



Astaro Global Survey 2007



Agenda



1. The Survey
2. Respondent Structure
3. Future Trends
4. Summary & Conclusions

1. The Survey

Background



▪ Objectives

- Understand current usage of IT security technology by our customers
- Get feedback about biggest IT security challenges for the near future
- Understand priorities of additional technologies Astaro should look into

▪ Survey period 13 – 30 June 2007

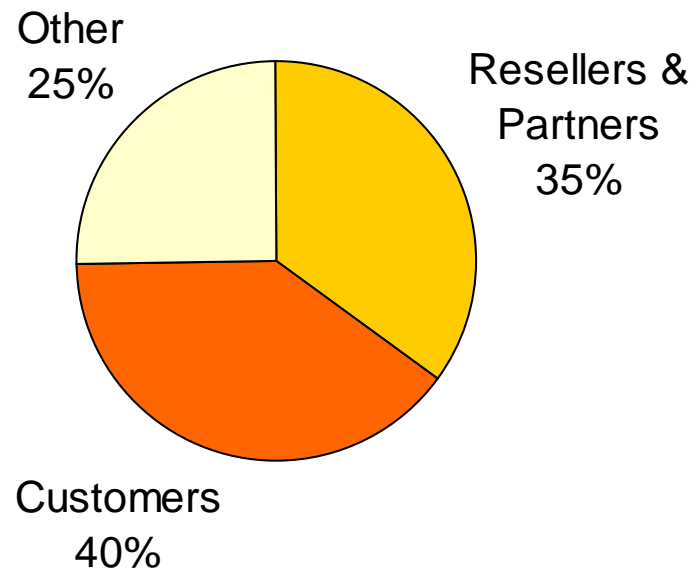
▪ Statistical analysis

- Frequencies
- Correlations

1. The Survey

Responses: 2.873

thereof:



Agenda



1. The Survey

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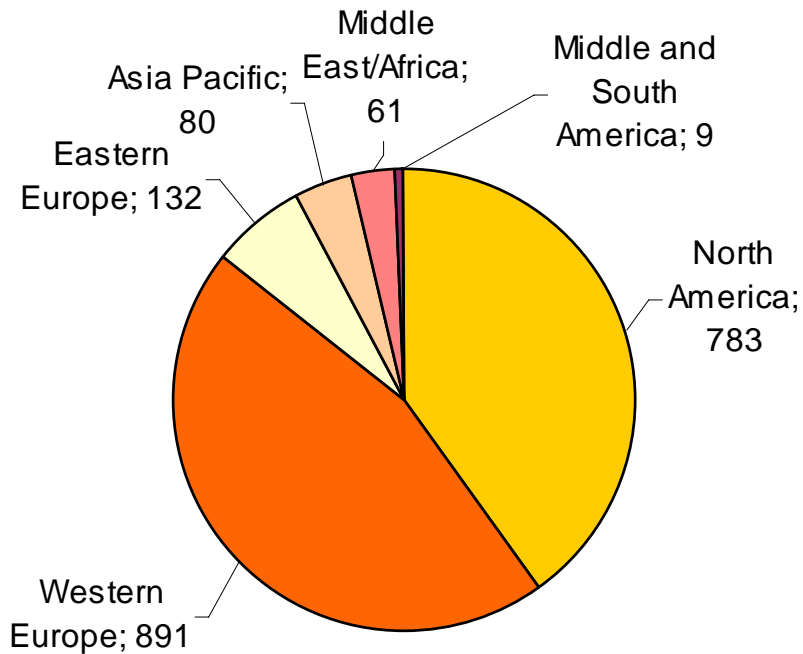
4. Summary & Conclusions

2. Respondent Structure

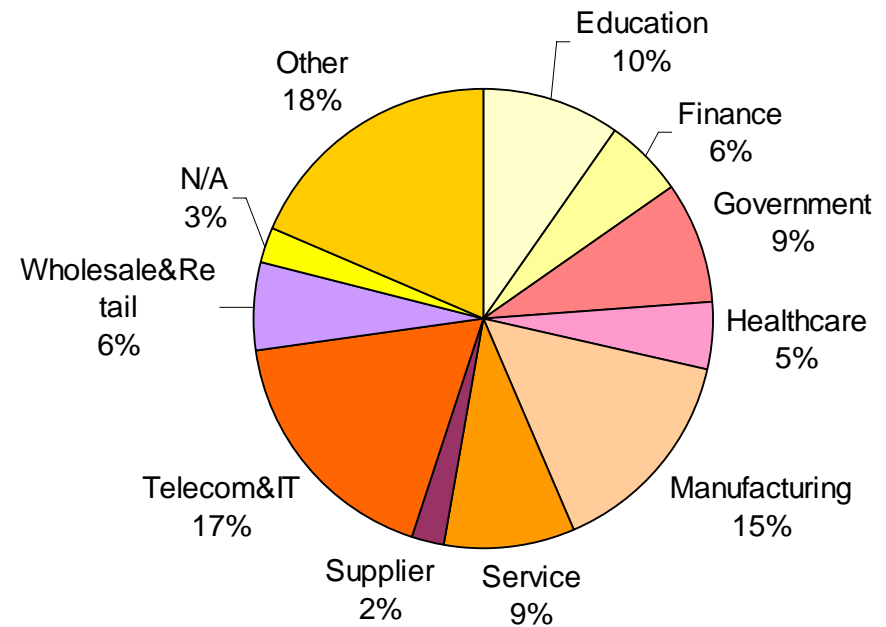
Region and Industry



Respondents per region



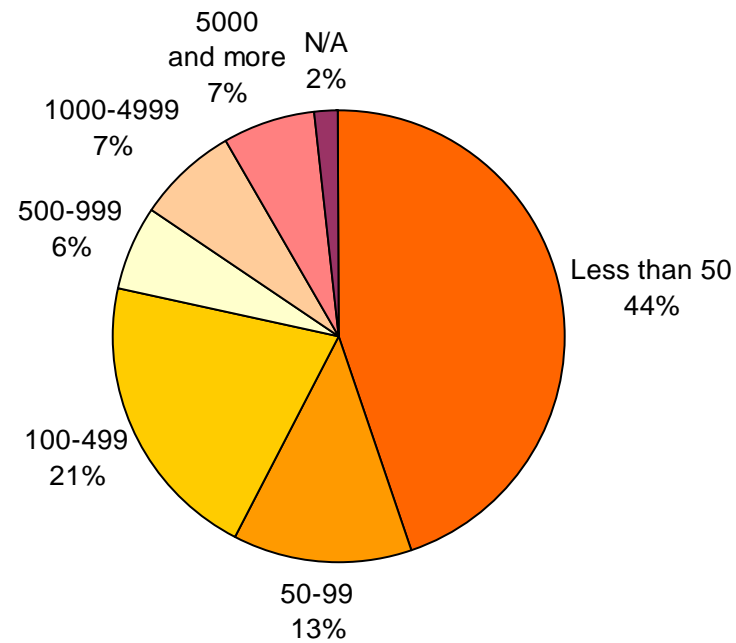
Astaro customers per industry



2. Respondent Structure

Company Size

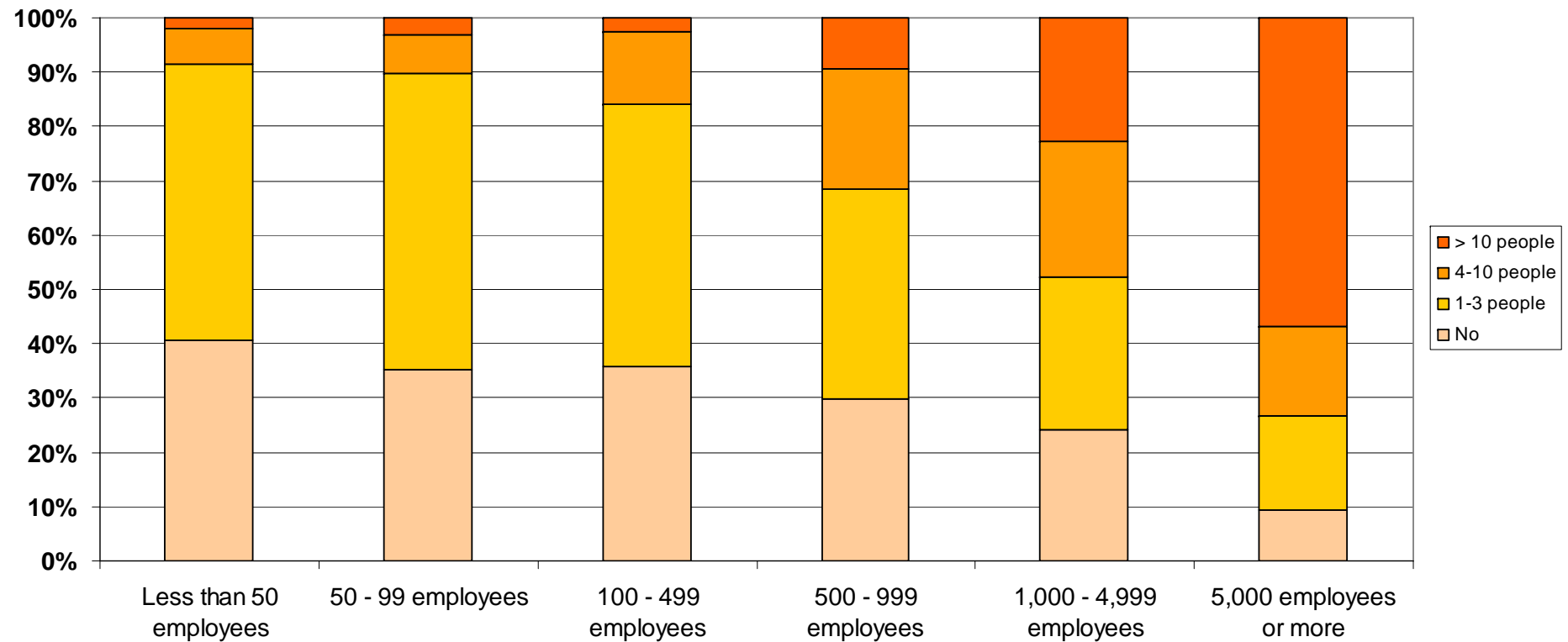
Company size of all respondents



2. Respondent Structure

Size of IT Security Team

Size of IT-Security Team depending on Company Size

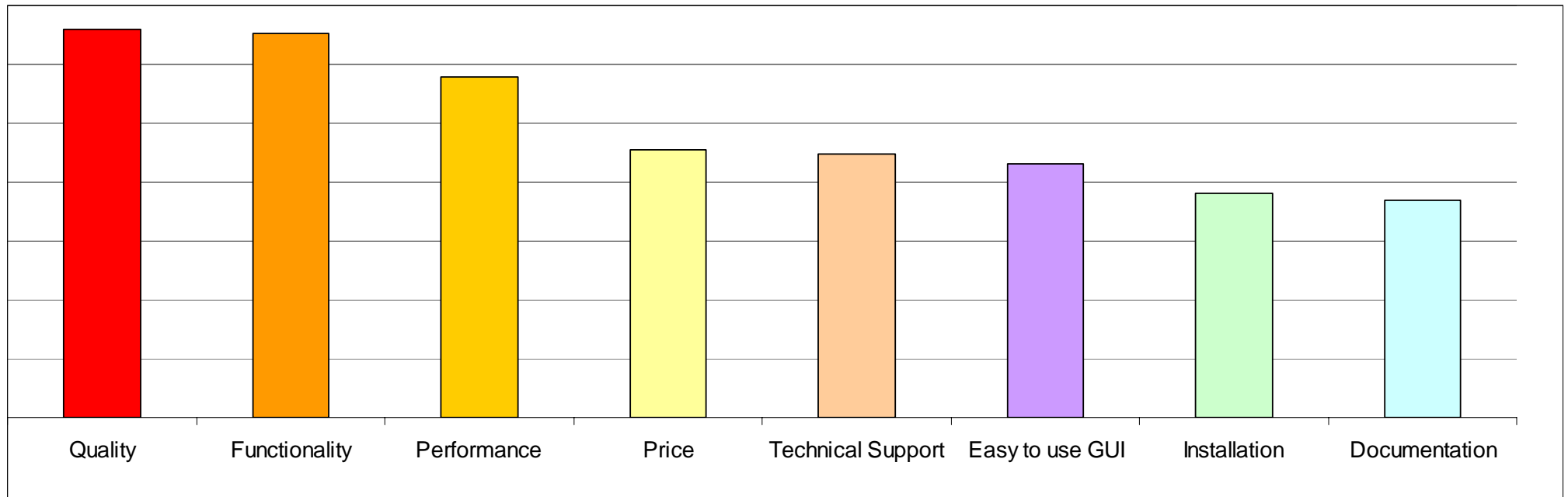


2. Respondent Structure

Buying decision criteria



How important are the following properties to you when buying network products?



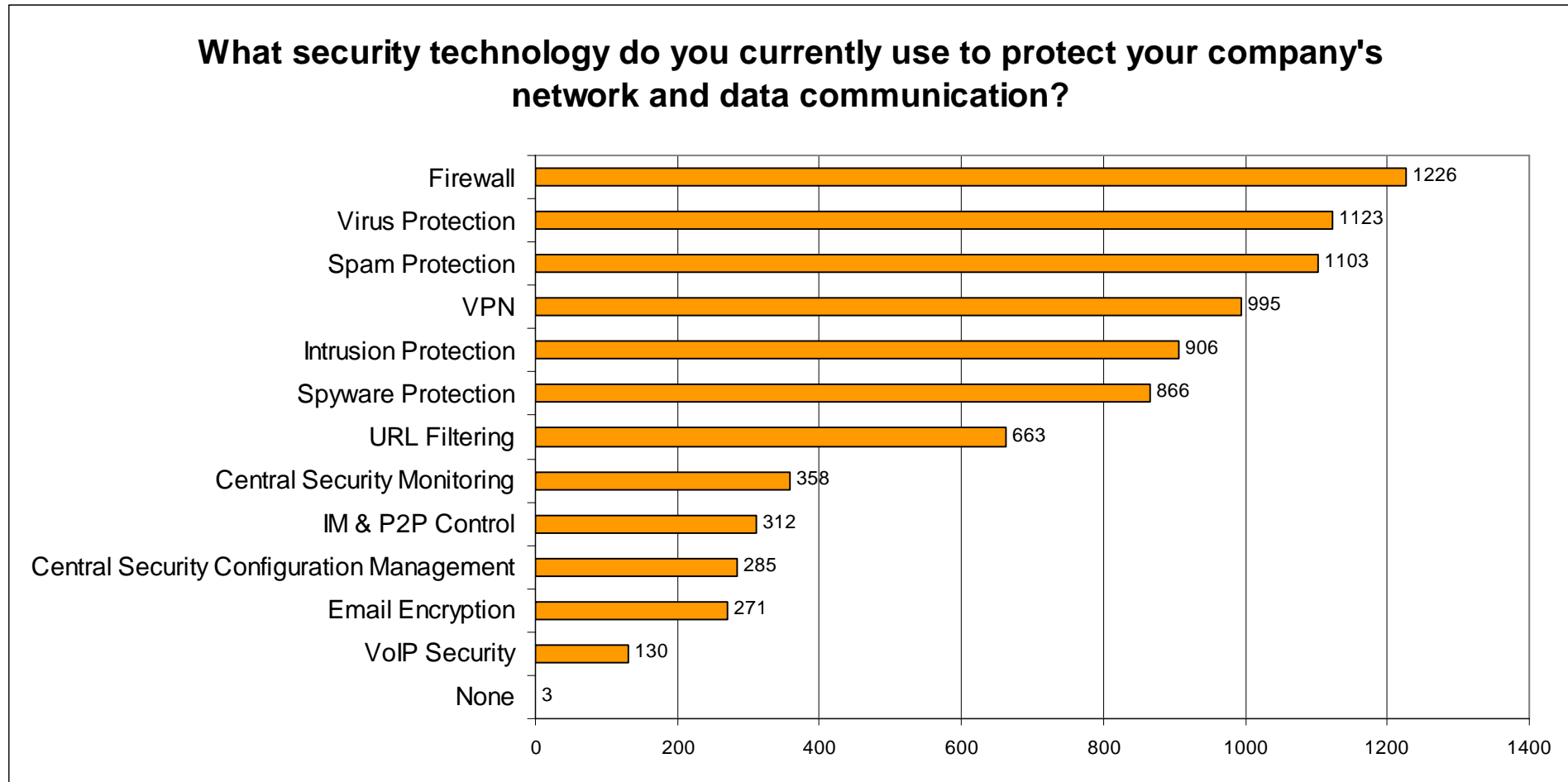
Agenda



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3. Future Trends

Customers Usage of Security Technology Today



n = 1226

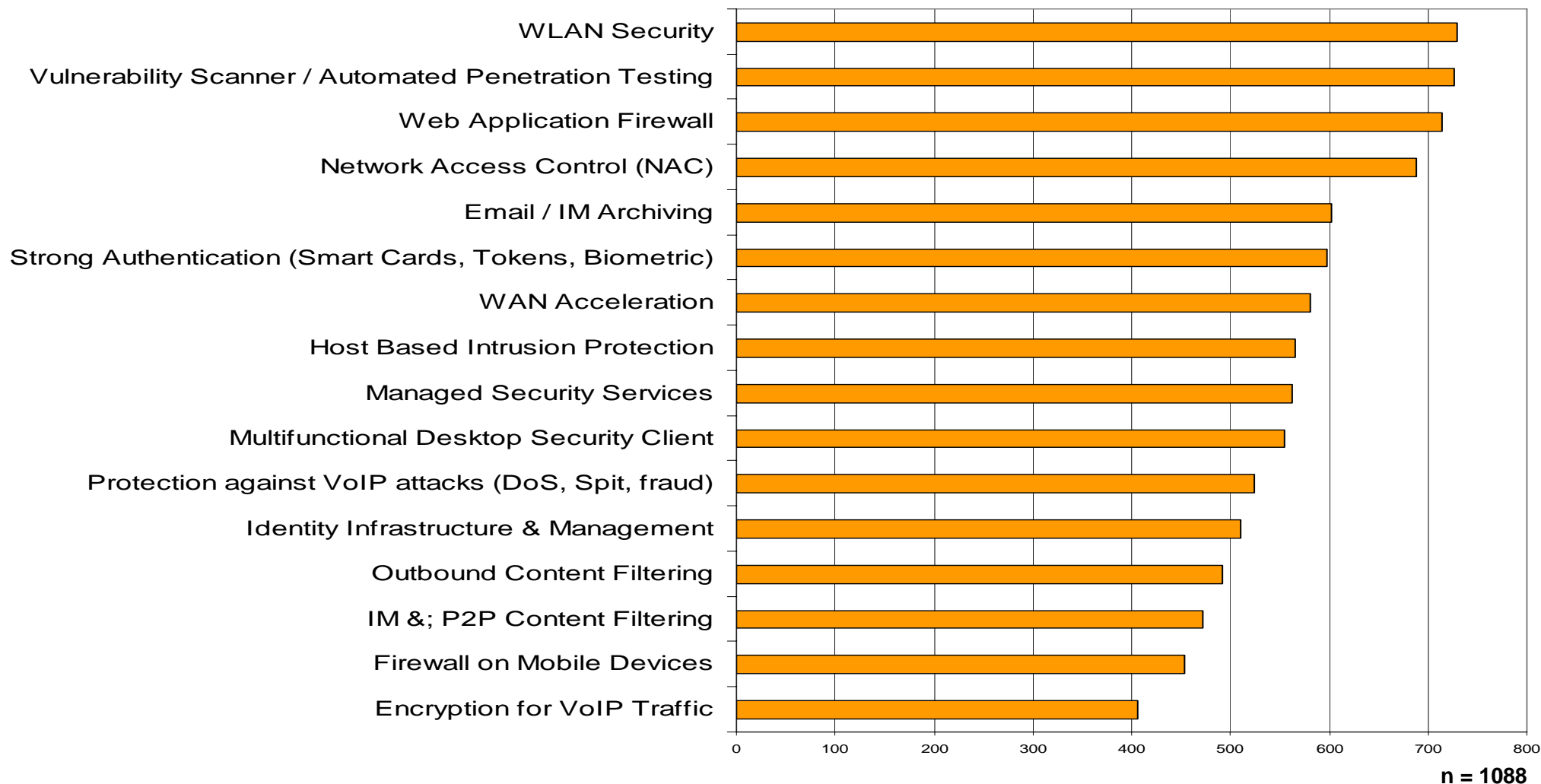
More than 22% of **Astaro customers** are already using email encryption.

3. Future Trends

Customers Interest in other Security Technology



How interested are you in the following applications?

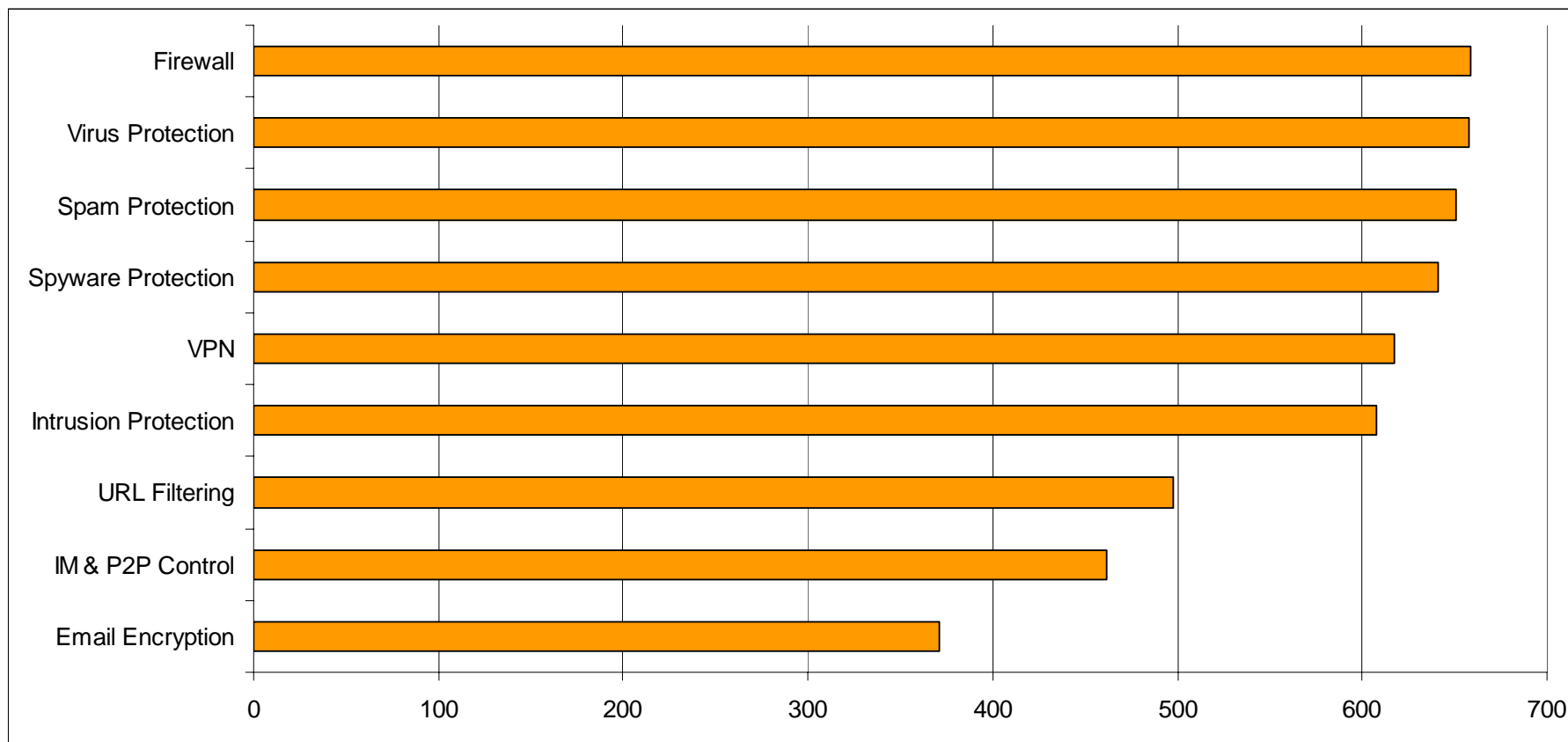


3. Future Trends

Partners Interest in Managed Security Services



Which of the following services are important to your business over the next 2 years?



n = 688

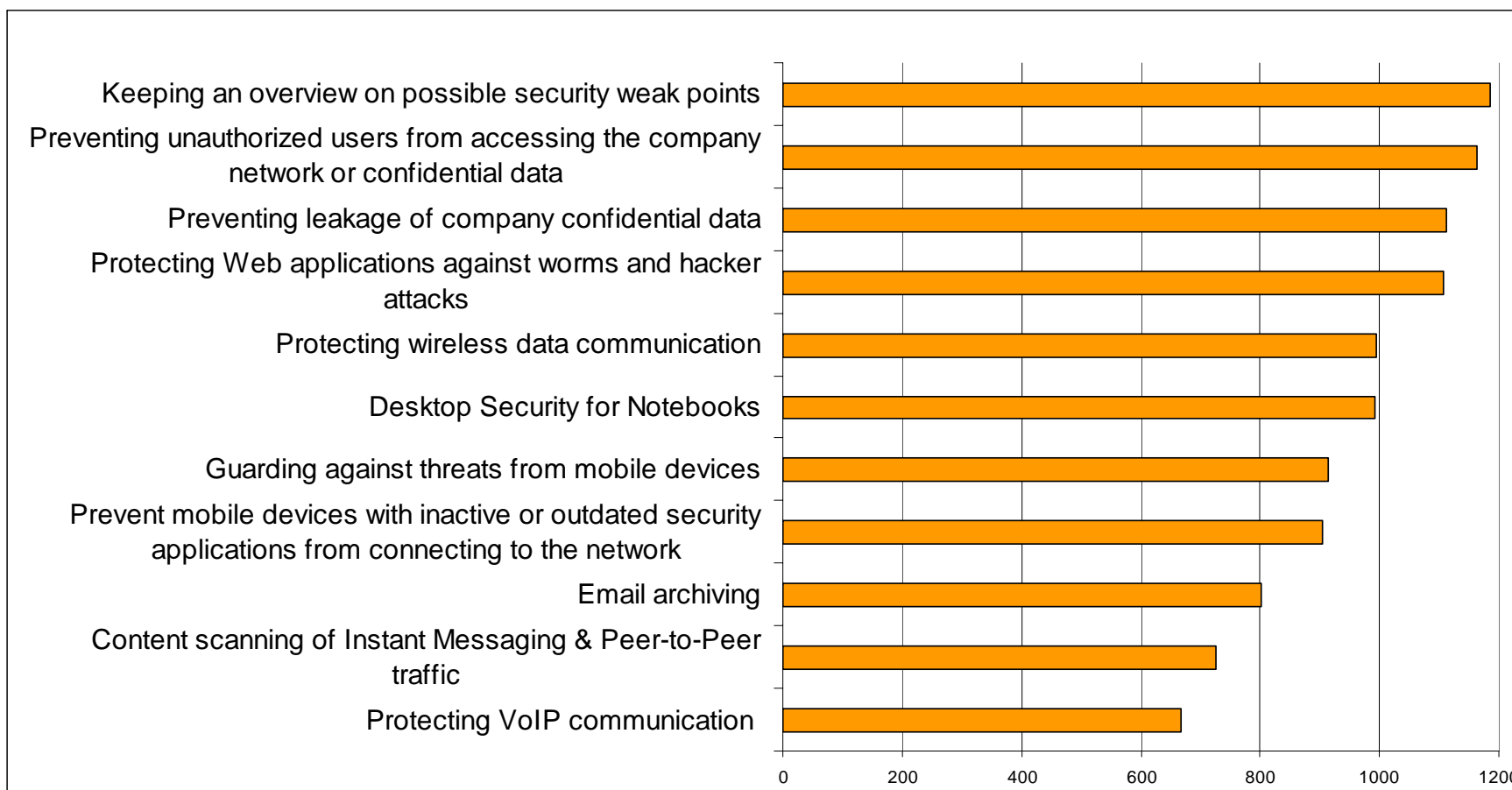
Managed Security Services are becoming important for almost every application.

3. Future Trends

IT Security Challenges



What do you foresee as the biggest challenge in protecting your network and confidential data over the next 5 years?



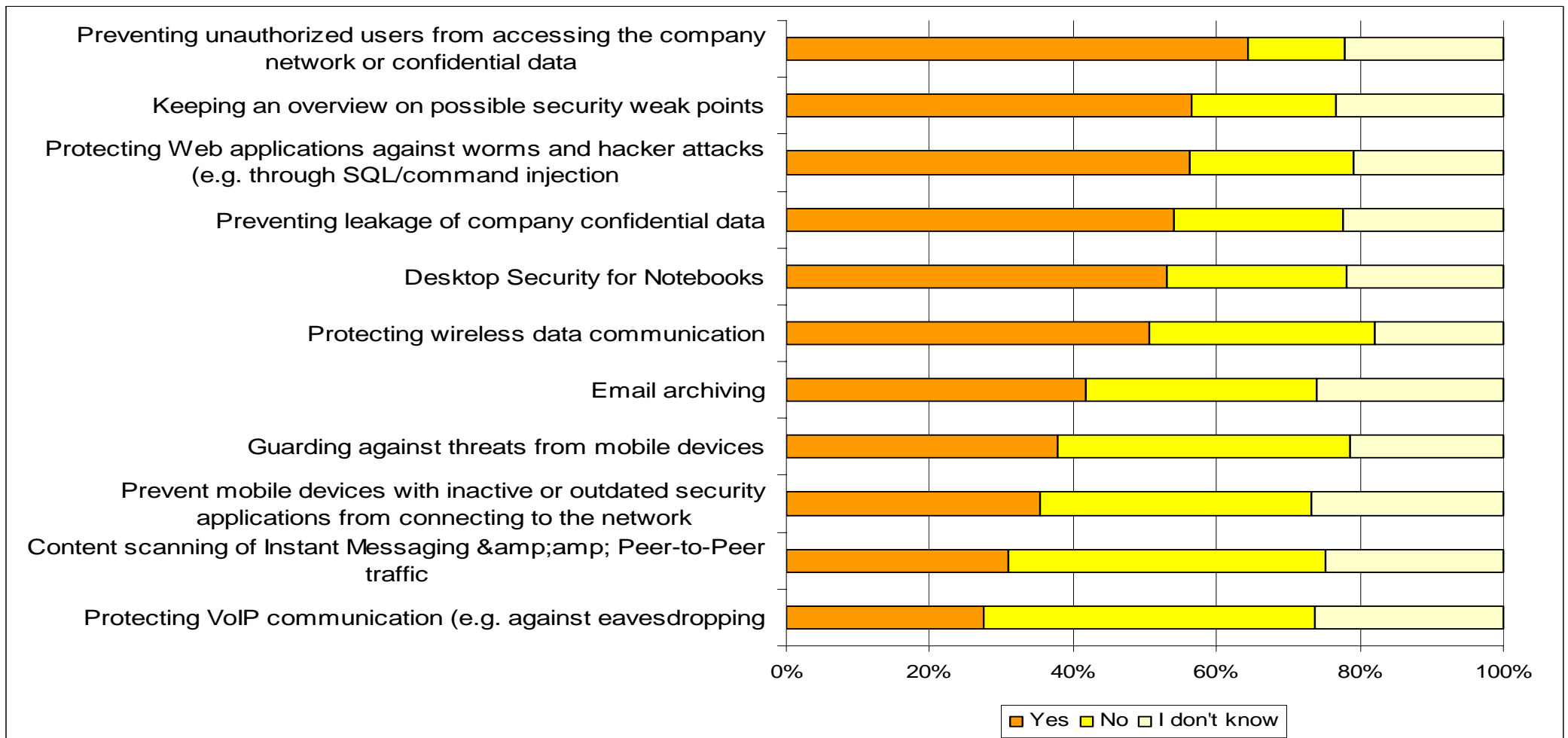
n = 1655

4. Future Trends

Planned Investments



In which IT security areas will you invest over the next fiscal year?

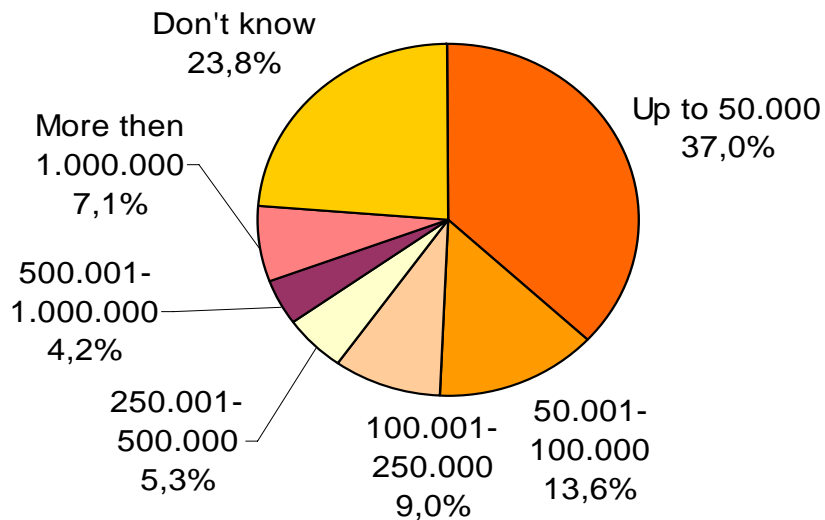


4. Future Trends

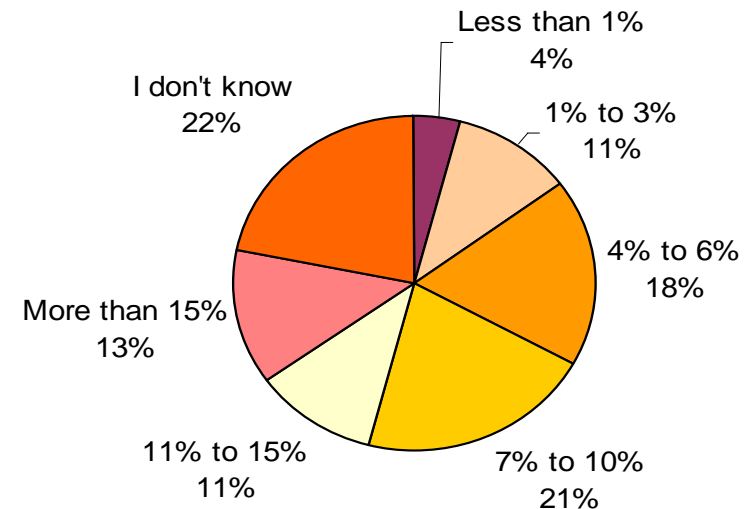
IT Security Budget



Please estimate your planned IT budget for the next fiscal year excluding staff (1\$=0,75€)



What percentage of the total IT budget do you estimate will be spent on security software and hardware?



Security budget of Astaro's customers with less than 100 employees is between \$ 5.000 and \$ 10.000.

Agenda



1. The Survey
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3. About Astaro
4. Future Trends
- 5. Summary & Conclusions**

5. Summary & Conclusions

Today's Usage of IT security



- Firewalls are the first line of defense within almost 100% of all companies surveyed
- Anti-virus (91.5%) and anti-spam scanners (90%) are also listed among the top three security technologies
- VPN products (81%) and intrusion protection systems (74%) are also established within most corporate networks

5. Summary & Conclusions

Interest in upcoming IT security areas



- Customers showed significant interest in additional applications
- Top 3 for which at least 65% of all respondents showed interest are:
 1. WLAN security
 2. Vulnerability Scanner / automated penetration testing
 3. Web Application Firewall
- Over 50% of all respondents said, they will invest into those technologies during the next fiscal year.

5. Summary & Conclusions

Future Challenges



- Top 3 concerns of at least 70% of all respondents are:
 1. Keeping an overview on possible security weak points
 2. Preventing unauthorized access to company confidential data
 3. Preventing leakage of company confidential data
- With only 22% of those surveyed stating that they are already using email encryption, we suggest that the use of email encryption is poised to rise significantly in the near future



Thank You.

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