Information Archiving Market, 2014-2018

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SCOPE

This study provides an analysis of the information archiving market in 2014 and its potential growth over the next four years. It provides market trends, market size, market share by vendor, four-year forecasts, and a detailed analysis of vendor products and strategies.

Information Archiving Solutions are products and services that provide interactive, long-term storage of user data, such as email, instant messages, social media, files, Microsoft SharePoint content and other structured and unstructured information. These solutions provide information indexing for easy search and retrieval, retention management, and basic tools for eDiscovery and legal hold.

This study looks at the Information Archiving market as comprising two segments:

- **On-premises Information Archiving Solutions** – are information archiving solutions offered as on-premises products for enterprise deployment.

- **Cloud-based Information Archiving Services** – are cloud-based information archiving solutions delivered as services.

All of the numbers in this study represent *worldwide* figures, unless otherwise indicated. Any financial data is expressed in $USD.

Regional breakouts are provided for: North America, Europe, Asia Pacific, and Rest of World. This report does not contain country breakouts but these may obtained from The Radicati Group at an extra charge.

The revenue projections in the following sections do not include revenues from systems integration or professional services.

METHODOLOGY

The information and analysis in this report are based on primary research conducted by The Radicati Group, Inc. Our proprietary methodology combines information derived from three principal sources:

a. Our Worldwide Database which tracks user population, seat count, enterprise adoption and IT use from 1993 onwards.
b. Surveys conducted on an on-going basis in all market areas which we cover.
c. Market share, revenue, sales and customer demand information derived from vendor briefings.

Forecasts are based on historical information as well as our in-depth knowledge of market conditions and how we believe markets will evolve over time.

Finally, secondary research sources have also been used, where appropriate, to cross-check all the information we collect. These include company annual reports and other financial disclosures, industry trade association material, published government statistics and other published sources.

Our research processes and methodologies are proprietary and confidential.

EXECUTIVE SUMMARY

- The information archiving market continues to show strong growth and is evolving along several different dimensions, which include: providing archiving

support for a growing list of different content types, offering customers more cloud-based and hybrid deployment options, and offering richer mobile access capabilities.

- The On-premises Information Archiving market is showing signs of slowing down in favor of cloud-based solutions. While in the past customers have been hesitant to adopt cloud-based solutions for information archival since it was considered less secure than on-premises archiving, this has changed dramatically in favor of cloud-based services this year. Much of the impetus behind this change of perception is that customers are increasingly moving their mail services to the cloud which is also driving greater adoption of cloud archiving.

- Nearly all vendors who offer an on-premises archiving solution are adding cloud-based and hybrid options to their portfolios. Some vendors are rolling out their own cloud-based solutions, while others partner with Managed Service Providers (MSPs) to more rapidly satisfy customer demand for cloud-based services. Vendors that have not yet released a cloud option, have it on their roadmap for 2015.

    o Hybrid deployments, which combine a cloud service and on-premises solution, are also seeing particular interest. This deployment strategy is primarily used by very large businesses, to satisfy requirements by different departments and/or workgroups. Typically these businesses need to stagger their data storage to comply with diverse policies. Some businesses will also utilize a hybrid deployment model as they transition from an on-premises to a cloud-based strategy.

- Mobile Access to information archiving stores has become more prevalent. Most archiving vendors offer mobile access for IT administrators and end users. Typically, vendors will utilize one of two approaches to delivering mobile functionality: a web-based mobile site, or a downloadable mobile app.

- eDiscovery solutions are rapidly becoming a natural addition to information archiving products and are being offered by most vendors, either as add-on components or as full complementary suites to their information archiving solutions.

- Figure 1, shows the worldwide Information Archiving market revenue from 2014 to 2018, including both on-premises and cloud (i.e. hosted) solutions. The total market is expected to be over $4 billion in revenues by year-end 2014, and will grow to nearly $7 billion by 2018.
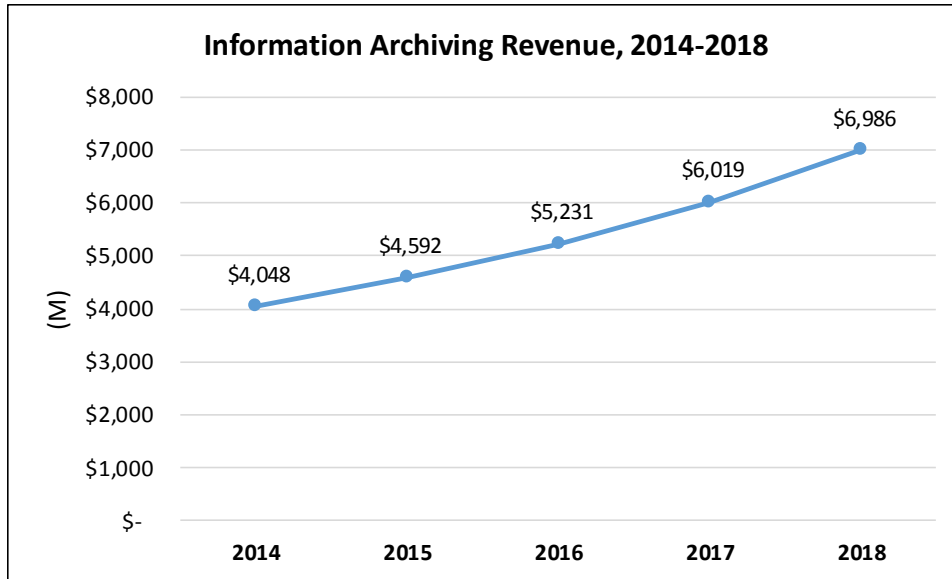
Information Archiving Revenue, 2014-2018

$8,000	
$7,000	$6,986
$6,000	$6,019
$5,000	$5,231
$4,000	$4,592
	$4,048

(M)

2014   2015   2016   2017   2018

Figure 1: Worldwide Information Archiving Revenue, 2014-2018

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