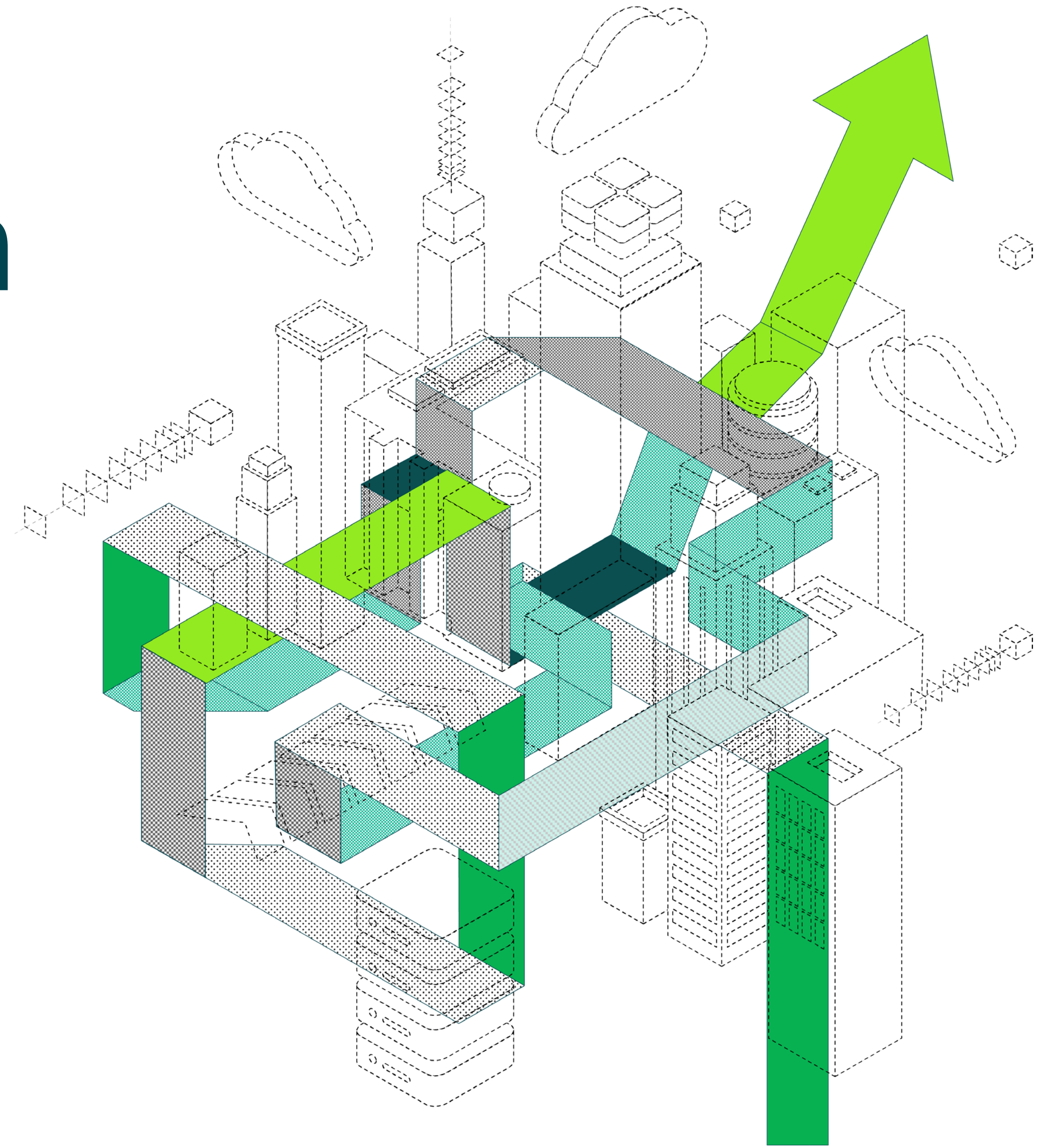


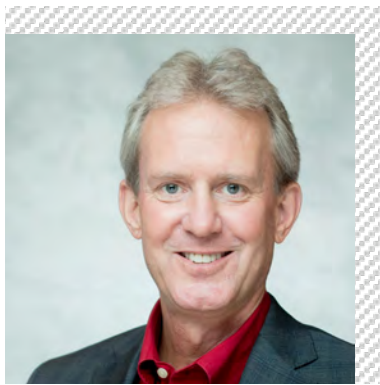
2020 Data Protection Trends

veeam



And why Cloud Data Management matters

In **January 2020**, an independent research firm completed a survey of **1,550** enterprises (**each over 1,000 users**) across 18 countries on what their data protection challenges and goals were, regardless of what their current or future data protection vendor choices were. The research project was commissioned by Veeam and helmed by two former industry analysts with a combined 60-years of experience in the data protection industry. The results and insights from the survey, as well as Veeam's perspective, are both offered in this report.



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1.1 Digital Transformation
& IT modernization

1.1

Digital Transformation & IT modernization

Technology is constantly moving forward, continually changing, and transforming how we do business. And because of this Digital Transformation, it's important to always look at the ever-changing IT landscape to see where businesses stand on their solutions, challenges and goals.

This research report is a look into a recent survey of more than **1,550** unbiased enterprises worldwide to understand their approach toward data protection and management today, and how they expect to be prepared for the IT challenges they face, including reacting to demand changes and interruptions in service, as well as more aspirational goals of IT modernization and Digital Transformation.

While organizations are already a diverse mix of physical servers (**38%**), virtual machines (**30%**), and cloud-hosted VMs (**32%**), approximately **10%** more of on-premises infrastructures will shift to the cloud (such as AWS and Azure) in just two years. This fast-paced switch shows that Digital Transformation has companies adopting a more cloud-friendly ecosystem.

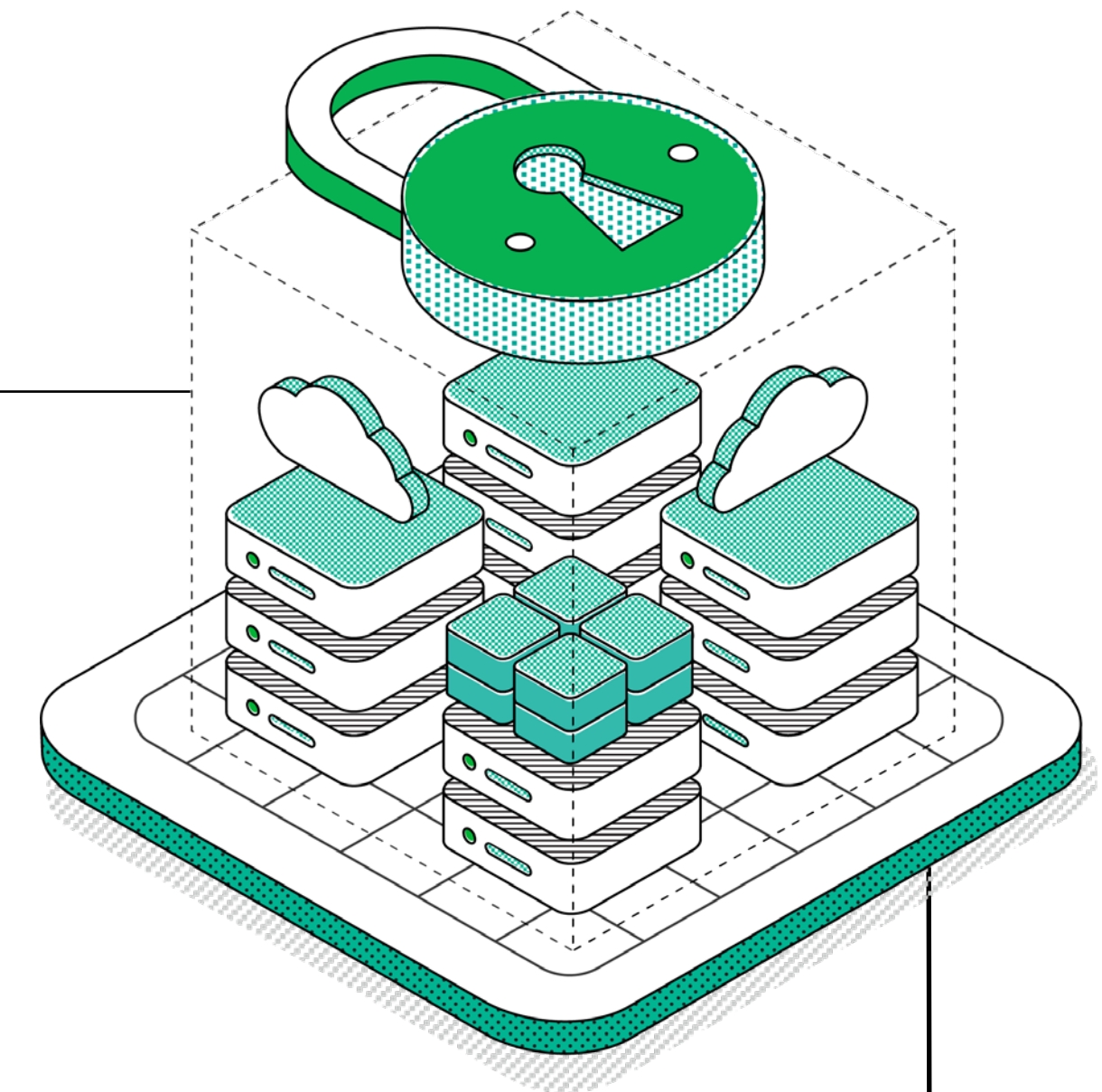
Company concerns seem to be consistent, with a lot of thought going toward data and cloud availability, customer experience, and brand impact. However, the research infers that by modernizing data protection with easy-to-use and flexible solutions, businesses can greatly increase the protection and usability of their data while also freeing a lot of resources to focus further on their IT modernization and management efforts.

As you read this report, please keep your own IT challenges and goals in mind as you consider how you and your organization align with the **1,550** enterprises surveyed on modern data protection.

2.0 The business impact of data protection



The data delivered through IT has become the heart and soul of most organizations, so it should not be a surprise how important “data protection” has become within IT teams, including not just backing up and restoring data, but also extending business capabilities. However, many organizations still rely on legacy systems to protect their data without fully knowing the impact this can have on their business.





2.1 Critical value of data

Veeam Perspectives

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An average outage
lasts **117 minutes**

2.1

Critical value of data

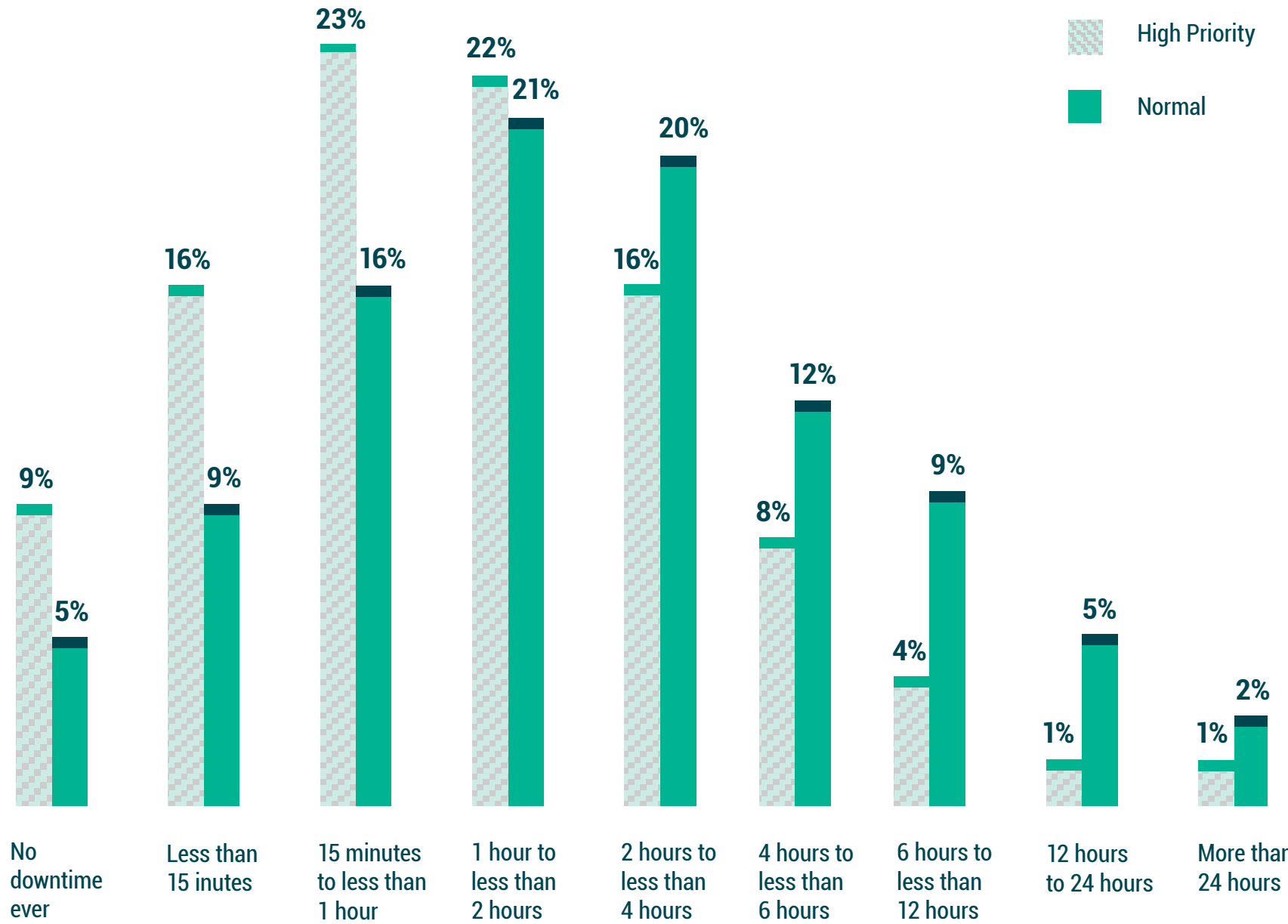
When data is down, it's going to take time to get it back into play, and time (as the saying goes) is money. Globally, survey results show **95%** of organizations experience unexpected outages, with at least **10%** of their servers having at least one outage per year. Considering that the average outage lasts just under 2 hours, while the average for longest outages is more than twice that, downtime is considered by some to be an inevitability.

With those timeframes in mind, consider the economic impacts of downtime. One hour of downtime for a “high-priority” application is estimated to cost **\$67,651**. The same for a “normal” application is estimated to cost **\$61,642**. Recognizing that companies consider 51% of their data to be high-priority and therefore 49% normal priority, one can average the two as a rough approximation that an hour of downtime costs **\$64,647**. With such a balance between high priority and normal in percentages and impact costs, the inference is that “all data matters” — downtime is intolerable anywhere within today’s environments.

These statistics show organizations are working with downtimes that are too long and too costly. They need a modernized approach that creates more recovery points to minimize downtime. Because when you consider the cost of an hour of downtime can be more than **\$67,000** per application, any downtime can have significant financial and brand impact to the business.



What is the amount
of downtime your
organization can
tolerate from its
applications?





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Critical value of data



Veeam Perspectives on “Why Cloud Data Management Matters”. Modern data protection should deliver backup that works frequently and intelligently. Veeam ran its own version of this survey with **500** of its registered customers, using the same demographics and distributions as the unbiased **1,550** worldwide respondents. Veeam customers stated they reduced their restoration time of business-critical workloads by **86%** by leveraging Veeam technologies. Veeam customers also stated that they reduced their average total data protection spend by **49%** annually, compared with the worldwide research.



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Loss of customer confidence is the #1 impact of downtime

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More Impacts of downtime beyond “just” money

Downtime costs money in a variety of ways due to how the lack of data affects business processes, but organizations will also experience non-monetary impacts due to downtime or data loss.

The most common negative effect and main concern was loss of customer confidence. Due to poor customer experience during an unexpected disaster, **51%** of downtimes damaged a company's relationship with customers. Following close behind in the results, is damage to brand integrity, which **44%** of downtime occurrences caused.

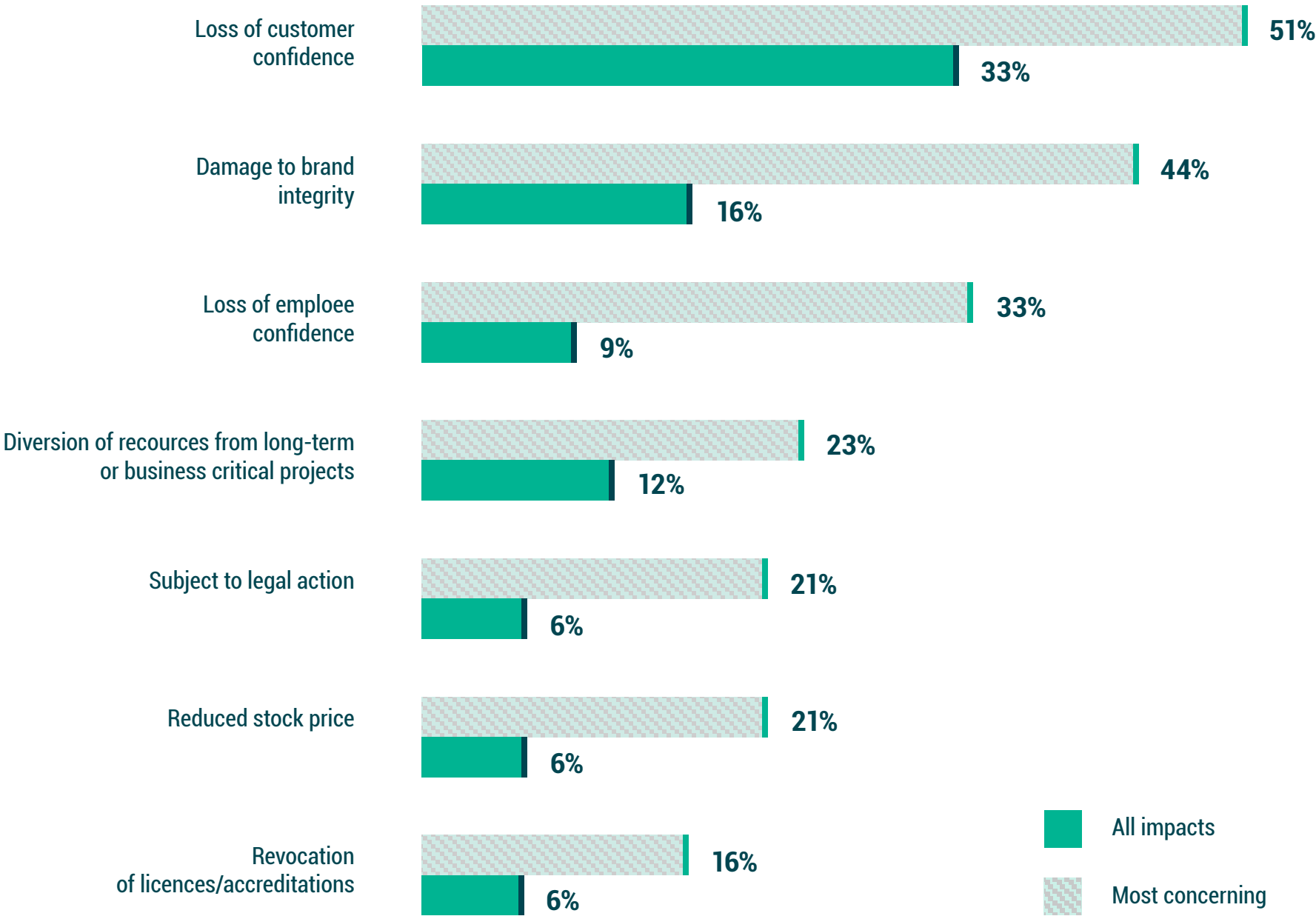
A customer having a negative experience with a company's service due to unforeseen circumstances is hard to swallow, but it's not surprising that customers will think twice before trying again. However, it's not just the customers who can be impacted by downtime; there are also the employees.

Loss of employee confidence sits at the highest third spot with **33%** of downtimes impacting it. Customers aren't the only ones who want something from businesses. Employees want their organizations to be profitable, sustainable, and a good place for them to make a career. But when IT routinely struggles, the rest of the employees can't do what is required of them — causing some to seek employment elsewhere.

Other impacts include diverting resources from long-term or critical projects (**23%**), subject to legal action (**21%**), reduced stock price (**21%**), and revocation of licenses (**16%**).



What impacts could your organization experience from application downtime? Which is the most concerning potential impact?





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More Impacts of downtime
beyond “just” money



Veeam Perspectives on “Why Cloud Data Management Matters”. Manual and time-consuming data protection results in longer downtime and lost IT productivity. Comprehensive backup software like Veeam Availability Suite can increase overall IT efficiency by 30% and decrease employee unproductivity due to data loss by 82%¹. Improving business continuity confidence by 53%².



2.1 Critical value of data

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Summary



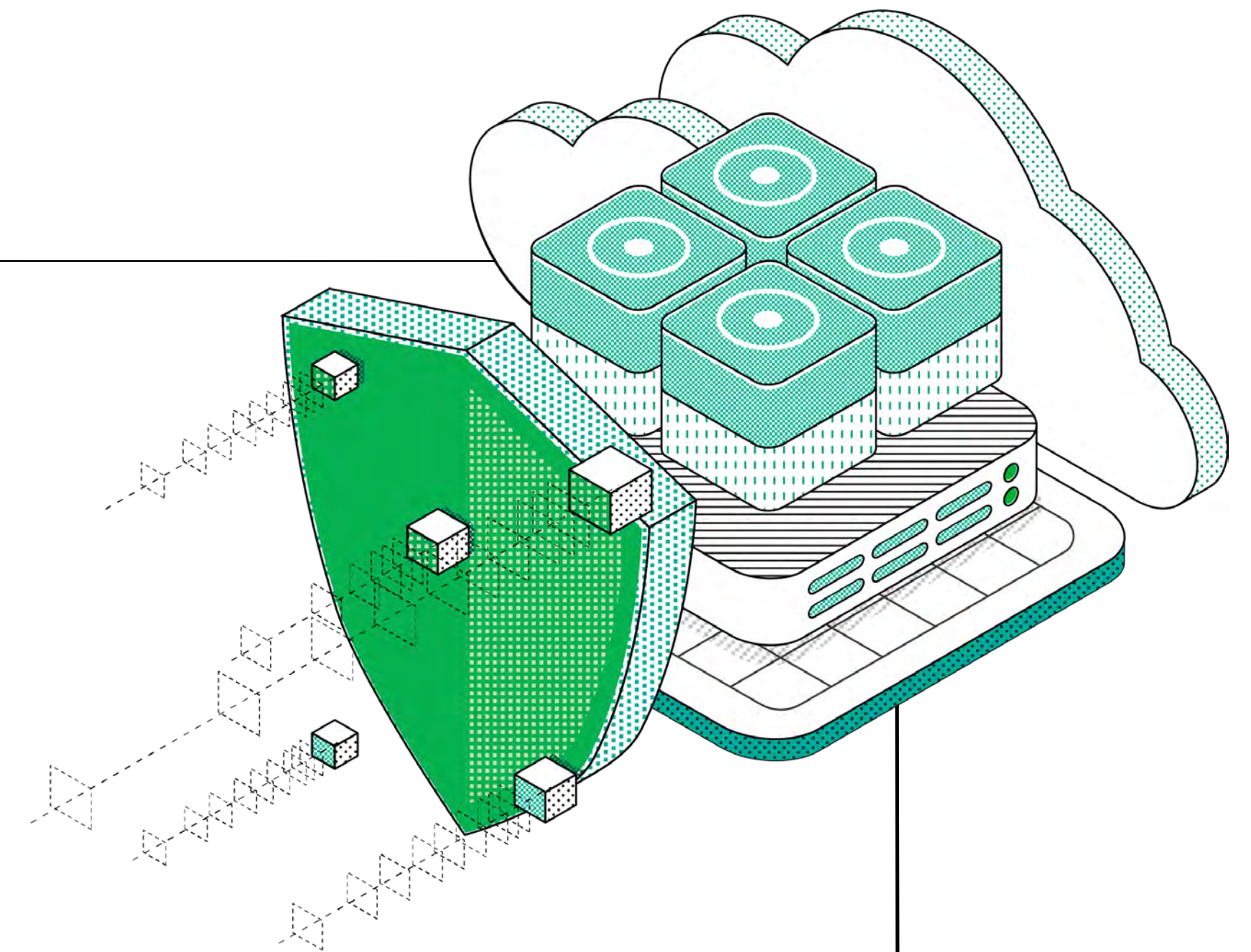
Data is important. That may be simplifying the matter a bit, but it's nonetheless true. Another true statement: your data is at risk. Almost every company is experiencing downtime, having **1 out of every 10 VM** have unexpected problems — problems that last for hours and cost hundreds of thousands of dollars. And cost is just the shortsighted aspect, lost and vulnerable data damages organizations' brands and relationships with customers and employees, adding up missed opportunities with every occurrence.

It's important that enterprises know data is a priority. A goal for a company's Digital Transformation should be to modernize data protection. To have the latest and best technology to keep data running, available, recoverable and safe at all times. Legacy systems show businesses are at risk, and it's costing them dearly. All of this mentioned downtime, whether it be to human error, natural disasters or cyberattacks, can be mitigated with proper data protection.

3.0 The changing landscape of data protection



Data protection is more important than ever now that many organizations continue to meet their operational IT demands while also aspiring towards Digital Transformation and IT modernization. These days, data and applications aren't constrained to a single server. Data is now spread across data centers and clouds through file shares, shared storage, and even SaaS-based platforms. Legacy tools designed to back up on-premises file shares and applications cannot succeed in the hybrid/multi-cloud world and are costing companies time and resources while also putting their data at risk.





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Digital Transformation challenges

The enterprises surveyed recognize Digital Transformation for how it will accelerate their organizations. Through modernizing business operations and processes, organizations can have a significant impact on customer service, cost reduction and employee tasks. More than **80%** of organizations are in the process or planning for Digital Transformation, however, many face challenges in achieving their desired results.

The top challenges for companies pursuing Digital Transformation are lack of IT staff skills **(44%)** and dependency on legacy systems **(40%)**. These obstacles also cause a significant lack of time and budget. Said another way, as organizations strive for modernization, aging platforms and manual processes can slow that down considerably.



What, if anything, is preventing/did prevent your organization's ability to move forward with its digital transformation initiatives?



Legacy systems are challenging Digital Transformation efforts



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Digital Transformation challenges



Veeam Perspectives on “Why Cloud Data Management Matters”. Many businesses are banking on cloud computing as a primary driver for Digital Transformation, with **78%** saying Digital Transformation is their main reason to adopt cloud infrastructure and services. However, the lack of time, resources and budget cause serious roadblocks to that strategy. IT organizations that modernize data protection with Veeam are **30%** more efficient and have **82%** less production time lost when dealing with backup and recovery¹. This returns time, money and resources to what’s important – transforming your IT.



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Data protection challenges

When it comes to the challenge of protecting and managing data, **8** out of **9** businesses state that they are struggling; many due to a lack of resources. The most common challenge is the lack of staff to work on new initiatives (**42%**), followed by the lack of budget for new initiatives (**40%**). These top concerns show that companies want to do more with protecting and managing data. They want to put more manpower into working on it and they need money to explore new options.

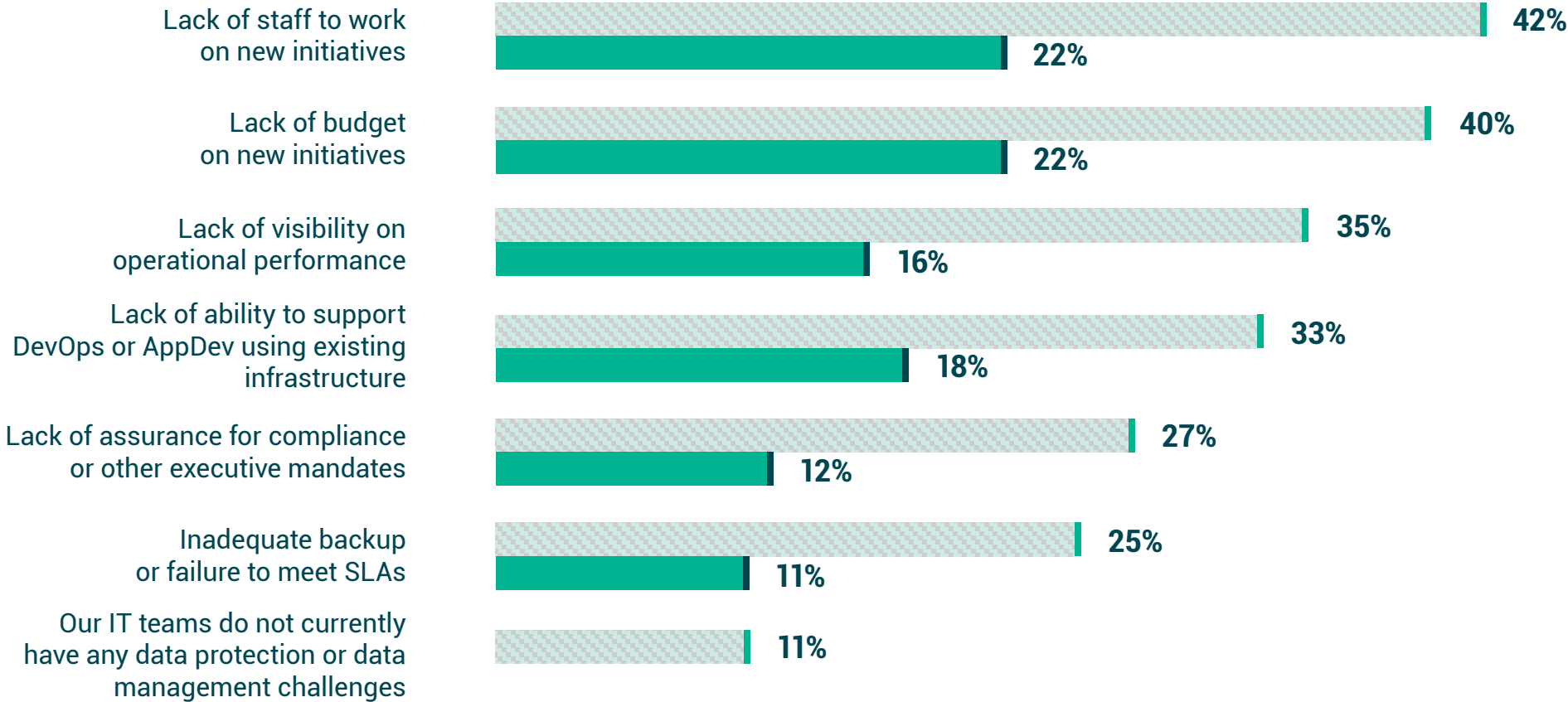
Further on the list are more technical challenges, including visibility on operational performance, ability to support DevOps or AppDev, assurance for compliance, and inadequate backups. The lack of time, budget and resources has a serious impact on being able to support critical aspects of the business, including app development, governance and security.



More than **40%** of organizations lack the staff to drive new data protection initiatives



Which of the following data protection or data management challenges does your organization's IT teams currently have? Of those challenges, which is the most impactful?



- All challenges
- Most impactful challenges



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Data protection challenges



Veeam Perspectives on “Why Cloud Data Management Matters”. Software should be simple, flexible and reliable. If adding a new NAS device or cloud storage requires you to change your data protection routine and spend time re-educating IT staff, you’re doing it wrong. Veeam Cloud Data Management helps you free up locked-in resources and budget, opening the door for further innovation and 55% more efficient data backup and recovery teams¹.



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Ransomware is the #1 concern for today's business

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Challenges that 2020 provide

What do companies expect to face in 2020? Or rather, how do they see the IT landscape will change, and how they can Digitally Transform to overcome those challenges?

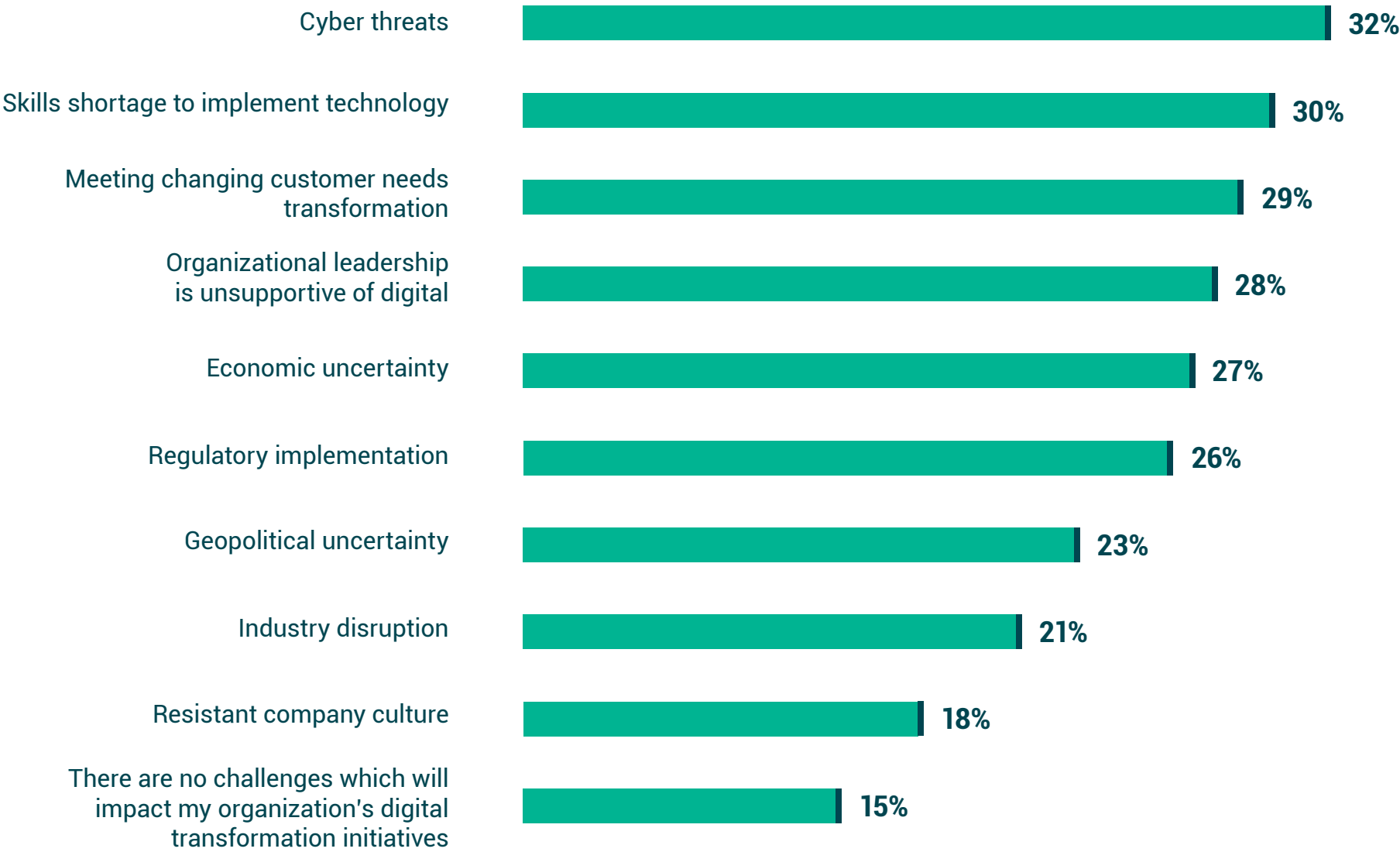
Enterprises predict the most common IT challenge in 2020 will be cyberthreats **(32%)**, which includes devious attacks such as ransomware, spyware and malware. Technology can grow in more ways than one. Just as technological advances can make life easier, attackers are also advancing ways to make life more difficult. Organizations realize this and predict that 2020 could bring some challenging cyberthreats they'll need to be ready for.

The next concern, skill shortage to implement technology, sits at **30%**. This is an alarming number given the challenge of cyberthreats. Skilled parties and the ability to implement technology are key items in a business' Digital Transformation and necessary for protection against malicious attacks. But it seems the numbers concerned about cyberthreats and technology implementation are very close together.

The third challenge is meeting changing customer needs **(29%)**. Predicting customer needs is a bit like predicting technology, and businesses know both landscapes continue to change. The year 2020 is bound to bring new needs to the forefront, and businesses need to be prepared to meet those needs right away, or at least be able to adapt as soon as possible.



Which of these challenges do you anticipate will impact your organization within the next 12 months?





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Challenges that 2020 provide



Veeam Perspectives on “Why Cloud Data Management Matters”. For far too many organizations, ransomware is no longer a question of IF but WHEN. Veeam offers transparent and actionable strategies on how to educate employees, rotate backup copies across several locations, and leverage cloud options for making your backups practically immutable. Using Veeam Cloud Data Management Platform, **96% of organizations cut their average ransomware payments down to \$5,000, with 76% of companies not paying anything at all³.**



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DRaaS is helping companies adopt cloud faster

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What does modern data protection look like?

Enterprises know they must continue to make progress with their IT modernization and Digital Transformation initiatives in order to meet new industry challenges, and according to this report's feedback, the most defining aspects of a modern data protection strategy all hinge upon utilization of various cloud-based capabilities.

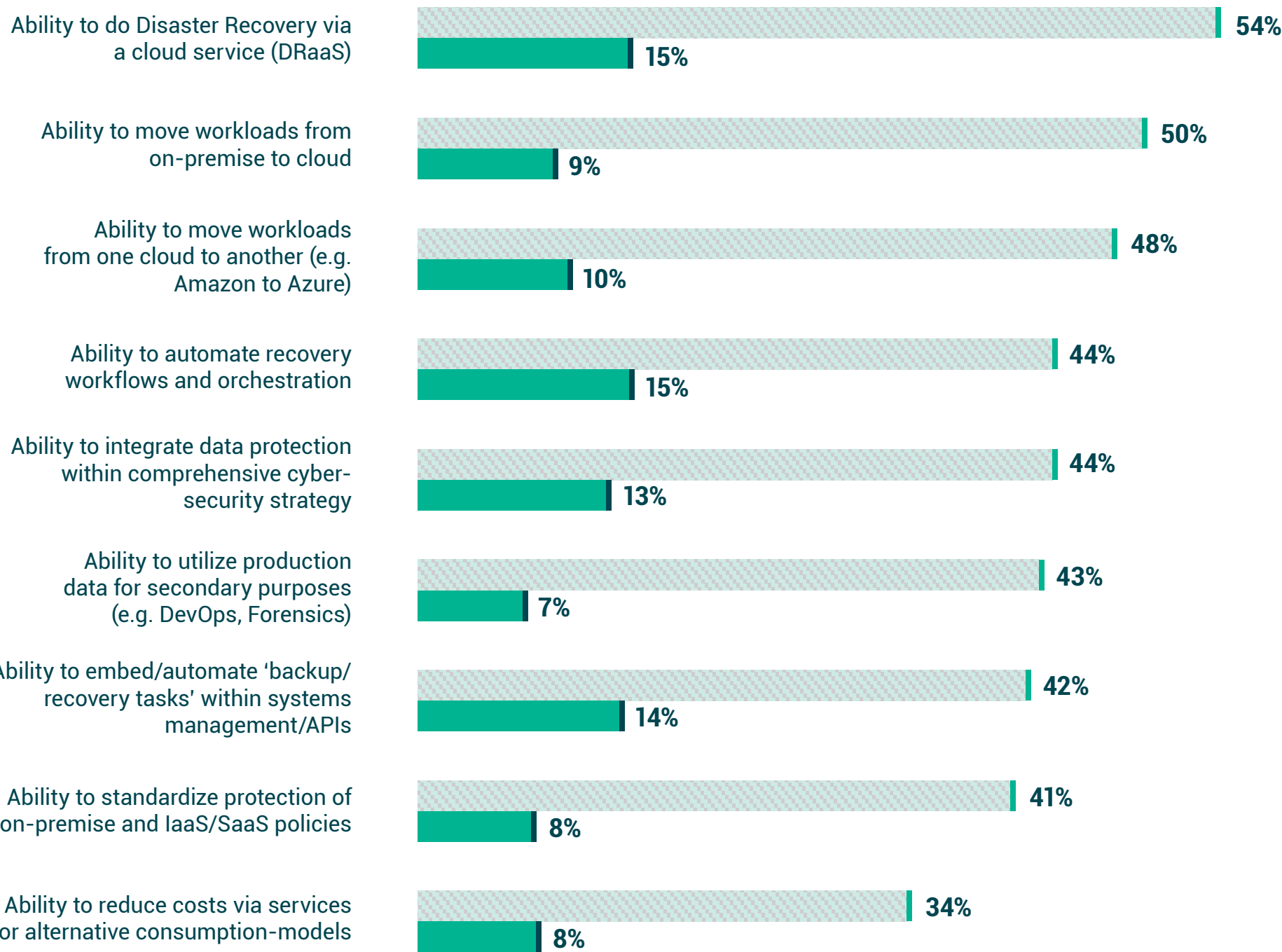
The ability to do disaster recovery via a cloud service leads the poll at **54%**, the ability to move workloads from on-premise to cloud follows at 50%, and the ability to move workloads from one cloud to another is third at **48%**.

Said another way, half of businesses recognize that the cloud has a pivotal part to play in today's data protection strategy; and it will most likely become even more important in the future. There are still companies using legacy solutions, but for many, the path of Digital Transformation leads directly to the clouds. And for a truly modernized data protection plan, a company not only needs to work with the cloud but have a flexible plan that works with on-premises tools and multiple cloud services.

The other defining aspects of modern data protection include the ability to automate recovery workflows and orchestration (**44%**), ability to integrate data protection within comprehensive cybersecurity strategy (**44%**), and the ability to utilize production data for secondary purposes (**43%**).



Which would you consider to be defining aspects of a 'modern' or 'innovative' data management or data protection solution for your organization? Which would you consider the most important aspect?



Defining aspects

Most important



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What does modern data protection look like?



Veeam Perspectives on “Why Cloud Data Management Matters”. Is your organization ready for cloud migration and workflow orchestration? With **52%** of organizations citing “migrating applications or data to cloud” as a key challenge that hinders their IT initiatives, modernizing data protection can suffer. Licensing models continue to be a major restriction for data mobility. Solutions like Veeam Universal License gives you the ability to scale across any platform, without the need to buy additional licenses or hardware boxes.



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Modern data protection needs

The importance of data has grown to drive every aspect of the digital business, and so has the need for solutions that can do far more than ensure its availability. Data protection must move to a higher state of intelligence and be able to anticipate needs and meet demand.



MODERN DATA PROTECTION SHOULD BE:



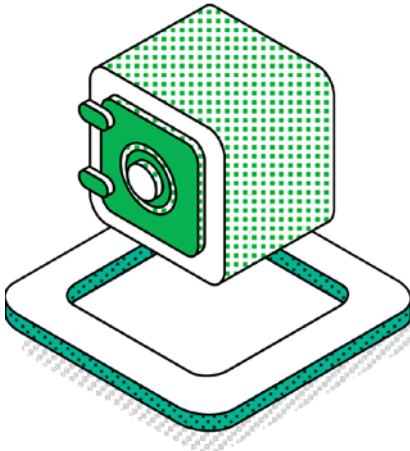
SIMPLE

No delay in implementation and immediate ROI.



FLEXIBLE

Access your data anywhere at anytime.



RELIABLE

Be confident you're always protected, even as your environment evolves.



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The shift to cloud

In today's environment, organizations are progressively migrating their workloads, applications and data to the cloud. This has been an evolution that has continued since the implementation of virtualization in the mid-2000s. Businesses achieved new agility and huge operational optimizations by moving physical platforms to virtual, and many are experiencing similar benefits by adding cloud-based services.

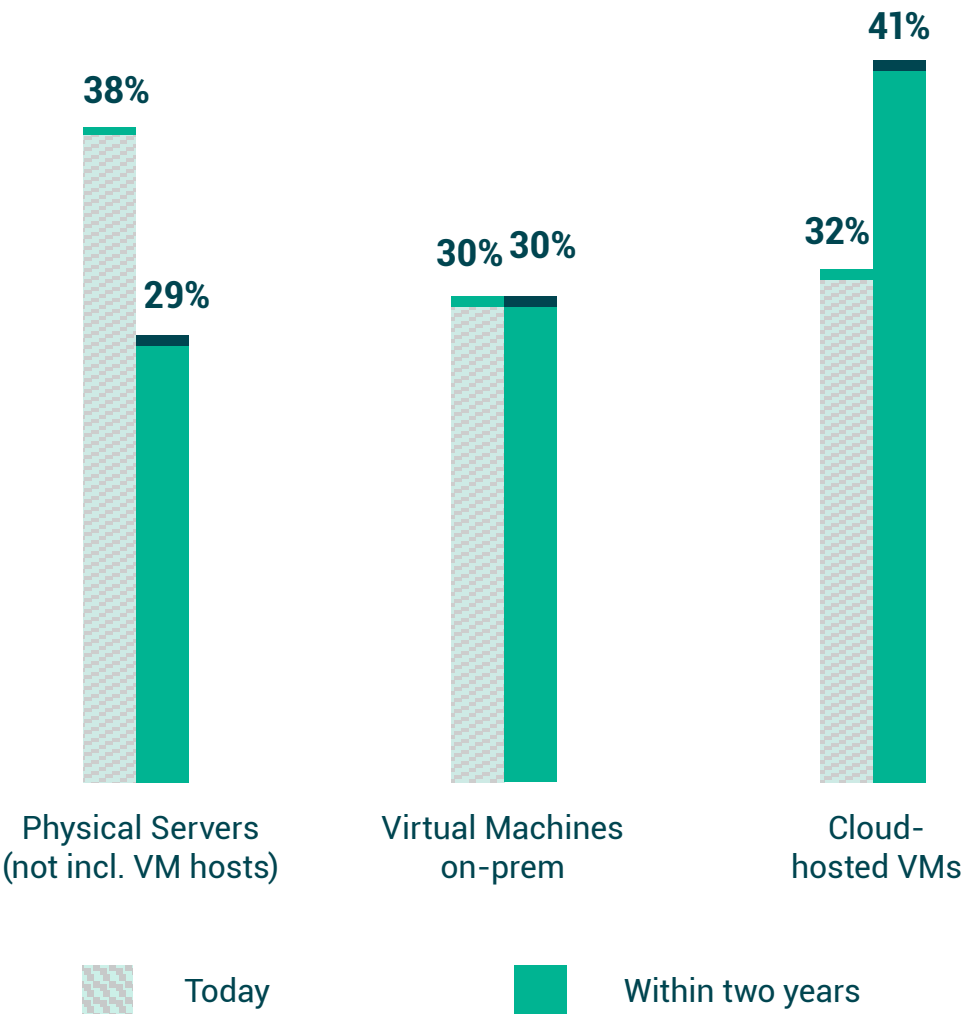
While the survey data shows an anticipated **9%** net shift from physical infrastructures to cloud-hosted infrastructures, the reality is that most conservative organizations will likely modernize from physical to virtual, while more progressive organizations will modernize from virtual to cloud-hosted. The more important takeaway is that organizations expect to be hybrid as their continued state for the foreseeable future with some reduction in physical attributes, while also assuredly adding cloud services. This will exacerbate their data protection challenges, as companies using existing legacy backup solutions to protect modern platforms or solutions will find themselves moving from well-protected data centers to unprotected clouds.



By 2022, more than **40%** of all servers will be cloud-hosted



Approximately what percentage of your organization's servers are in each of the following three formats currently? What do you anticipate the percentage will be in two years' time?





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The shift to cloud



Veeam Perspectives on “Why Cloud Data Management Matters”. Moving to the cloud might be inevitable, but it’s unlikely every business will depend **100%** on the cloud. Make sure you’re not locked into just physical or just virtual data protection options, and your backup files are transferrable across any environment. Hybrid data management can be a headache, but customers using Veeam Cloud Data Management have saved over **49%** across their data protection efforts.



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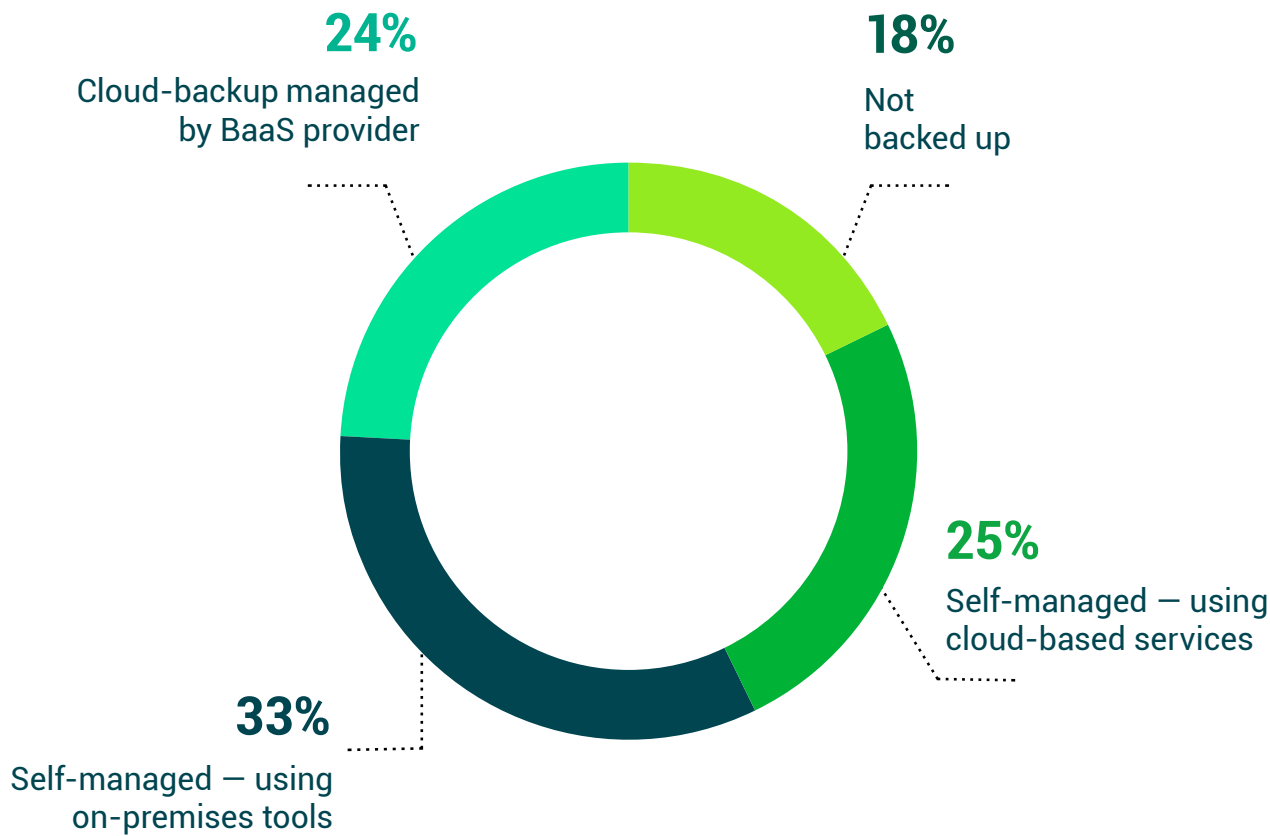
By 2022, 77% of organizations expect to leverage cloud-based services as part of their primary backup method

3.7

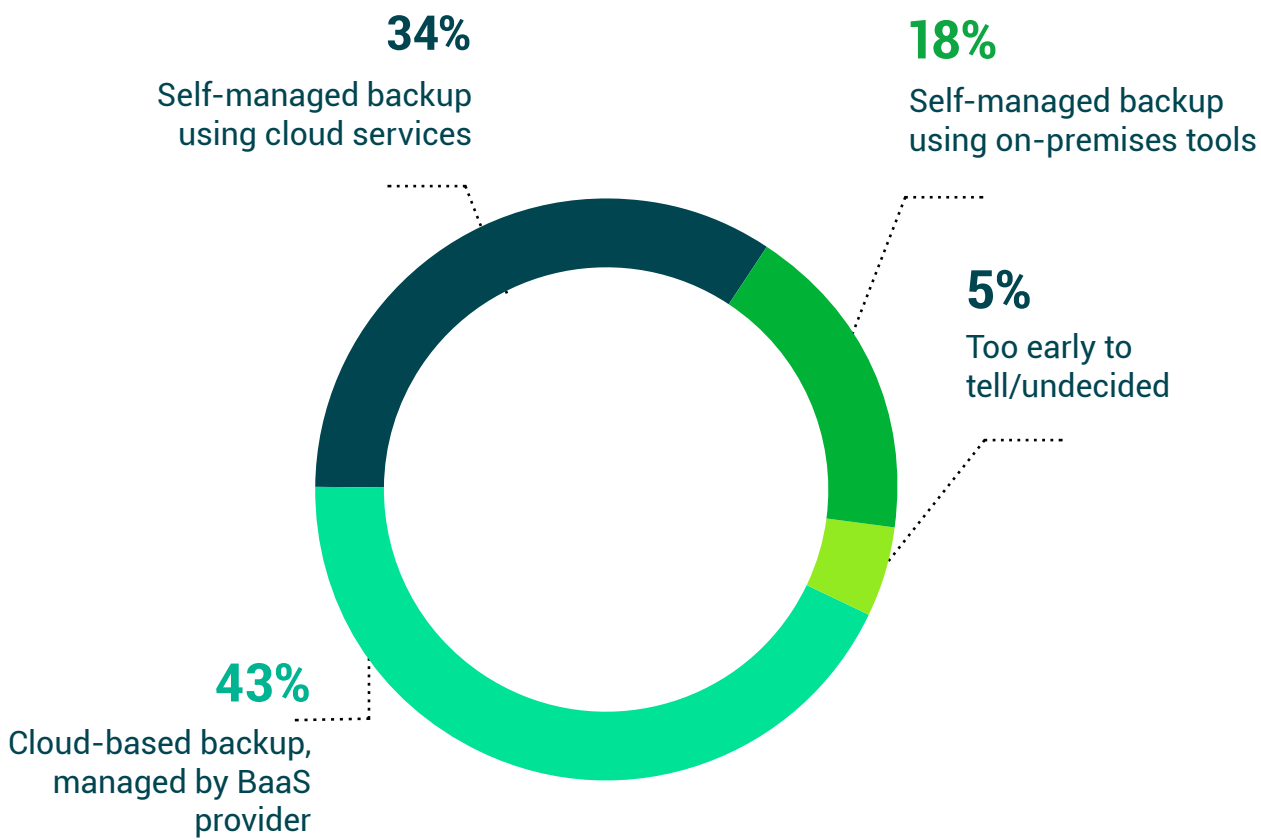
The effect of cloud on modern backup

It is impossible to have an IT modernization discussion that does not recognize an increase in cloud adoption. But to get a better idea of how companies plan to keep their data protection up to date, they were asked to describe their current backup environments and what they plan their environments to be like in 2022.

Today, businesses are using cloud-based services (storage and/or BaaS) for about half of their backups. Cloud-backup managed by a BaaS provider makes up for **24%** and self-managed backups using cloud-based services makes up for **25%**. When asked what their primary backup solution will be by 2022, respondents explained they plan for BaaS-managed cloud backups to account for **43%** of backups, while self-managed backups that use cloud services are expected to work for **34%**. This means in 2022, organizations anticipate using cloud-based services for more than three-fourths (**77%**) of their backups.



Considering how your organization backs up production data, approximately what percentage of your organization's production data is protected by each of the following mechanisms?



Which do you anticipate being your organization's primary method of backing up data in two years?



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The effect of cloud on modern backup



Veeam Perspectives on “Why Cloud Data Management Matters”. For most businesses, the road to cloud enables new services that will enhance productivity and efficiency, as well as help streamline operations and reduce cost. By already starting to modernize their infrastructures in 2020, companies expect to continue their Digital Transformation and increase their cloud use by a total of **28%**. By contrast, current backups that are self-managed using on-premises tools are expected to drop from **33%** to **18%** in 2022.



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Why change backup solutions in 2020: reliability, economics & operational improvement

If it's not broken, don't fix it, right? But that kind of thinking is what stalemates businesses into keeping legacy, outdated solutions. So, what exactly would drive organizations into changing its primary backup solution for a new one?

When organizations were asked why they would replace their existing backup solution, the number one answer **(39%)** was to improve the reliability of backups. The second most common driver for change is economics, including both reducing software or hardware costs **(38%)** and improving ROI/TCO **(33%)**.

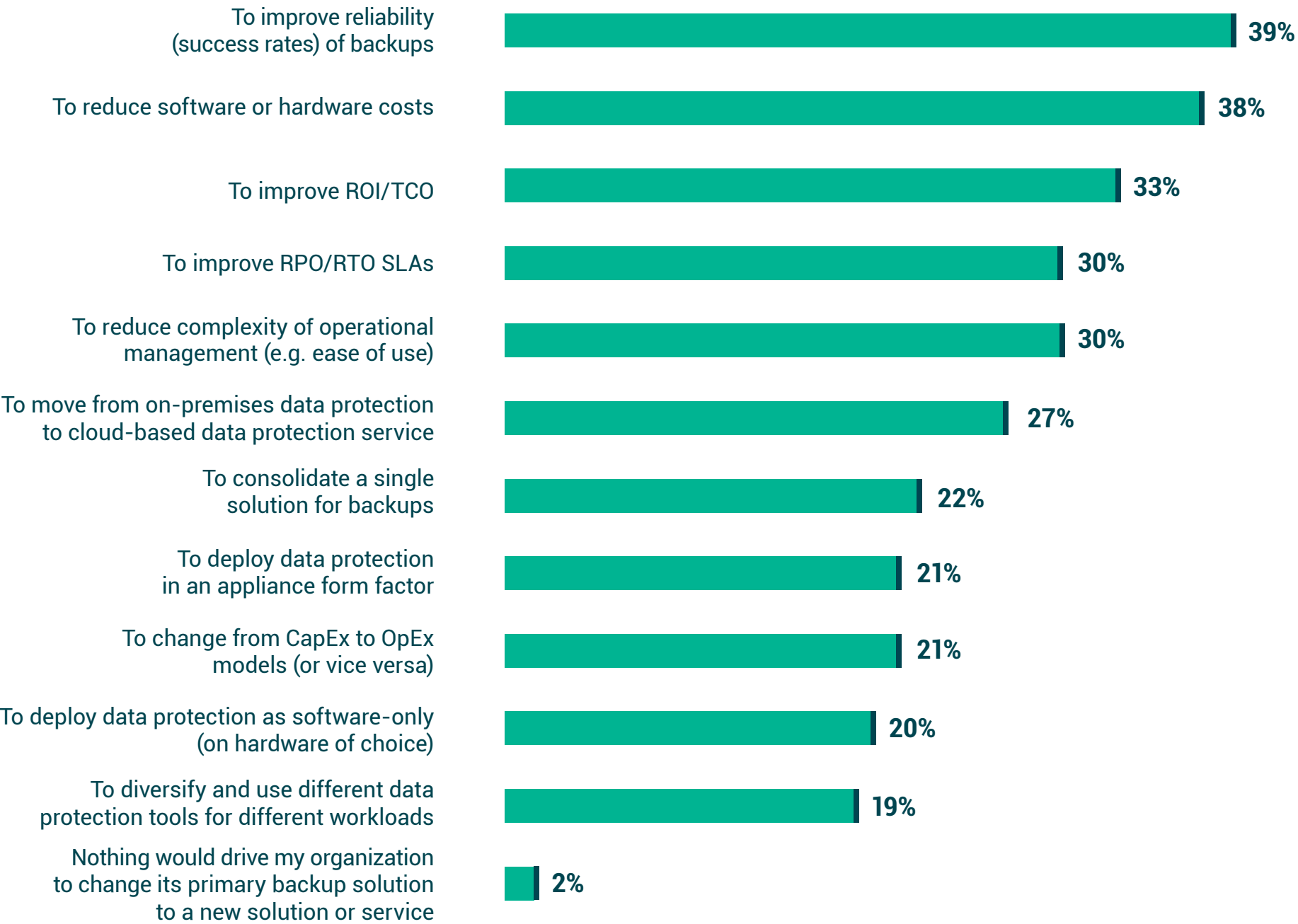
The third driver is operational improvement, including both improving RPO/RTO SLAs **(30%)** and reducing complexity **(30%)**. Beyond those three meta-trends, cloud usage as well as various form-factor/consumption choices round out the top ten drivers for change.



Capabilities, cost, and complexity remain the top reasons for switching data protection solutions



Which of the following would drive your organization to change its primary backup solution to a new solution or service?





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Why change backup solutions in 2020: reliability, economics & operational improvement



Veeam Perspectives on “Why Cloud Data Management Matters”. Organizations looking to strengthen their business continuity while conserving resources will continue to invest in modern backup solutions through 2020. This will help these enterprises with their Digital Transformation challenges and enable them to drive through projects faster. Veeam provides customers **55%** more RPO/RTO objectives met, with **33%** fewer instances of data loss. Offering a **50%** lower backup and recovery cost¹.



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Summary

Change can pose certain challenges, but as the IT landscape changes, so must the companies. And while some “motion does create friction,” change is ultimately good. As enterprises continue to adapt to the changing demands of their users, their IT strategies for both production and protection must change as well, often yielding secondary positive benefits along the way.

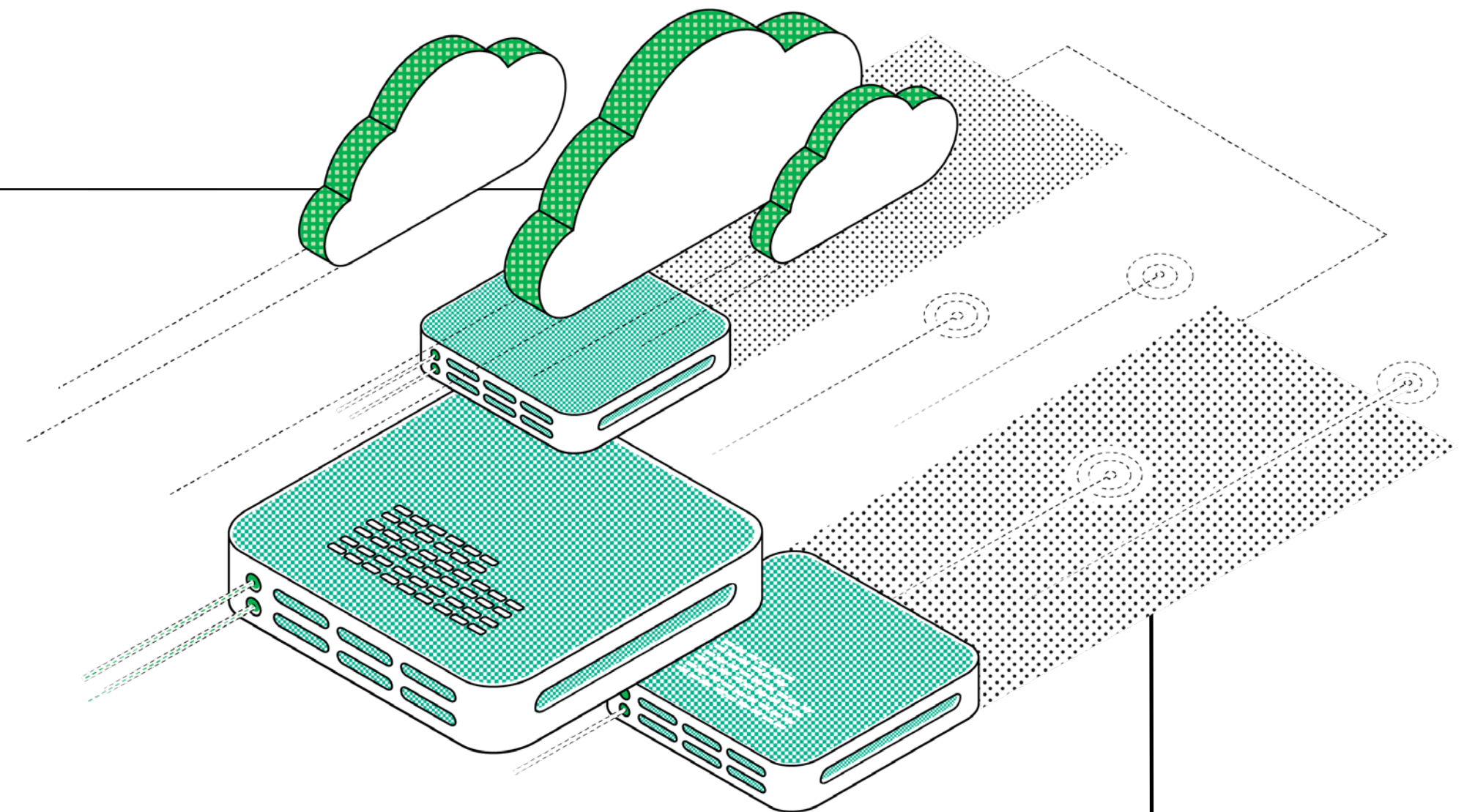
By adopting a single platform that is automation and cloud-friendly, companies are meeting today's challenges and future-proofing for tomorrow. This Digital Transformation is necessary in today's technology world as businesses need something more than backup.



4.0 Veeam Cloud Data Management – going beyond backup



Entrepreneurs understand the importance of cultivating an intelligent business for their future success, and this starts with a strong data protection and management foundation. By harnessing these capabilities, business leaders and IT get a clearer view of what's happening across the organization and deliver data that's fast and reliable. Cloud Data Management goes beyond backup. It's the next step in Digital Transformation, bringing enterprises backup modernization, hybrid cloud acceleration, and data security and governance.





4.1 Backup modernization

4.2 Hybrid cloud acceleration

4.3 Data security and governance

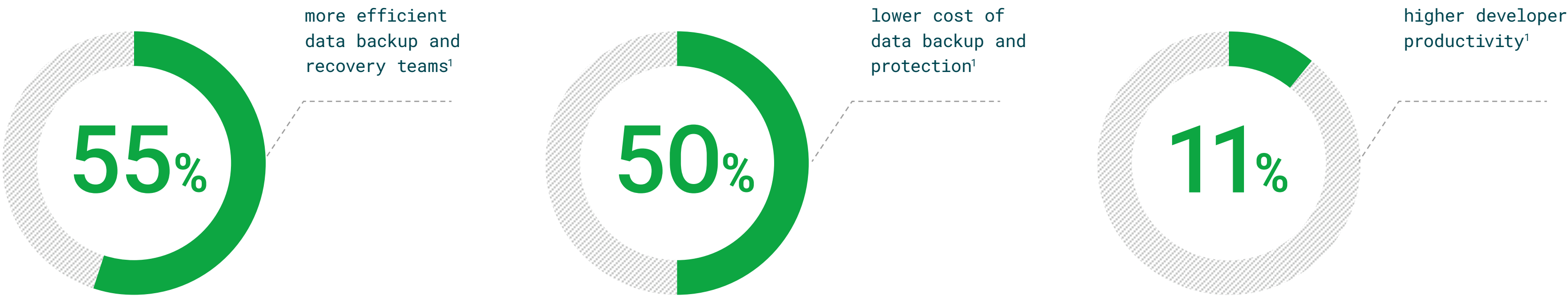
4.4 Summary

4.1

Backup modernization

Backup modernization frees the tied-up resources committed to legacy data protection and focuses them on core innovation projects to propel businesses forward. Through Veeam Cloud Data Management, organizations are cutting the cost of data backup and protection by **50%** and achieving a **55%** increase in data backup and recovery efficiency.

Enterprises that build on modern backup platform can future-proof their environment to ensure sustained protection as they grow across the cloud and other platforms. These organizations can also use intelligent automation for successful backups and verified recoveries, and re-use data for application development, workload testing and data mining and reporting.





4.1 Backup modernization

4.2 Hybrid cloud acceleration

4.3 Data security and governance

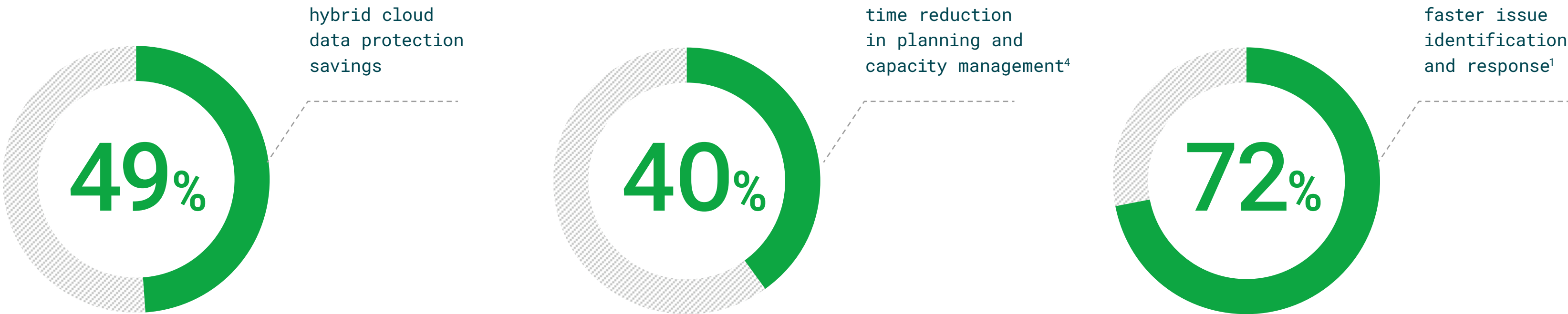
4.4 Summary

4.2

Hybrid cloud acceleration

The #1 challenge for businesses regarding moving to the cloud is the literal action of moving data to the cloud. Afterall, data protection and management are highly integrated into legacy, on-premises solutions. But IT modernization and Digital Transformation initiatives are driving increased cloud adoption by unifying tools, enabling **49%** savings on costs through hybrid cloud and data center protection. By leveraging the rich components of the Veeam Cloud Data Management Platform, organizations have **72%** faster issue identification and response time and reduce time for planning and capacity management by **40%**.

Legacy systems trap data in propriety formats and systems, but a hybrid cloud system makes data mobile, flowing from site to cloud, and cloud to cloud without restrictions.





4.1 Backup modernization

4.2 Hybrid cloud acceleration

4.3 Data security and governance

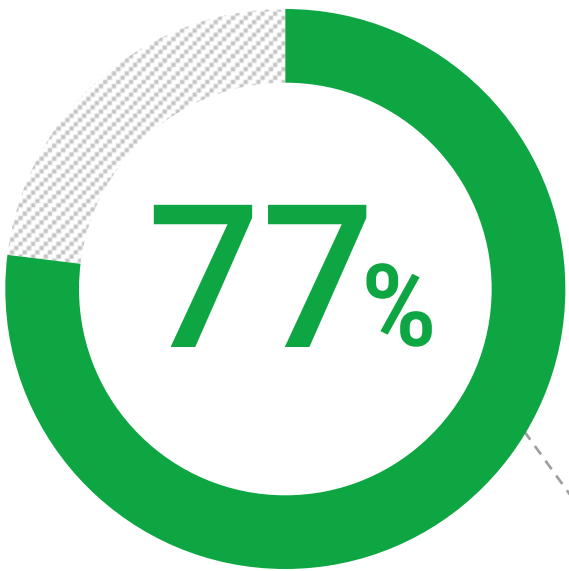
4.4 Summary

4.3

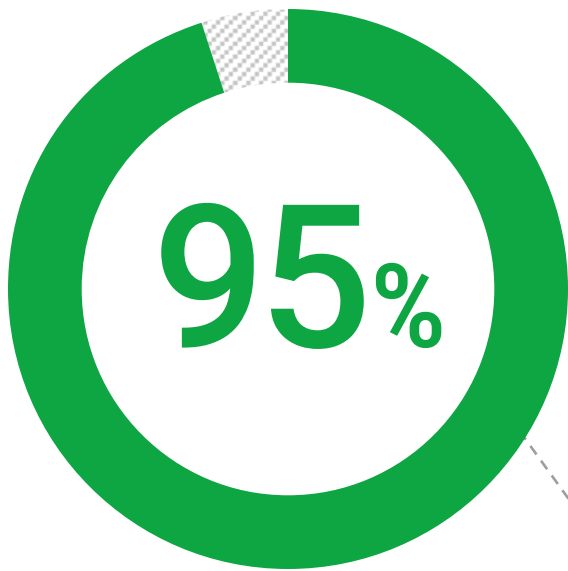
Data security and governance

The number of data regulations and cost of compliance change each year, but it's essential companies meet these requirements. Many companies continue to rely on manual processes, using legacy or ad-hoc cloud systems to protect and audit data, creating isolated pockets of visibility. These pockets run the risk of being targeted by cyberattacks.

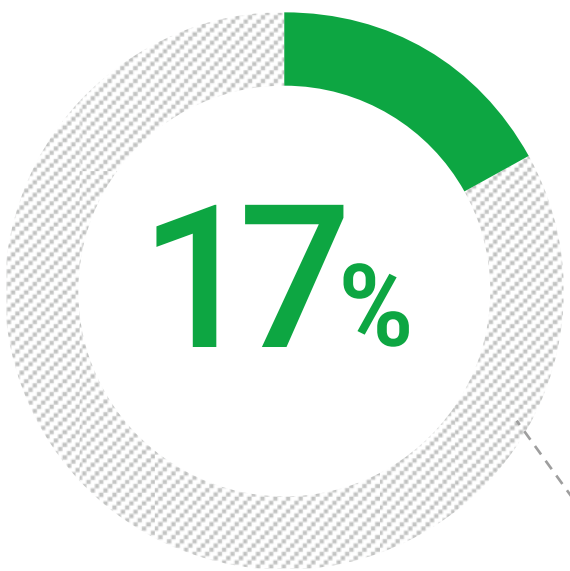
Organizations using Veeam Cloud Data Management, however, have reduced the effect of cyberattacks, with **95%** of them experiencing little to no financial impact due to ransomware. **77%** of Veeam customers also saw a reduction in risk of data loss, as well as **17%** of customers seeing reduction in both audit and compliance failure.



reduction in risk of data loss²



experienced little to NO financial impact due to ransomware³



reduction in both audit and compliance failure⁴



4.1 Backup modernization

4.2 Hybrid cloud acceleration

4.3 Data security and governance

4.4 **Summary**

4.4

Summary



Legacy solutions are there to protect your data, but they're so outdated that they cost you more money, time, resource and trouble than you probably know. Modern protection, Cloud Data Management, is a tool that goes beyond backup. A tool that helps enterprises go beyond as well. Cloud Data Management saves costs so that money can be repurposed for future development. It frees employees so they can put their skills into developing something new and exciting. It automates itself so time can be saved from recovering from the past and instead focus on the future. It's no longer tied to on-premises, physically-dedicated environments, but in the cloud and readily available for what you need, when you need it.



5.0

Conclusion

Data has grown into a key element for every digital business, so the solutions must grow with it. Legacy tools are an outdated answer to yesterday's challenges. Modern data protection must be more intelligent and able to anticipate needs and meet demands. Ensuring reliable backup, instant recovery and reuse of data requires an evolution in how data is managed, leveraging intelligence to enable data to back up autonomously, migrate to the right location based on business needs and secure itself from anomalous activity.

Veeam has emerged as a frontrunner in data backup and recovery, in part by innovating and extending its industry-leading approach to offer an end-to-end solution in data management. The platform integrates data protection and mobility, as well as security and compliance management, into a single platform that can handle data protection on nearly any infrastructure your business chooses to use.

By adopting Veeam's platform, customers have access to one of the most modern solutions on the market. This enables organizations to free tied up resources due to legacy tools and focus them on innovative projects. Data that isn't flexible can't take part in the rapid adoption of cloud services. Without the cloud, organizations are limited in how fast they can move. Veeam's hybrid cloud solutions help make data free and fluid across any cloud without any hardware, software or licensing barriers.

Also, keeping data safe, secure and compliant can take multiple teams of people. Veeam rapidly automates protection, security and compliance reporting to enable the return of tied up costs and resources back to the business.

The result is well-protected data that can be leveraged across a hybrid environment. This gives you the ability to accelerate your business and its Digital Transformation by ensuring the availability and integrity of your critical data.

¹ IDC Research, The Economic Impact of Veeam Cloud Data Management Platform, April 2020

² IDC Research, Race to Zero Survey , October 2018

³ Veeam Ransomware Customer Study, August 2018

⁴ IDC Research, Using Veeam to Ensure Data Availability and Retention in Multi-Cloud Environments, August 2019



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