



# Disaster Recovery and Online Back- up as a Service

Global Overview &  
Outlook

## AMI-Partners

505 Eighth Ave., Ste. 1705, NY, NY 10018  
212-944-5100

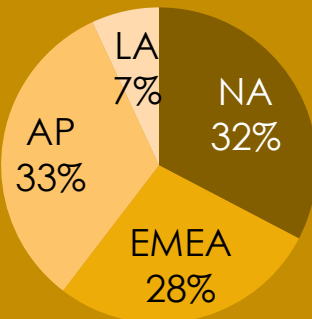
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# A \$6+b Market by 2021 (Commercial Small, Medium and Large Enterprises)

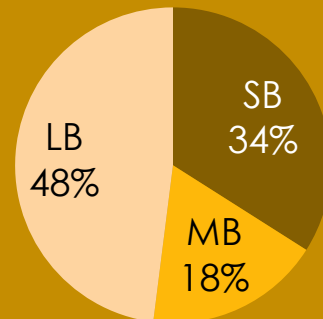
Total WW SMLB DRaaS & Online Back-up Spending (\$b)



Spend By Region '16

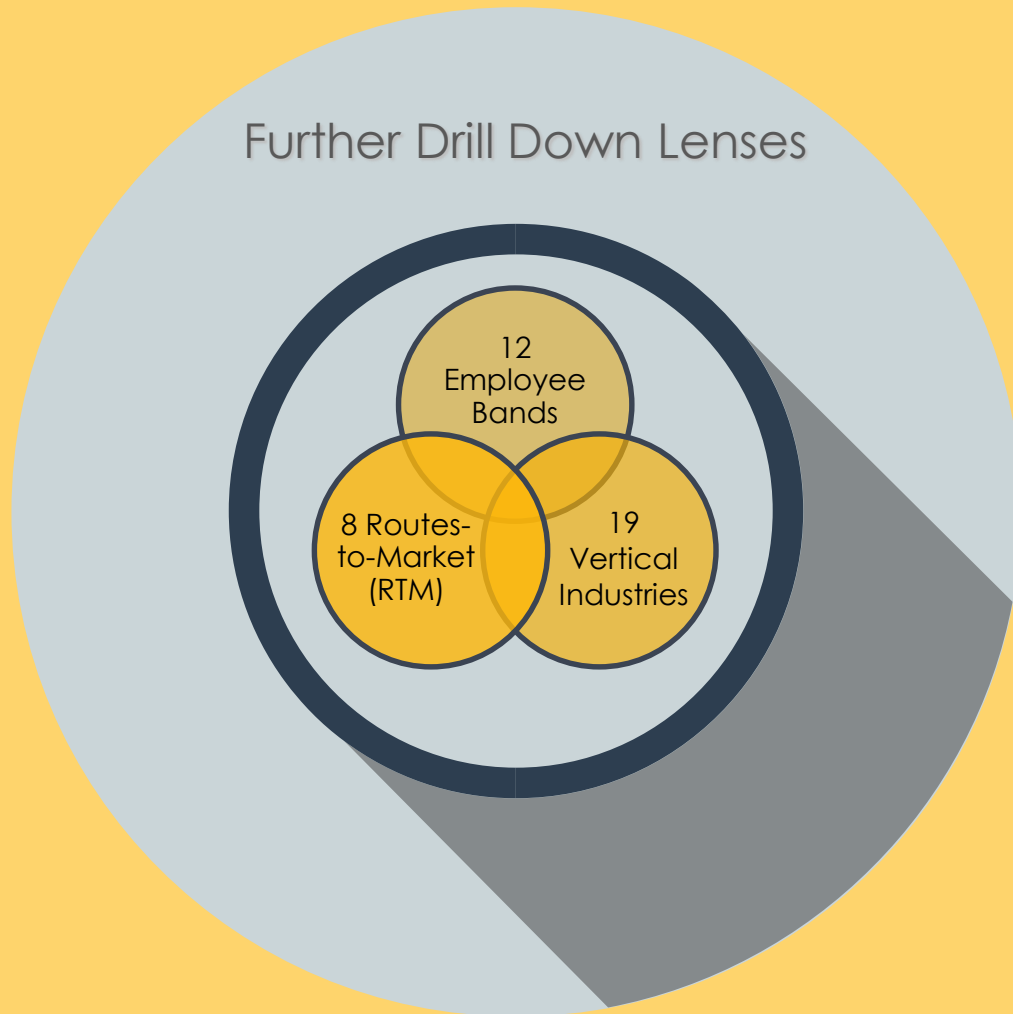


SMB vs. LB Breakout '16



- **Cloud-based disaster recovery as a service (DRaaS) is rapidly expanding its reach into the SMB space.**
- **Online Backup is well established and growing, but profit pools reside in higher-end collaborative and DR type products.**
- **Over 0.7 million firms worldwide will be using DraaS, while another 7.3 million will be using Online Backup by 2019.**
- **SMBs drive 75% of total opportunity**

# An In-Depth Opportunity Assessment of the DRaaS and Online Back-up Market



## Practice Contents

### 1. Needs & Buying Behavior by Size Band

- Triggers and value propositions across employee bands
- Implications for messaging and positioning
- Key decision makers—titles, roles and purchase criteria
- Influencers and informational sources used in purchase process

### 2. Current Market Overview (Adoption/penetration by employee size

- Number of firms using DRaaS and Online Backup
- Spending by employee size, region and top countries
- Spending by vertical industry

### 3. Forecast and Outlook

- By region and top 10+ countries
- Spending by employee size bands and vertical industry

### 4. Routes to Market (RTM)

- DRaaS and Online Backup purchase volume by channel/RTM by region:
  - MSPs
  - VARs/channel partners/ISVs
  - Service providers (telco/cable)
  - Hosters
  - Vendor direct
  - Systems integrators
  - Retail
  - DMR

### 5. Implications for Vendors

#### OPTIONAL:

**SMB Segmentation-Driven Lead Generation**

# DRaaS and Online Back-up Study Coverage

Countries, Employee Size Bands, Verticals and Routes to Market Covered

Countries				
U.S.	Germany	China	Australia	Brazil
Canada	France	India	Japan	Mexico
	U.K.	Rest of Asia		Rest of Latin America
	Rest of W. Europe	Pacific		
	Rest of EEMEA			

## Employee Sizes

### Small Business

- 1-4 Employees
- 5-9 Employees
- 10-19 Employees
- 20-49 Employees
- 50-99 Employees

### Medium Business

- 100-249 Employees
- 250-499 Employees
- 500-999 Employees

### Large Bus. (Enterprise)

- 1,000-2,499 Empls.
- 2,500-4,999 Empls.
- 5,000-9,999 Empls.
- 10,000 + Empls.

## Verticals

1. Agriculture/Mining
2. Banking/Financial
3. Construction
4. Discrete Manufacturing
5. Healthcare
6. Hospitality
7. Information & Media
8. Insurance
9. Life Sciences
10. Other Services
11. Pharmaceuticals
12. Process Manufacturing
13. Professional Services
14. Real Estate
15. Retail
16. Telecommunications
17. Transportation
18. Utilities
19. Wholesale

## Routes to Market

1. **Vendor Direct**
2. **CPs:** Channel Partners, Value Added Resellers (VARs)
3. **DMR:** no retail presence
4. **Retail**
5. **SIs:** Large/Medium System Integrators
6. **MSPs:** Managed Service Providers
7. **SPs:** Service Providers, Telecom Providers, Mobile Network Carriers, and Cable Network Operators
8. **Hosters**



- **DRaaS provides on-demand, recovery of a business's principal cloud/virtual or on-premise IT deployments that is seamlessly provisioned in the event of failure in the principal IT deployment.**
- **Online Back-up is automated data back-up to online (and off-site) storage space provided by a third party.**

# Deliverables

## Deliverables

- **Deliverables include:**
  - PowerPoint Deck
  - Pivot Table
- **The pivot tables break out the market opportunity and forecast is by a number of actionable lenses which include:**
  - Employee Bands
  - Verticals
  - Routes to market
  - Top 10 countries and regions
- **Metrics include number of firms using DRaaS and online back-up, dollar spending volume —broken out by employee size and vertical industry.**

## Contact AMI:

- **North America, Latin America, Europe**  
John Rezac  
[jrezac@ami-partners.com](mailto:jrezac@ami-partners.com)  
646.356.1710
- **Asia Pacific**  
Kishalay Choudhury  
[kchoudhury@ami-partners.com](mailto:kchoudhury@ami-partners.com)  
33.4003.3093
- **Japan – Yuki Uehara**  
[yuehara@ami-partners.com](mailto:yuehara@ami-partners.com)  
212.944.5100



# About AMI-Partners

- **GLOBAL END-USER/IT-USER RESEARCH INVESTMENT** Founded in 1996, each year AMI invests in the industry's most comprehensive primary research-based surveys with several thousand SMBs (targeting IT and business decision makers – TDMs/BDMs) in SBs (1 to 99 employees) and MBs (100 to 999 employees) globally across North America, Europe, the Asia Pacific and Latin America to update its proprietary knowledge base and models. **Markets are gauged on an annual basis via comprehensive tracking platforms.** Countries covered include:
  - North America: U.S., Canada
  - Latin America: Brazil, Mexico
  - Western Europe: France, Germany, U.K. , Spain, Italy,
  - EEMEA: Russia, Czech Republic, Poland, Turkey
  - Asia-Pacific: Australia, Japan, China, India, Singapore, Thailand, Malaysia, Indonesia, S. Korea, Taiwan, Hong Kong, New Zealand, Vietnam, Philippines, Pakistan, Bangladesh, Sri Lanka
- **EMPLOYEE SIZE SEGMENTS** AMI defines small businesses as those with 1 to 99 employees, further classified into several sub-categories (1-4, 5-9, 10-19, 20-49 and 50-99 employees); medium businesses as those having 100 to 999 employees, further classified into (100-249, 250-499 and 500-999 employees) ; and large businesses as those with 1,000 or more employees (further classified into 1,000-2,499, 2,500-4,999 and 5,000+), in each of the countries that AMI tracks. AMI also tracks home-based businesses (HBBs) and public sector (government and education) across various geographies.
- **GO-TO-MARKET SEGMENTATION** AMI has successfully applied our GTM segmentation and predictive modeling expertise to bring marketing clarity to the worldwide SMB market. We have deployed actionable segmentation models and prospect lists tied to specific product campaigns/lead gen activities across various geographies.
- **TAM/FORECAST MODELS** AMI's Global Model (GM) is the IT industry's most comprehensive market sizing, forecasting and market planning tool.
  - Over 110 separate ICT sub-categories are sized/forecasted for all geographic regions, further broken out by 12 employee-size and 19 vertical markets. Regional and worldwide roll-up views are provided, and RTM overlays are available.
  - Each year AMI augments the model with additional geographic breakouts and technologies, including in-country regional breakouts (top metros/cities).
- **CHANNELS/RESELLERS** In addition, AMI tracks the SMB & LB channel partner markets covering various areas including channel partner demographics, product/service offerings, customer characteristics, business models, cloud transformation. key vendors, etc. The channel partner studies involve one-on-one in-depth interviews as well as structured quantitative surveys across leading countries in North America, Latin America, Europe and Asia.