BACKGROUND

To understand how enterprises view key vendors in the data center security space, Infonetics Research conducted a web survey of qualified IT purchase-decision makers at 104 large organizations (over 1,000 employees) that operate their own data centers.

We then published the results with analysis in our March 25, 2013 Data Center Security Strategies and Vendor Leadership: North American Enterprise Survey. The following are excerpts from the survey, reprinted with permission by Cisco Systems.

RESPONDENTS PLACE CISCO AT HEAD OF THE PACK FOR DATA CENTER SECURITY

From massive hosting providers to cloud-centric companies like Google and Amazon to large and medium enterprises, IT organizations around the world are consolidating and rebuilding data centers or moving infrastructure into the cloud, all in an effort to get the scale and agility they need to operate their businesses and manage cost.

Not every enterprise has a Google-sized data center operation, but they’re all looking to deploy new security solutions in data centers and have to consider a wide range of security technologies and architectures: server software that protects a single virtual machine, virtual appliances that deliver security at the hypervisor level, and big iron security products that sit in the data center in multiple locations.
The winning vendors in this space will be the ones that position themselves through a mix of the right products, a great track record for security efficacy, a great solutions/integration offering, and the ability to leverage adjacent strengths.

We asked respondents to name the top 3 data center security suppliers for each of 10 important buying criteria (this is a prompted question—respondents could only pick from a provided list of vendors). Exhibit 1 shows the percentage of respondents who consider each vendor to be among the top 3 for each criterion. Well-known brand names like Cisco (the clear leader with the highest marks for all criteria), McAfee, HP, and Trend Micro are the clear top 4 among survey respondents. Strength in the individual criteria is also tied to overall brand strength and awareness.

Exhibit 1: Data Center Security Solution Supplier Leadership

Source: Infonetics Research, Data Center Security Strategies and Vendor Leadership: North American Enterprise Survey, March 2013 (excerpt of top 6 vendors only)

The winning vendors in this space will be the ones that position themselves through a mix of the right products, a great track record for security efficacy, a great solutions/integration offering, and the ability to leverage adjacent strengths — like Cisco creating a strong offering that blends security, switching, and routing.
Cisco is the clear leader here as well, and it’s this brand strength that carries over into respondent perception of their strength in specific criteria we asked about.

**CISCO CONSIDERED TOP DATA CENTER SECURITY SOLUTION SUPPLIER**

In an open-ended question, we asked respondents whom they consider to be the top 3 security solution suppliers for data centers, a measure called unaided brand awareness, which provides a good view of overall brand strength.

Cisco is the clear leader here as well, and it’s this brand strength that carries over into respondent perception of their strength in specific criteria we asked about.

**Exhibit 2: Top Data Center Security Solution Suppliers: Respondent Perception**

![Bar chart showing respondent perception of top data center security solution suppliers.](chart.png)

CISCO IN THE TOP 2 VENDORS INSTALLED AND UNDER EVALUATION FOR FUTURE PURCHASES

In addition to understanding which vendors survey respondents believe are strongest for important buying criteria, we wanted to know whose products they had installed, and who they were evaluating for future purchases. Therefore, in an open-ended question, we asked respondents whose data center security solutions they are using now and who they are evaluating for use by 2014.

Exhibit 3: Data Center Security Solution Suppliers Installed and Under Evaluation

Source: Infonetics Research, Policy Management Deployment Strategies and Vendor Leadership: Global Service Provider Survey, December 2012

This is a fragmented market, and vendors in use include a mix of virtualization vendors, application/database vendors, server/data center heavy hitters, client security players, network security vendors, and vendors that also have a large stake in the network integration business for data centers.
To say you’re the leader in data center/cloud security is to say you are an innovator who can tackle the biggest problems in IT security for the biggest and most demanding customers.

BOTTOM LINE

The data center/cloud is at the heart of a major transformation in IT, and security products designed for it will push the boundaries of threat protection, performance, functionality, flexibility, feature integration, and management.

To say you’re the leader in data center/cloud security is to say you are an innovator who can tackle the biggest problems in IT security for the biggest and most demanding customers.

Respondents to this survey spent an average of US$14.6 million on security products for the data center in 2012, which they plan to grow to an average of US$16.9 million in 2013, a 16% increase. Vendors who are not already delivering a comprehensive set of data center security products and communicating their short- and long-term vision will be left out of this round of upgrade spending.

Given its performance in this survey and the strength of its overall network and content security market share, Infonetics believes that Cisco is well positioned to be a leader in the enterprise data center security space.
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ABOUT INFORNETICS RESEARCH

Infonetics Research is an international market research and consulting firm serving the communications industry since 1990. A leader in defining and tracking emerging technologies in all world regions, ‘Infonetics’ analysts help clients plan, strategize, and compete more effectively.

In addition to publishing buyer surveys and vendor market share and forecast reports on communications markets ranging from core infrastructure to client devices, Infonetics also offers custom research, consulting, event speaking, and custom papers.

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