

STATE OF THE DATA CENTER SURVEY GLOBAL RESULTS

SEPTEMBER 2012



CONTENTS

3 METHODOLOGY

4 INTRODUCTION

5 DATA CENTER COMPLEXITY IS PERVASIVE

6 EFFECTS OF DATA CENTER COMPLEXITY ARE DIVERSE AND COSTLY

8 IT FIGHTING BACK WITH TRAINING, STANDARDIZATION AND INFORMATION GOVERNANCE

10 RECOMMENDATIONS—WAYS THAT IT CAN TRY TO MITIGATE THE EFFECTS OF DATA CENTER COMPLEXITY

METHODOLOGY

ReRez surveyed 2,453 global organizations across 32 countries

Symantec commissioned ReRez Research to field The 2012 State of the Data Center Survey in March of 2012. They contacted a total of 2,453 IT professionals at organizations in 32 countries. Respondents included senior IT staff focused on operations and tactical functions, as well as staff members focused on planning and IT management.

The poll has a reliability of 95% confidence with +/- 2% margin of error.

North America (2 countries)

United States	250
Canada	250

Latin America (12 countries)

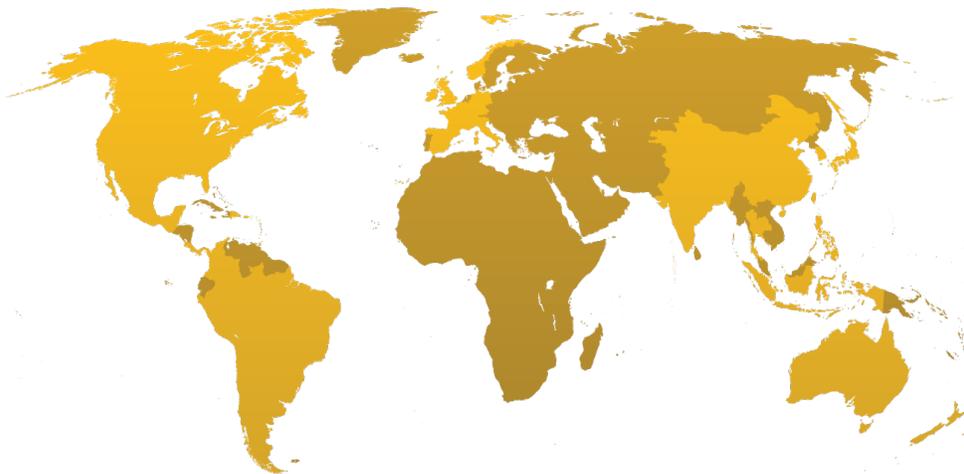
Brazil	75
Mexico	75
NOLA	50
SOLA	50

EMEA (7 countries)

United Kingdom	100
France	100
Germany	100
Italy	100
Spain	100
Sweden	100
Switzerland	100

APJ (11 countries)

China	103
Japan	100
Australia/New Zealand	100
India	100
Indonesia	100
South Korea	100
Philippines	100
Singapore	100
Thailand	100
Vietnam	100



INTRODUCTION

IT executives have long had to grapple with challenges related to managing the data center, including providing robust logical and physical security, ensuring disaster recovery and high availability, handling server maintenance and accounting for data backup.

But with the emergence of overarching IT trends such as virtualization, cloud computing and the proliferation of mobile devices, data centers are being transformed. In many ways they're becoming more complex, and as a result the challenges of managing these IT resources are changing.

To get the most value out of their organizations' data centers, IT executives need to understand the new challenges and how to effectively address them. Otherwise, their investments in virtualization software, blade servers and other technologies designed to "modernize" the data center might be in vain.

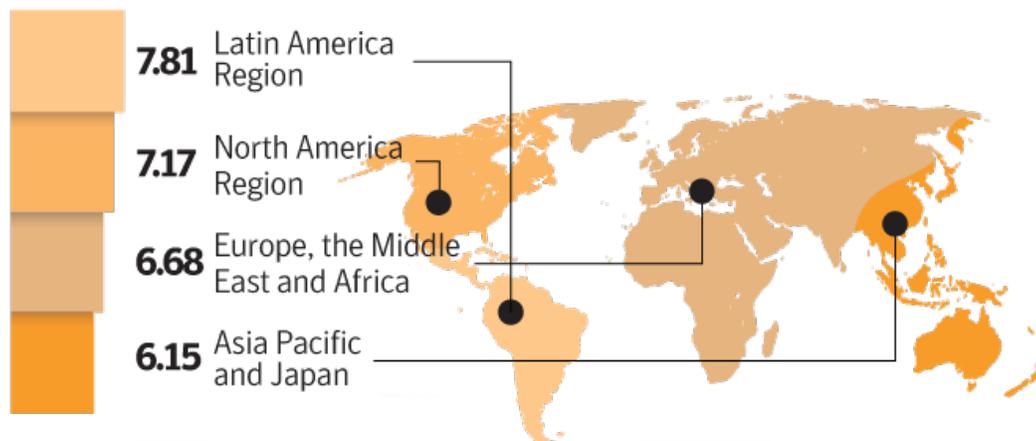
DATA CENTER COMPLEXITY...

... IS PERVASIVE

The transformation of the data center is having an impact on multiple areas of technology. The survey asked respondents to rate the level of complexity in each of five areas on a scale of 0 to 10, and the results show that data center complexity affects all aspects of computing, including security and infrastructure, disaster recovery, storage and compliance.

For example, respondents on average rated all the areas 6.56 or higher on the complexity scale, with security topping the list at 7.06. The average level of complexity for all areas for companies around the world was 6.69. [Organizations in the Americas on average rated complexity highest, at 7.81, and those in Asia-Pacific/Japan lowest, at 6.15].

“You need new skill requirements; you need to keep up to date,” says an IT director for a healthcare organization, who took part in a focus group related to the research. “Power and cooling requirements for the data center never go away. Even though you virtualize, there’s an amazing number of applications these days. These vendors want them to run on a single machine, so you run it on a single VM, but it just multiplies.”



EFFECTS OF DATA CENTER COMPLEXITY...

... ARE DIVERSE AND COSTLY

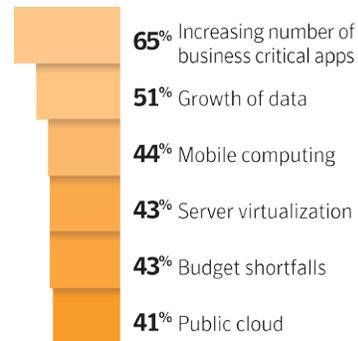
What's driving the complexity? Several factors, according to the research. For one thing, 65 percent of companies stated that the number of business-critical applications is increasing. Other key drivers of complexity include growth in the volume of data, mobile computing, server virtualization and cloud computing, as well as inadequate budgets.

The effects of growing data center complexity are far reaching. By far the most commonly mentioned impact is higher costs, with nearly half of the organizations in the survey citing that as an effect of complexity.

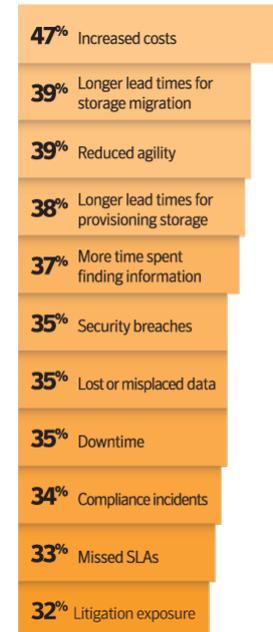
"We may be saving money with virtualization, but the more I talk about going to the cloud, that's an expense," says the chief of IT operations at a healthcare organization. "You may alleviate expense in one area, but you may increase it in another."

Other impacts include reduced agility (stated by 39 percent of respondents); longer lead times for storage migration (39 percent) and provisioning storage (38 percent); longer time to find information (37 percent); security breaches (35 percent); lost or misplaced data (35 percent); downtime (35 percent); and compliance incidents (34 percent).

DRIVERS OF increasing complexity



SIDE EFFECTS OF data center complexity

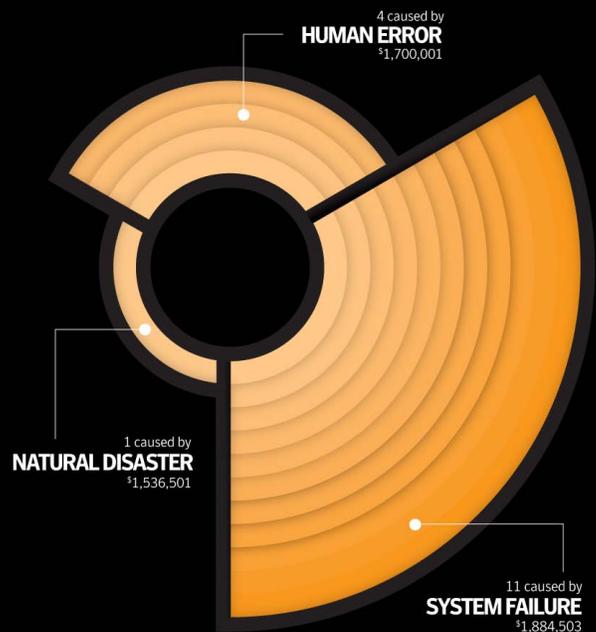


A CIO at a large law firm said, “The expectation is that no matter where our attorneys are, they should have access to the system. Being able to provide that 24/7 uptime, and also being able to provide access from any kind of device, makes it more complex.”

Data center reliability is critical to business’ operations, so it’s alarming that one third of the organizations indicate that downtime is an effect of data center complexity.

The typical organization in the report experienced an average of 16 data center outages over the past 12 months, at a cost of \$5.1 million. The most common cause of downtime was systems failures, followed by human error and natural disasters.

ONE COST OF DATA COMPLEXITY IS DOWNTIME
AT A TYPICAL COMPANY THIS DOWNTIME RESULTS IN
16 outages and a loss of \$5.1 Million



IT IS FIGHTING BACK...

... WITH TRAINING, STANDARDIZATION AND INFORMATION GOVERNANCE

IT executives and staffers are taking steps to mitigate data center complexity. Common activities include staff training; standardizing applications, hardware and security; increasing budgets; and centralizing data centers.

“We’re starting to look at all the applications and software with management and re-classifying all the apps,” says the vice president of global technology at a large financial company, who took part in the focus group. “It’s going to save quite a bit of money and make the environment less complex.”

But the single biggest initiative is information governance. A huge majority of the organizations surveyed (90 percent) are either actively discussing governance or have implemented trials or actual governance programs. About one-third have already implemented information governance solutions.

The biggest drivers for launching a governance effort include security (rated somewhat or extremely important by 75 percent of respondents), the availability of new technologies that make information governance easier (69 percent), increased data center complexity (65 percent), the growth of data (65 percent), regulatory issues and legal issues (61 and 56 percent, respectively).

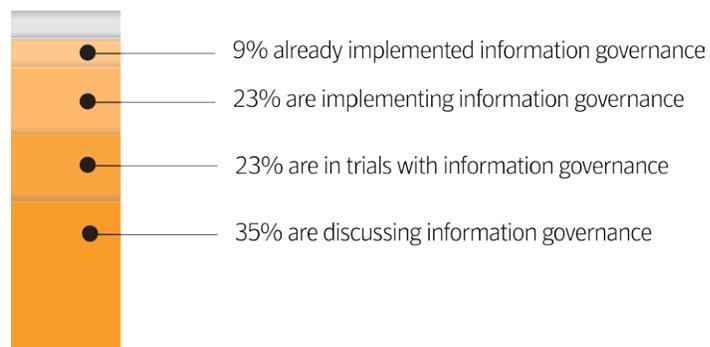
Among the goals companies hope to achieve with information governance are enhanced security (considered important by 75 percent), ease of finding the right information in a timely manner (70 percent), reduced costs of information management (69 percent) and storage (68 percent), reduced legal and compliance risks (65 and 64 percent, respectively), and a move to the cloud (59 percent).

HOW ARE COMPANIES DEALING WITH INCREASED COMPLEXITY?

9 of 10 organizations are implementing or actively discussing information governance

Of those organizations that are not pursuing an information governance initiative, the most common reason is a lack of budget, cited by 50 percent of respondents. Other reasons are that they are too busy with other initiatives (42 percent), the IT staff lacks the requisite skills (37 percent) or they do not see a need for a governance program (32 percent).

COMPANIES INVOLVEMENT WITH INFORMATION GOVERNANCE



RECOMMENDATIONS—

WAYS THAT IT CAN MITIGATE

Symantec suggests several ways that IT can try to mitigate the effects of data center complexity:



1. **Establish C-level ownership of information governance**
2. **Get visibility beyond platforms**
3. **Understand IT assets,**
ones you have, how they are consumed, and by whom
4. **Reduce the number of backup applications**
5. **Deploy deduplication everywhere**
6. **Use backup appliances to simplify**

Establish C-level ownership of information governance. Building an information-responsible culture and creating an umbrella of information governance can help organizations capture synergies across focused projects.

Get visibility beyond platforms. Understand the business services that IT is providing and all of the dependencies to reduce downtime and miscommunication.

Understand what IT assets you have, how they are being consumed, and by whom. This will help cut costs and risk. The organization won't buy servers and storage it doesn't need, teams can be held accountable for what they use, and the company can be sure it isn't running out of capacity.

Reduce the number of backup applications to meet recovery SLAs and reduce capital expenses, operating expenses and training costs.

Deploy deduplication everywhere to help address the information explosion and reduce the rising costs associated with backing up data.

Use backup appliances to simplify backup and recovery operations.



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