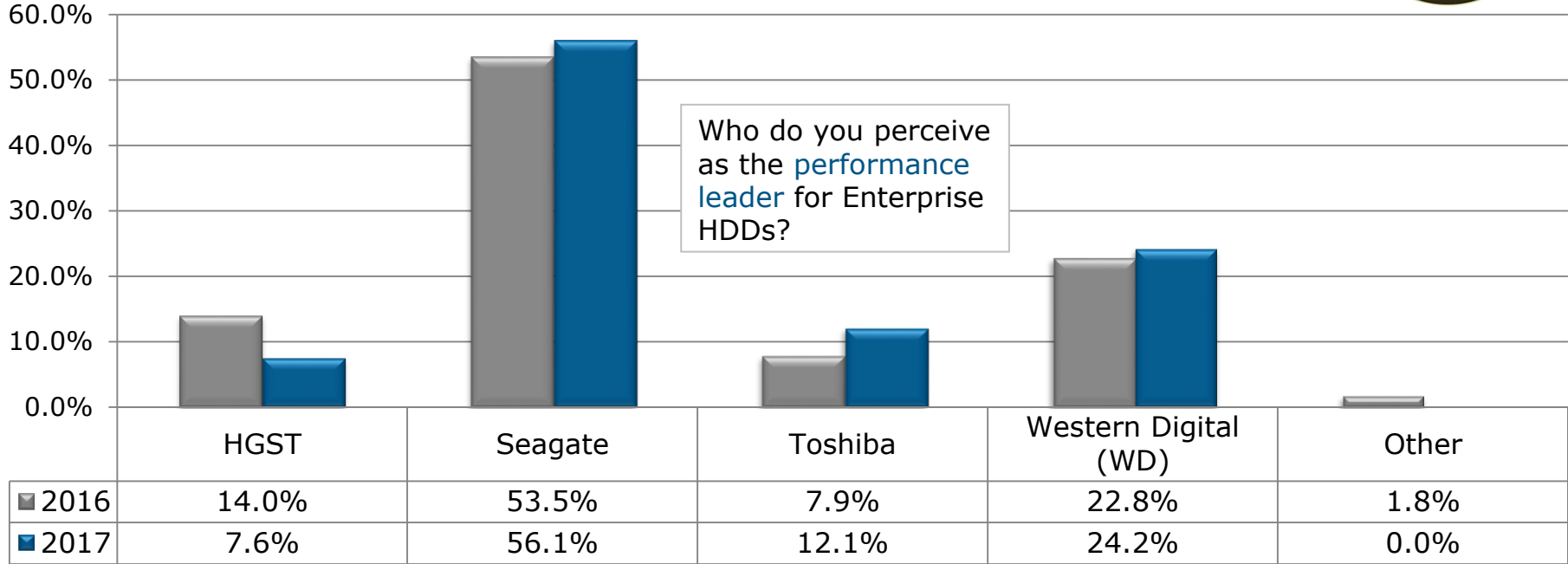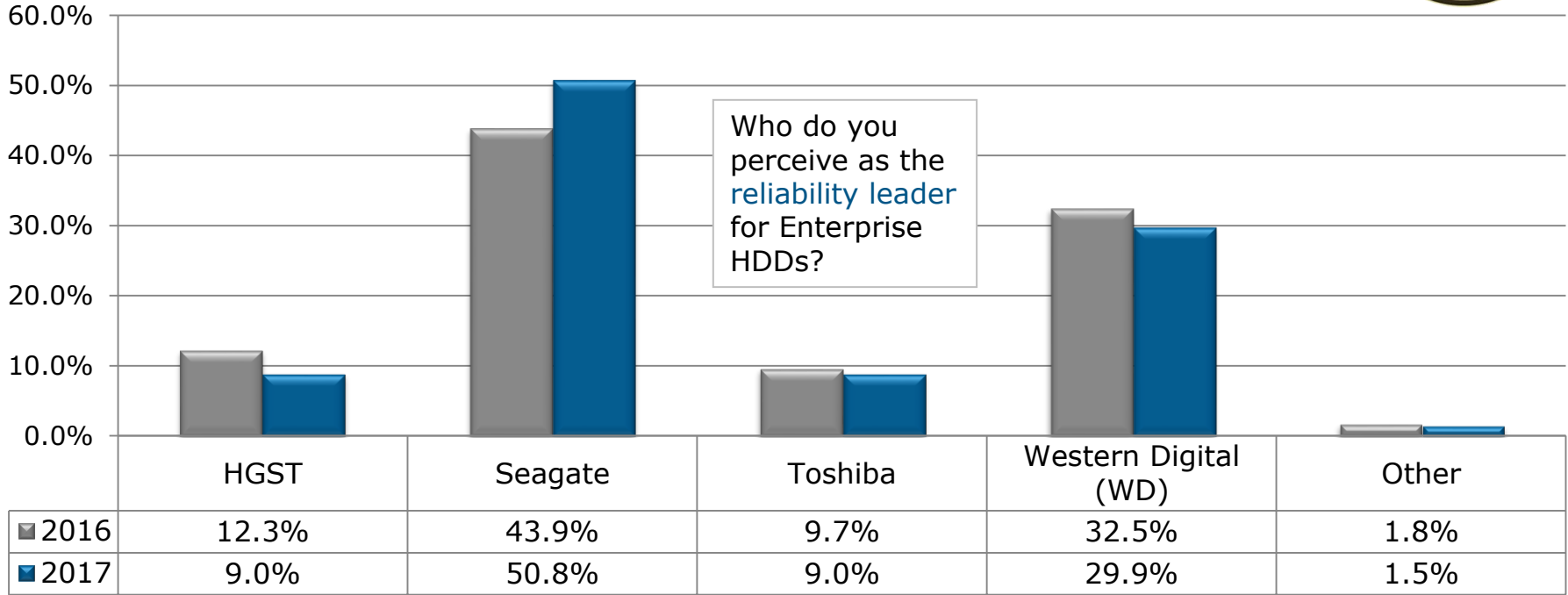
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Service and Support Leader
Enterprise HDDs: 2017 vs 2016

Who do you perceive as the service and support leader for Enterprise HDDs?

	HGST	Seagate	Toshiba	Western Digital (WD)	Other
2016	11.4%	44.7%	8.8%	33.3%	1.8%
2017	7.6%	45.5%	12.1%	33.3%	1.5%
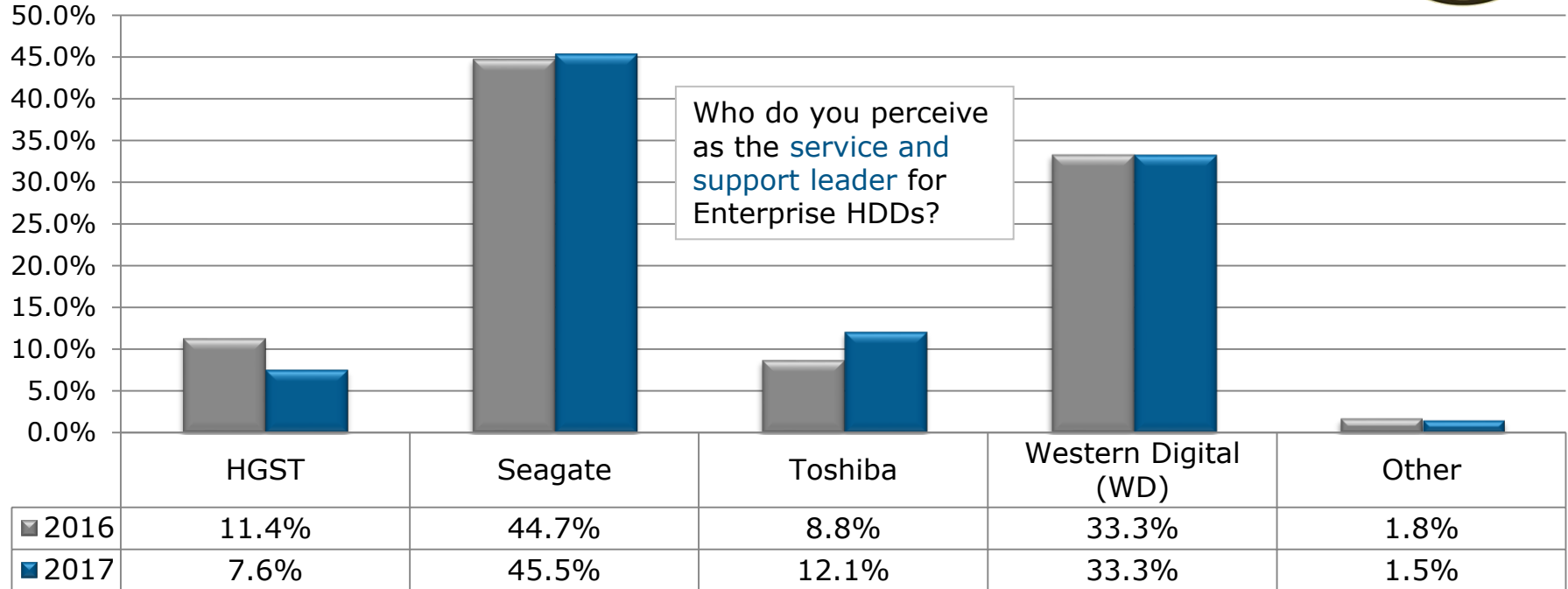
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Innovation Leader
Enterprise HDDs: 2017 vs 2016

Who do you perceive as the innovation leader for Enterprise HDDs?

	HGST	Seagate	Toshiba	Western Digital (WD)	Other
2016	14.9%	48.3%	8.8%	25.4%	2.6%
2017	13.4%	49.3%	9.0%	26.9%	1.5%
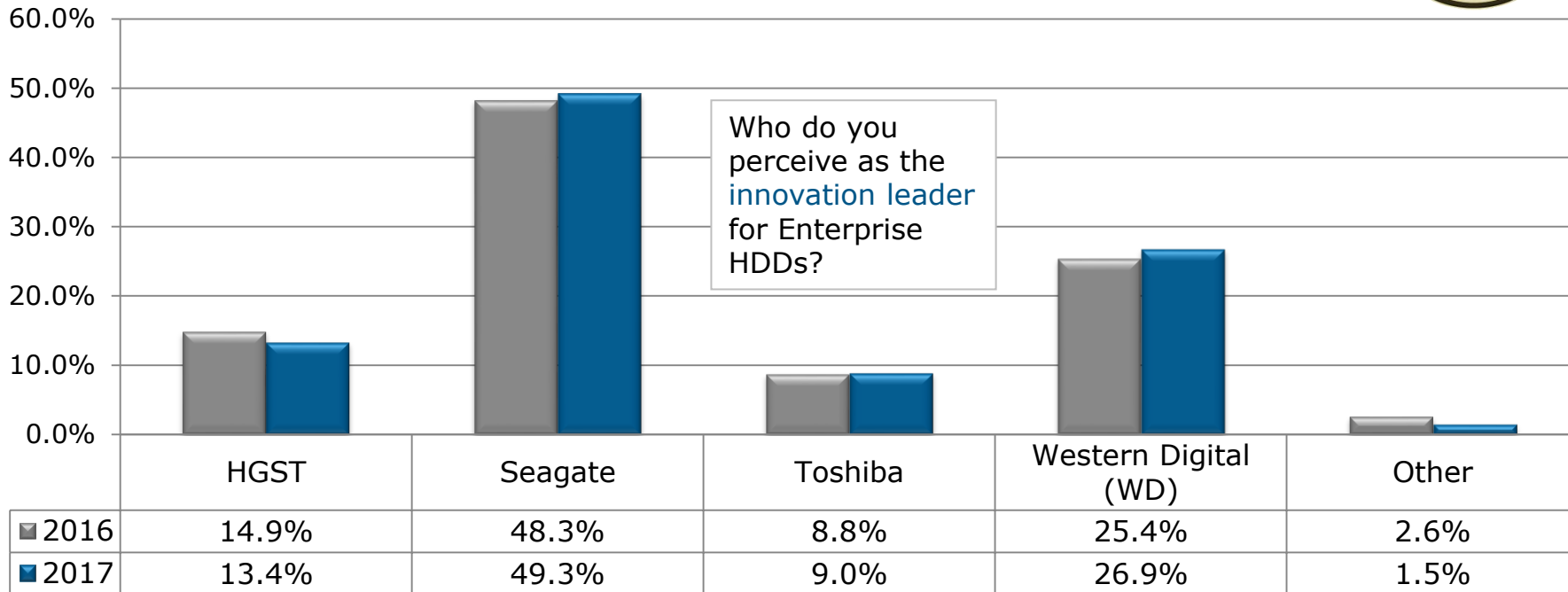
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Brand Leader Survey Data: 2017 vs 2016

Enterprise HDD	HGST	Seagate	Toshiba	Western Digital	Other	Total
2017						
Market Leader	10.5%	**53.7%**	7.5%	28.4%	0.0%	100%
Price Leader	10.5%	40.3%	4.5%	**43.3%**	1.5%	100%
Performance Leader	7.6%	**56.1%**	12.1%	24.2%	0.0%	100%
Reliability Leader	9.0%	**50.8%**	9.0%	29.9%	1.5%	100%
Service & Support Leader	7.6%	**45.5%**	12.1%	33.3%	1.5%	100%
Innovation Leader	13.4%	**49.3%**	9.0%	26.9%	1.5%	100%
2016						
Market Leader	11.4%	**49.1%**	8.8%	29.8%	0.9%	100%
Price Leader	11.4%	**38.6%**	12.3%	36.8%	0.9%	100%
Performance Leader	14.0%	**53.5%**	7.9%	22.8%	1.8%	100%
Reliability Leader	12.3%	**43.9%**	9.7%	32.5%	1.8%	100%
Service & Support Leader	11.4%	**44.7%**	8.8%	33.3%	1.8%	100%
Innovation Leader	14.9%	**48.3%**	8.8%	25.4%	2.6%	100%

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IT Brand Pulse

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Cheryl Parker oversees the IT Pro Research practice for IT Brand Pulse. Cheryl and her team conduct IT Brand Leader, technology adoption, and customer satisfaction surveys, as well as focus groups and custom research. Cheryl has spent more than 25 years in communications, research, PR, marketing and sales, and is a former news and sports writer for the *Los Angeles Times.* You can reach Cheryl at cheryl.parker@itbrandpulse.com.