

Cloud vs. On-Premise Software

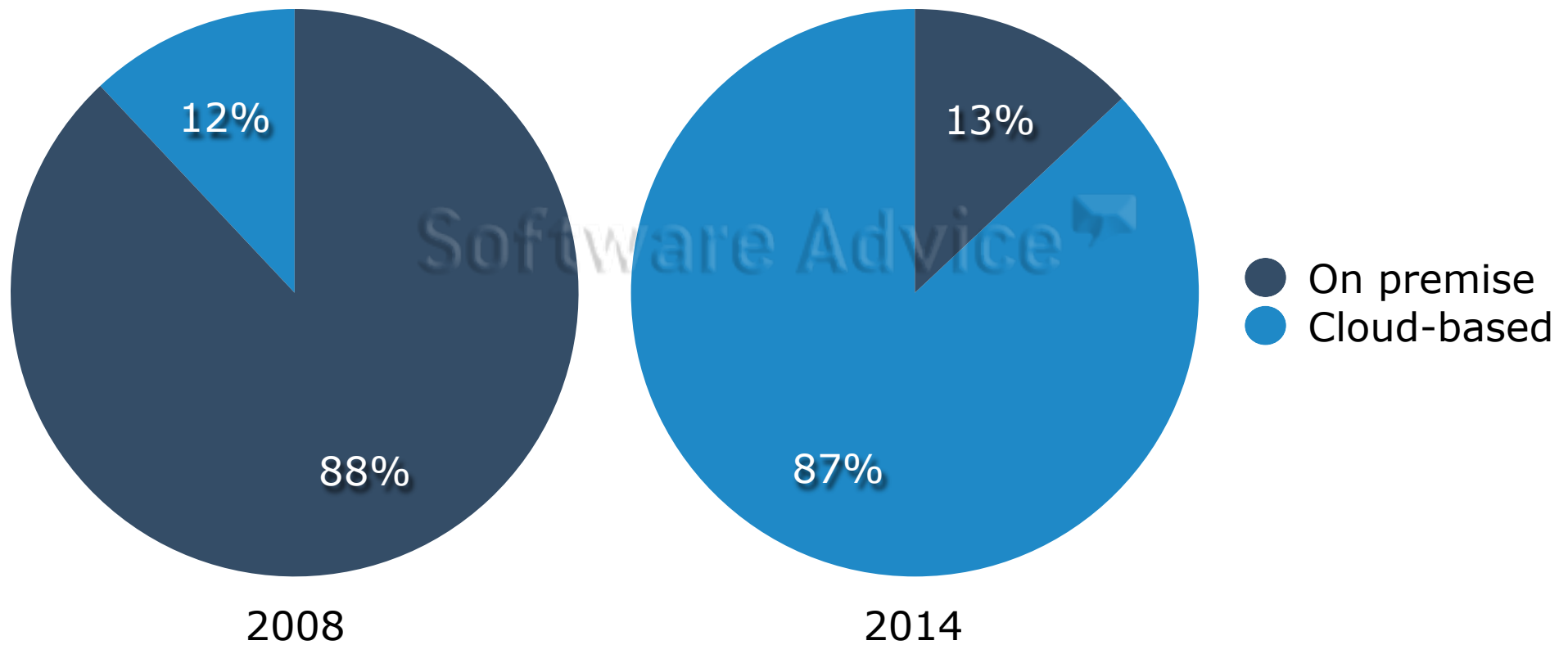
Changes in Deployment Preference 2008-2014

Abstract

We analyzed our interactions with software buyers between 2008 and 2014 to learn how preferences for on-premise versus cloud deployment have changed. Our key findings show that:

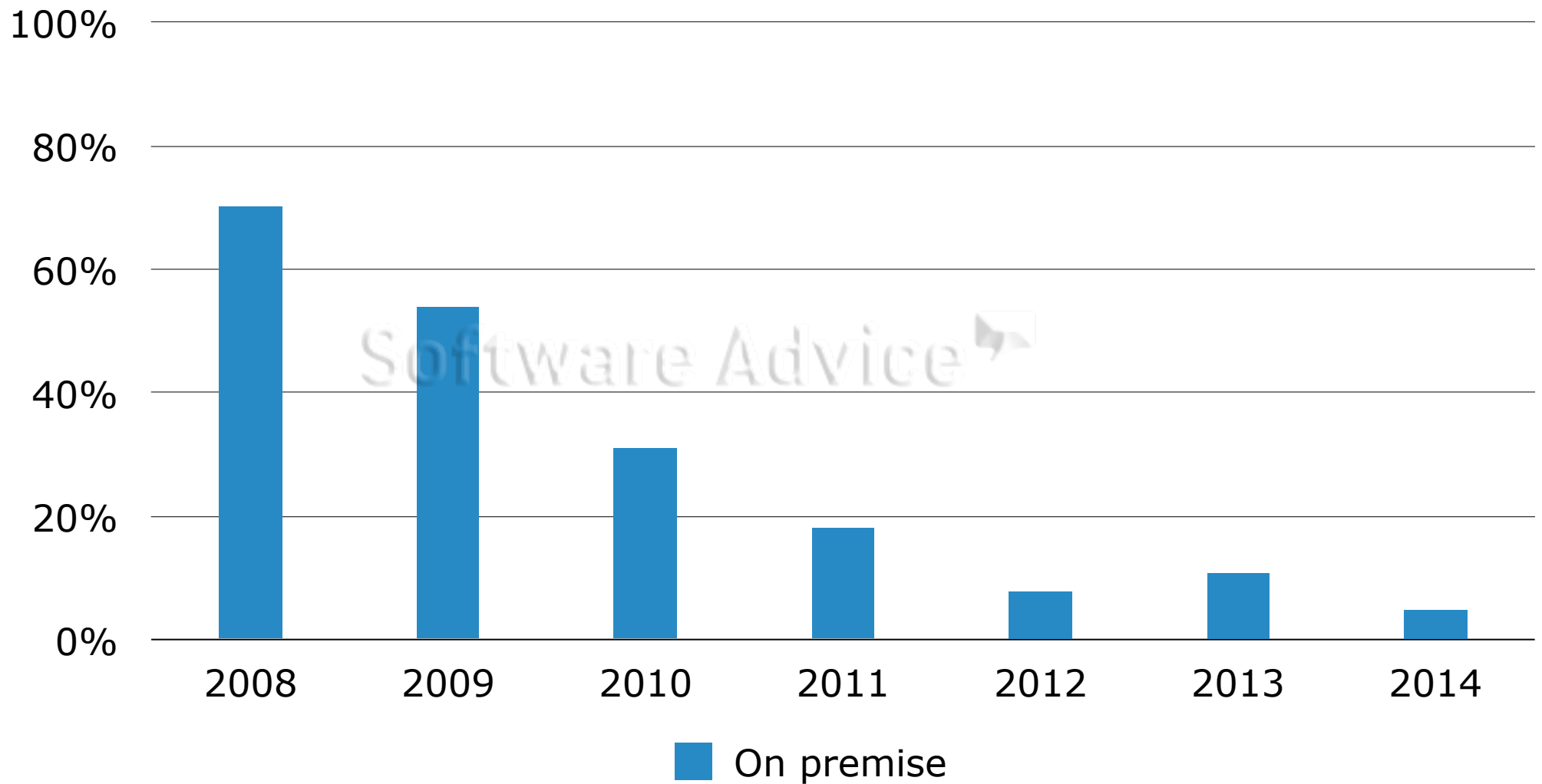
- There has been a radical shift in deployment preference over the past six years: 88 percent of buyers preferred on-premise solutions in 2008, while 87 percent preferred cloud solutions in 2014.
- The percentage of buyers without a deployment preference has grown significantly; from 20 percent in 2008 to 64 percent in 2014.
- Deployment preference is contingent on industry: from 2012 to 2013, CRM buyers' preference for cloud solutions grew from 42 to 54 percent, while construction buyers' preference decreased from 11 to 5 percent.

Preference for Cloud Deployment Eclipses On-Premise



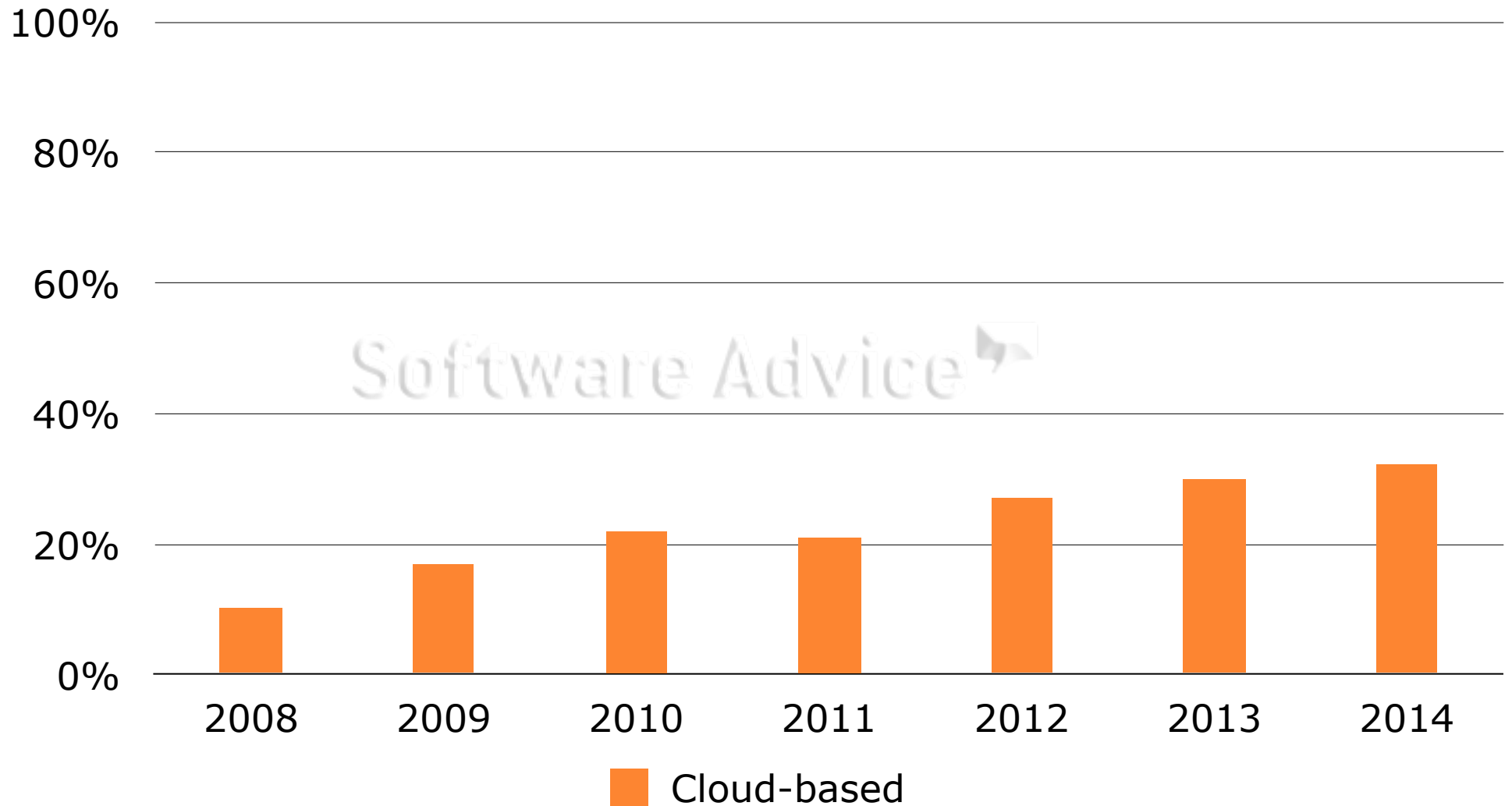
By 2014, the majority of buyers (87 percent) requested cloud deployment, with just 13 percent of buyers asking to evaluate on-premise.

On-Premise Preference Drops Steeply from 2008 to 2013



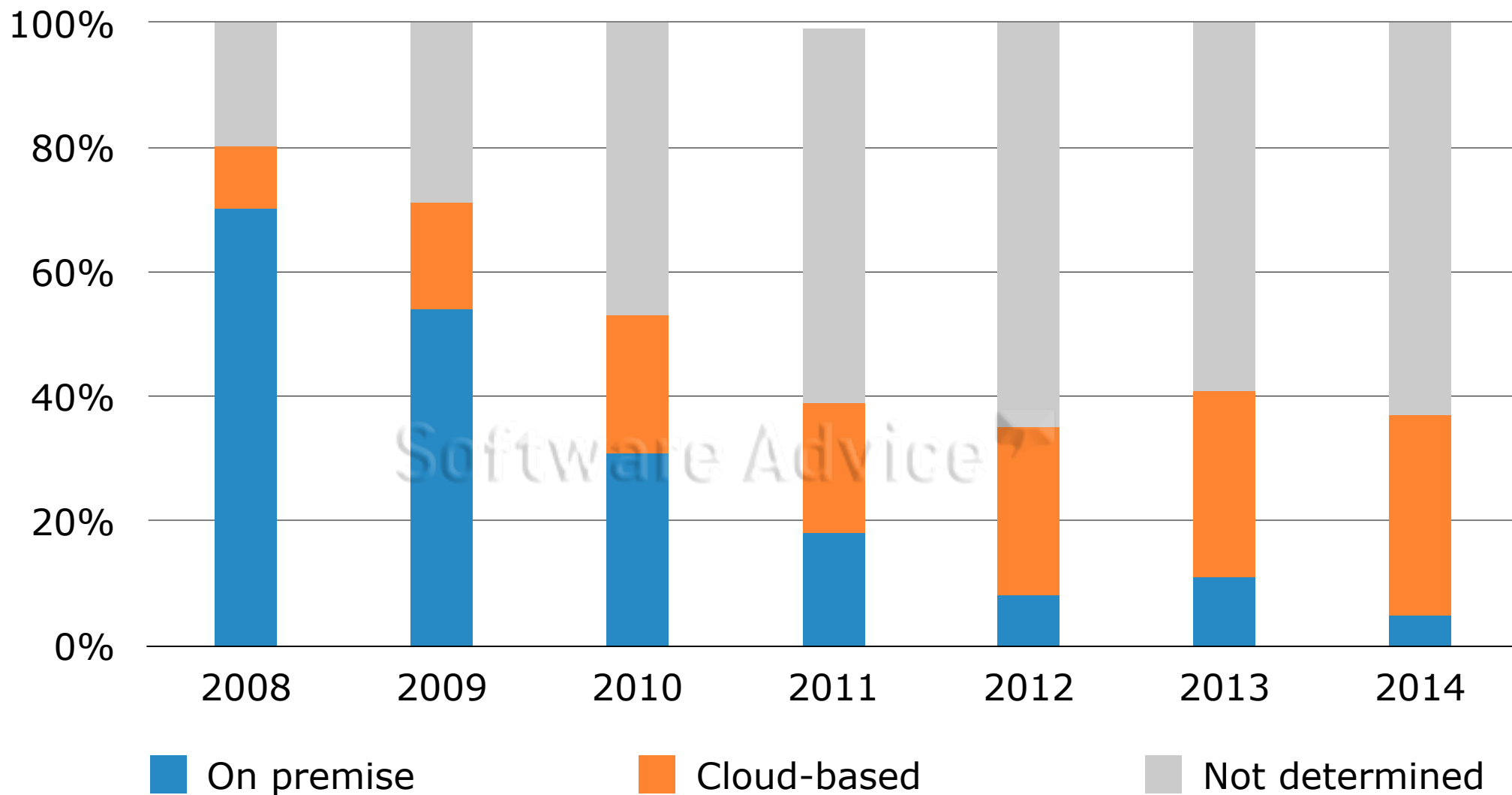
In 2008, 70 percent of buyers wanted on-premise deployment. In 2014, just 5 percent of buyers wanted to evaluate on-premise software.

Cloud Preferences Rise Gradually Year-by-Year



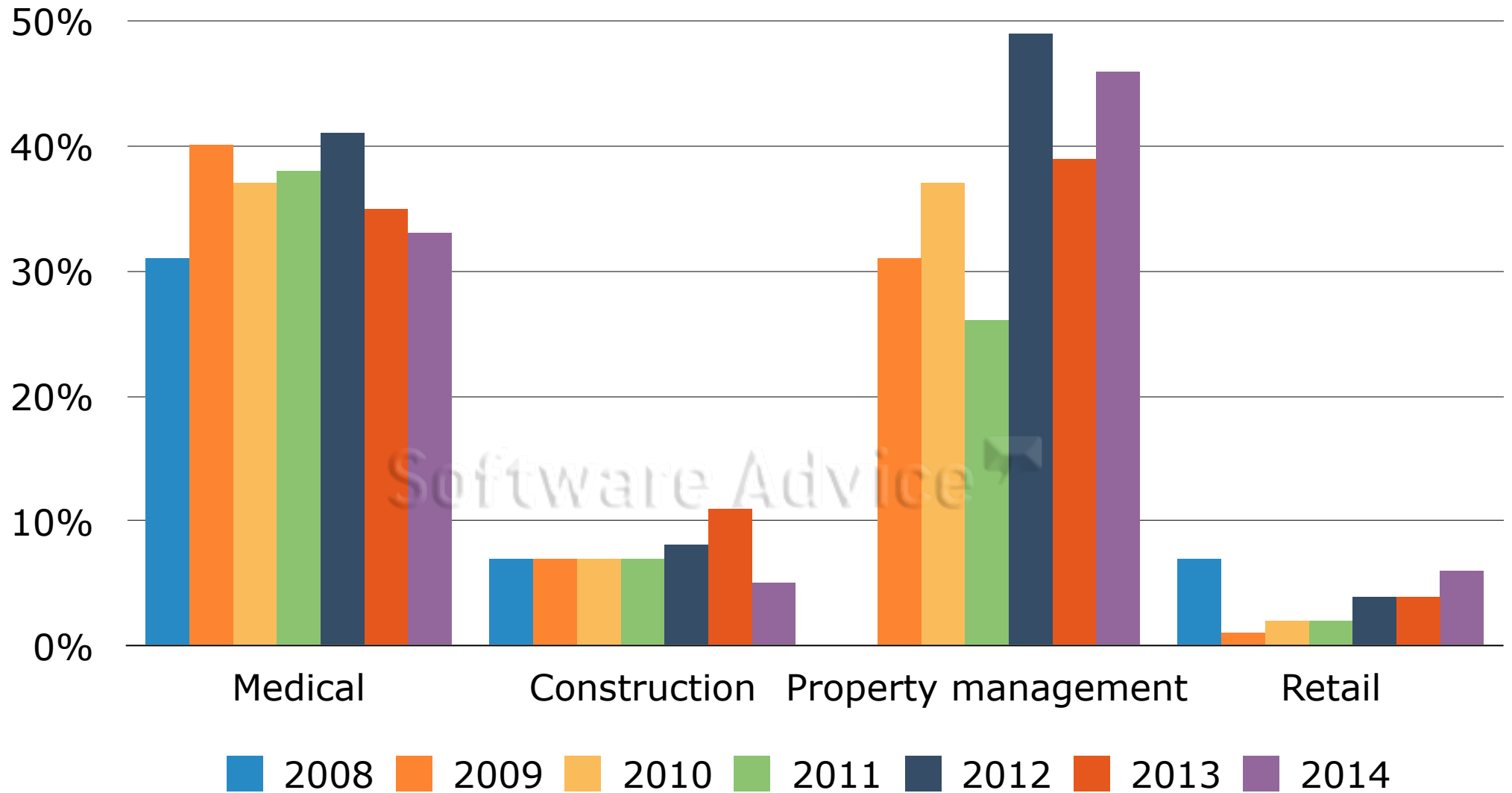
The preference for cloud deployment has risen gradually; from 10 percent in 2008 to 32 percent in 2014, growing between 2 and 7 percent each year.

Increasing Number of Buyers Have No Deployment Preference



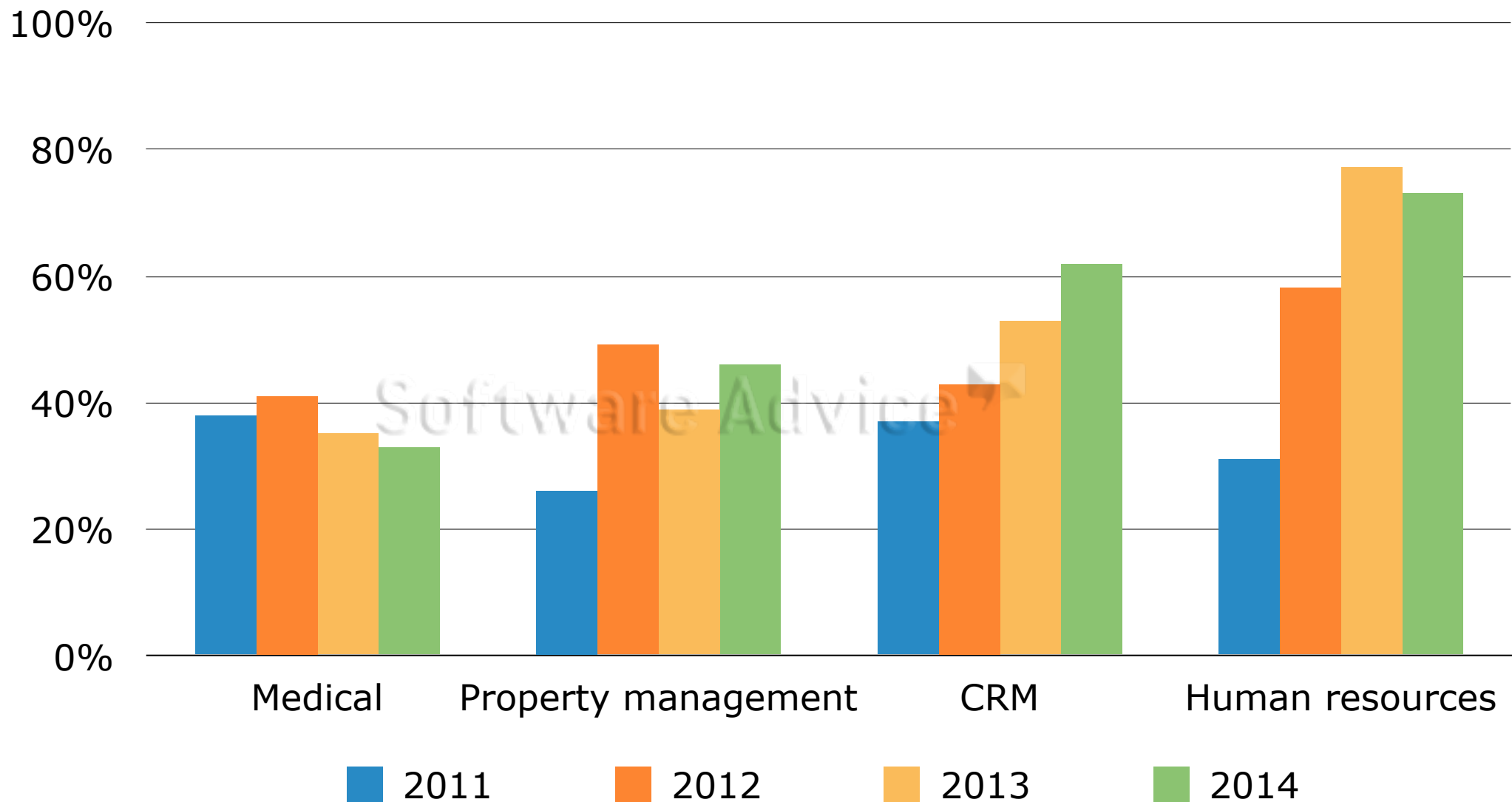
In 2008, only 20 percent of buyers are not determined, while in 2014 not determined buyers have become the majority at 64 percent.

Cloud Preferred by Medical and Property Management Buyers



From 2008-2014, preferences for cloud in the medical field ranged from 30 to 40 percent, while property management fluctuated between 26 and 49 percent.

HR and CRM Buyers Increasingly Prefer Cloud Deployment



The demand for cloud increases in other markets, especially human resources (HR), which maxed at 77 percent in 2012 and dropped to 73 percent in 2013.

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