



Securing Your Journey
to the Cloud



Cloud Security Survey Global Executive Summary

Corporate Marketing

Objective And Methodology

Objective:

- To understand more about global and regional virtualization and cloud adoption rates and barriers to adoption.

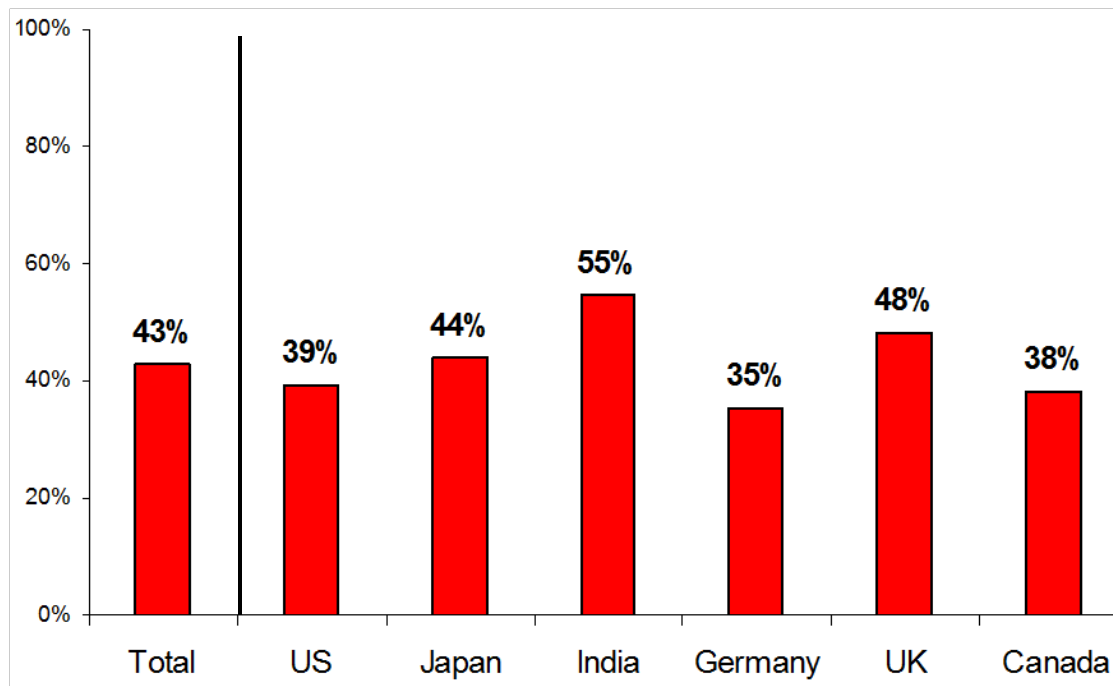
Methodology:

- An online survey was conducted in May, 2011 in six countries: the US, Canada, the UK, Germany, Japan and India.
- 1,200 respondents (200 per country) were surveyed: all were purchase decision makers or key influencers for one or more of the following three solutions/services:
 - Cloud Computing Services,
 - Server Virtualization, and/or
 - Virtual Desktop Infrastructure (VDI).
- Companies were limited to 500+ employees.

Executive Summary

Cloud Is Not Secure. Almost Half Experienced Data Security Lapse Or Issue In The Last 12 Months

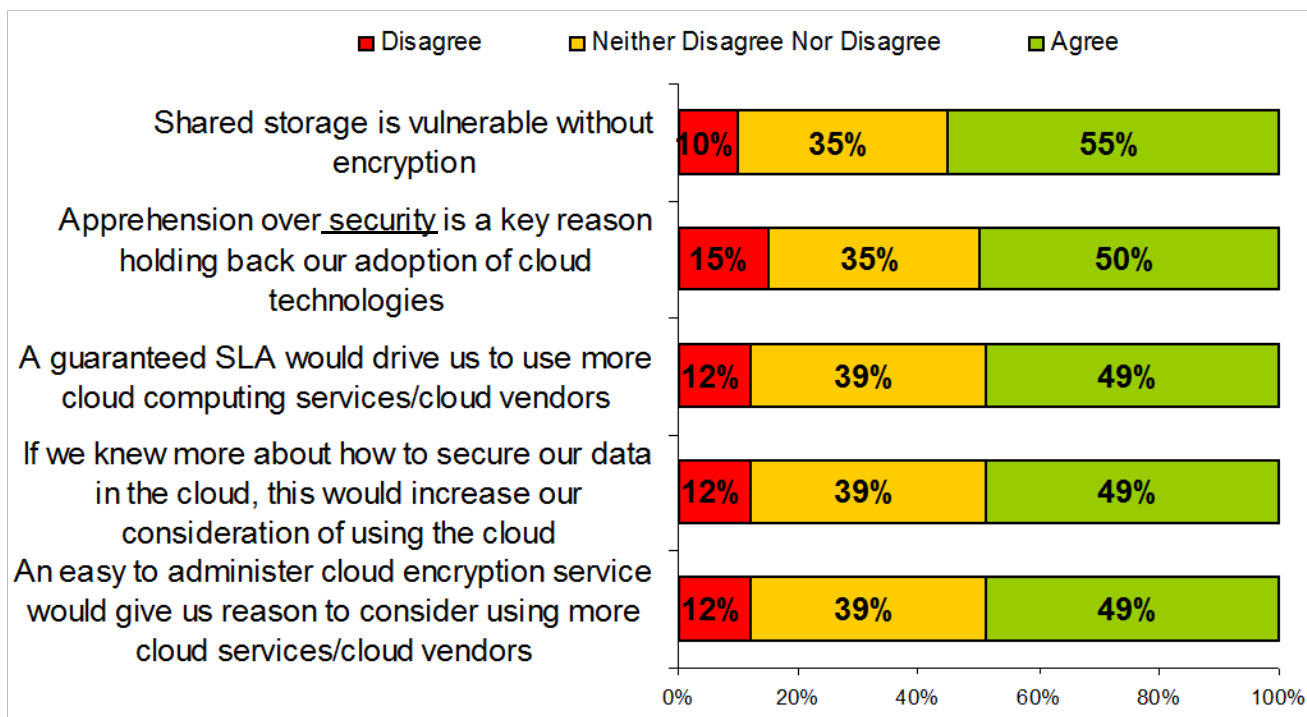
- Globally, 43% of the respondents who are currently using a cloud computing service reported they have experienced a data security lapse or issue with the cloud service their company is using within the last 12 months. This percentage is particularly high in India (55%).



Q: Has your organization experienced a data security lapse or issue within the last 12 months?

Enterprises Are Concerned About Using Cloud Computing Services

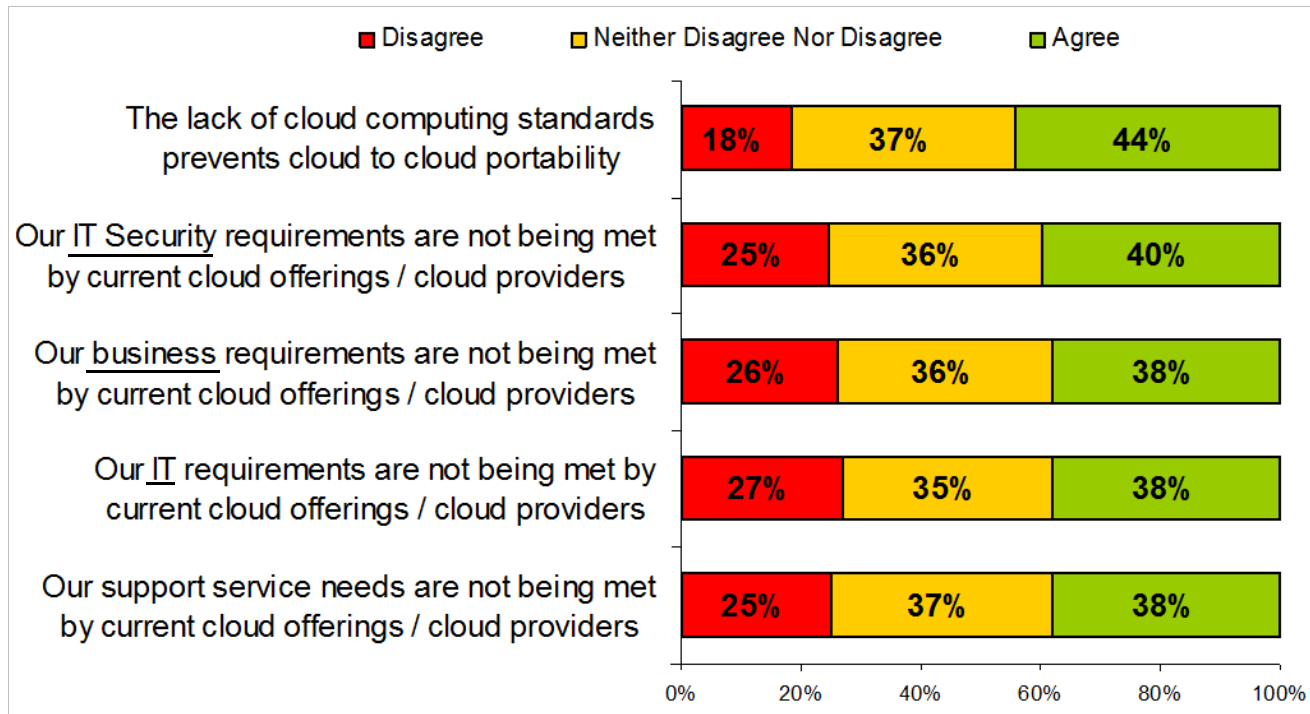
- Half of the respondents indicated that apprehension over security is a key reason holding back their adoption of cloud technique. More than half believed shared storage is vulnerable without encryption.
- Roughly half expressed more willingness to consider using the cloud if they knew more about how to secure their data in the cloud.



Q: How much do you agree or disagree with the following statements about cloud vendors / cloud computing services?

Not All Cloud Providers Meet Enterprise IT Security Requirements

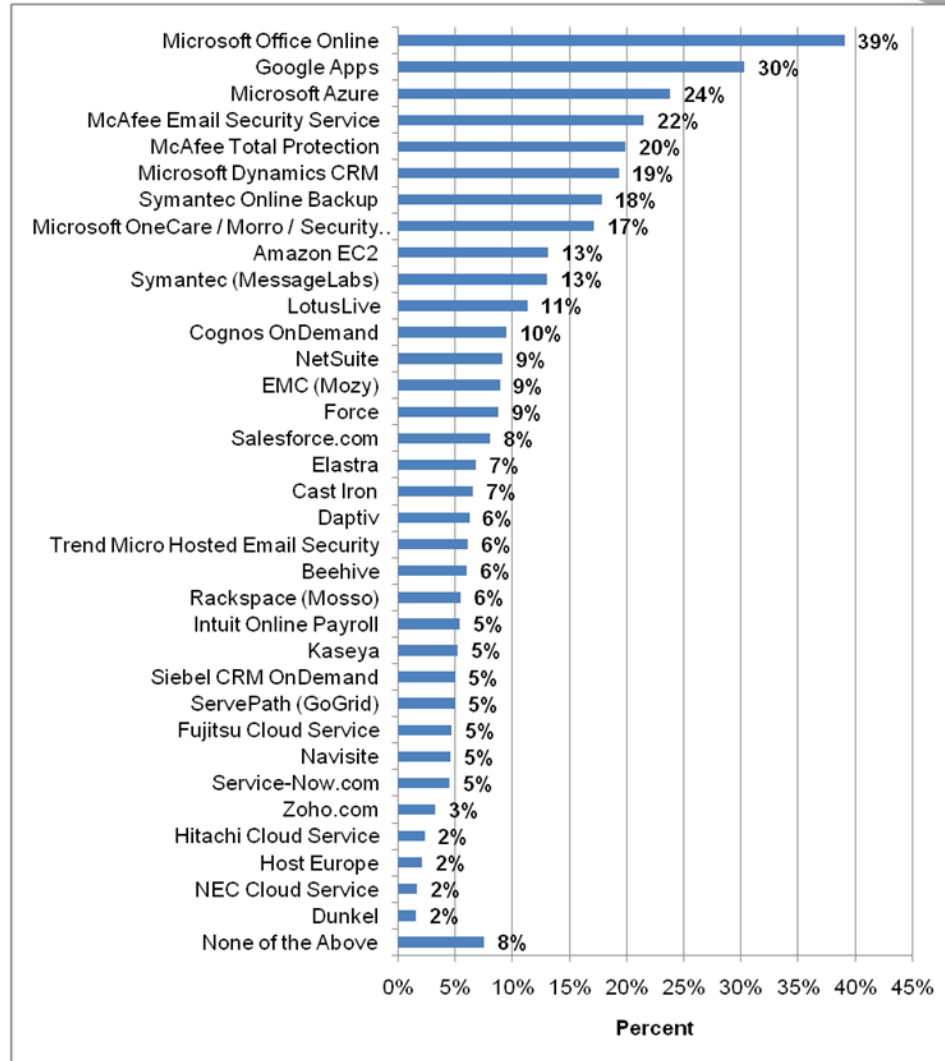
- Four in ten respondents indicated their IT security requirements are not being met by current cloud providers / offerings.



Q: How much do you agree or disagree with the following statements about the current set of cloud computing service offerings in the market?

Some Enterprises Don't Even Know They Are Actually Using A Cloud Computing Service

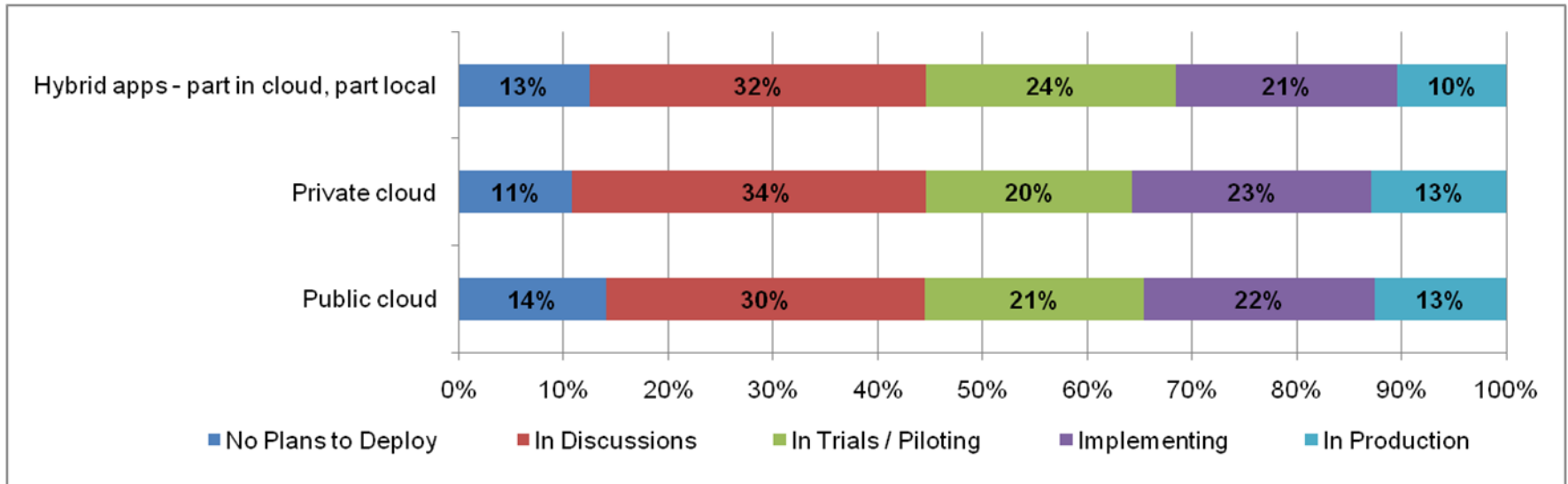
- There is still confusion about what cloud computing services exactly are. When presented with a list of cloud services, 93% of the respondents said they are currently using at least one of them. However, 7% of these respondents indicated, on the other hand, that their company has no plans to deploy any cloud computing services.



Q: Which, if any, of the following vendors / services does your company currently use?

More Enterprises Are Moving To The Cloud Quickly

- Although slightly over 10% of the respondents currently have cloud computing services in production, close to half are either implementing or piloting.



Q: With regards to the following steps, please indicate where your company is – in terms of usage/deployment (In Production; Implementing; In Trials/Piloting; In Discussions; No Plans To Deploy):

- Public Cloud
- Private Cloud
- Hybrid apps – part in cloud, part local

And More Applications Are Moving To The Cloud; More Servers and Endpoints Are Being Virtualized

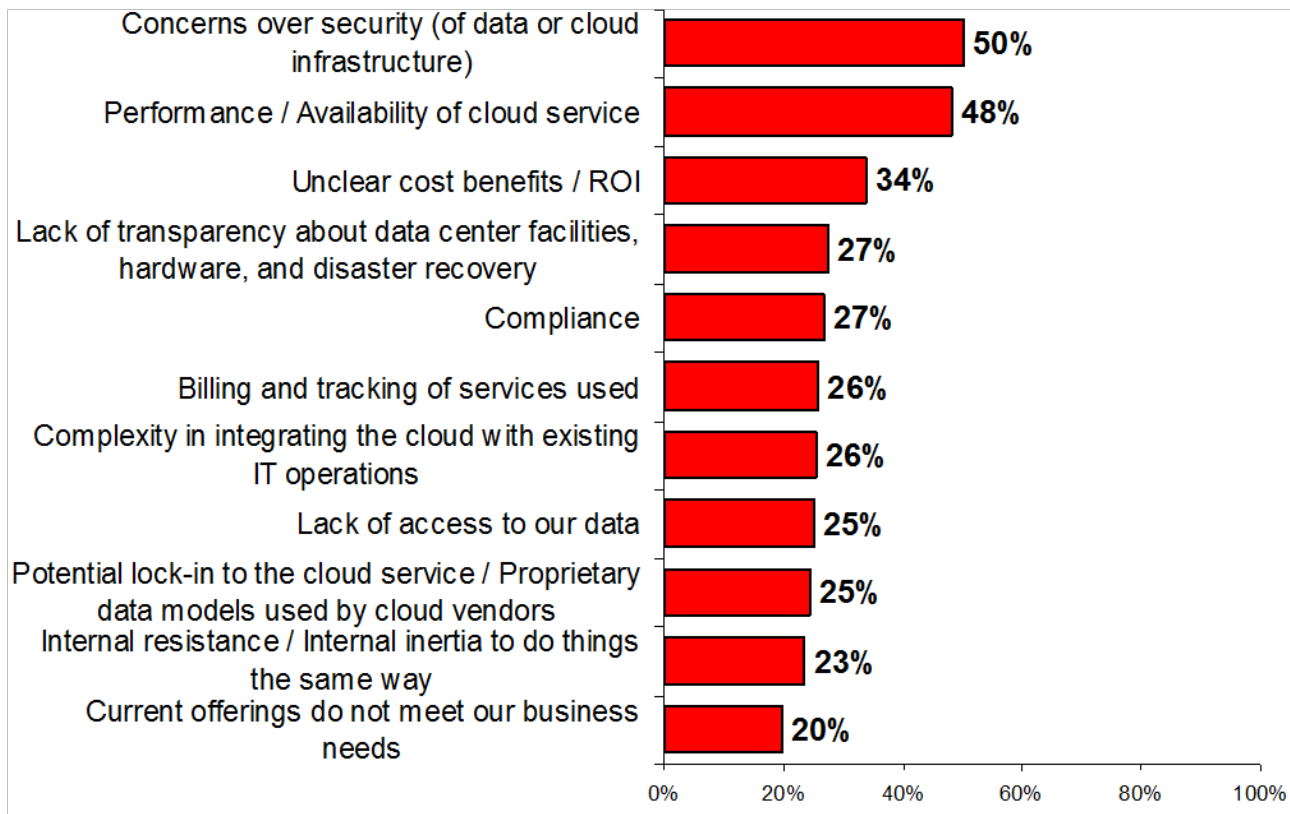
- For companies that have public cloud or hybrid apps currently in production, an average of **45%** of the existing applications are already deployed in the cloud. An average of **53%** of the new applications will be deployed in the cloud.
- For companies that have server virtualization currently in production, an average of **47%** of their servers are currently virtualized. In the next 12 months, an average of **63%** of their servers will be virtualized.
- For companies that have VDI currently in production, an average of **42%** of their endpoints are currently virtualized. In the next 12 months, an average of **60%** of their endpoints will be virtualized.

Qs: What percentage of your company's:

- % of EXISTING applications deployed in the cloud; % of NEW applications to be deployed in the cloud?
- % of Endpoints CURRENTLY Virtualized; % of Endpoints that WILL BE virtualized in the next 12 months?
- % of Servers CURRENTLY Virtualized; % of Servers that WILL BE virtualized in the next 12 months?

Security Is Important, But Performance and Availability Are Equally Important

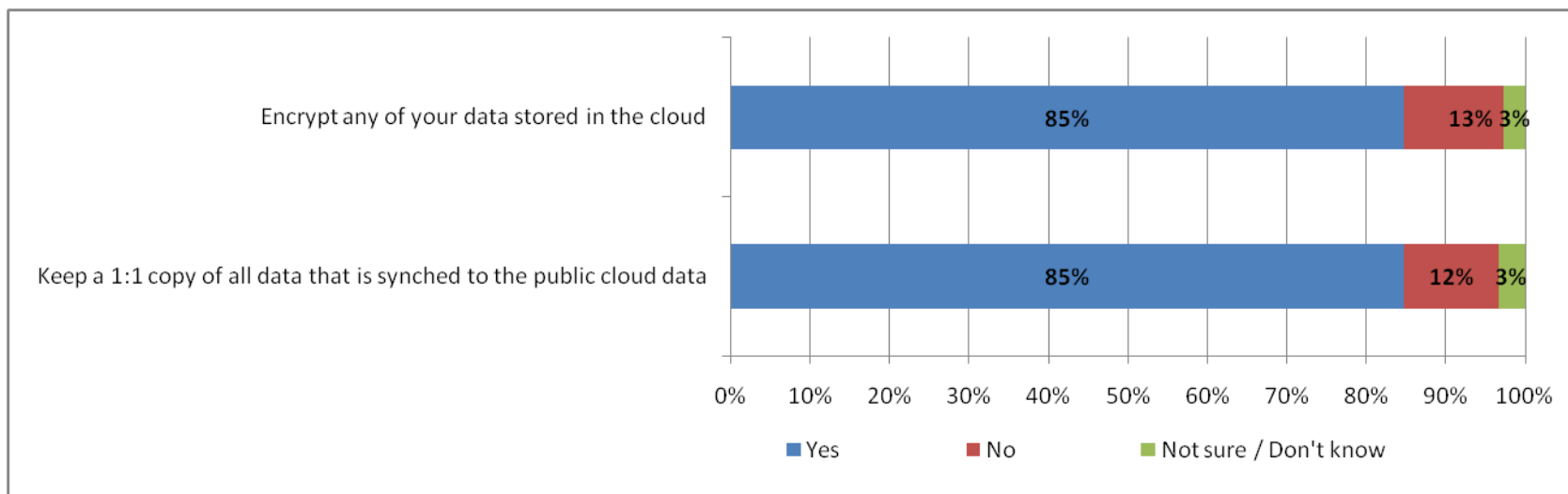
- Security and performance/availability of cloud services stand out as the top barriers in adopting cloud computing services.



Q: What risks/barriers do you perceive in adopting cloud computing services?

Encryption Is A Key Measure Taken To Secure Data In The Cloud

- For those who have public cloud in production, the vast majority, 85% said they encrypt their data stored in the cloud and keep a 1:1 copy of all data that is synched to the cloud.



Qs: Does your company encrypt any of your data stored in the cloud?
Does your company keep a 1:1 copy of all data that is synched to the public cloud data?

Companies That Have Server Virtualization In Production Have A Tendency To Also Move To The Cloud

- Use of server virtualization was significantly correlated to cloud services usage.
- Of the 707 respondents who have Server Virtualization in production or in pilot:
 - 70% also have VDI in production/pilot
 - 62% have Private Cloud Computing in production/pilot
 - 60% have Public Cloud Computing in production/pilot

**Q: Which of the following best describes your organization's use of the following technologies?
(Currently Piloting; Currently Deployed / in Production; Planning To Deploy; Have No Plans To
Deploy; Not Sure /Don't Know)**

- Server Virtualization
- VDI
- Private Cloud
- Public Cloud



Appendix:

**Usage of Cloud Computing Services, Server
Virtualization and VDI**

Adoption/Usage of Server Virtualization, VDI, Public Cloud and Private Cloud

- Overall, adoption rate for the various technologies is highest in the US and the UK, and is lowest in Japan and Canada.

% that have currently deployed or are piloting among decision makers*	Total	US	Japan	India	Germany	UK	Canada
Server Virtualization	59%	70%	58%	51%	61%	68%	47%
VDI	52%	62%	42%	48%	55%	63%	45%
Private Cloud	46%	56%	34%	42%	54%	51%	38%
Public Cloud	45%	54%	37%	38%	48%	52%	42%

*Decision makers: Enterprise IT professionals who make purchase decisions for cloud computing services, server virtualization or Virtual Desktop infrastructure (VDI) solutions.

Note: For each row, numbers highlighted in green are significantly higher than numbers highlighted in red.

Q: Which of the following best describes your organization's use of the following technologies? (Currently Piloting; Currently Deployed / in Production; Planning To Deploy Within The Next 6 Months; Planning To Deploy In The Next 7 To 12 Months; Planning To Deploy But Do Not Know When; Have No Plans To Deploy; Not Sure /Don't Know)

- Server Virtualization
- VDI
- Private Cloud
- Public Cloud)



THANK YOU!