

U.S. Market Study of Web Filter Total Cost of Ownership: A Comparison of 3 Top Web Filters

Summary Report

March 2009

Study Objective

- To identify and obtain a statistically valid sample for quantification and evaluation of Total Cost of Ownership (TCO) associated with Web Filtering usage in U.S. mid-enterprise companies across 3 brands: St. Bernard, SurfControl, and Websense. The measurement of IT resources deployed included the following:
 - Total Hours by:
 - Set up and installation
 - Management and administration
 - Hardware maintenance
 - Reporting
 - Other Related Metrics and Demographic information:
 - Industry sub-segment
 - Job Title
 - Web usage, access, and acceptable use policy

Methodology Overview

- Developed, administered and analyzed by Robert Hale and Associates – www.roberthaleassociates.com
- Conducted during late February and early March 2009.
- Random sample of 300 St. Bernard, Websense and SurfControl users (100 organizations by each brand)
- US Mid-enterprise commercial accounts between 250 and 1,000 employees stratified equally by brand
- Targeted IT professionals responsible for administration of web filter
- Blinded vendor neutral survey request. Survey positioned to help understand key trends in Web filtering use
- Survey conducted online, and included an incentive of a nominal Starbucks gift card awarded upon completion of the survey
- Respondents with incomplete and/or unreliable surveys were contacted via phone to attempt clarification and resolution. If they were not reachable, they response was eliminated from the study.

Statistical TCO Results

Web Filter IT Hours Results Across All Industries

| | | St. Bernard | Websense | SurfControl |
|-------------------------------|---|--------------------------------|----------------------|----------------------|
| One-Time | Setup & Install | 19.86 ^{(W)(S)} | 38.25 ^(B) | 39.27 ^(B) |
| | Management & Administration | 14.38 ^(S) | 27.09 | 26.63 ^(B) |
| Monthly | Hardware maintenance related directly to web filter | 11.90 ^{(W)(S)} | 25.41 ^(B) | 20.85 ^(B) |
| | Reporting | 12.34 ^{(W)(S)} | 31.01 ^(B) | 25.06 ^(B) |
| Total Hours First Year | | 483.30^{(W)(S)} | 1040.37 | 909.75 |

W) statistically significant from Websense at 95% confidence level; S) statistically significant from SurfControl at 95% confidence level and B) statistically significant from St. Bernard at 95% confidence level

- St. Bernard (Setup S.E.=2.2, Mgmt S.E.=2.5, Hardware S.E.=1.8, Reporting S.E.=1.3)

- Websense (Setup S.E.=3.9, Mgmt S.E.=4.4, Hardware S.E.=4.9, Reporting S.E.=5.2)

-SurfControl (Setup S.E.=5.0, Mgmt S.E.=3.4, Hardware S.E.=2.5, Reporting S.E.=3.2)

Note: S.E. = standard error of the sample mean for respective hour estimates. Total Hours First Year = (12 x monthly hours) + (1 x setup & install hours)



Robert Hale & Associates

BUILDING BRAND AND MARKET SHARE

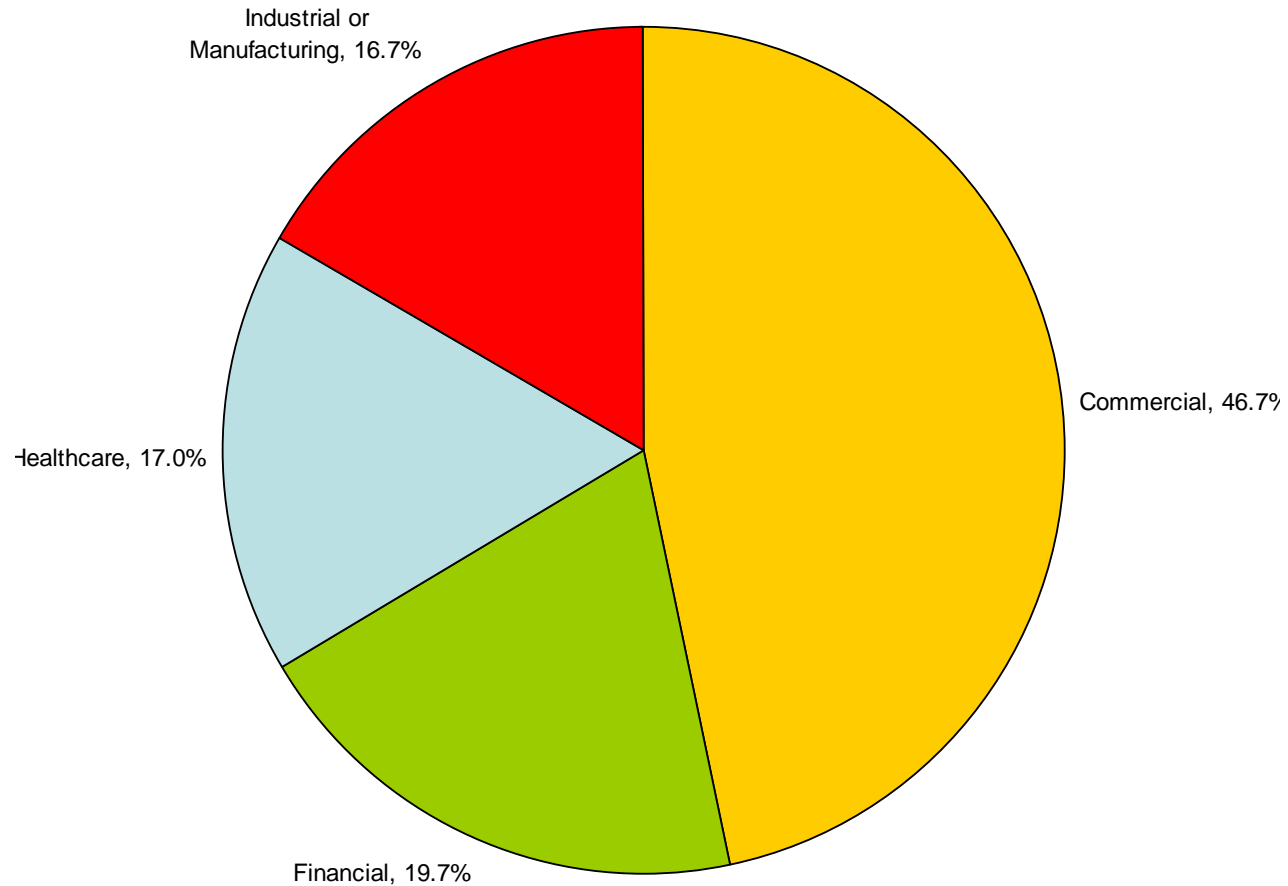
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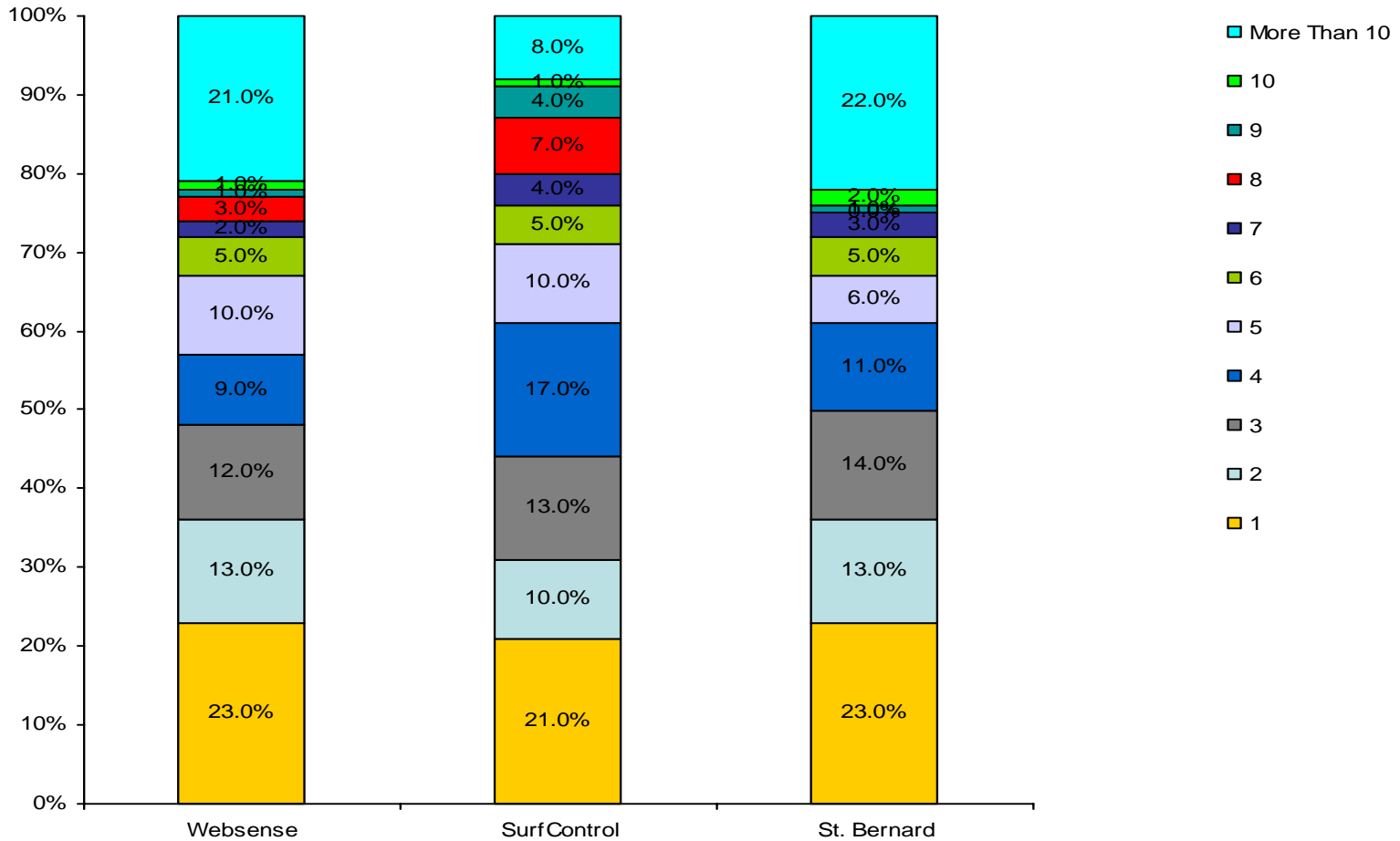
Demographic Statistics

No statistically significant differences were found across the brands relating to respondent profile. Lack of difference is an indicator of valid or un-biased sampling across respondent profiles.

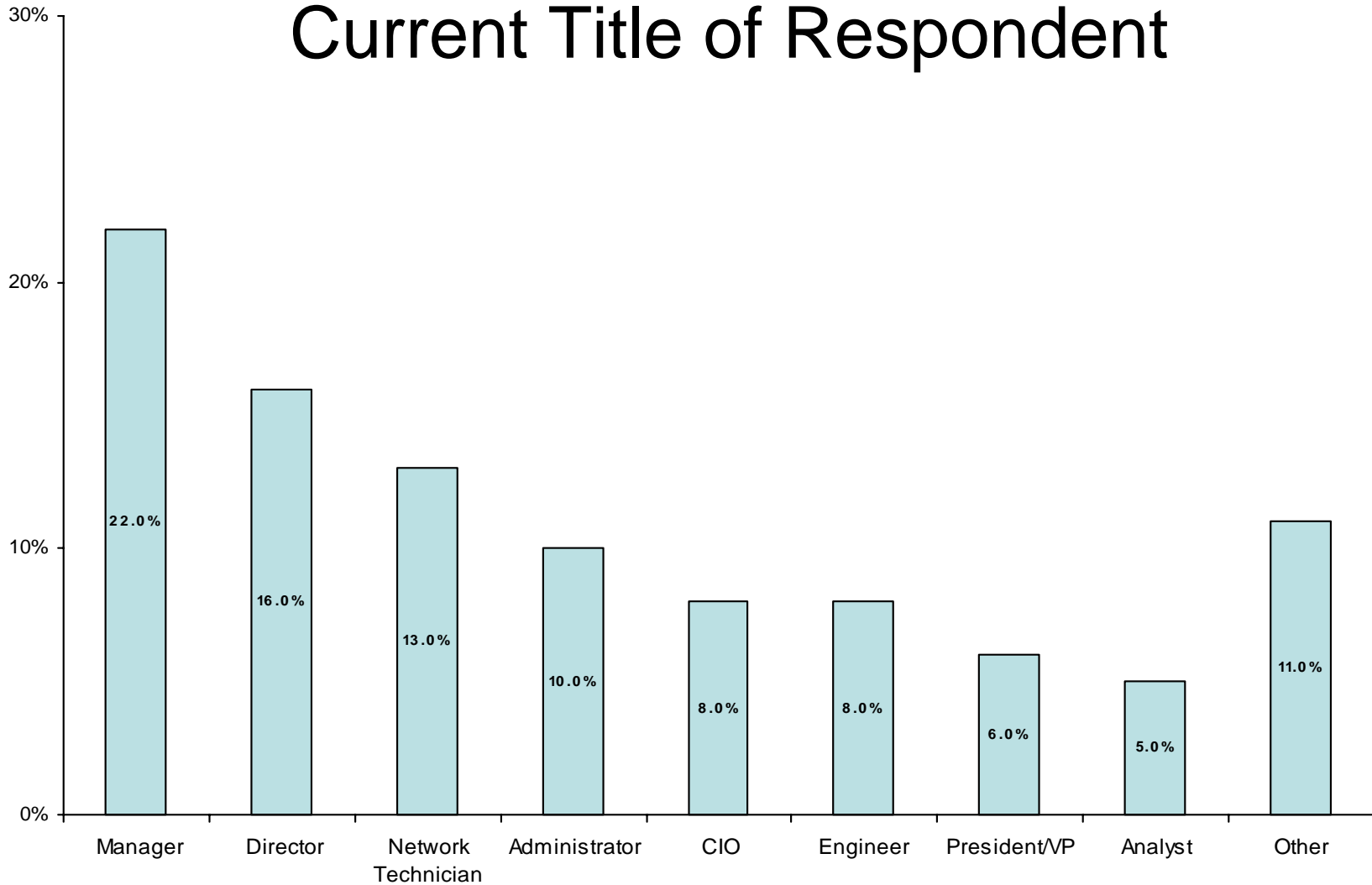
Which best describes the industry that your company or organization falls into?



Number of company locations using Web filtering.



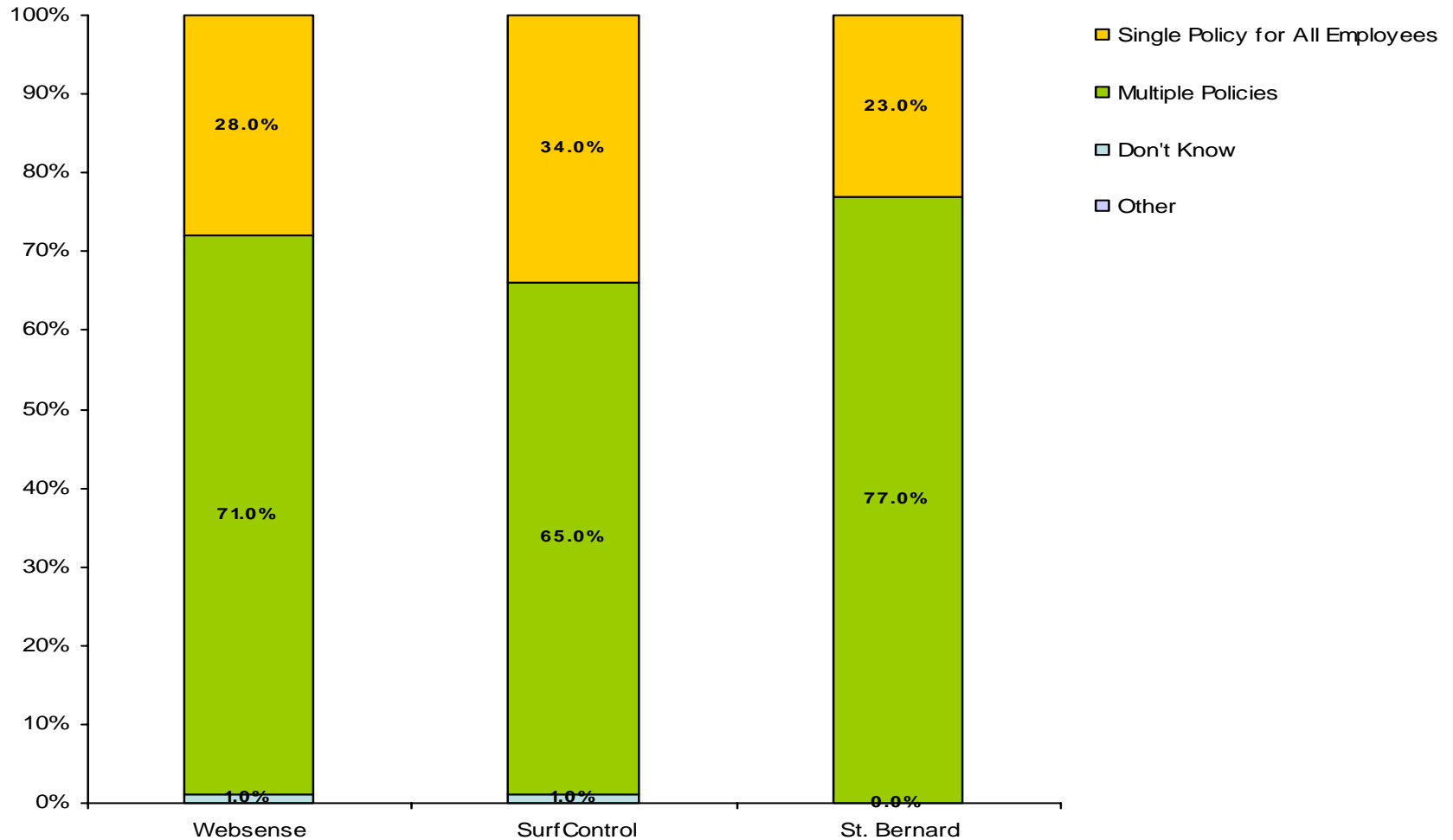
Current Title of Respondent



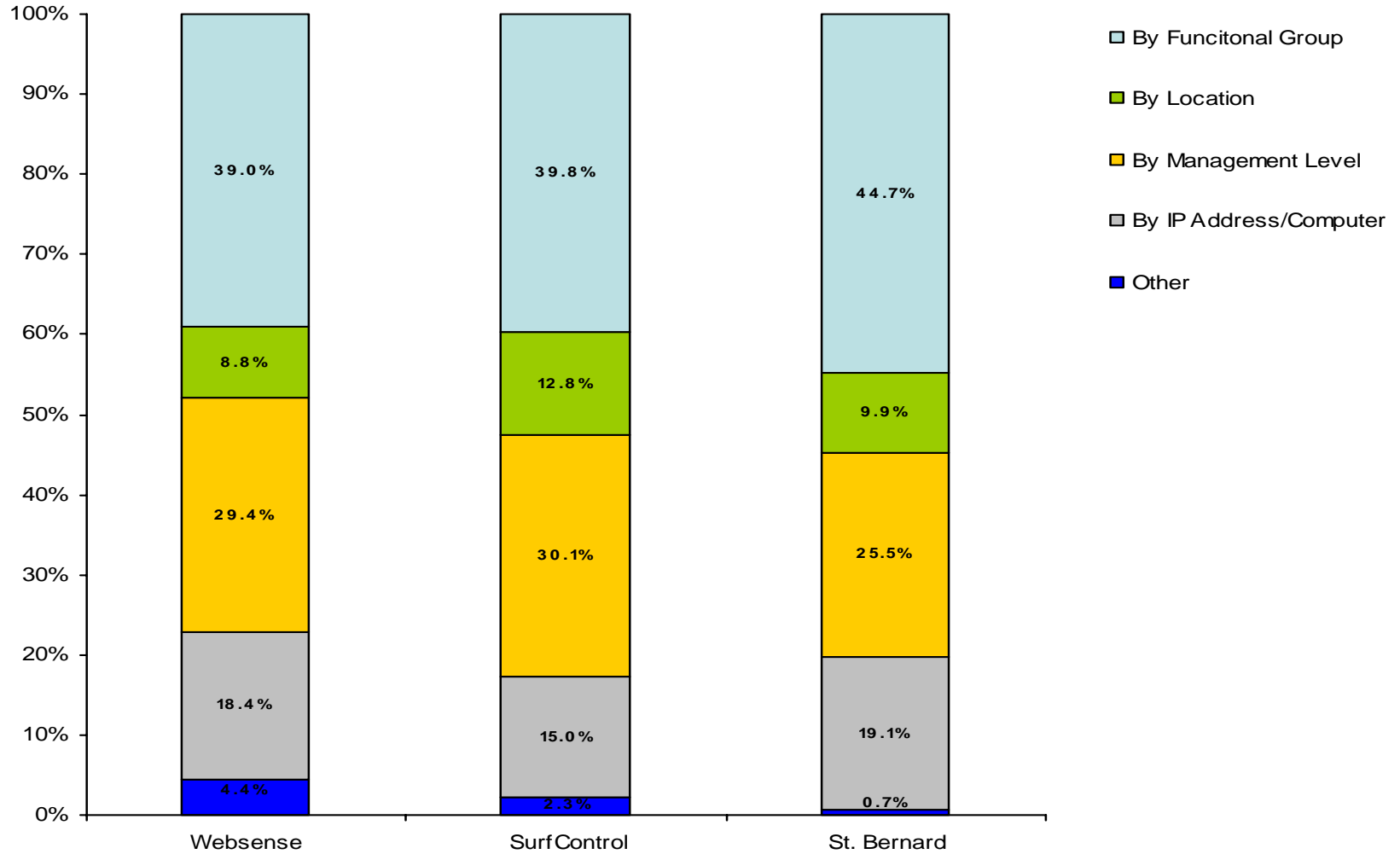
Web Usage Statistics

No statistically significant differences were found across the brands relating to web use, access rates, and policy. Lack of difference is an indicator of valid or un-biased sampling across usage profiles.

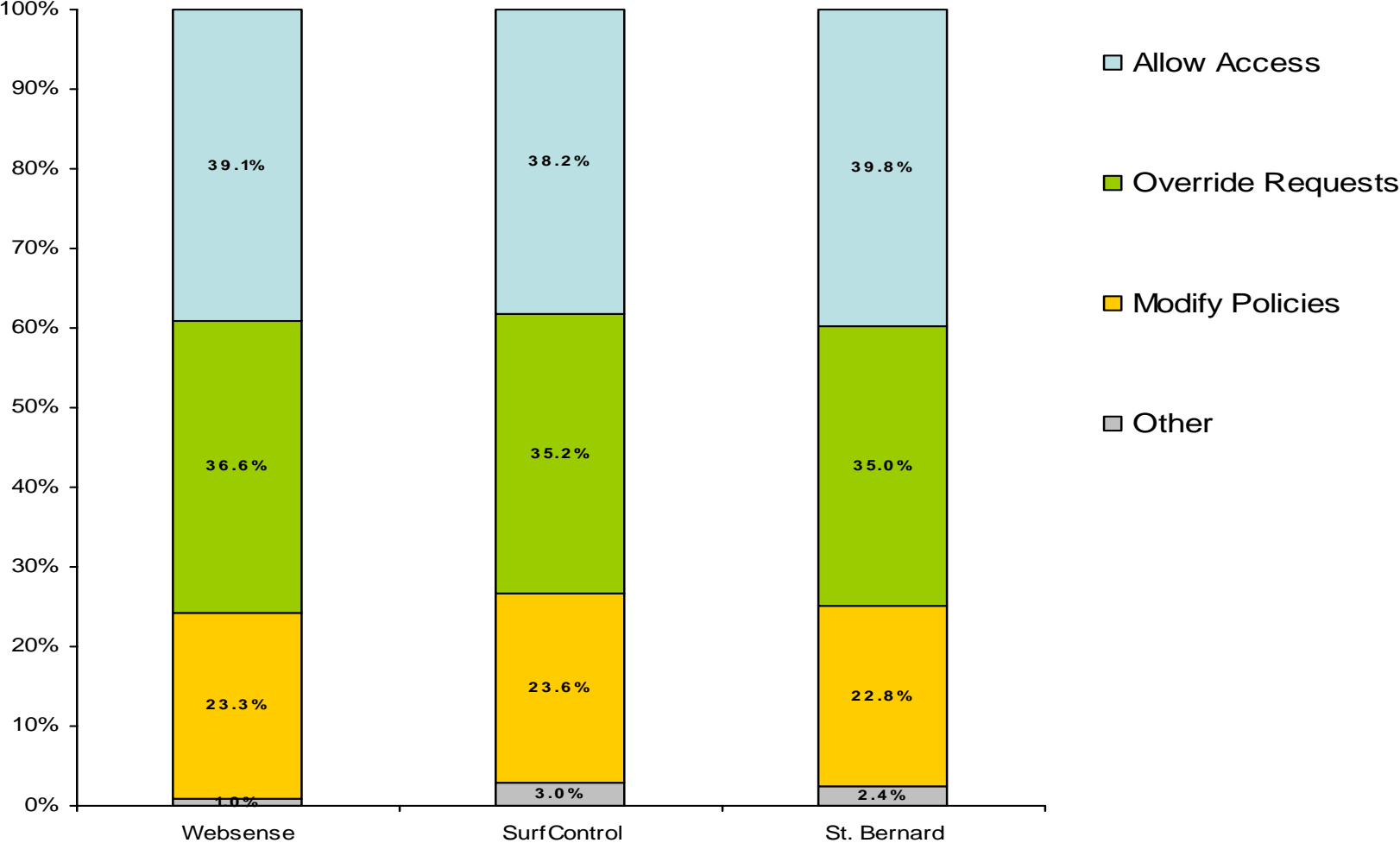
Does your company or organization have a single policy for all employees for Web filtering or do you provide different filtering based on job function or other category?



How does your company organize its Web filter policies? (multiple response)



What policy activities does your organization perform for ongoing Web filter management on a monthly basis? (multiple response)



What reporting activities does your company perform for the ongoing Web filter management on a month basis? (multiple response)

