



## DISASTER RECOVERY AS A SERVICE MARKET

*Global Forecast to 2021*



MARKETSANDMARKETS

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### DISASTER RECOVERY AS A SERVICE MARKET - GLOBAL FORECAST TO 2021

By Service Type (Backup, Real-Time Replication, Data Security, & Professional Services),  
Provider (Cloud, Managed, and Telecom & Communications), Deployment, Organization Size, Vertical, & Region



## REPORT OVERVIEW

### 1.1 OBJECTIVES OF THE STUDY

- To define and segment the global Disaster Recovery as a Service (DRaaS) market
- To describe and forecast the global DRaaS market on the basis of service types, providers, deployment models, organization size, industry verticals, and regions
- To forecast the market size of the five main regional segments, namely North America, Europe, Asia-Pacific (APAC), Middle East and Africa (MEA), and Latin America
- To strategically analyze sub-segments with respect to individual growth trends, future prospects, and contribution to the total market
- To provide a detailed information regarding the major factors influencing the growth of the market (drivers, restraints, opportunities, and challenges)
- To analyze the opportunities in the market for stakeholders and to provide details of competitive landscape for major players
- To strategically profile key players and comprehensively analyze their core competencies and positioning
- To track and analyze competitive developments such as Mergers & Acquisitions (M&A), new product developments, and partnerships & collaborations in the market

## 1.2 MARKET DEFINITION

DRaaS is the replication of data on virtual servers to ensure business continuity in the event of manmade or natural disasters mainly facilitated by system integrators and the Managed Service Providers (MSPs). DRaaS is based on three important aspects that comprise disaster planning/management, business continuity, and backup. DRaaS is extremely useful for the Small and Medium Enterprises (SMEs) and the large enterprises that lack the expertise and are unaware about the benefits of cloud-based Disaster Recovery (DR).

## 1.3 MARKET SCOPE

- The market study covers the DRaaS market on the basis of service types (real-time replication, backup, data security, and professional services) and on the basis of providers (cloud service providers, managed service providers, and telecom and communication service providers).
- The market study covers the DRaaS market on the basis of deployment models (public, private, and hybrid).
- The market study covers the DRaaS market on the basis of organization size (SMEs and large enterprises).
- The market study covers the DRaaS market on the basis of industry vertical (Banking, Financial Services, and Insurance (BFSI), consumer goods & retail, government & public sector, healthcare & life sciences, manufacturing, media & entertainment, telecommunication & ITES, and others).
- The market study covers the DRaaS market on the basis of regions (North America, Europe, APAC, MEA, and Latin America).

## 1.3.1 MARKETS COVERED

The DRaaS market is segmented on the basis of service types, providers, deployment models, organization size, industry verticals, and regions.

**FIGURE 1 GLOBAL DISASTER RECOVERY AS A SERVICE MARKET: MARKET SEGMENTATION**

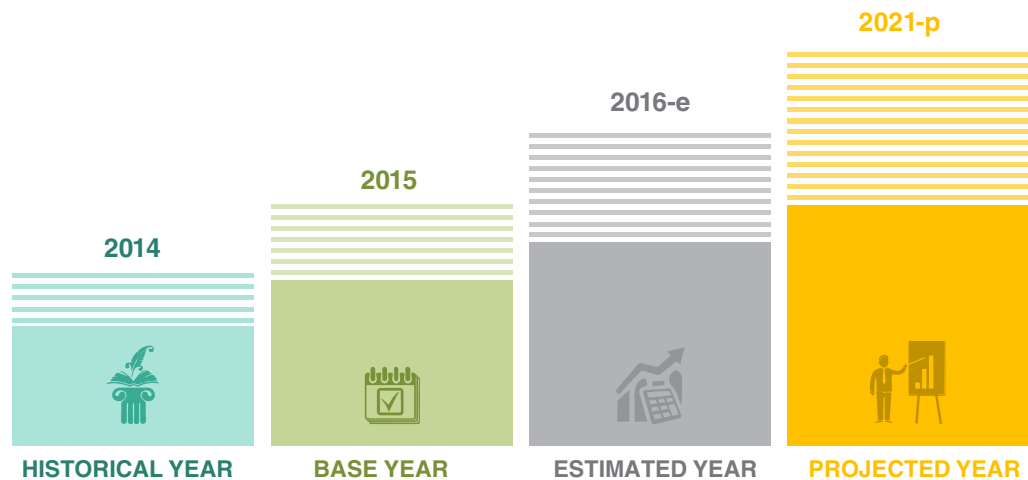


*Note: By Vertical: The others vertical includes transportation & logistics, travel & hospitality, education, oil & gas, E-commerce, and military & defense industries*

*By Provider: The others provider includes disaster recovery service providers, Independent Software Vendors (ISVs), and technology providers & suppliers*

*Source: MarketsandMarkets Analysis*

## 1.3.2 YEARS CONSIDERED IN THE REPORT



*Note: Forecast period under consideration is 2016–2021*

## 1.4 CURRENCY

The currency used in the report is U.S. dollar (USD), with market size indicated only in USD billion and USD million.

- For companies reporting their revenue in U.S. dollars, the revenues were picked up from their annual reports.
- For companies that reported their revenues in currencies other than USD, average annual currency conversion rate was used for that particular year to convert the value to USD.

## 1.5 LIMITATIONS

- The study is limited to DR service types and providers.
- The report focuses on the five major regions, namely North America, Europe, APAC, MEA, and Latin America.
- The report does not include any hardware and on-premises technologies required for DR.
- The internal staffing and related expenses are not considered at the time of forecasting the market size.

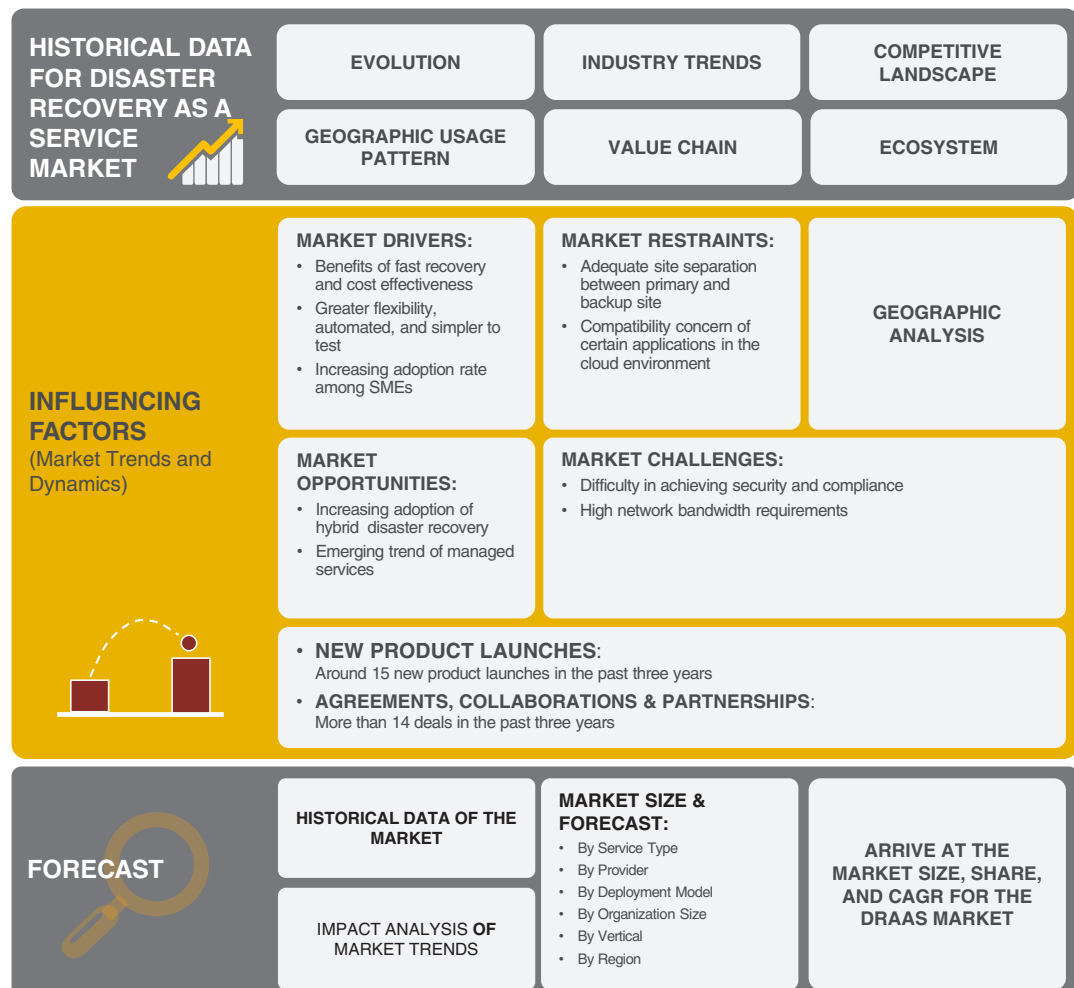
## 1.6 STAKEHOLDERS

- Cloud vendors
- Application design and development service providers
- System integrators/migration service providers
- Consultancy firms/advisory firms
- Training and education service providers
- Data integration service providers
- Managed service providers
- Data quality service providers

## 2.1 RESEARCH DATA

This research study involves the usage of extensive secondary sources, directories, and databases, such as Factiva and Bloomberg BusinessWeek, to identify and collect information useful for this comprehensive market research study on the DRaaS market. The primary sources are mainly the various industry experts from core and related industries, preferred solution vendors, IT administrators, and consumers, to name a few, from companies and organizations related to all segments of the DRaaS market value chain. In-depth interviews were conducted with various primary respondents that include key industry participants and subject-matter experts to obtain and verify critical qualitative and quantitative information as well as to assess future prospects. The following illustration shows the market research methodology applied in making this report on the global DRaaS market.

**FIGURE 2 GLOBAL DISASTER RECOVERY AS A SERVICE MARKET: RESEARCH DESIGN**



Source: Industry Experts and MarketsandMarkets Analysis



## 2.1.1 SECONDARY DATA

In the secondary research process, various secondary sources were referred to for identifying and collecting information for this study. The secondary sources include annual reports, press releases and investor presentations of companies and white papers, certified publications, and articles from recognized associations and government publishing sources.

Secondary research was mainly used to obtain key information about the industry's value chain, the market's monetary chain, the overall pool of key players, market classification and segmentation according to industry trends to the bottom-most level, regional markets, and key developments from both market-and technology-oriented perspectives.

### 2.1.1.1 KEY DATA FROM SECONDARY SOURCES

PARAMETER	SOURCE
<b>MARKET SIZE</b>	<ul style="list-style-type: none"> <li>• Company Financials</li> <li>• Magazines</li> <li>• Journals</li> <li>• Press Releases</li> <li>• Paid Databases</li> <li>• MarketsandMarkets Data Repository</li> </ul>
<b>REVENUE OF COMPANIES</b>	<ul style="list-style-type: none"> <li>• Annual Reports</li> <li>• Company Websites</li> <li>• Public Databases</li> <li>• MarketsandMarkets Data Repository</li> </ul>
<b>QUALITATIVE INFORMATION</b> (Market Dynamics and Market Trends)	<ul style="list-style-type: none"> <li>• Company Websites</li> <li>• Annual Reports</li> <li>• Press Releases</li> <li>• MarketsandMarkets Data Repository</li> </ul>

Source: MarketsandMarkets Analysis

## 2.1.2 PRIMARY DATA

In the primary research process, various primary sources from both supply and demand sides were interviewed to obtain qualitative and quantitative information for this report. The primary sources from the supply side include industry experts, such as Chief Operating Officers (CEOs), Chief Technology Officers (CTOs), Chief Operating Officers (COOs), Vice Presidents (VPs), Managing Directors (MDs), technology and innovation directors, and related key executives from different key companies and organizations operating in the DRaaS market.

### 2.1.2.1 KEY DATA FROM PRIMARY SOURCES

TYPE	PARAMETER	KEY DATA POINT
<b>GEOGRAPHIC SPLIT</b>	<ul style="list-style-type: none"> <li>Overall market and subsegments in 2016</li> <li>CAGR of each region during the forecast period (2016 – 2021)</li> </ul>	<ul style="list-style-type: none"> <li>The global DRaaS market by region – North America, Europe, APAC, MEA, and Latin America</li> </ul>
<b>GLOBAL MARKET SIZE</b>	<ul style="list-style-type: none"> <li>The global market size for 2016</li> <li>CAGR for the forecast period (2016 – 2021)</li> </ul>	<ul style="list-style-type: none"> <li>The global DRaaS market, by service type</li> <li>The global DRaaS market, by provider</li> <li>The global DRaaS market, by deployment model</li> <li>The global DRaaS market, by organization size</li> <li>The global DRaaS market, by vertical</li> <li>The global DRaaS market, by region</li> </ul>
<b>MARKET SPLIT</b>	<ul style="list-style-type: none"> <li>Service Type</li> <li>Provider</li> <li>Deployment Models</li> <li>Organization Size</li> <li>Verticals</li> <li>Regions</li> </ul>	<ul style="list-style-type: none"> <li>Service Type: Real-time replication, backup, data security, and professional services</li> <li>Provider: Cloud service providers, managed service providers, telecom and communication service providers, and others</li> <li>Deployment Model: Public cloud, private cloud, and hybrid cloud</li> <li>Organization Size: SMEs and large enterprises</li> <li>Verticals: BFSI, consumer goods &amp; retail, government &amp; public sector, healthcare &amp; life sciences, manufacturing, media &amp; entertainment, telecommunication &amp; ITES, and others</li> <li>Regions: North America, Europe, APAC, MEA, and Latin America</li> </ul>

*Note: By Vertical: The others vertical includes transportation & logistics, travel & hospitality, education, oil & gas, E-commerce, and military & defense industries*

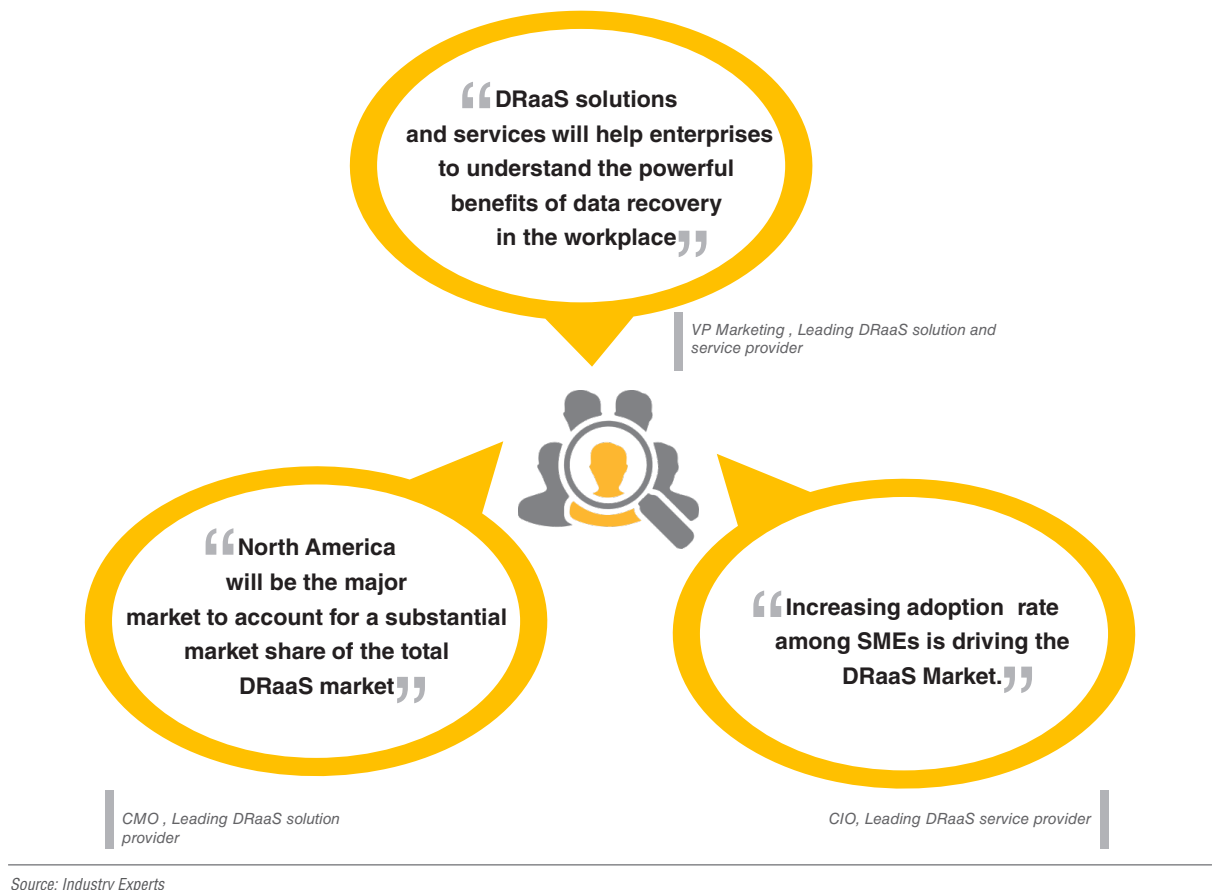
*By Provider: The others provider includes disaster recovery service providers, ISVs, and technology providers & suppliers*

*Source: MarketsandMarkets Analysis*

After the complete market engineering (which includes calculations for market statistics, market breakdown, market size estimations, market forecasting, and data triangulation), extensive primary research was conducted to gather information and to verify and validate the critical numbers arrived at. Primary research was also conducted to identify and validate the segmentation types; industry trends; key players; competitive landscape of DR services offered by different types of market players; and key market dynamics such as drivers, restraints, opportunities, challenges, industry trends, and key strategies.

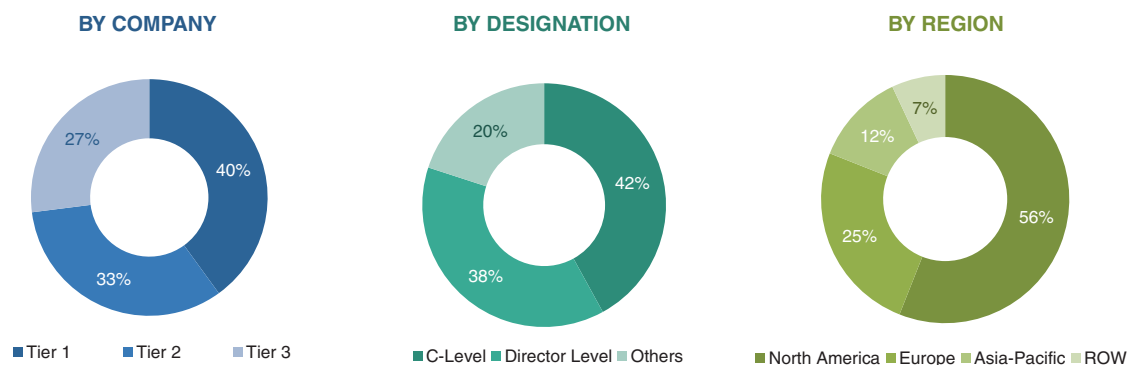
In the complete market engineering process, bottom-up approaches were extensively used along with several data triangulation methods to perform market estimation and market forecasting for the overall market segments and subsegments listed in this report. Extensive qualitative and quantitative analysis was performed on the complete market engineering process to list key information/insights throughout the report.

### 2.1.2.2 KEY INDUSTRY INSIGHTS



### 2.1.2.3 BREAKDOWN OF PRIMARIES

**FIGURE 3 BREAKDOWN OF PRIMARY INTERVIEW: BY COMPANY TYPE, DESIGNATION, AND REGION**



Note: \*Others include sales managers, marketing managers, and product managers

Note: Tier 1 companies have revenues more than USD 10 billion, Tier 2 companies range in between USD 1 to 10 billion of overall revenues, and Tier 3 companies range between USD 500 million to 1 billion of overall revenues

Source: Industry Experts

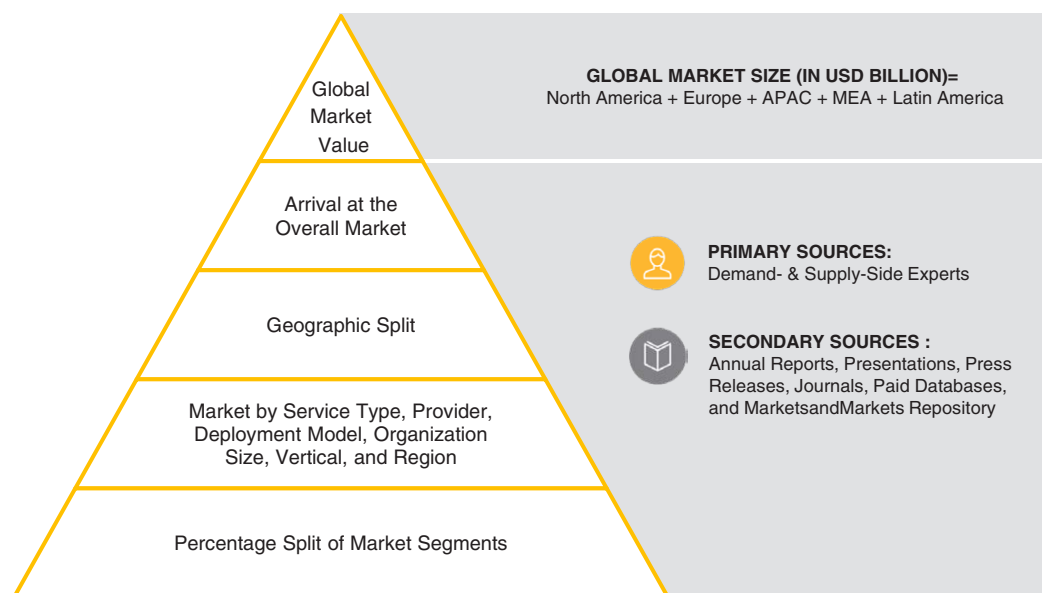


## 2.2 MARKET SIZE ESTIMATION

Top-down and bottom-up approaches were used to estimate and validate the size of the global market and to estimate the size of various other dependent submarkets in the overall DRaaS market. The research methodology used to estimate the market size includes the following details: The key players in the market were identified through secondary research and their market shares in respective regions were determined through primary and secondary research. This entire procedure includes the study of the annual and financial reports of top market players and extensive interviews for key insights from industry leaders, such as CEOs, VPs, directors, and marketing executives. All percentage shares, splits, and breakdowns were determined by using secondary sources and verified through primary sources. All possible parameters that affect the markets covered in this research study have been accounted for, viewed in extensive detail, verified through primary research, and analyzed to get the final quantitative and qualitative data. This data is consolidated and added with detailed inputs and analysis from MarketsandMarkets and presented in this report.

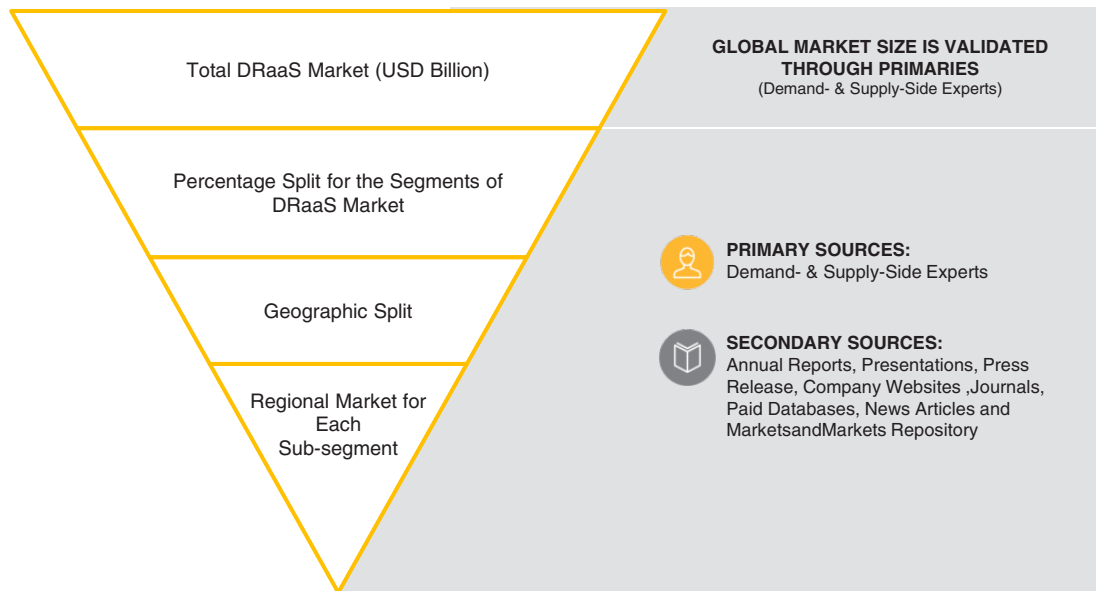
The following figure is an illustrative representation of the overall market size estimation process employed for the purpose of this study.

**FIGURE 4 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH**



Source: Industry Experts and MarketsandMarkets Analysis

**FIGURE 5 MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH**



Source: MarketsandMarkets Analysis

The bottom-up procedure was employed to arrive at the overall market size of the DRaaS market from the revenue of key players (companies) and their shares in the market.

Calculations based on the revenue of key companies identified in the market led to the overall market size. This overall market size was used in the top-down procedure to estimate the size of other individual markets (service types, providers, deployment models, organization size, verticals, and regions) via percentage splits from secondary and primary research.

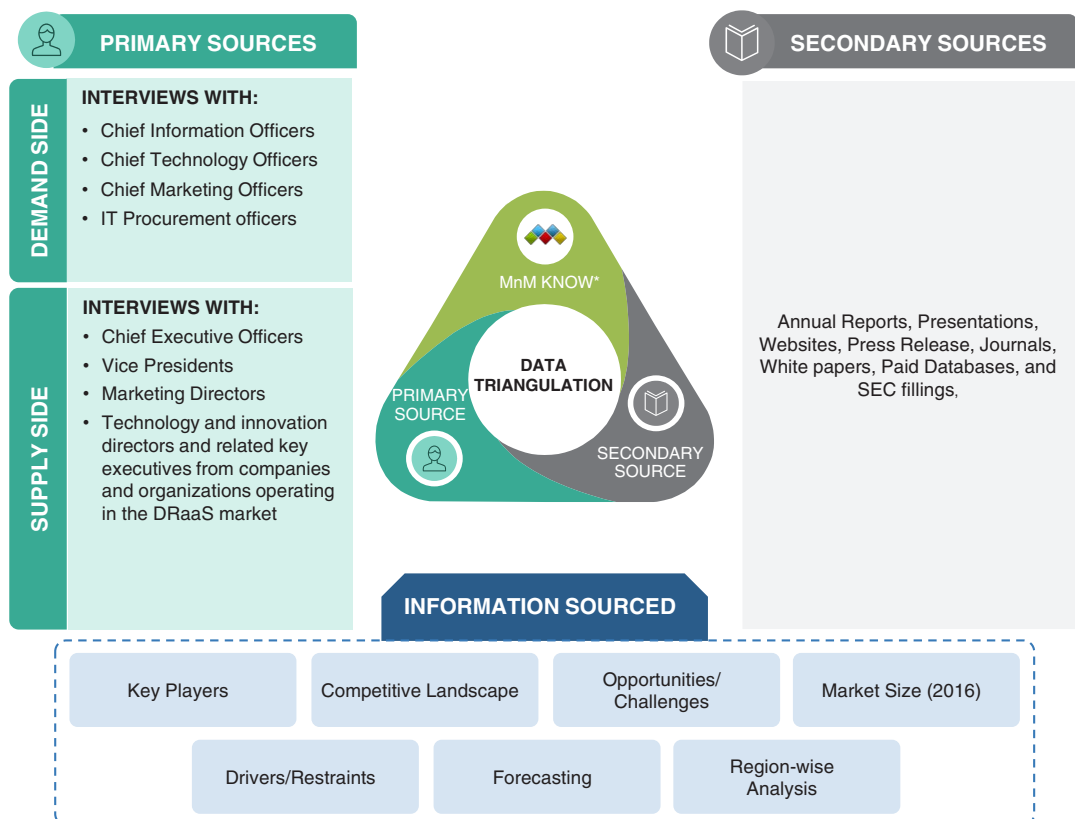
For the calculation of each type of specific market segment, the most appropriate immediate parent market size was used for implementing the top-down procedure. The bottom-up procedure was also implemented for data extracted from secondary research to validate the market segment revenues obtained.

The data triangulation procedure implemented for this study is explained in the next section.

## 2.3 MARKET BREAKDOWN AND DATA TRIANGULATION

After arriving at the overall market size from the market size estimation process explained above, the total market was split into several segments. To complete the overall market engineering process and arrive at the exact statistics for all segments and sub-segments, the data triangulation and market breakdown procedures were employed, wherever applicable. The data was triangulated by studying various factors and trends from both the demand and supply sides. Along with this, the market was validated using both top-down and bottom-up approaches.

**FIGURE 6 DATA TRIANGULATION**



MnM KNOW\* stands for MarketsandMarkets' 'Knowledge Asset Management' framework. In this context, it stands for existing market research knowledge repository of over 5,000 granular markets, our flagship competitive intelligence and market research platform "RT", subject matter experts, and independent consultants. MnM KNOW acts as an independent source that helps us validate information gathered from primary and secondary sources .

Source: Industry Experts and MarketsandMarkets Analysis

## 2.4 RESEARCH ASSUMPTIONS

The following assumptions were taken into consideration for the DRaaS market report:

**FIGURE 7 GLOBAL DISASTER RECOVERY AS A SERVICE MARKET: ASSUMPTIONS**

PARAMETER	ASSUMPTION
<b>EXCHANGE RATE</b>	Dollar fluctuations will not be serious enough to affect the forecasts to a significant extent. Fall in the value of dollar will enhance the revenue growth opportunities for the U.S. multinationals; whereas, stability of dollar will stabilize the price of imports and exports.
<b>POLITICAL STABILITY</b>	Most of the regions covered are politically stable. However, the political tensions prevailing in some regions will not hamper the economic growth significantly.
<b>GLOBAL ECONOMIC CONDITION</b>	The world economy is assumed to be stable, exhibiting a strong positive growth. This is also expected to pertain among the economies of countries which will increase the amount of IT spending across the globe.
<b>FINANCIAL STATISTICS</b>	All the revenue and financial insights are extracted from the company websites or annual reports, which is true to the best of MarketsandMarkets' knowledge.

Source: Industry Experts and MarketsandMarkets Analysis

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**TABLE 1** DISASTER RECOVERY AS A SERVICE MARKET SIZE, BY SERVICE TYPE, 2014-2021 (USD MILLION)

SERVICE TYPE	2014	2015	2016-e	2021-p	CAGR (2016-2021)
Backup	XX.X	XX.X	XX.X	XX.X	XX.X%
Real-Time Replication	XX.X	XX.X	XX.X	XX.X	XX.X%
Data Security	XX.X	XX.X	XX.X	XX.X	XX.X%
Professional Services	XX.X	XX.X	XX.X	XX.X	XX.X%
<b>TOTAL</b>	<b>XX.X</b>	<b>XX.X</b>	<b>XX.X</b>	<b>XX.X</b>	<b>XX.X%</b>

Source: Press Releases, Investor Presentations, Expert Interviews, and MarketsandMarkets Analysis

**TABLE 2** DISASTER RECOVERY AS A SERVICE MARKET SIZE, BY PROVIDER, 2014-2021 (USD MILLION)

PROVIDER	2014	2015	2016-e	2021-p	CAGR (2016-2021)
CSP	XX.X	XX.X	XX.X	XX.X	XX.X%
MSP	XX.X	XX.X	XX.X	XX.X	XX.X%
Telecom and Communication Service Provider	XX.X	XX.X	XX.X	XX.X	XX.X%
Others	XX.X	XX.X	XX.X	XX.X	XX.X%
<b>TOTAL</b>	<b>XX.X</b>	<b>XX.X</b>	<b>XX.X</b>	<b>XX.X</b>	<b>XX.X%</b>

Source: Press Releases, Investor Presentations, Expert Interviews, and MarketsandMarkets Analysis

**TABLE 3** PUBLIC CLOUD: DISASTER RECOVERY AS A SERVICE MARKET SIZE, BY REGION, 2014-2021 (USD MILLION)

REGION	2014	2015	2016-e	2021-p	CAGR (2016-2021)
North America	XX.X	XX.X	XX.X	XX.X	XX.X%
Europe	XX.X	XX.X	XX.X	XX.X	XX.X%
APAC	XX.X	XX.X	XX.X	XX.X	XX.X%
MEA	XX.X	XX.X	XX.X	XX.X	XX.X%
Latin America	XX.X	XX.X	XX.X	XX.X	XX.X%
<b>TOTAL</b>	<b>XX.X</b>	<b>XX.X</b>	<b>XX.X</b>	<b>XX.X</b>	<b>XX.X%</b>

Source: Press Releases, Investor Presentations, Expert Interviews, and MarketsandMarkets Analysis

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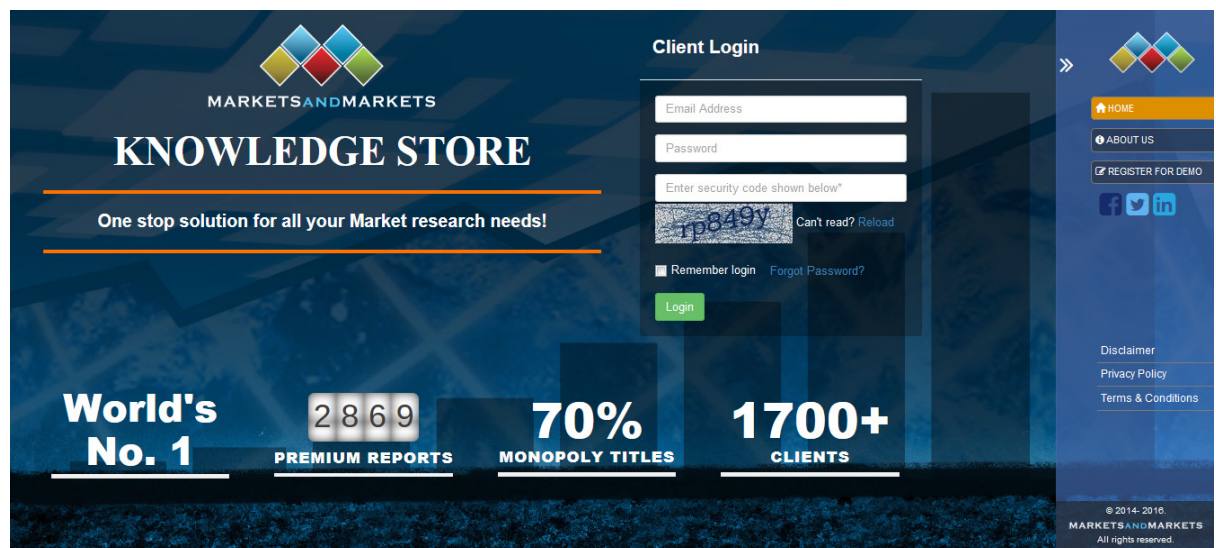
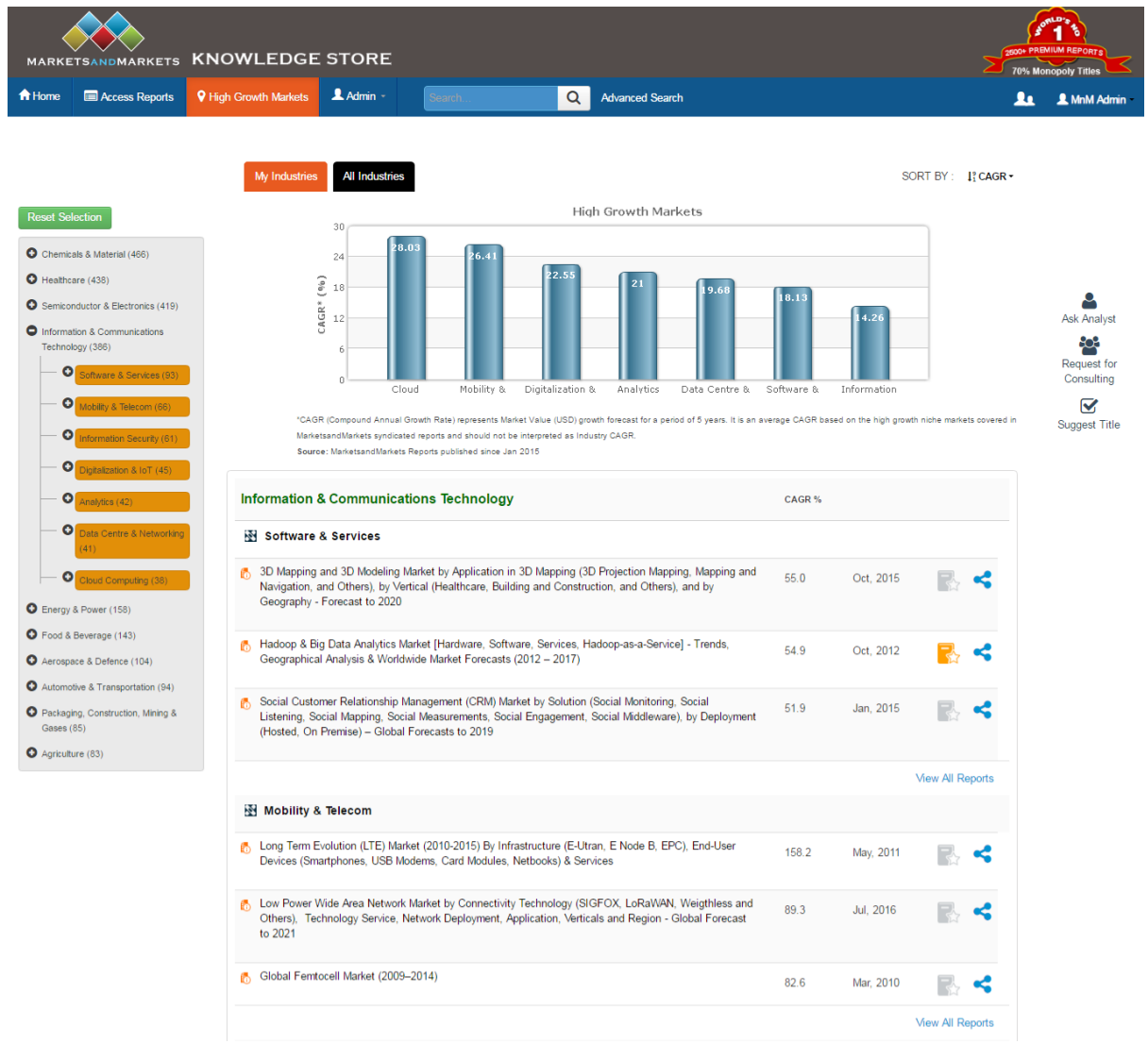


FIG: MARKETSANDMARKETS KNOWLEDGE STORE: TELECOM AND IT INDUSTRY SNAPSHOT





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