

Research Report

Abstract:

The Shift Toward Data Protection Appliances

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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

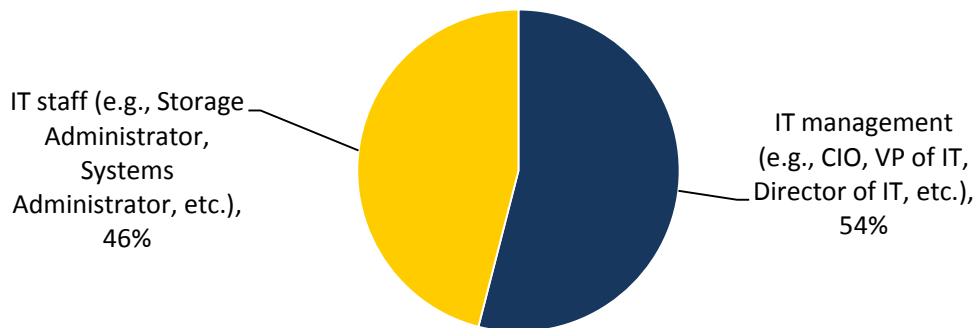
The data presented in this report is based on a survey of 299 qualified respondents. The Figures 1-7 detail the demographics of the respondent base, including individual respondents' current role, technology responsibility, and age, as well as respondent organizations' total number of employees, primary 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)



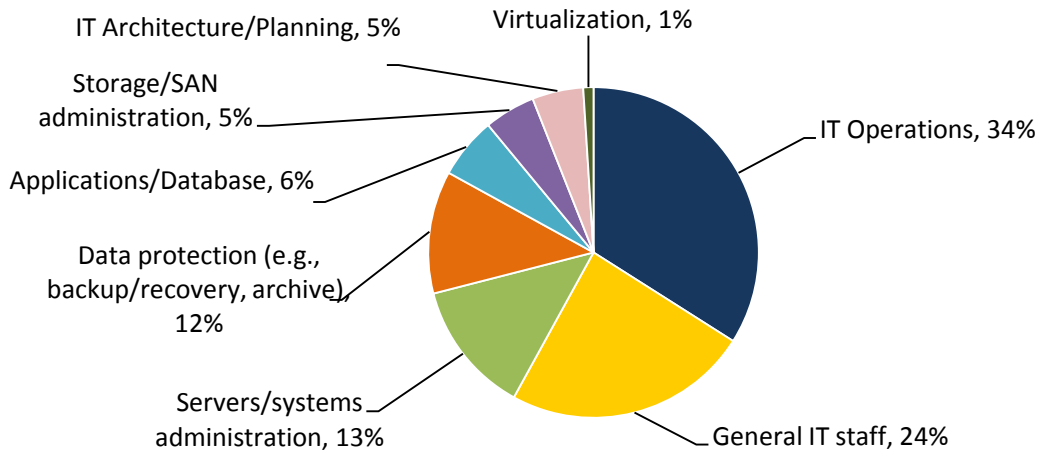
Source: Enterprise Strategy Group, 2015.

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)



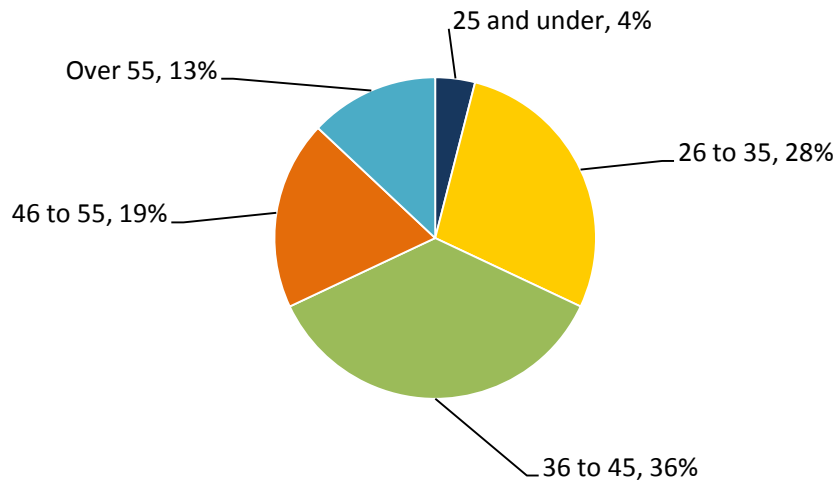
Source: Enterprise Strategy Group, 2015.

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)



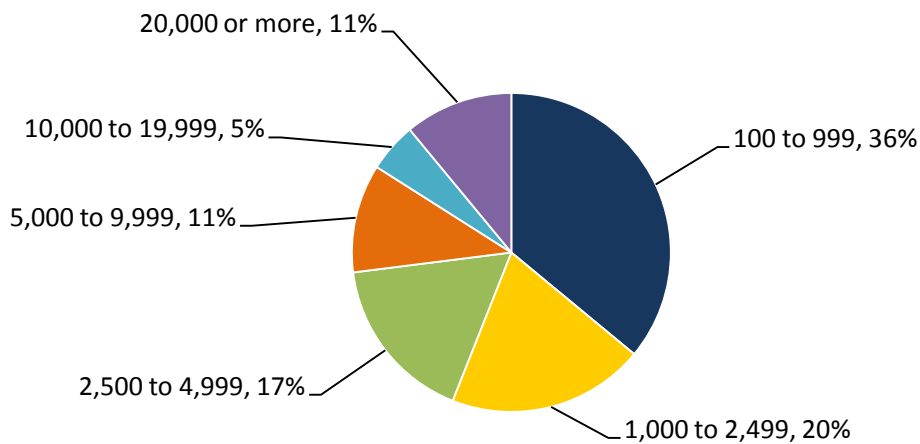
Source: Enterprise Strategy Group, 2015.

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)

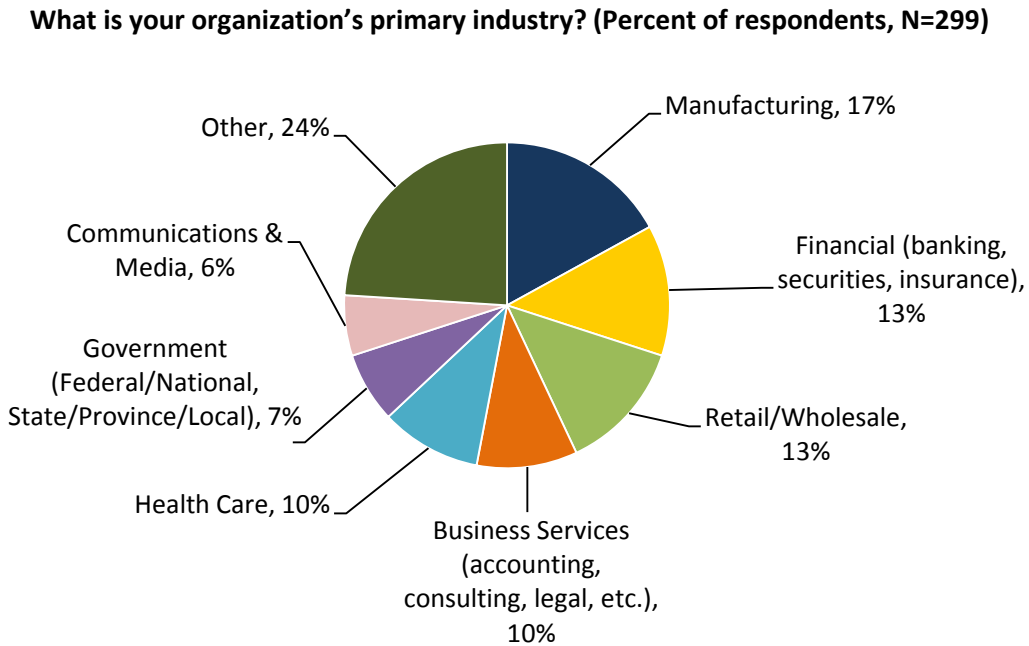


Source: Enterprise Strategy Group, 2015.

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



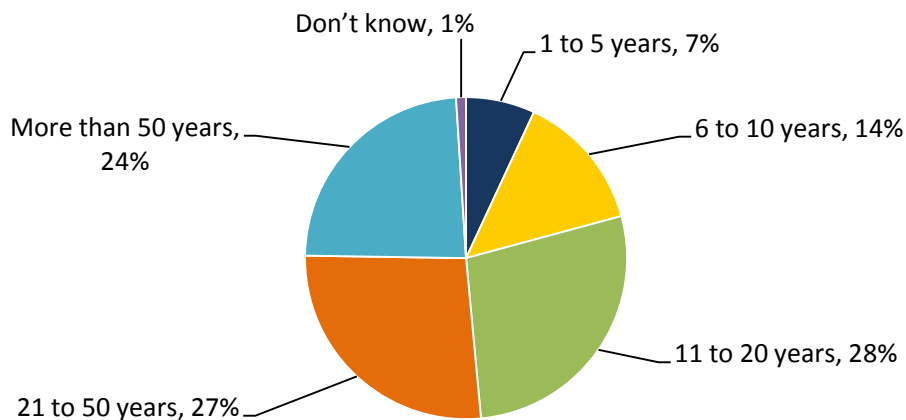
Source: Enterprise Strategy Group, 2015.

Respondents by Age of Organization

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

Figure 6. Survey Respondents by Age of Organization

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

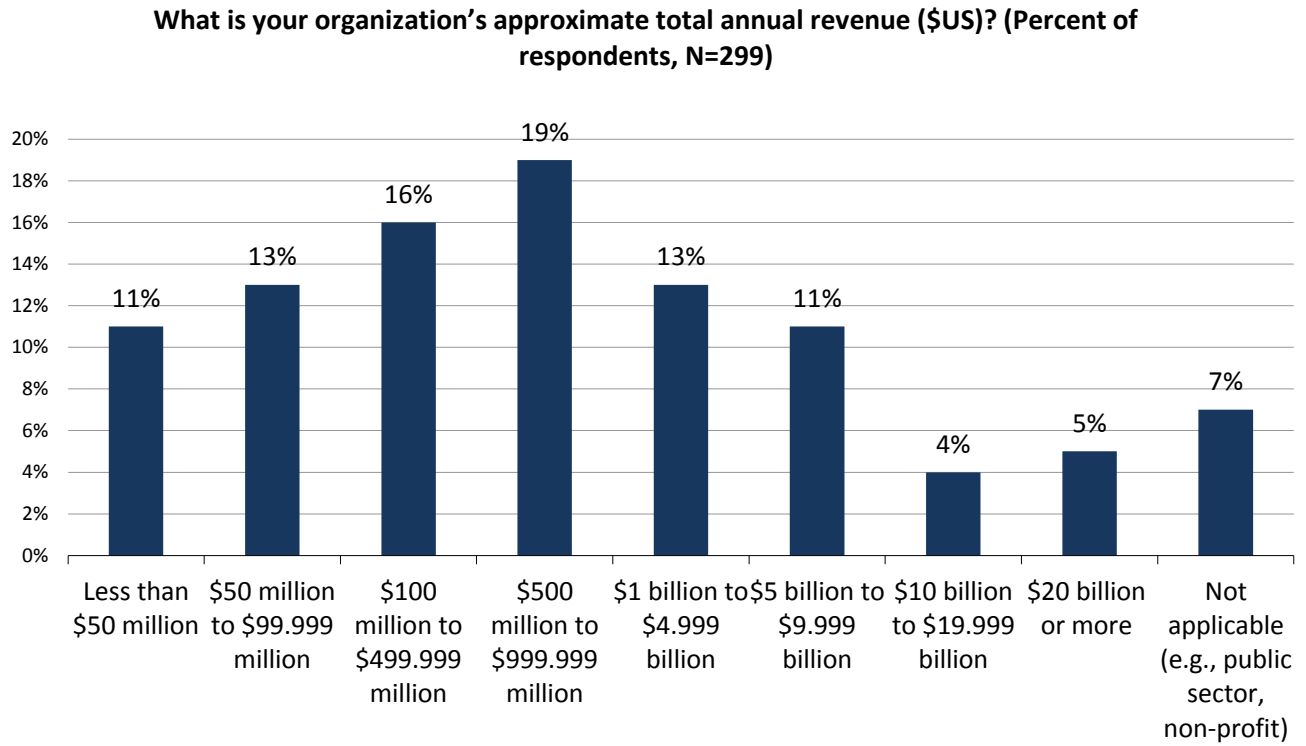


Source: Enterprise Strategy Group, 2015.

Respondents by Annual Revenue

Respondent organizations' annual revenue is shown in Figure 7.

Figure 7. Survey Respondents by Annual Revenue



Source: Enterprise Strategy Group, 2015.



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