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## ***Email Disaster Recovery Market, 2009-2013***

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### **SCOPE**

This study provides an analysis of the Email Disaster Recovery market in 2009 and its potential growth over the next four years. The study provides a detailed analysis of market trends, and also examines features, strengths, and weaknesses of various email disaster recovery solutions.

The study provides data on current worldwide installed base, vendor market share, revenues, and forecasted market growth (i.e. revenues) from 2009 to 2013.

All market numbers, such as market size, forecasts, installed base, revenue information, and any financial information presented in this study represent worldwide numbers, unless explicitly otherwise indicated. All revenue numbers are expressed in \$USD.

This report deals only with the email DR market. This report does not include solutions dealing with email security (e.g. anti-virus, anti-spam), eDiscovery, archiving, content management, or migration.

### **METHODOLOGY**

The data and analysis in this report is based on primary research conducted by The Radicati Group, Inc. It consists of data collected from vendors and corporate enterprises via interviews and surveys.

Secondary research sources have also been used to cross-check the data collected. These include company annual reports and market size information from various related market segments of the computer industry.

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## EXECUTIVE SUMMARY

- With email being the dominant form of communication among businesses today, it is no surprise that Email Disaster Recovery (DR) is a must-have technology for most organizations.
- Email Disaster Recovery (DR) solutions include products and services that backup and recover corporate email servers in the event of system failure or disaster. Email DR solutions provide comprehensive protection against data loss until email servers are brought back online.
- Disaster Recovery planning has moved to the forefront of Business Continuity strategies for many businesses, in order to assure day-to-day operations can continue during, and after a system failure, or disaster.
- Customers have continued to show support for new types of DR solutions that offer Continuous Data Protection (CDP). Data loss is kept to a minimum as CDP captures data at the transaction level, and can always restore from the last clean copy that was recorded, as opposed to Replication which can succumb to increased data loss if corruption occurs on the secondary server.
- Backup and recovery solutions that were once able to get a business' email servers back online and running within a few days no longer measure up. Even a one hour window for recovery is considered too lengthy for some businesses, and some vendors offer recovery within minutes of system failure or disaster.
- Support for virtual environments has continued to gain popularity, with more DR vendors offering support for virtual servers from VMware, and Microsoft. This emerging technology has not yet taken off in terms of sales, but the interest is there, and many of the email DR solutions can be deployed in physical or virtual environments, or in a hybrid physical/virtual environment.
- This report looks at the Email Disaster Recovery market as comprising two distinct segments:
  - *On-Premises Email Disaster Recovery*: This segment includes all email disaster recovery products offered by vendors that can be implemented onsite, and protect corporate email servers via traditional backup, replication, or continuous backup (CDP).

- *Hosted Email Disaster Recovery*: This segment includes all hosted email disaster recovery services offered by a hosted service provider.
- Larger enterprises continue to favor On-premises Email DR solutions, as they typically have the resources, such as a dedicated administrative team, to fully manage and maintain an On-premises DR solution.
- However, Hosted email DR solutions are continuing to grow in popularity. They can eliminate hardware expenses (purchase, maintenance), as well as save the time that would be needed to train administrators, monitor, and test an on-premises solution.
- We expect the worldwide revenue for the Email Disaster Recovery market, for both On-premises and Hosted segments, to increase from \$861 million by year-end 2009, to \$1.2 billion by 2013.
- Table 1, shows the worldwide revenue of the Email Disaster Recovery market, from 2009 to 2013.

<b>Email Disaster Recovery Revenue, 2009-2013</b>					
	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
<b>Worldwide Revenue (\$M)</b>	\$861	\$944	\$1,035	\$1,125	\$1,222
% Change		10%	10%	9%	9%

**Table 1: Email DR Market – Worldwide Revenue, 2009-2013**

- Figure 1, illustrates the worldwide revenue of the Email Disaster Recovery market, from 2009 to 2013.

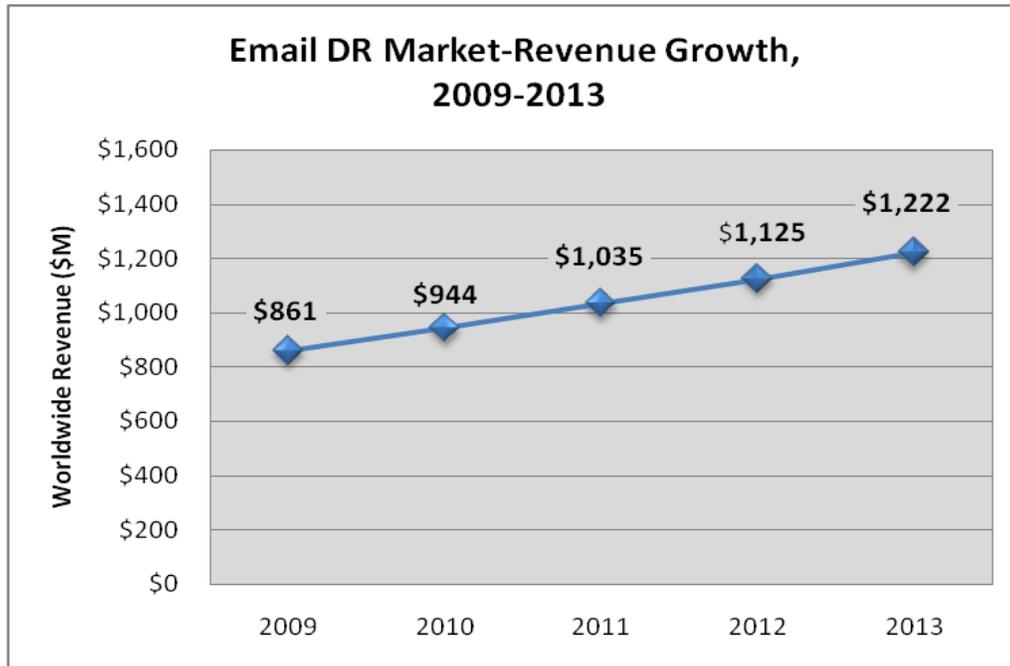


Figure 1 : Email DR Market – Revenue Growth, 2009-2013

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