



**Trusted Strategies**

*Defining the Business of IT Security*

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# **Product Demand Survey**

## **Jucura ver 3.1**

An Analysis of Market Demand for Jucura ver 3.1

Document No: 50631010

Prepared by Trusted Strategies for Jucura Corporation  
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For additional information, please contact:

Trusted Strategies, Inc.  
239 Main Street Suite E  
Pleasanton, CA 94566  
925 461-1002

[www.trustedstrategies.com](http://www.trustedstrategies.com)

Trusted Strategies LLC  
Pleasanton, CA  
(925) 461-1002  
[www.trustedstrategies.com](http://www.trustedstrategies.com)

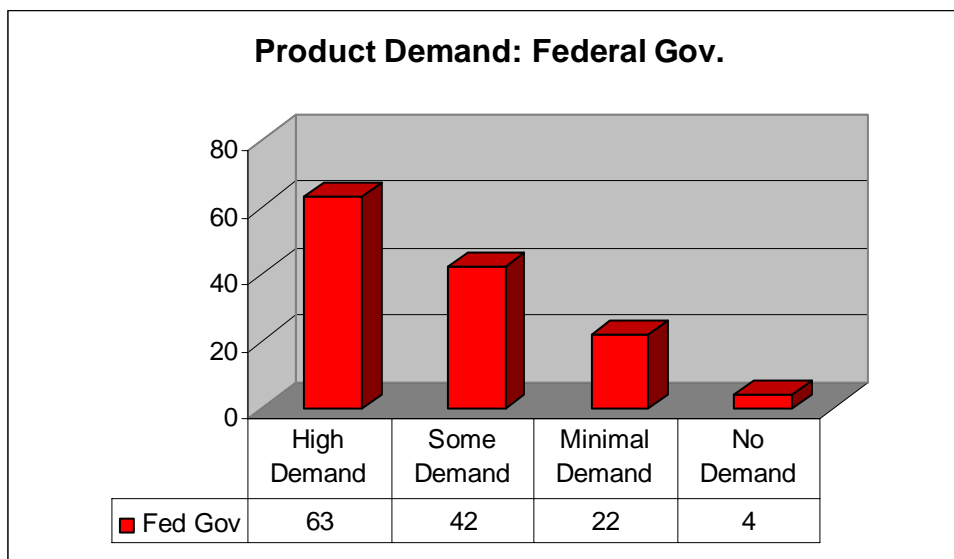
## Executive Summary

Trusted Strategies was engaged by Jucura Inc. to identify market demand for the company’s planned 3.2 release of the flagship product. In consultation with Jucura, it was determined that a market survey should be conducted among several industries including the Federal Government, banking and finance, high-tech, health care, and a few others in order to establish interest in the new product.

With input from Jucura, Trusted Strategies designed the survey and questions, and then engaged Techtel Inc. to execute the mechanics of enlisting the appropriate survey panel of participants and in gathering the data. The survey was initiated by emails to 706 panel participants on October 8<sup>th</sup> 2006. As of the cut off date of October 11<sup>th</sup>, 317 responses had been received and that data was used to compile this report. All survey participants have job roles that influence the purchase of IT products, including IT security products.

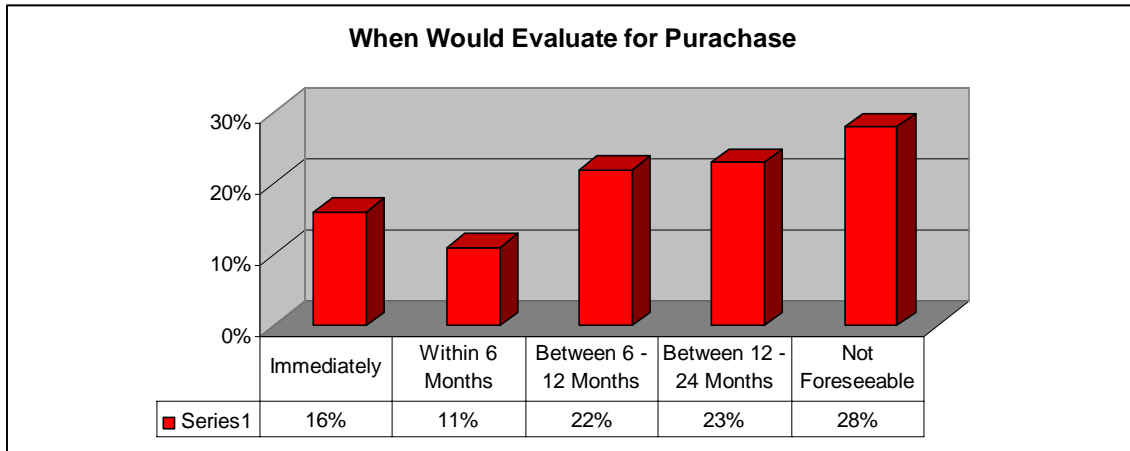
Each respondent was provided with a brief description of Jucura 3.2. The description included a section describing two new product features (code named “Alberta” and “Voyager”) in reasonable detail in order to get specific reaction regarding these new features.

Product demand was highest in the Federal Government sector, followed by the banking and finance sectors. Interesting, health care was the lowest demand sector, showing a strong indicator that the product and new features was of little interest.



**Figure 1: Number of respondents selecting each of the stated demand categories**

The number of respondents that indicated they would evaluate the product within the next 12 months was also enlightening. Nearly half (49%) of the survey respondents that answered this question indicated they would be interested in evaluating the product for purchase within the next 12 months. This is a very strong indicator of product demand, especially given that a number of survey participants were from the health care industry, or from smaller businesses which indicated little demand interest in the product.



**Figure 2: Percentages of respondents indicating when they would evaluate**

In general, the larger the business, the more interested they were in the product. Small business showed significantly less demand than large businesses and enterprises. Questions were also asked about the expected price and how IT products are normally purchased (direct, systems-integrators, resellers, on-line, etc.). The report also addresses who the key decision makers are within the organization.

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## Product Demand Survey Overview

The objective of the *Jucura version 3.2 Market Demand Survey* was to establish the product's potential in the marketplace. The overall demand for the product, as well as demand for specific features was tested against a panel of qualified participants that represent the product's target marketplace. Additional data was also gathered from the panel indicating pricing expectations, deployment cycles, and preferred channel for obtaining similar products.

The remaining portions of this document give the methodology and results of the survey.

## Survey Methodology

### *Survey Design & Execution*

The questions used in this survey were selected by Jucura Inc, with Trusted Strategies acting as consultants and assisting in the question selection and design process. The target industries, organization sizes, and participant titles and roles were chosen in the same manner.

Trusted Strategies engaged Techtel Inc. to execute the mechanics of the survey and to gather the survey data. The participants were selected from the Techtel participant panel which has been carefully cultivated over several years. The panel consists of over 1200 individuals representing hundreds of leading U.S. based companies and federal agencies.

The survey was carefully designed, selecting 706 panel participants best matching the criteria specified by Jucura. The selected participants for this survey represent several target industries as well as a combination of small, medium, or large size organizations. All panel participants were business people with buying influence or purchase authority for IT and communications products and services.

The survey was initiated by emails to the panel participants on February 8<sup>th</sup>. The emails included a link to the web-based survey. An incentive was included. As of the cut off data of February 11<sup>th</sup>, 317 responses had been received for a response rate of 44.9%.

This survey data was compiled by Techtel and Trusted Strategies LLC.

### ***About Trusted Strategies***

Trusted Strategies is the premier advisory, consulting, and market intelligence firm focused solely on the information technology (IT) security industry. Offering a unique, business-oriented perspective, Trusted Strategies offers security product developers accurate, expert, and concise consulting and market research for use in setting strategy, and building business.

The company has developed the most comprehensive research resource in the IT security industry. With well over 700 IT security firms and products segmented into 50 sectors, this exhaustive database and decades of industry experience as security product developers enables the company to deliver superior research, trend analysis, and advisory services. Clients include leading security companies and investors in IT security.

Trusted Strategies is privately held, and located in Pleasanton Calif.



Trusted Strategies LLC  
Pleasanton, CA  
(925) 461-1002  
[www.trustedstrategies.com](http://www.trustedstrategies.com)

### ***About Techtel***

For nearly two decades, Techtel has provided demand market intelligence for the technology and financial market industries. The company's proprietary panel of key IT buyers and decision makers utilized in this survey made it possible to quickly and accurately ascertain market demand.

Techtel analyzes over 40 technology markets, including enterprise solutions, emerging technologies, and e-commerce.

Techtel is headquartered in the San Francisco Bay Area city of Emeryville, California, strategically close to the Silicon Valley.



Corporate Headquarters  
Techtel Corporation  
2000 Powell St., Suite 1500  
Emeryville, CA 94608

General inquiries: +1 (510) 655-9414  
Fax: +1 (510) 655-9670  
E-mail: [info@techtel.com](mailto:info@techtel.com)  
[www.techtel.com](http://www.techtel.com)

## What We Asked

Each survey participant was provided with a brief description of Jucura 3.2, and in particular, descriptions about new features. Then we asked the following types of questions:

- Qualifying questions about the survey *respondent's company or organization*
- Qualifying questions about the *respondent's experience and current role*
- Qualifying questions about the *respondent's level of influence* in the purchase of IT and IT security products
- Questions about the *product itself*, and how interested the respondent's company or similar companies could be in the product
- *Who is involved in the process to purchase* IT or IT security products
- *How their company typically purchases* IT or IT security products (direct from the vendor; reseller; system integrators; etc.)
- What *timeframe* might be considered for an evaluation

### What we *didn't* ask in this Survey:

- Anything about competitive products or their perception of them or their respective development companies
- Market awareness questions, such as "Have you ever heard of Jucura Inc. or any of its IT security products"?
- If they had ever evaluated Jucura

Many of the more significant questions actually used in the survey are presented later in this document, along with each of the sections that highlight the survey results.

A full set of survey questions is available on request. Contact Trusted Strategies for additional information.

## About the Survey Respondents

Survey respondents cut across a number of industries and organizational sizes. The respondents also represented a variety of roles within the organization, ranging from staff employees that have influence over the selection of IT products, to managers, directors and executives.

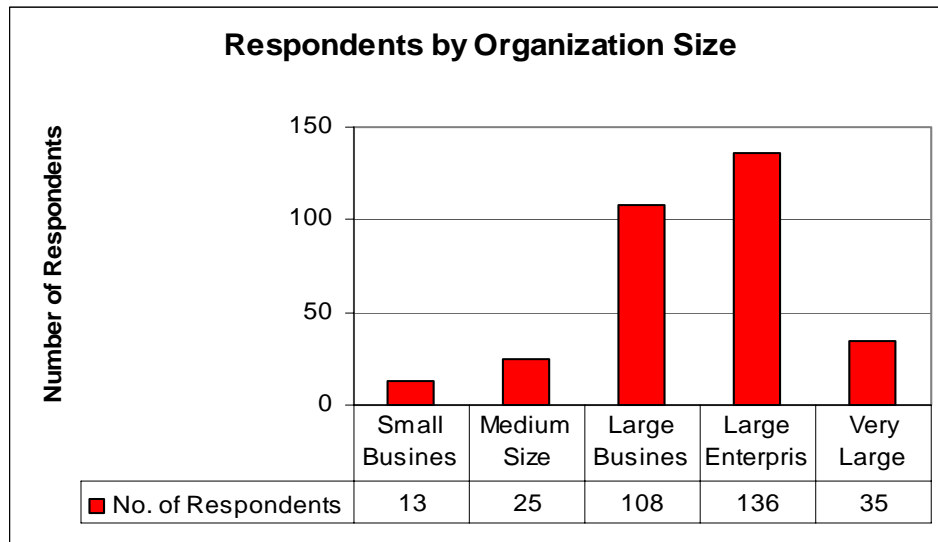
### *Respondents per Organization Size*

#### Survey Question:

Indicate the size of your company:

- Between 1 and 249 employees
- Between 250 and 999 employees
- Between 1000 and 4999 employees
- Between 5,000 and 9,999 employees
- 10,000 or more employees

#### Survey Results



#### Understanding the data

- Small business** - Between 1 and 249 employees
- Med. size business** - Between 250 and 999 employees
- Large Business** - Between 1000 and 4999 employees
- Enterprise** - Between 5,000 and 9,999 employees
- Very Large Enterprise** - 10,000 or more employees

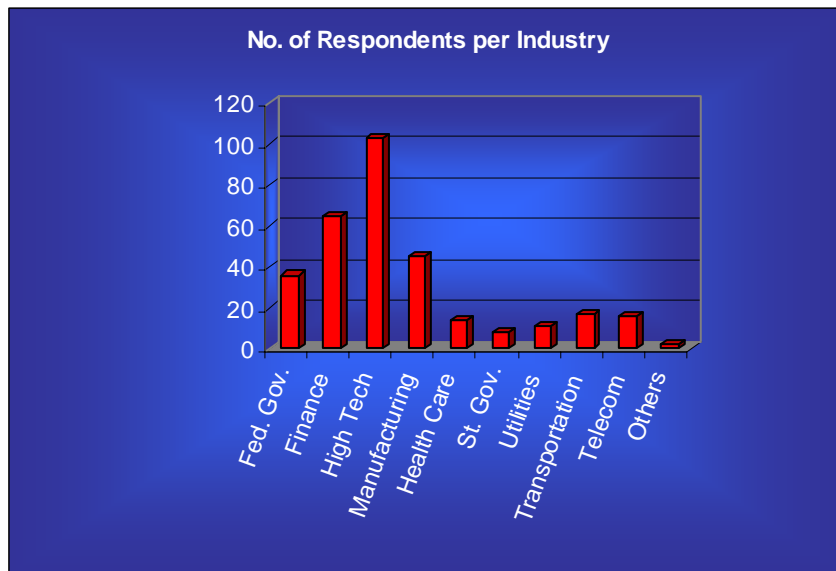
**Respondents per Industry**

**Survey Question:**

*Indicate the type of business your organization is affiliated with.*

- Hi tech
- Transportation
- Finance
- Health Care
- Manufacturing
- Federal Government
- State Government
- Education
- Retail
- Public Utilities
- Telecom
- Other

**Survey Results**



**Number of Respondents by Industry**

Fed. Gov.	36
Finance	65
High Tech	103
Manufacturing	45
Health Care	14
St. Gov.	8
Utilities	11
Transportation	17
Telecom	16
Others	2
<b>Total Respondents</b>	<b>317</b>

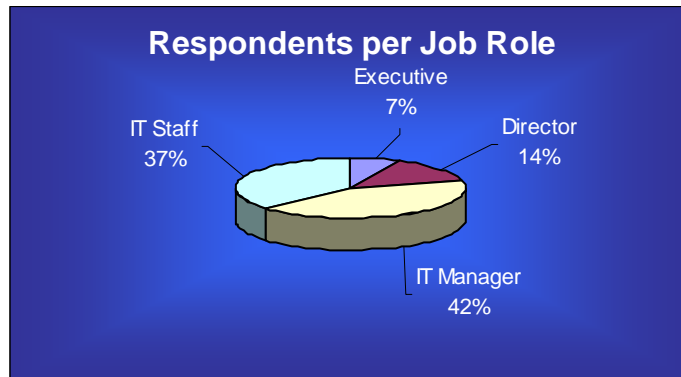
***Respondents per Job Role***

**Survey Question**

Indicate your role in the organization:

- Senior Executive (CEO, CFO, CTO, CSO CIO, VP, company owner or president)
- Division or department level director
- IT Manager or supervisor
- IT Staff (System administrators, technical support, etc.)

**Survey Results**



Number of Respondents by Job Role

Executive	23
Director	45
IT Manager	133
IT Staff	116
<b>Total Respondents</b>	<b>317</b>

**Understanding the data**

Upper management, including executives and director levels accounted for 21% of the total survey respondents. The majority of the respondents were managers and staff of IT departments. All respondents indicated they are influential in the process of selecting and recommending IT products.

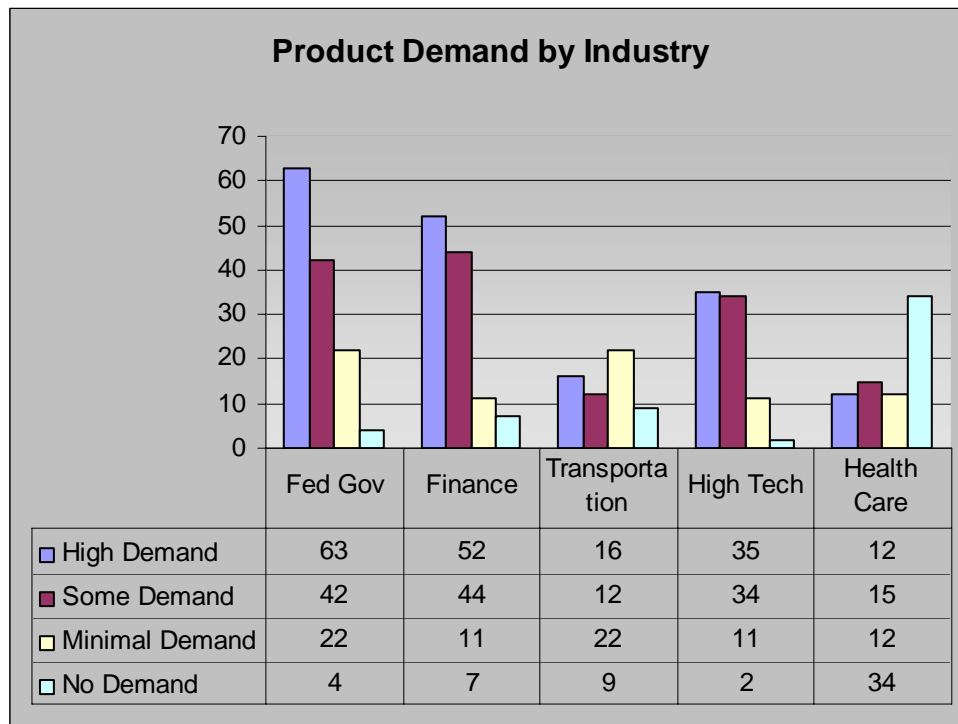
## Product Demand by Industry

### Survey Question:

To the best of your ability, indicate how interested you believe a company such as yours would be in purchasing and deploying Jucura 3.2

- High Interest
- Some Interest
- Minimal Interest
- No Interest

### Survey Results



### Understanding the data

The survey showed fairly strong demand among the federal government and the financial sectors, with 48% of those surveyed indicating high demand. 32% indicated some demand, and only 3% indicated no demand. The finance industry stated a healthy demand whereas health care and transportation found significantly less demand. The majority of those in the health care industry indicated there was “no demand”.

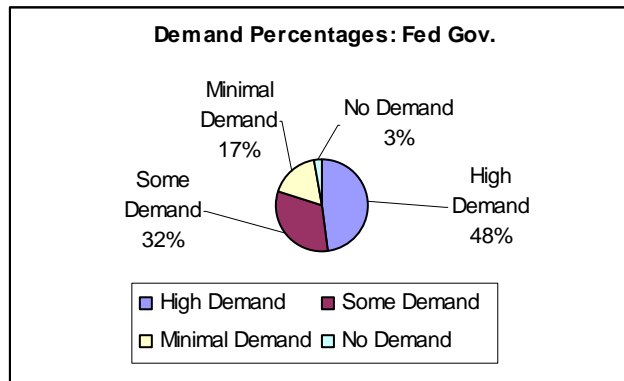
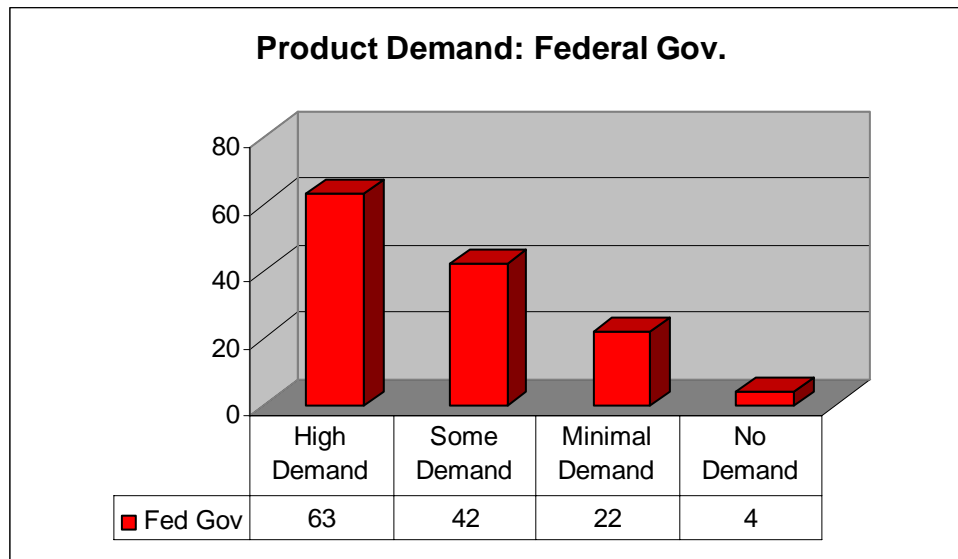
**Product Demand: Federal Government**

**Question Asked**

To the best of your ability, indicate how interested you believe a company such as yours would be in purchasing and deploying Jucura 3.2

- High Interest
- Some Interest
- Minimal Interest
- No Interest

**Survey Results**



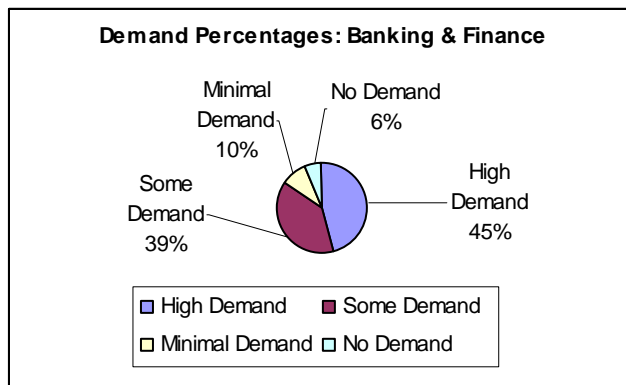
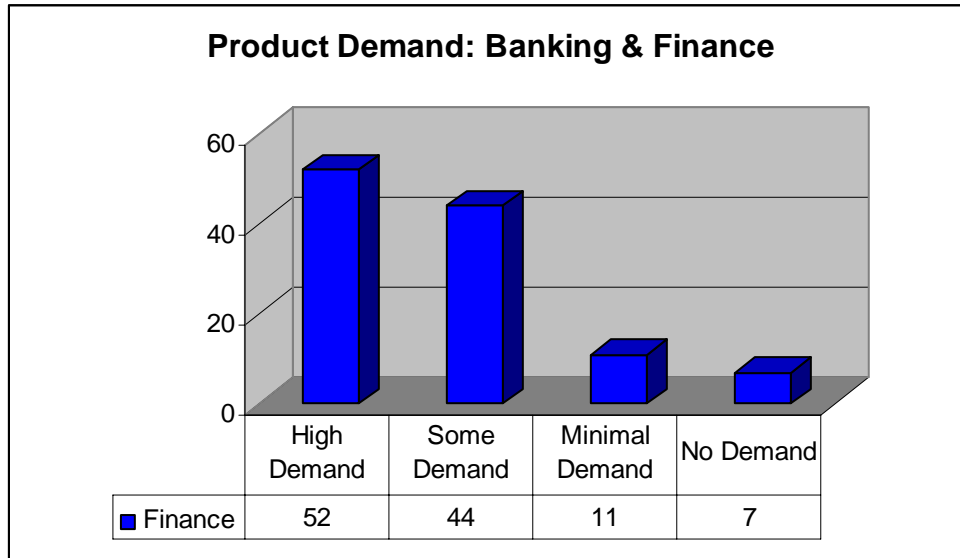
***Product Demand: Banking and Finance***

**Question Asked**

To the best of your ability, indicate how interested you believe a company such as yours would be in purchasing and deploying Jucura 3.2

- High Interest
- Some Interest
- Minimal Interest
- No Interest

**Survey Results**



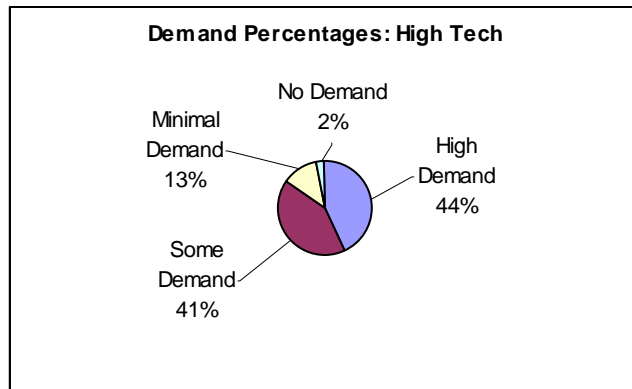
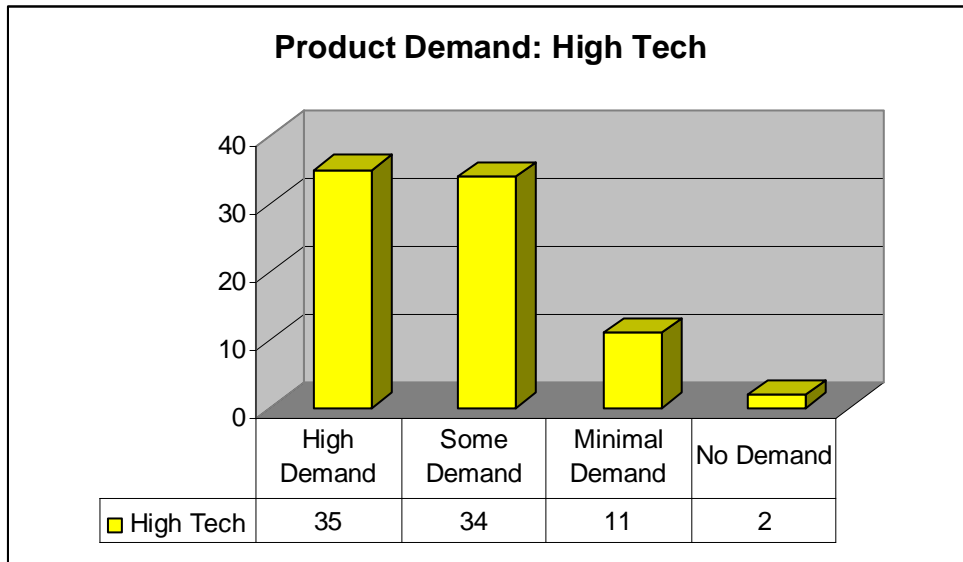
**Product Demand: High Tech**

**Question Asked**

To the best of your ability, indicate how interested you believe a company such as yours would be in purchasing and deploying Jucura 3.2

- High Interest
- Some Interest
- Minimal Interest
- No Interest

**Survey Results**



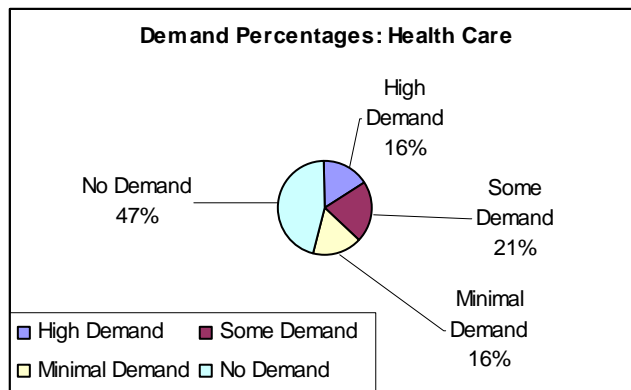
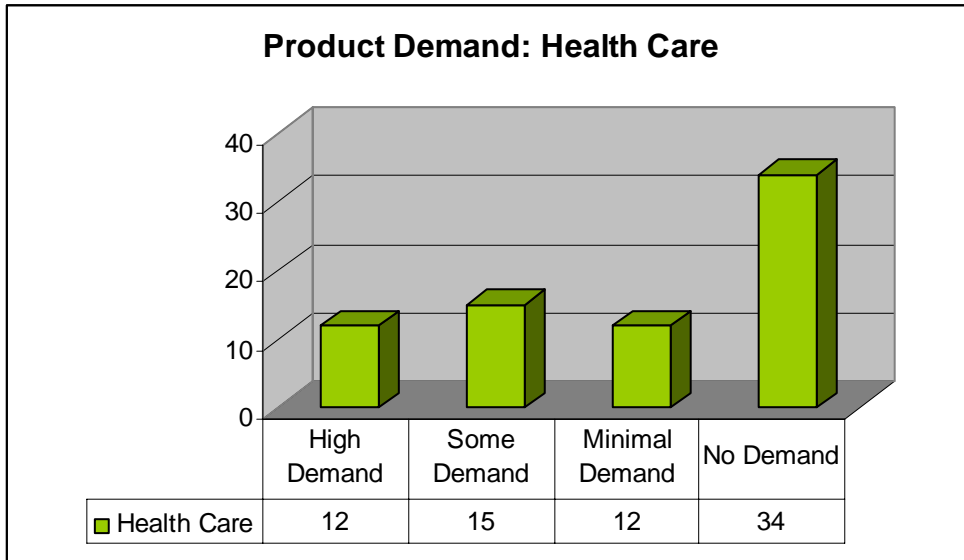
**Product Demand: Health Care**

**Question Asked**

To the best of your ability, indicate how interested you believe a company such as yours would be in purchasing and deploying Jucura 3.2

- High Interest
- Some Interest
- Minimal Interest
- No Interest

**Survey Results**



## Product Demand by Organization Size

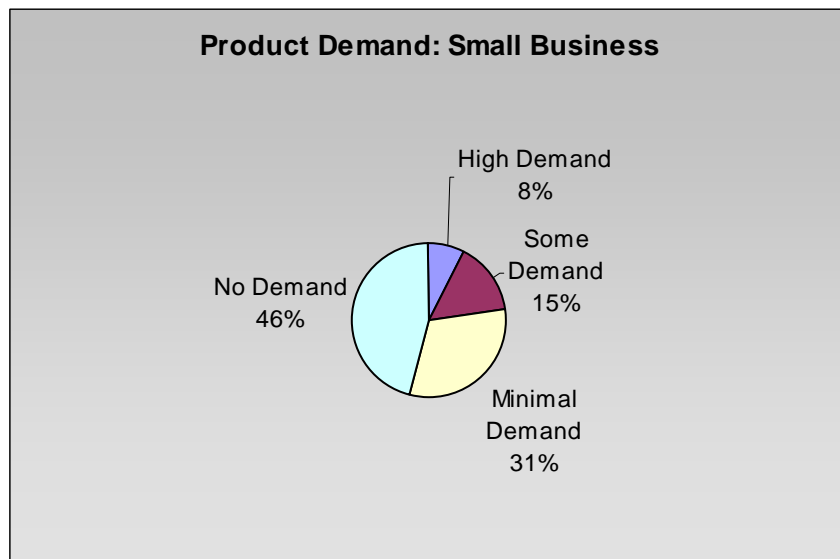
### *Product Demand: Small Business*

#### Question Asked

To the best of your ability, indicate how interested you believe a company such as yours would be in purchasing and deploying Jucura 3.2

- High Interest
- Some Interest
- Minimal Interest
- No Interest

#### Survey Results



#### Understanding the data

This question was asked, and then filtered by the size of business the respondent is currently in, in this case, for small businesses. Small businesses are defined as having between 1 and 249 employees. Collectively, 77% of the participants from small businesses indicated the product had no or only minimal value. Only 23% of small businesses indicated any demand for the product.

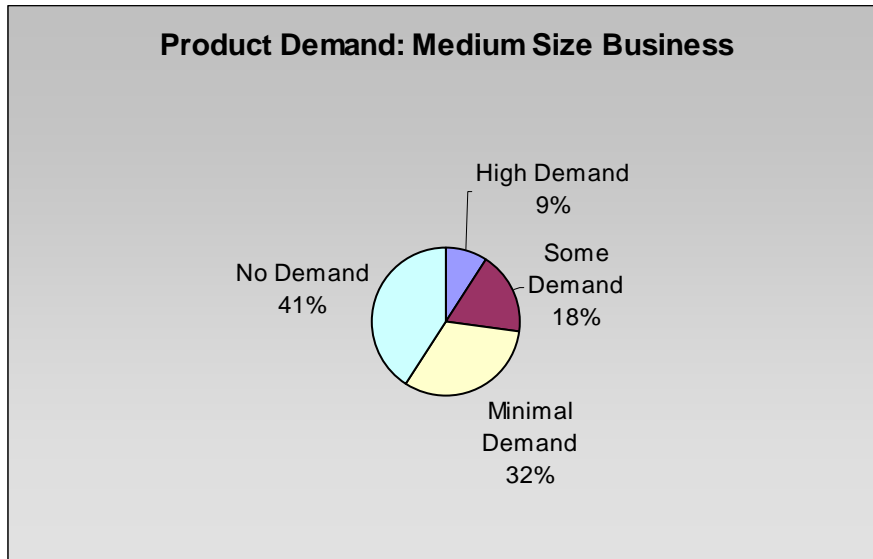
***Product Demand: Medium Size Business***

**Question Asked**

To the best of your ability, indicate how interested you believe a company such as yours would be in purchasing and deploying Jucura 3.2

- High Interest
- Some Interest
- Minimal Interest
- No Interest

**Survey Results**



**Understanding the data**

This question was asked, and then filtered by the size of business the respondent is currently in, in this case, for medium businesses. Medium size businesses are defined as having between 250 and 999 employees.

Collectively, 73% of the participants from small businesses indicated the product had no or only minimal value. Only 27% of small businesses indicated any demand for the product.

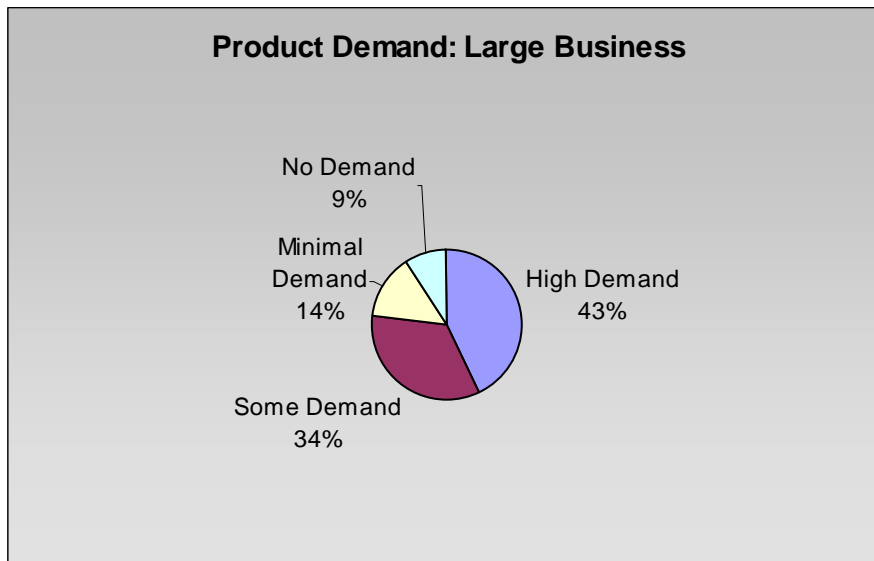
***Product Demand: Large Business***

**Question Asked**

To the best of your ability, indicate how interested you believe a company such as yours would be in purchasing and deploying Jucura 3.2

- High Interest
- Some Interest
- Minimal Interest
- No Interest

**Survey Results**



**Understanding the data**

This question was asked, and then filtered by the size of business the respondent is currently in, in this case, for large sized businesses. Large size businesses are defined as having between 1,000 and 4,999 employees.

Collectively, 77% of the participants from large businesses indicated the product had at least some demand, with 43% indicating high demand. Only 9% of large businesses indicated no demand for the product.

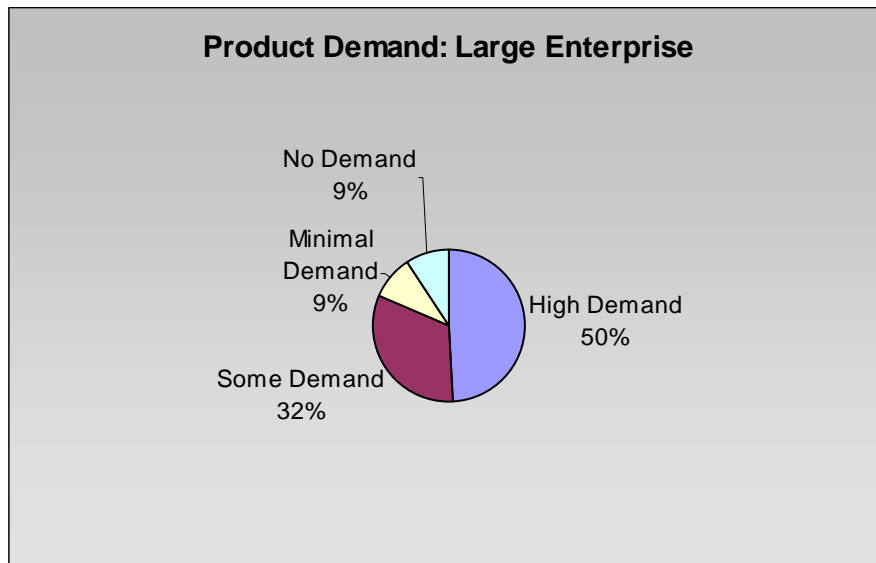
***Product Demand: Large Enterprises***

**Question Asked**

To the best of your ability, indicate how interested you believe a company such as yours would be in purchasing and deploying Jucura 3.2

- High Interest
- Some Interest
- Minimal Interest
- No Interest

**Survey Results**



**Understanding the data**

This question was asked, and then filtered by the size of business the respondent is currently in, in this case, for large enterprises. *Large enterprises are defined as having between 5,000 and 9,999 employees.*

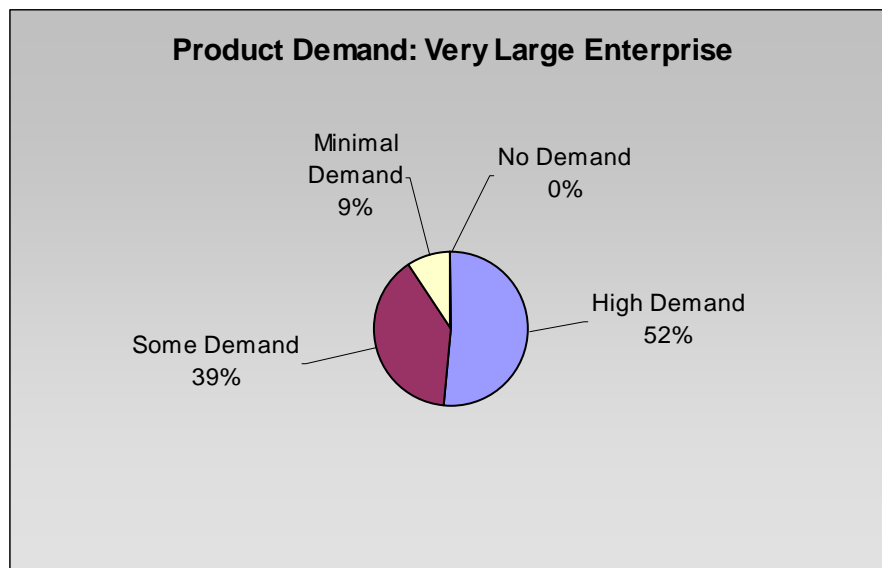
Collectively, 82% of the participants from large businesses indicated the product had at least some demand, with 50% indicating high demand. Only 9% of large businesses indicated no demand for the product.

***Product Demand: Very Large Enterprises***

**Question Asked**

To the best of your ability, indicate how interested you believe a company such as yours would be in purchasing and deploying Jucura 3.2

- High Interest
- Some Interest
- Minimal Interest
- No Interest



**Understanding the data**

This question was asked, and then filtered by the size of business the respondent is currently in, in this case, for very large enterprises. *Very Large enterprises are defined as having 10,000 or more employees.*

Collectively, 89% of the participants from large businesses indicated the product had at least some demand, with 52% indicating high demand. None of the large businesses indicated zero demand for the product.

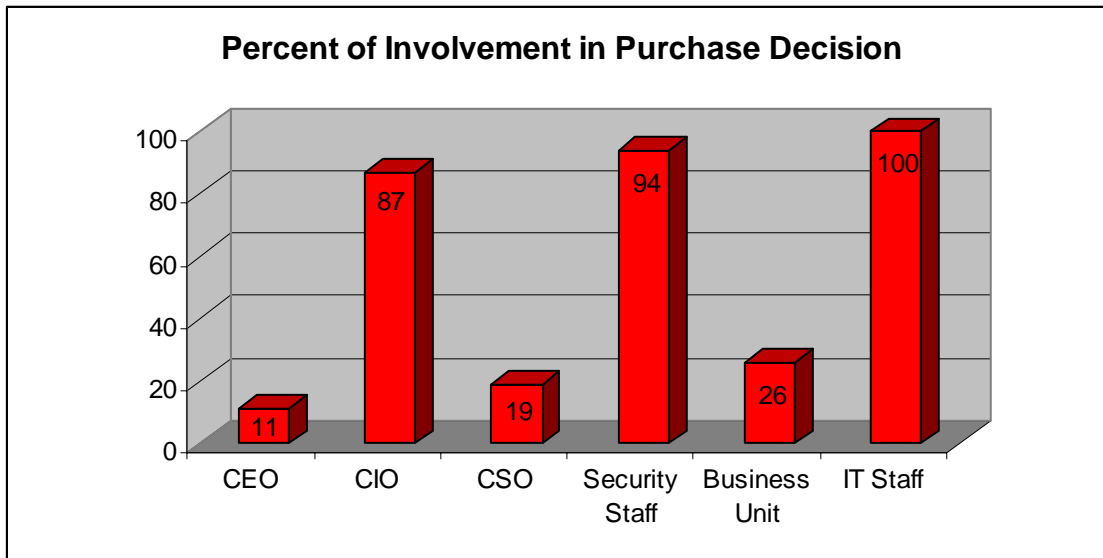
## Who Are the Decision Makers?

### Survey Question

In regards to making IT security product purchases in your organization, please indicate the level of involvement for each individual or area below:

Title	Very Involved	Sometimes Involved	Rarely Involved	Not Involved
CEO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CIO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CSO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Security Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bus. Unit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Survey Results



### Understanding the data

For this question, only data for organizations larger than 250 employees was used. The numbers were aggregated across all industries and the percentage of involvement was calculated for each area or role. It is interesting that CSOs were involved only 19% of the time. We believe this is because only around 20% of organizations have a CSO.

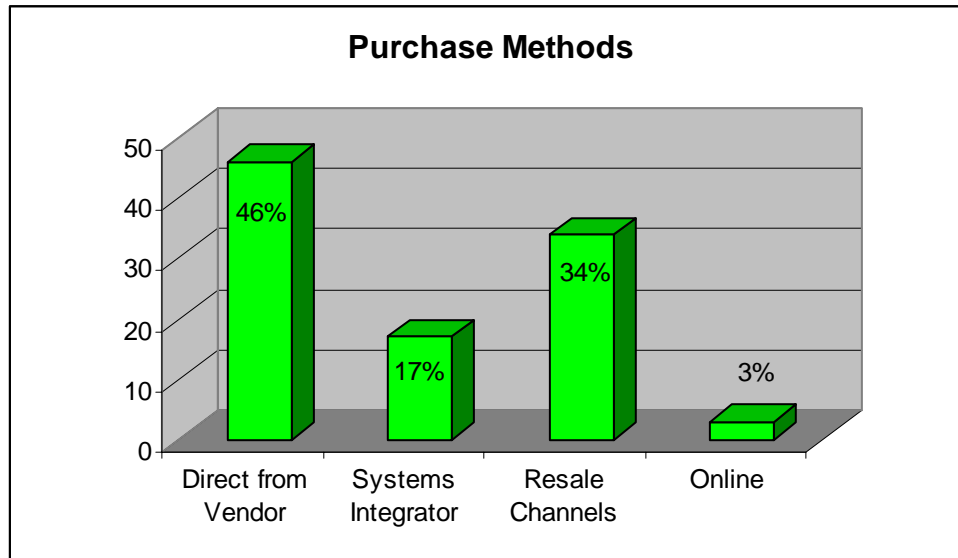
## How Do They Buy?

### Survey Question

Indicate how your company typically purchases IT products. Provide the percentage of products acquired by each method.

Purchase Method	Percentage Purchased
Direct from Vendor	
Systems Integrator	
Resale Channels	
Online	

### Survey Results



### Understanding the data

All survey respondents that answered this question are included in the data above, regardless of the size of their organization. Interestingly enough, the 3% of online purchases all came from small businesses.

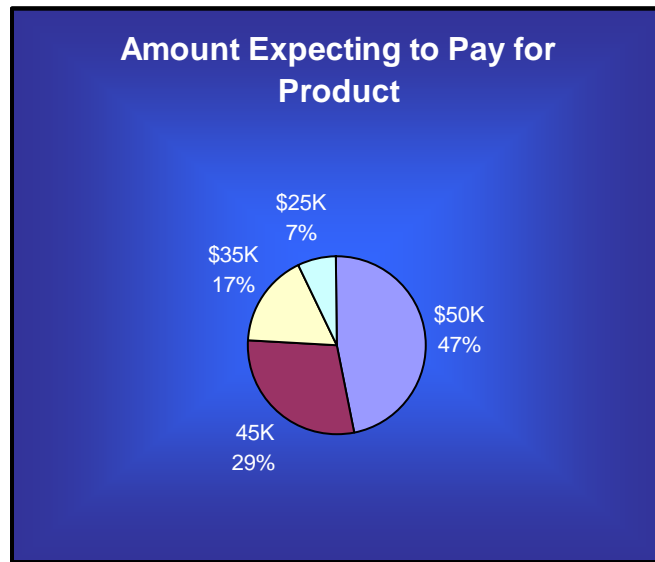
## How Much Will They Pay?

### Survey Question

Indicate how much you might expect a company such as your to ay for Jucura version 3.2?

- \$25K
- \$35K
- \$45K
- \$50K

### Survey Results



### Understanding the data

The survey results indicate most respondents expect to pay more than \$45,000 for Jucura 3.2 with 47% expecting to pay around \$50K. Only 7% of the respondents expect the product to cost around \$25K. All survey participants that answered this question were included in the above data. There were 12 respondents that did not answer the question (around 4%).

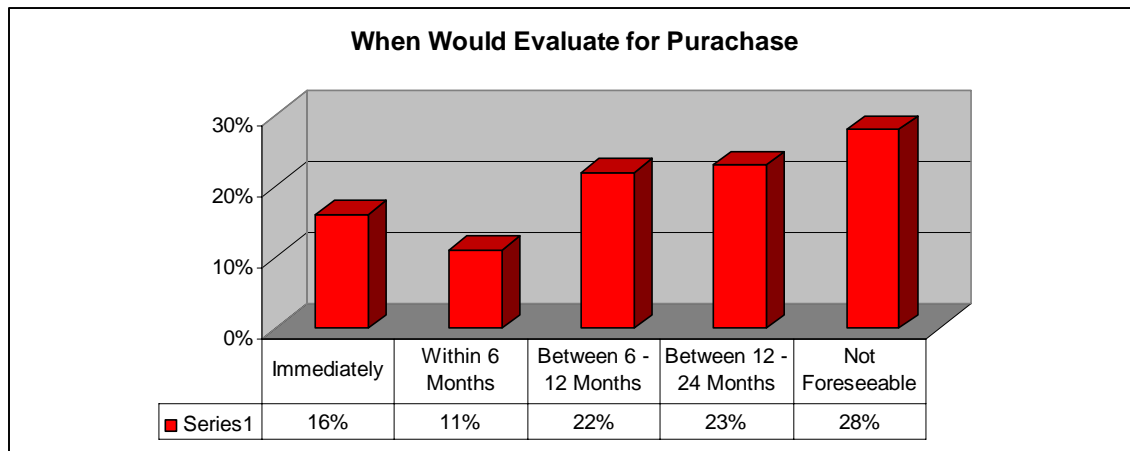
## When Would They Purchase?

### Survey Question

Assuming Jucura 3.2 or a similar product is readily available, please indicate when you think your own company might consider evaluating such a product for purchase?

- Immediately
- Within 6 months
- Between 6 to 12 months
- Between 12 and 24 months
- Not in the foreseeable future

### Survey Results



### Understanding the data

Nearly half (49%) of the survey respondents that answered this question indicated they would be interested in evaluating the product for purchase within the next 12 months. This is a very strong indicator of product demand, especially given that a number of survey participants were from the health care industry, or from smaller businesses which indicated little demand interest in the product.

## The Competition

No questions were asked about competitive products or companies in this survey.

## Summary Conclusions

The survey revealed the following major conclusions:

- Jucura 3.2 has high appeal to the federal and financial markets with 48% & 45% respectively selecting “high demand”
- The health care is in general not interested in the product with a full 47% selecting “no demand”
- Large businesses and enterprises are the most interested. A number of small to medium size businesses were interested, but most of them stated a lack of interest
- Nearly half (49%) indicated interest in evaluating Jucura with 12 months
- The CIO, IT staff and security staff are the chief product purchase decision makers
- Most products are purchased directly from IT security vendors with 46%, followed by purchases through resellers at 34%. Not to be forgotten however are the system integrators who move 17% of the products. Online purchases were insignificant
- Most respondents expected to pay around \$50K for Jucura 3.2, with 76% expecting to pay \$45K or more for the product.