

## 2010 Site Census: Demographics

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### INTRODUCTION

The Site Census from Intersect360 Research gathers and presents information on the hardware, software, and network configurations across a varied sampling of HPC user sites. Intersect360 Research surveyed members of the HPC user community spanning industry, government, and academia. The surveys were conducted utilizing a web-based survey tool and asked respondents to list characteristics of their HPC servers, storage, networks, middleware, and applications software.

This report provides the demographics of the respondents from our most recent survey (2010 Survey) as well as total sites in our database. The report's intent is to provide general demographics to supplement the other focused reports. Specific topic areas where in-depth analysis is provided include: systems, processor, storage, interconnects, and software.

The 2010 Survey was conducted from March through April 2010 and received responses from 163 sites. All Site Census surveys combined represent installations at 312 sites. The HPC User Site Census survey questionnaire can be found on the Intersect360 Research website at <http://intersect360.com/services/methodology.php>.

Our goals for collecting and maintaining site census data include:

- Developing demand-side data for tracking and modeling fundamental characteristics of the HPC market in such areas as computer room contents, vendor positioning, technology adoption, user purchase patterns, etc.
- Collecting and comparing demand-side data to supply-side data in order to accurately frame the entire HPC ecosystem
- Tracking trends in these characteristics over time, and
- Supporting our HPC market-sizing and forecasting models.

Intersect360 Research will conduct the Site Census on a yearly basis. Additionally, we will update our census data on an ongoing basis with data provided from end user site reviews, other Intersect360 Research surveys, publicly available data, and analyst opinion.

## 2010 SITE CENSUS DEMOGRAPHICS

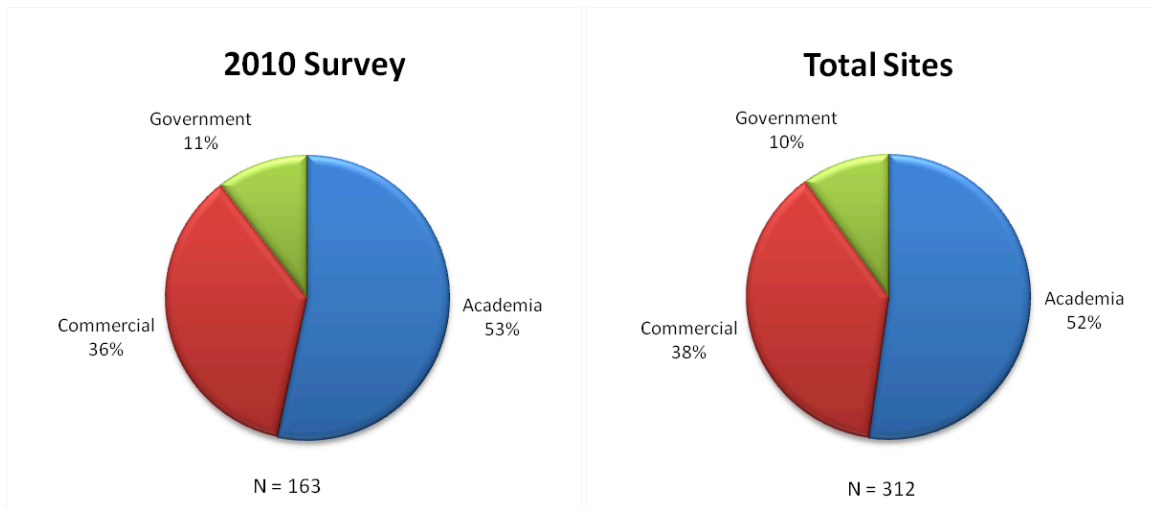
In our 2010 site census, 163 sites provided information about the hardware, software, and network configurations at their site. Combining these with the two previous studies completed in 2008 and 2009, our site census database includes a total of 312 sites.

The following figures and tables provide the demographics for respondents in the 2010 survey and for all sites combined (referred to as Total Sites).

### Sector

Figures 1 and 2 provide the respondents by sector for the 2010 survey and total sites. Academia has been and still is the largest sector responding to our surveys with over 50% representation. Academic sites typically have an easier time responding due to an inherent mission to advance and disseminate knowledge, and fewer restrictions on confidentiality.

**Figures 1 and 2. Respondents by Sector for 2010 Survey and Total Sites**

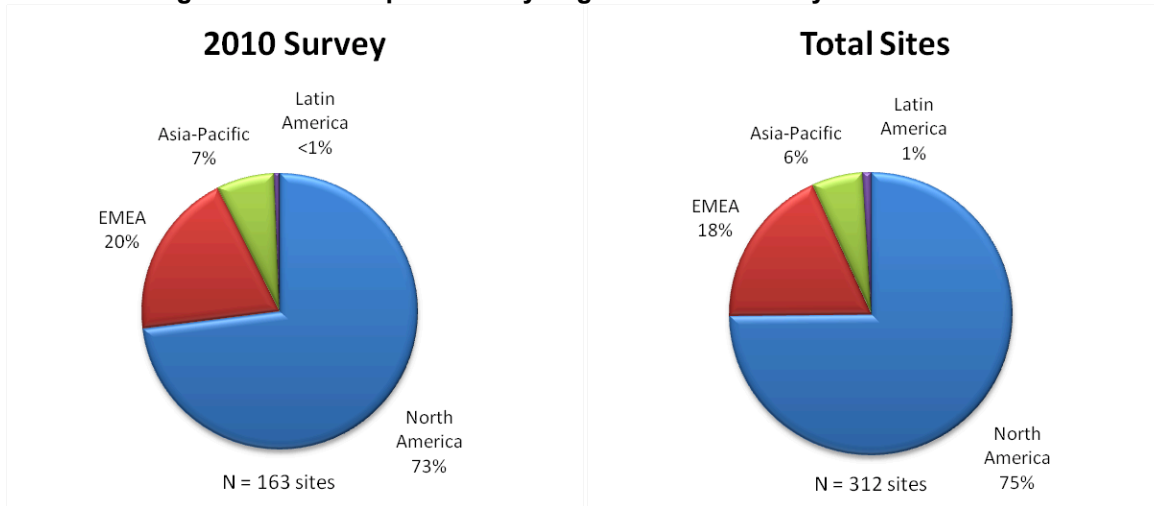


Source: Intersect360 Research, 2010

## Region

North America is represented by almost three-fourths of the respondents. North America and the United States in particular, have historically been the leading consumers of HPC technology.

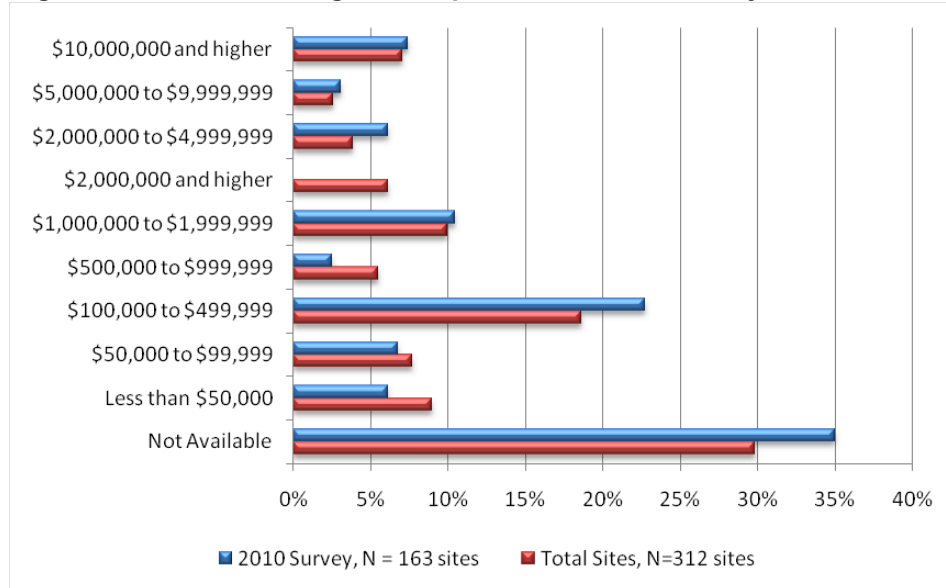
**Figure 3 and 4. Respondents by Region for 2010 Survey and Total Sites**



## Annual HPC Budget

Respondents are also asked to provide their organization’s annual budget for HPC, including servers, software, storage, and services, see Figure 5. The largest budget segment was the \$100,000 to \$499,999 with 23% and 19%, followed by \$1 million to \$1,999,999. If all large budgets (\$2 million and greater) were combined, they would represent about 20% of the reporting respondents. The distribution provides a good cross section of the HPC installed base. Considering this is a sensitive question, we were not surprised that about one-third of the respondents stated they could not provide their budget.

**Figure 5. Annual HPC Budget of Respondents for 2010 Survey and Total Sites**



Note: \$2,000,000 and higher was used prior to 2010 Survey, then segmented further Source: Intersect360 Research, 2010