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# Research Report

## Abstract:

## Remote Office/Branch Office Technology Trends

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# Introduction

### Research Objectives

In order to determine the IT priorities and challenges when it comes to supporting the technology requirements of remote office/branch office (ROBO) locations, and how organizations plan to address those challenges, ESG recently surveyed 347 North American senior IT professionals representing midmarket (100 to 999 employees) and enterprise-class (1,000 employees or more) organizations. All respondents worked at headquarters locations or other centralized corporate sites and were responsible for ROBO IT operations and/or strategy, including the delivery of IT services to these locations, authorization of expenditures, and establishment and enforcement of corporate IT policies for remote/branch offices. Respondent organizations were required to have at least two ROBO locations to qualify for the survey.

The survey was designed to answer the following questions:

- How many ROBO locations do organizations currently support?
- What is the average number of employees that work at each ROBO location? What is the largest ROBO in terms of number of employees?
- What percentage of ROBO locations has dedicated on-premises IT staff? How do organizations determine which locations qualify for these localized resources?
- What are the top ROBO IT priorities? What are the top security challenges when it comes to supporting the IT needs of remote/branch offices?
- How are the majority of corporate applications and/or IT services delivered to users at ROBO locations?
- How pervasive is SaaS usage by employees at ROBO locations?
- What benefits do organizations derive from delivering corporate applications and/or IT services to their ROBO locations?
- What challenges do organizations face in delivering corporate applications and/or IT services to their ROBO locations? What steps have they taken to address these challenges?
- How many servers do organizations have deployed at a typical ROBO location?
- How extensive is server virtualization usage at ROBO locations, and how does this vary by average server footprints?
- On average, approximately how much data storage capacity is deployed at the typical ROBO location?
- What type of external disk storage system is the most widely used at ROBO locations? How does this vary by average ROBO storage capacity levels?
- Do organizations currently use any type of converged infrastructure (i.e., integrated computing platform) at their ROBO locations?
- Which factors drove organizations to deploy—or consider deploying—an integrated computing platform(s)? What was the *primary* reason that they deployed—or are considering deploying—an integrated computing platform(s)?
- What is the primary data protection process organizations employ at their ROBO locations?
- For those organizations backing up their data to a central location, what drove them to this model and what challenges—if any—have they experienced?

Survey participants represented a wide range of industries including manufacturing, financial services, communications and media, health care, retail, government, and business services. For more details, please see the *Research Methodology* and *Respondent Demographics* sections of this report.

## Research Methodology

To gather data for this report, ESG conducted a comprehensive online survey of IT managers from private- and public-sector organizations in North America (United States and Canada) between November 6, 2014 and November 19, 2014. To qualify for this survey, respondents were required to be senior IT managers working at headquarters locations or other centralized corporate sites and personally responsible for or familiar with the IT operations and strategies at their organization's remote/branch offices. All respondents were provided an incentive to complete the survey in the form of cash awards and/or cash equivalents.

After filtering out unqualified respondents, removing duplicate responses, and screening the remaining completed responses (on a number of criteria) for data integrity, we were left with a final total sample of 347 IT managers.

Please see the *Respondent Demographics* section of this report for more information on these respondents.

Note: Totals in figures and tables throughout this report may not add up to 100% due to rounding.

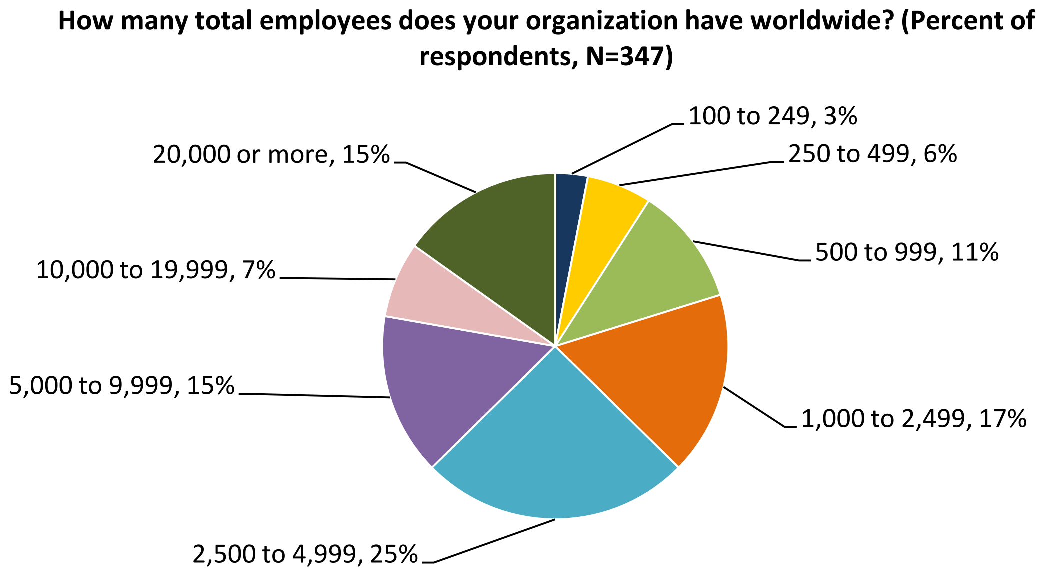
# Respondent Demographics

The data presented in this report is based on a survey of 347 qualified respondents. Figures 1-3 detail the demographics of the respondent base, including organizations' total number of employees, primary industry, and annual revenue.

## Respondents by Number of Employees

The number of employees in respondents' organizations is shown in Figure 1.

*Figure 1. Survey Respondents, by Number of Employees*

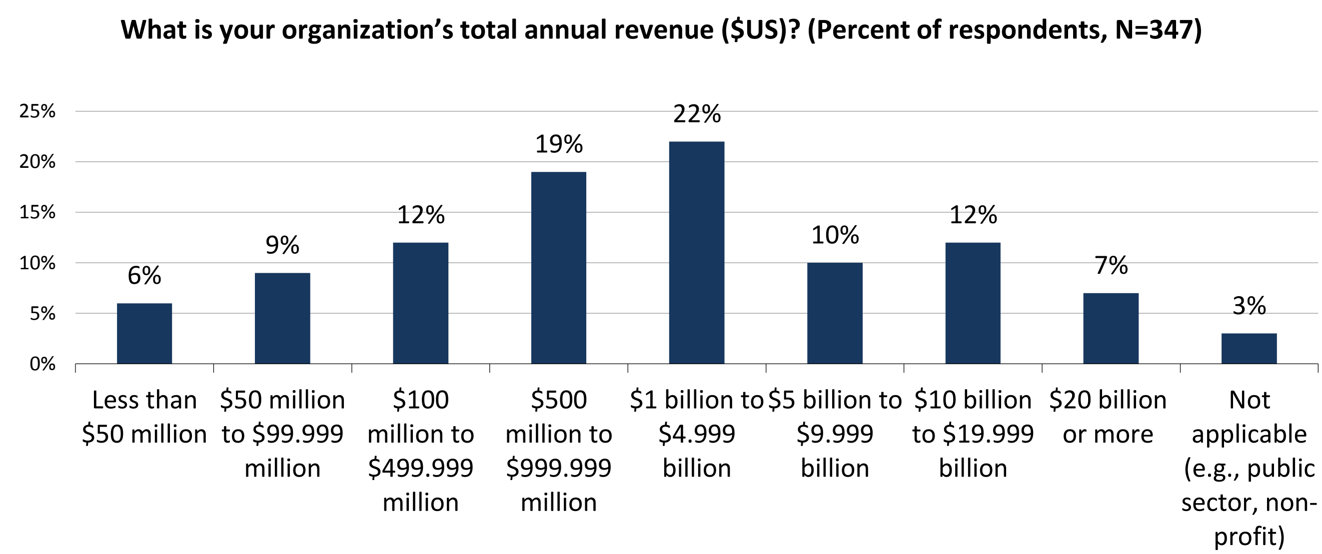



*Source: Enterprise Strategy Group, 2015.*

## Respondents by Annual Revenue

Respondent organizations' annual revenue is shown in Figure 2.

*Figure 2. Survey Respondents, by Annual Revenue*



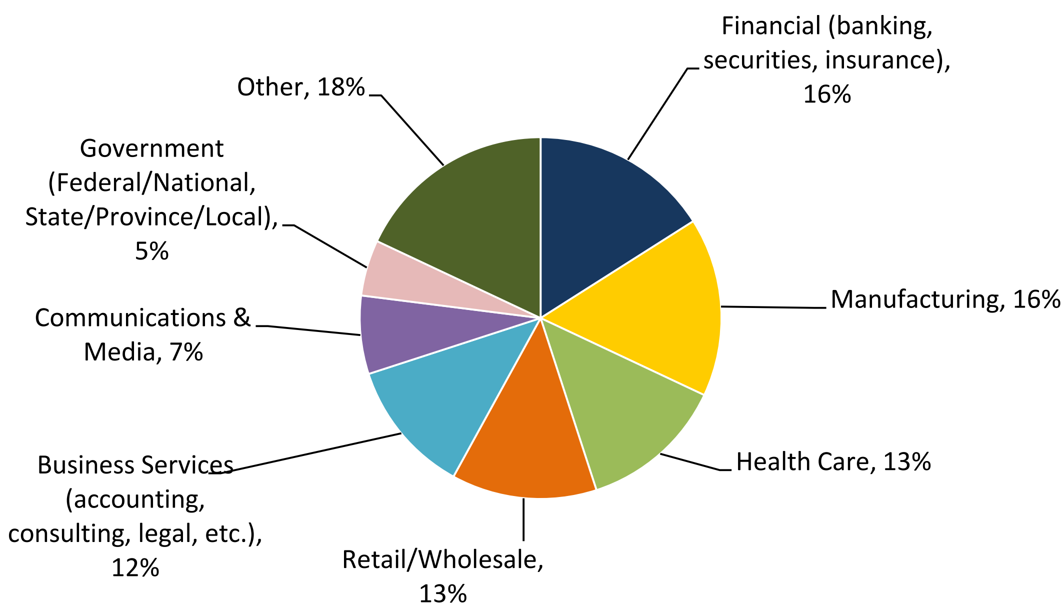

*Source: Enterprise Strategy Group, 2015.*

## Respondents by Industry

Respondents were asked to identify their organization's primary industry. In total, ESG received completed, qualified respondents from individuals in 19 distinct vertical industries, plus an "Other" category. Respondents were then grouped into the broader categories shown in Figure 3.

*Figure 3. Survey Respondents, by Industry*

**What is your organization's primary industry? (Percent of respondents, N=347)**




*Source: Enterprise Strategy Group, 2015.*

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