Abstract:
The Shift Toward Data Protection Appliances

By Jason Buffington, Senior Analyst and Bill Lundell, Senior Research Analyst
With Jennifer Gahm, Senior Project Manager

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Introduction

Research Objectives

In order to accurately assess organizations’ preferences toward data protection appliances—those devices (physical or virtual) that were specifically designed to deliver or enhance data protection scenarios—ESG surveyed 299 IT professionals representing midmarket organizations (defined as organizations with 100 to 999 employees) and enterprise-class organizations (defined as organizations with 1,000 or more employees) in North America. All respondents were responsible for data protection technology purchase decisions at their organizations.

The survey was designed to answer the following questions:

- Regardless of current usage of backup appliances, what is the primary (as measured by the greatest amount of backup data stored) type of disk-based backup storage in use today? How is this expected to change—if at all—over the next 24 months?
- What types of data protection appliances are IT professionals currently using or interested in?
- For each type of data protection appliance, what are the considerations for or against usage?
- Among organizations currently using data protection appliances, how extensively are these solutions being used today? How is this expected to change over the next two years?
- When choosing between mainstream purpose-built backup appliances and deduplicated storage appliances, why do users of each prefer that type over the other?
- How extensively are tape media and cloud services used as a repository for backup data? How important is each media type as it pertains to data protection appliance strategies?
- Ignoring the respondents’ own organizational dynamics or needs, where would each IT professional consider using or recommend using each of the four types of data protection appliances?

Survey participants represented a wide range of industries including financial services, manufacturing, business services, communications and media, and government. 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 professionals from private- and public-sector organizations in North America (United States and Canada) between November 12, 2014 and December 5, 2014. To qualify for this survey, respondents were required to be IT professionals with day-to-day knowledge of and/or familiarity with their organization’s data protection environment and strategy. 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 299 IT professionals.

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 299 qualified respondents. The Figures 1-7 detail the demographics of the respondent base, including individual respondents’ current role, technology responsibility, and age, as well as respondent organizations’ total number of employees, primary industry, age of organization, and annual revenue.

Respondents by Current Role

Respondents’ current role within their organization is shown in Figure 1.

Figure 1. Survey Respondents by Current Role

Which of the following best describes your current role within your organization? (Percent of respondents, N=299)

- IT management (e.g., CIO, VP of IT, Director of IT, etc.), 54%
- IT staff (e.g., Storage Administrator, Systems Administrator, etc.), 46%


Respondents by Current Technology Responsibility

Respondents’ current technology responsibility is shown in Figure 2.

Figure 2. Survey Respondents by Current Technology Responsibility

Which of the following would you consider to be your primary area of technology responsibility? (Percent of respondents, N=299)

- IT Operations, 34%
- General IT staff, 24%
- Data protection (e.g., backup/recovery, archive), 12%
- Servers/systems administration, 13%
- Applications/Database, 6%
- Storage/SAN administration, 5%
- Virtualization, 1%
- IT Architecture/Planning, 5%

Respondents by Age

The age of survey respondents is shown in Figure 3.

**Figure 3. Survey Respondents by Age**

Please select your age group. (Percent of respondents, N=299)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>25 and under</td>
<td>4%</td>
</tr>
<tr>
<td>26 to 35</td>
<td>28%</td>
</tr>
<tr>
<td>36 to 45</td>
<td>36%</td>
</tr>
<tr>
<td>46 to 55</td>
<td>19%</td>
</tr>
<tr>
<td>Over 55</td>
<td>13%</td>
</tr>
</tbody>
</table>

*Source: Enterprise Strategy Group, 2015.*

Respondents by Number of Employees

The number of employees in respondents’ organizations is shown in Figure 4.

**Figure 4. Survey Respondents by Number of Employees**

How many total employees does your organization have worldwide? (Percent of respondents, N=299)

<table>
<thead>
<tr>
<th>Number of Employees</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,000 to 2,499</td>
<td>20%</td>
</tr>
<tr>
<td>2,500 to 4,999</td>
<td>17%</td>
</tr>
<tr>
<td>5,000 to 9,999</td>
<td>11%</td>
</tr>
<tr>
<td>10,000 to 19,999</td>
<td>5%</td>
</tr>
<tr>
<td>100 to 999</td>
<td>36%</td>
</tr>
<tr>
<td>20,000 or more</td>
<td>11%</td>
</tr>
</tbody>
</table>

*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 5.

![Figure 5. Survey Respondents by Industry](image)

What is your organization's primary industry? (Percent of respondents, N=299)

- Manufacturing, 17%
- Financial (banking, securities, insurance), 13%
- Retail/Wholesale, 13%
- Business Services (accounting, consulting, legal, etc.), 10%
- Communications & Media, 6%
- Government (Federal/National, State/Province/Local), 7%
- Health Care, 10%
- Other, 24%


Respondents by Age of Organization

The age of respondents' organizations is shown in Figure 6.

![Figure 6. Survey Respondents by Age of Organization](image)

For approximately how long has your current employer been in existence? (Percent of respondents, N=299)

- More than 50 years, 24%
- 11 to 20 years, 28%
- 21 to 50 years, 27%
- 6 to 10 years, 14%
- 1 to 5 years, 7%
- Don’t know, 1%

Respondents by Annual Revenue

Respondent organizations’ annual revenue is shown in Figure 7.

**Figure 7. Survey Respondents by Annual Revenue**

What is your organization’s approximate total annual revenue ($US)? (Percent of respondents, N=299)

![Bar chart showing annual revenue distribution](chart.png)

# Contents

List of Figures .................................................................................................................................................. 3

Executive Summary ........................................................................................................................................... 4
  Report Conclusions ................................................................................................................................... 4

Introduction .................................................................................................................................................... 5
  Research Objectives .................................................................................................................................. 5

Research Findings ......................................................................................................................................... 6
  Disk Employed as Part of Most Data Protection Strategies ........................................................................... 6
  The Data Protection Appliance (DPA) Landscape ....................................................................................... 7
  Which Appliance Type Would Data Protection Professionals Recommend? .................................................. 21

Conclusion ..................................................................................................................................................... 22
  Research Implications for Vendors .............................................................................................................. 22
  Research Implications for Data Protection Professionals .......................................................................... 23

Research Methodology ................................................................................................................................. 24

Respondent Demographics ........................................................................................................................... 25
  Respondents by Current Role ...................................................................................................................... 25
  Respondents by Current Technology Responsibility ................................................................................... 25
  Respondents by Age ..................................................................................................................................... 26
  Respondents by Number of Employees ........................................................................................................ 26
  Respondents by Industry .............................................................................................................................. 27
  Respondents by Age of Organization .......................................................................................................... 27
  Respondents by Annual Revenue ............................................................................................................... 28
List of Figures

Figure 1. Primary Disk-based Storage Organizations Used for Backup Data: Today and 24 Months from Now........ 6
Figure 2. Four Data Protection Appliance Categories ............................................................................................ 7
Figure 3. Organization’s Usage of Data Protection Appliances .................................................................................. 8
Figure 4. Percentage of Organization’s Backup Jobs Performed by Backup Appliances: Today and 24 Months from Now ........................................................................................................................................... 9
Figure 5. Organization’s Usage of Virtualized Backup Appliances ............................................................................. 10
Figure 6. Primary Backup Engine Form Factor among Current Backup Appliance Users: Today and 24 Months from Now ........................................................................................................................................... 10
Figure 7. Reasons for Deploying/Considering Deploying Backup Appliances ............................................................ 11
Figure 8. Percentage of Organization’s Secondary Storage Used for Data Protection within Storage Appliances: Today and 24 Months from Now ........................................................................................................................................... 12
Figure 9. Reasons for Deploying/Considering Deploying Storage Appliances ............................................................. 13
Figure 10. Reasons for Choosing a Backup Appliance Over a Storage Appliance ......................................................... 14
Figure 11. Reasons for Choosing a Storage Appliance Over a Backup Appliance .......................................................... 14
Figure 12. Most Important Features/Functions of a Gateway Appliance .................................................................... 15
Figure 13. Percentage of Organization’s Servers Able to Resume Functionality from a Secondary Site: Today and 24 Months from Now ........................................................................................................................................... 16
Figure 14. Important Features/Functions When Evaluating/Selecting a Failover Appliance ............................................. 17
Figure 15. Minimum Amount of Storage Capacity Required of a Virtual Appliance To Be Useful ............................... 18
Figure 16. Maximum Amount of Storage Capacity for a Virtual Appliance To Be Useful .............................................. 18
Figure 17. Percentage of Organization’s Backup Data Stored on Tape and in the Cloud Today ....................................... 19
Figure 18. Importance of Tape Connectivity to Data Protection Appliance Strategy ..................................................... 20
Figure 19. Importance of Cloud Extensibility to Data Protection Appliance Strategy ..................................................... 20
Figure 20. Type of Organizations Respondents Believe Data Protection Appliances Would Be Suitable For .................. 21
Figure 21. Survey Respondents by Current Role ......................................................................................................... 25
Figure 22. Survey Respondents by Current Technology Responsibility ......................................................................... 25
Figure 23. Survey Respondents by Age ....................................................................................................................... 26
Figure 24. Survey Respondents by Number of Employees .......................................................................................... 26
Figure 25. Survey Respondents by Industry ................................................................................................................ 27
Figure 26. Survey Respondents by Age of Organization ............................................................................................... 27
Figure 27. Survey Respondents by Annual Revenue .................................................................................................. 28

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