

# Research Report

## ***Abstract:***

### **2010 Data Protection Trends**

*By Lauren Whitehouse and Bill Lundell  
With John McKnight and Jennifer Gahm*

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## Introduction

### Research Objectives

In order to assess the current state of the data protection market, ESG recently surveyed 510 North America-based senior IT professionals representing midmarket (100 to 999 employees) and enterprise-class (1,000 employees or more) organizations. All respondents were personally responsible for evaluating, purchasing, or managing data protection technologies—such as backup and recovery software, data replication software, and disk or tape storage systems used for secondary data storage—for their organization.

The survey was designed to answer the following questions:

- What are the primary data protection challenges that organizations are currently facing?
- Which areas of data protection will merit the greatest level of investment in 2010?
- How confident are organizations that their data protection applications and processes are adequately protecting their data?
- Which types of data protection technologies and processes are currently in use? How will this change going forward?
- What impact does the business value of data have on data protection applications and processes?
- How satisfied are organizations with their current data protection technologies and strategies?
- What types of storage solutions are currently used to support data protection requirements and how will this change over time?
- How pervasive has data deduplication usage become over the last several years?

Survey participants represent a wide range of industries including manufacturing, financial services, communications and media, health care, retail, government, and business services. For more details, please see the *Research Methodology* and *Respondent Demographics* sections of this report.

## Research Methodology

To gather data for this report, ESG conducted a comprehensive online survey of IT managers from private- and public-sector organizations in North America (United States and Canada) between January 8, 2010 and January 29, 2010. To qualify for this survey, respondents were required to have day-to-day responsibility for evaluating, purchasing, or managing data protection technologies such as backup and recovery software, data replication software, and/or disk or tape systems used for secondary data storage. All respondents were provided an incentive to complete the survey in the form of cash awards and/or cash equivalents.

After filtering out unqualified respondents, removing duplicate responses, and screening the remaining completed responses (on a number of criteria) for data integrity, ESG was left with a final total sample of 510 IT managers.

Please see the *Respondent Demographics* section of this report for more information on these respondents.

Note: Totals in figures and tables throughout this report may not add up to 100% due to rounding.

## Respondent Demographics

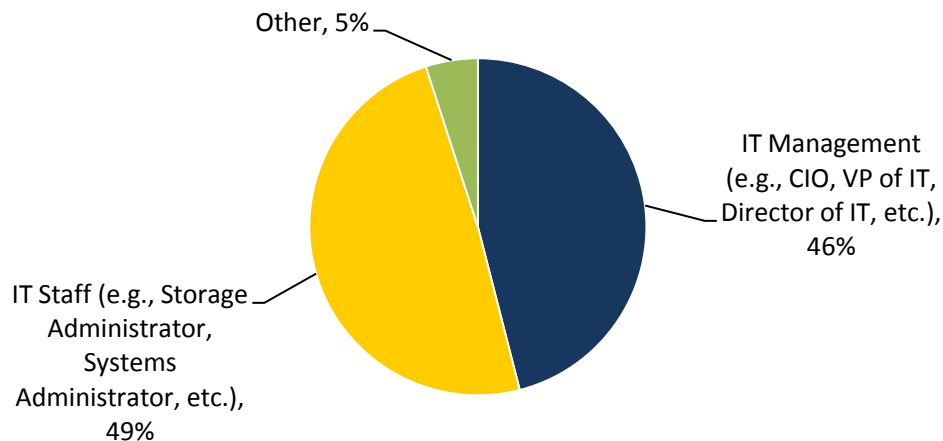
The data presented in this report is based on a survey of 510 qualified respondents. The figures below detail the demographics of the respondent base.

### Respondents by Role

The breakdown of current roles within an organization among survey respondents is shown in Figure 1.

Figure 1. Survey Respondents, by Role

Which of the following best describes your current role within your organization?  
(Percent of respondents, N=510)



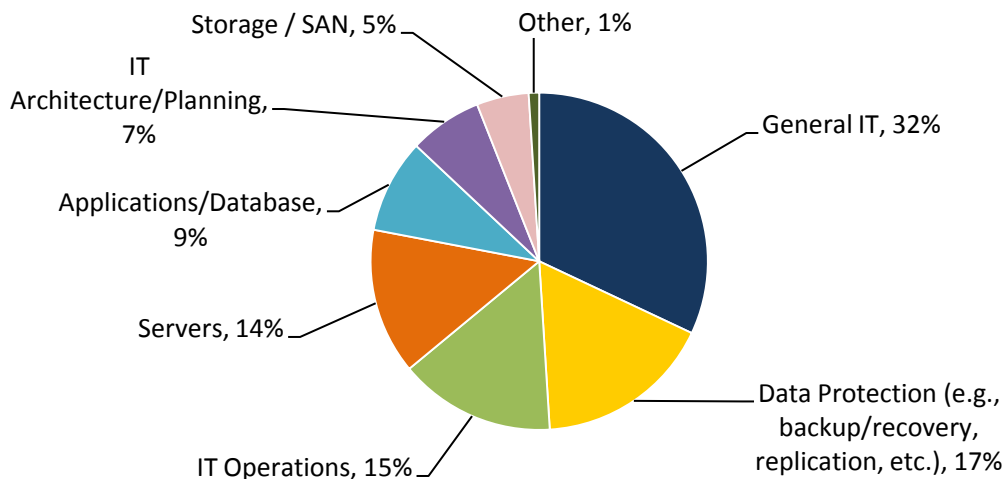
Source: Enterprise Strategy Group, 2010.

### Respondents by Technology Responsibility

Survey respondents' primary area of technology responsibility is shown in Figure 2.

Figure 2. Survey Respondents, by Primary Area of Technology Responsibility

Which of the following would you consider to be your primary area of technology responsibility? (Percent of respondents, N=510)



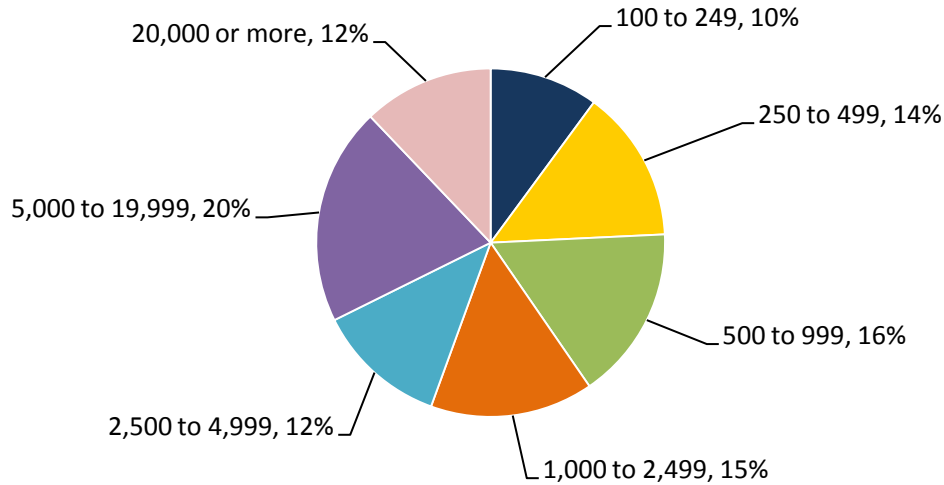
Source: Enterprise Strategy Group, 2010.

## Respondents by Number of Employees

The number of employees in respondents' organizations is shown in Figure 3.

Figure 3. Survey Respondents, by Number of Employees

**How many total employees does your organization have worldwide? (Percent of respondents, N=510)**



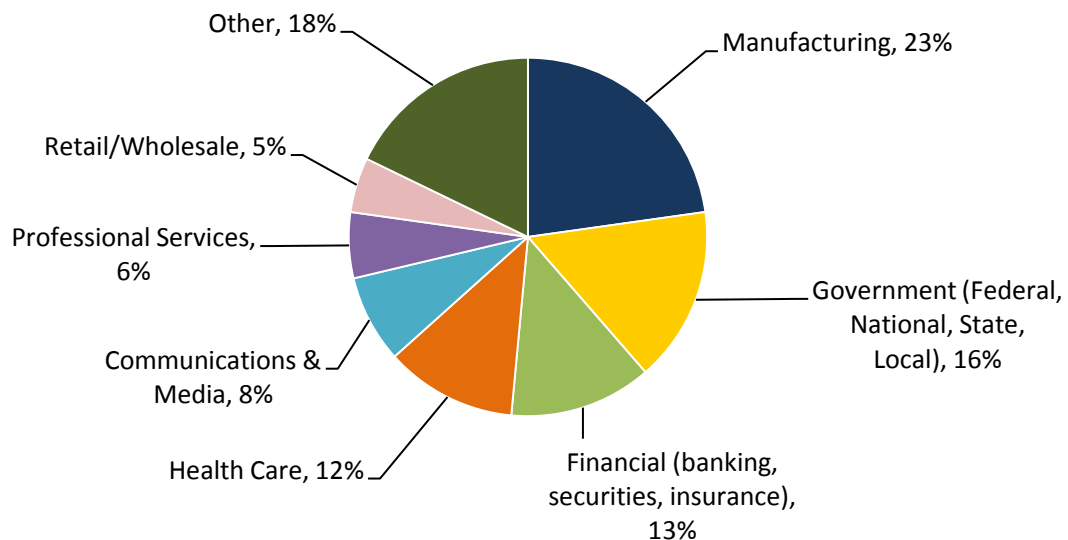
Source: Enterprise Strategy Group, 2010.

## Respondents by Industry

Respondents were asked to identify their organization's primary industry. In total, ESG received completed, qualified respondents from individuals in 18 distinct vertical industries, plus an "Other" category. Respondents were then grouped into the broader categories shown in Figure 4.

Figure 4. Survey Respondents, by Industry

**What is your organization's primary industry? (Percent of respondents, N=510)**

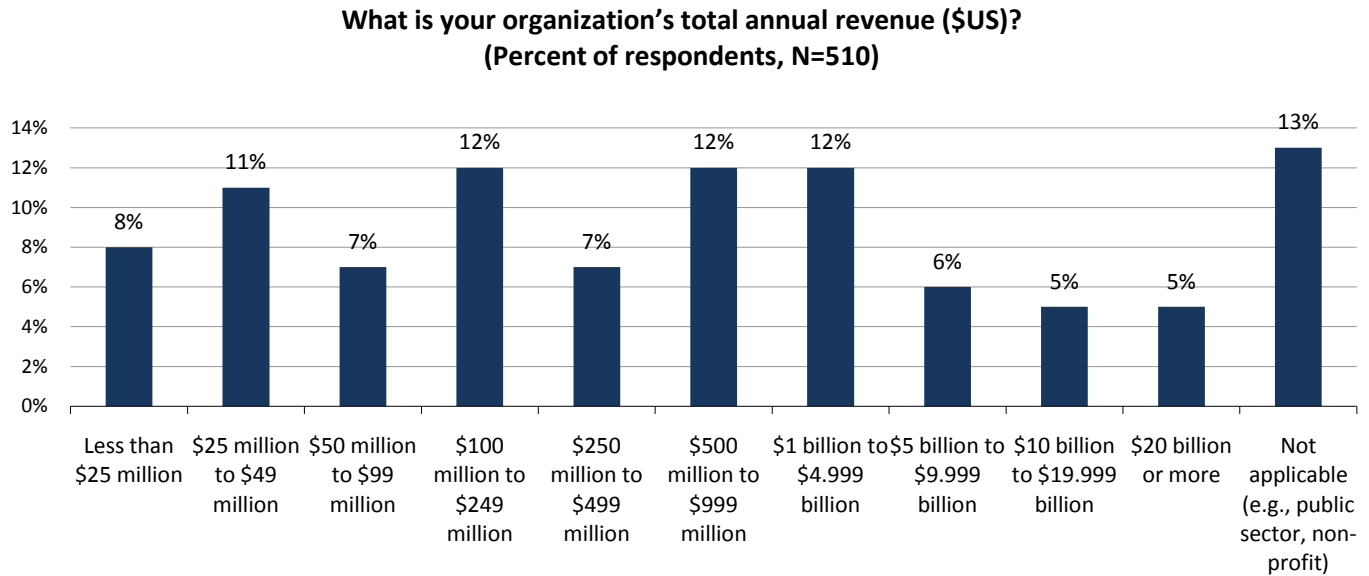


Source: Enterprise Strategy Group, 2010.

## Respondents by Annual Revenue

The annual revenue of survey respondents' organizations is shown in Figure 5.

Figure 5. Survey Respondents, by Annual Revenue



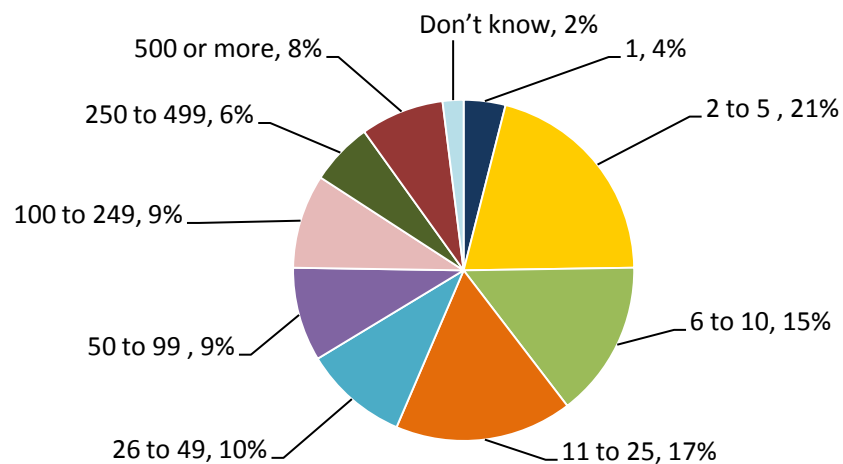
Source: Enterprise Strategy Group, 2010.

## Respondents by Physical Locations Worldwide

The number of worldwide physical locations of survey respondents' organizations is shown in Figure 6.

Figure 6. Survey Respondents, by Physical Locations Worldwide

**To the best of your knowledge, how many physical locations (offices, plants, branches, etc.) does your organization operate worldwide? (Percent of respondents, N=510)**



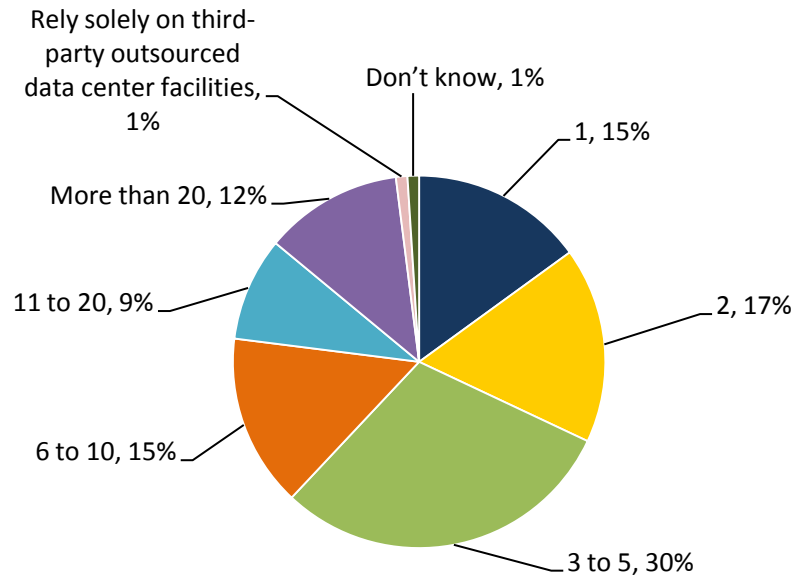
Source: Enterprise Strategy Group, 2010.

## Respondents by Data Centers Operated Worldwide

The number of data centers operated worldwide by survey respondents' organizations is shown in Figure 7.

Figure 7. Survey Respondents, by Data Centers Worldwide

**How many data centers does your organization operate worldwide? (Percent of respondents, N=510)**



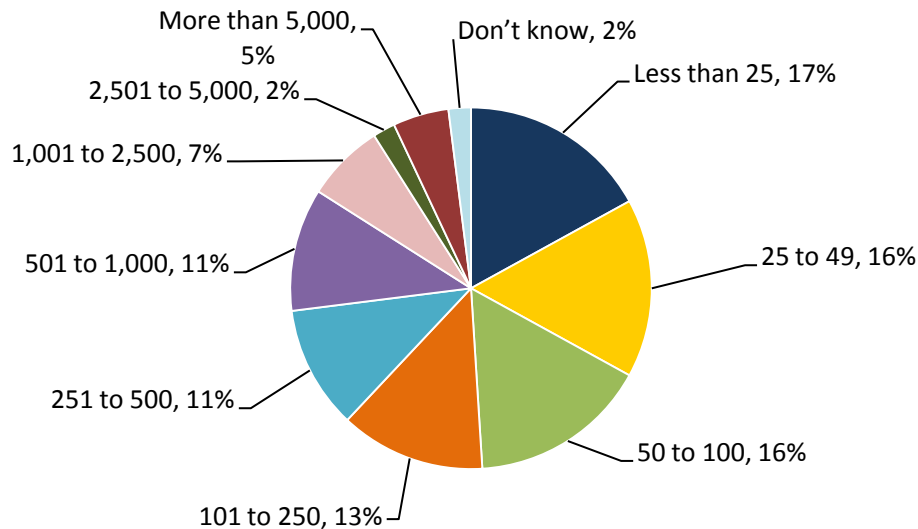
Source: Enterprise Strategy Group, 2010.

## Respondents by Number of Production Servers

The number of production servers in respondents' immediate organizations is shown in Figure 8.

Figure 8. Survey Respondents, by Number of Production Servers

**Approximately how many production servers (whether physical or virtual) are supported worldwide by your IT organization? (Percent of respondents, N=510)**

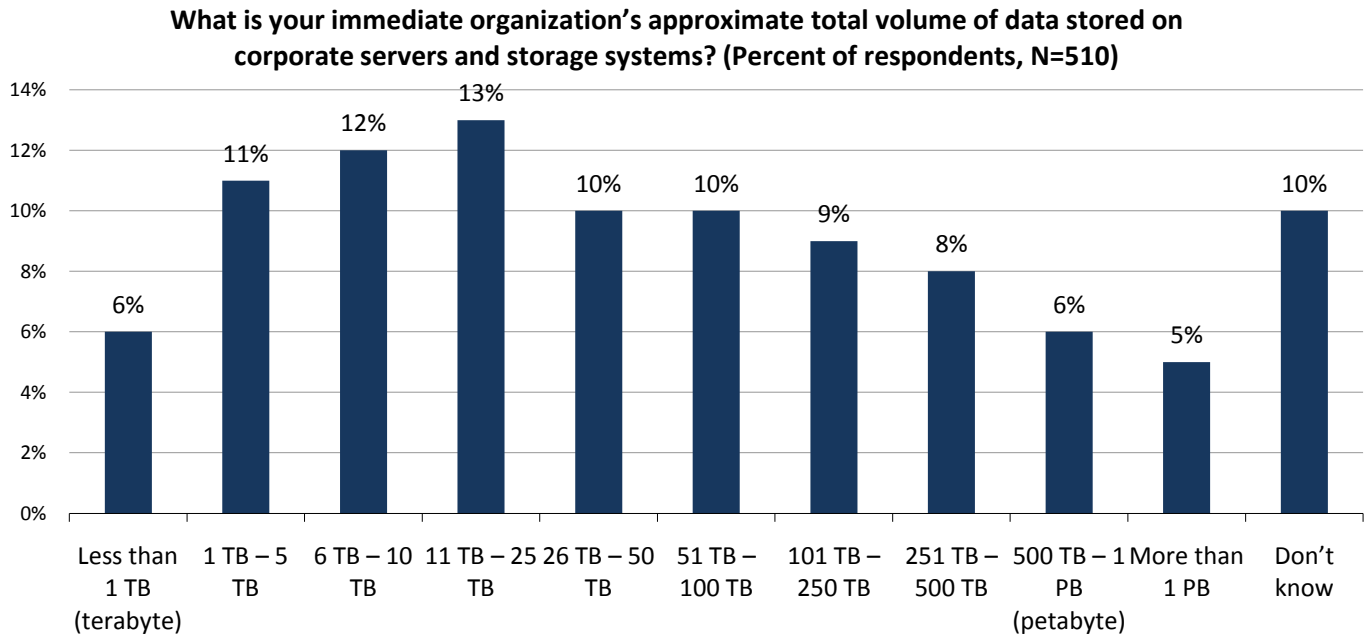


Source: Enterprise Strategy Group, 2010.

## Respondents by Total Amount of Data

The number of production servers in respondents' immediate organizations is shown in Figure 9.

Figure 9. Survey Respondents, by Total Amount of Data

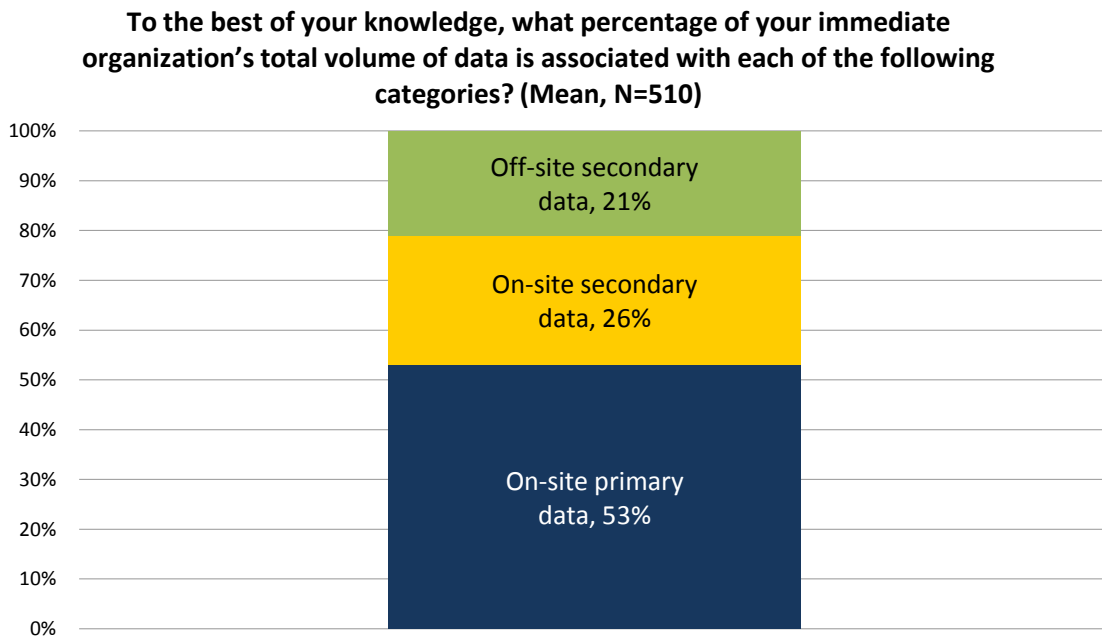


Source: Enterprise Strategy Group, 2010.

## On-Site vs. Off-Site Data

Respondents were asked to break down their organization's total amount of data by the categories presented in Figure 10.

Figure 10. Classification of Total Amount of Data



Source: Enterprise Strategy Group, 2010.



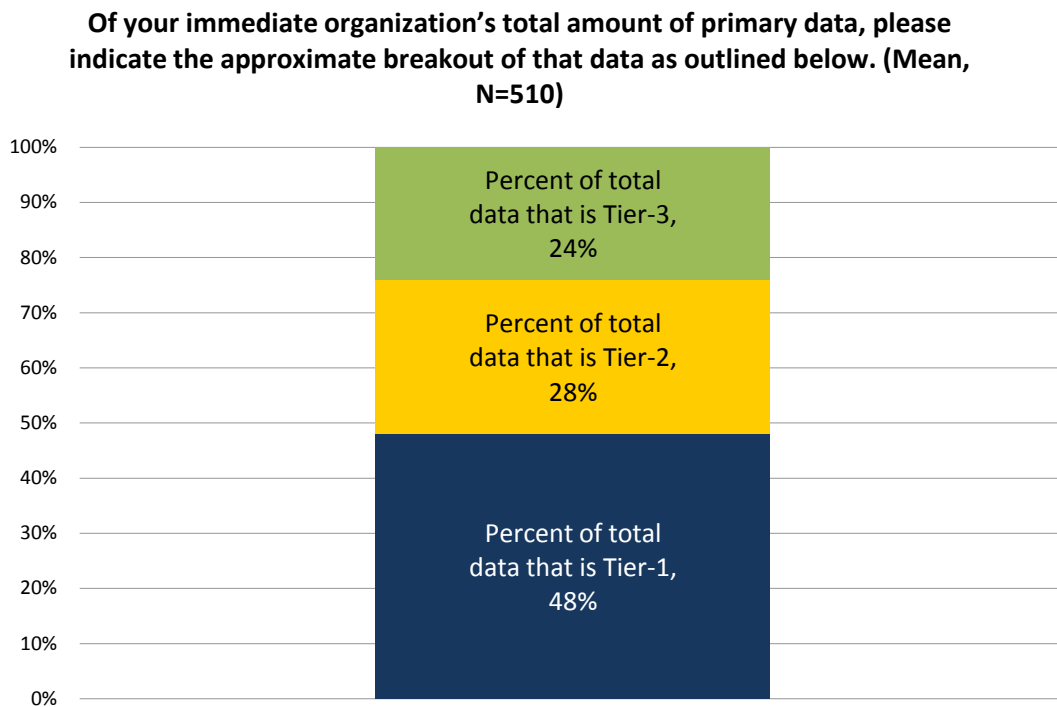
## Percent of Data by Tier

ESG asked respondents to categorize their organization's total volume primary data into three tiers based on the following definitions:

- **Tier-1:** Mission-critical data and applications with the highest requirements for both availability and performance.
- **Tier-2:** Data and applications requiring good performance and reliability, but not at the level of mission-critical data. This can include a mix of less-critical application data and older mission-critical data.
- **Tier-3:** Typically archived data; performance is less essential, but the data must be retrievable.

The results are presented in Figure 11.

Figure 11. Classification of Primary Data, by Business Value

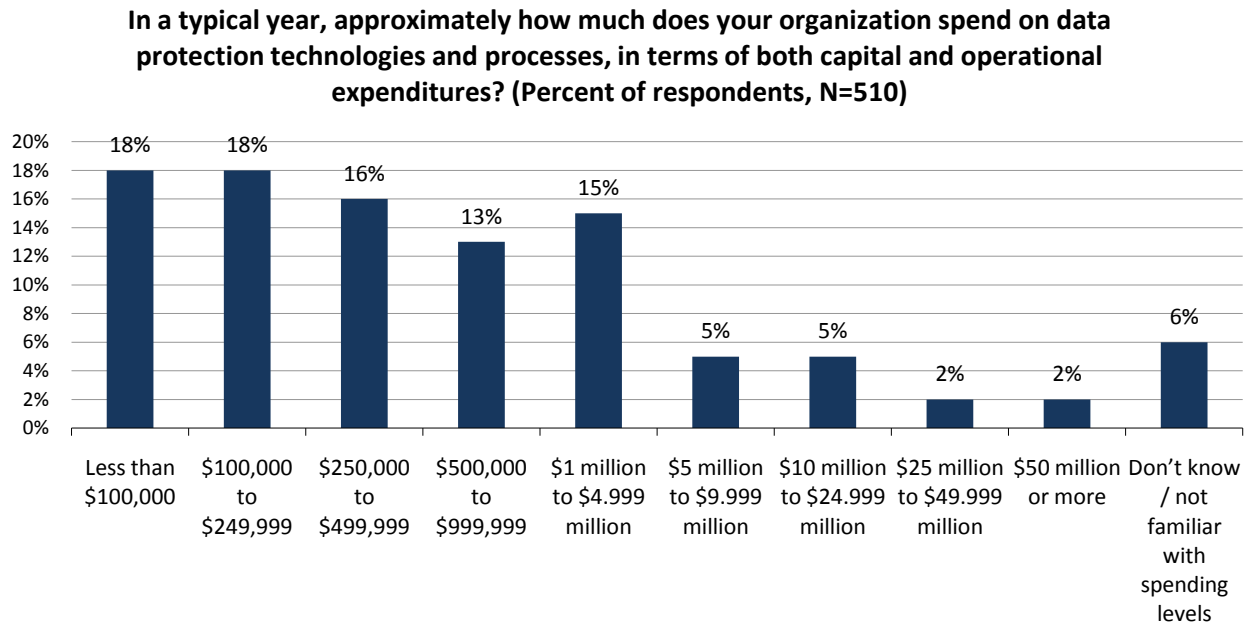


Source: Enterprise Strategy Group, 2010.

## Respondents by Annual Data Protection Budget

Respondents were asked to provide their organization's annual data protection budget in Figure 12.

Figure 12. Annual Data Protection Budget

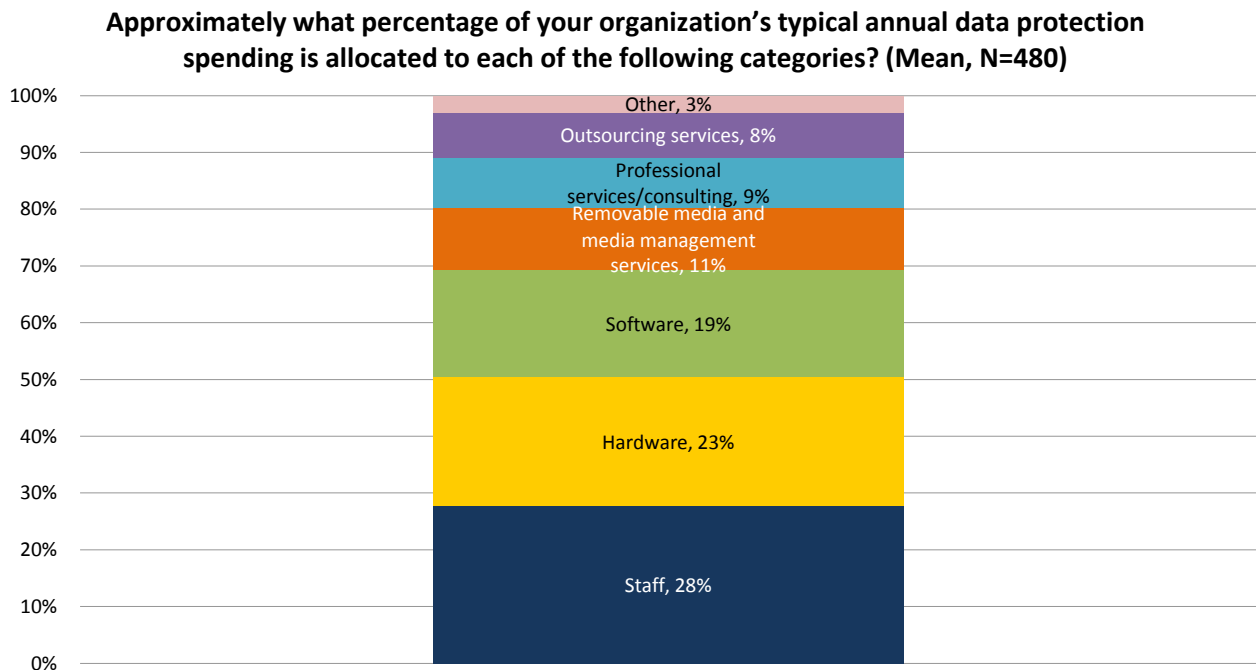


Source: Enterprise Strategy Group, 2010.

## Respondents by Data Protection Spending Allocation

Respondents were asked to approximate their organization's data protection spending allocation in Figure 13.

Figure 13. Data Protection Spending Allocation



Source: Enterprise Strategy Group, 2010.

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