HANOVER RESEARCH

BACKUP AND RECOVERY CHALLENGES AND TRENDS

Prepared for Metallic™, a Commvault Venture

November 2019

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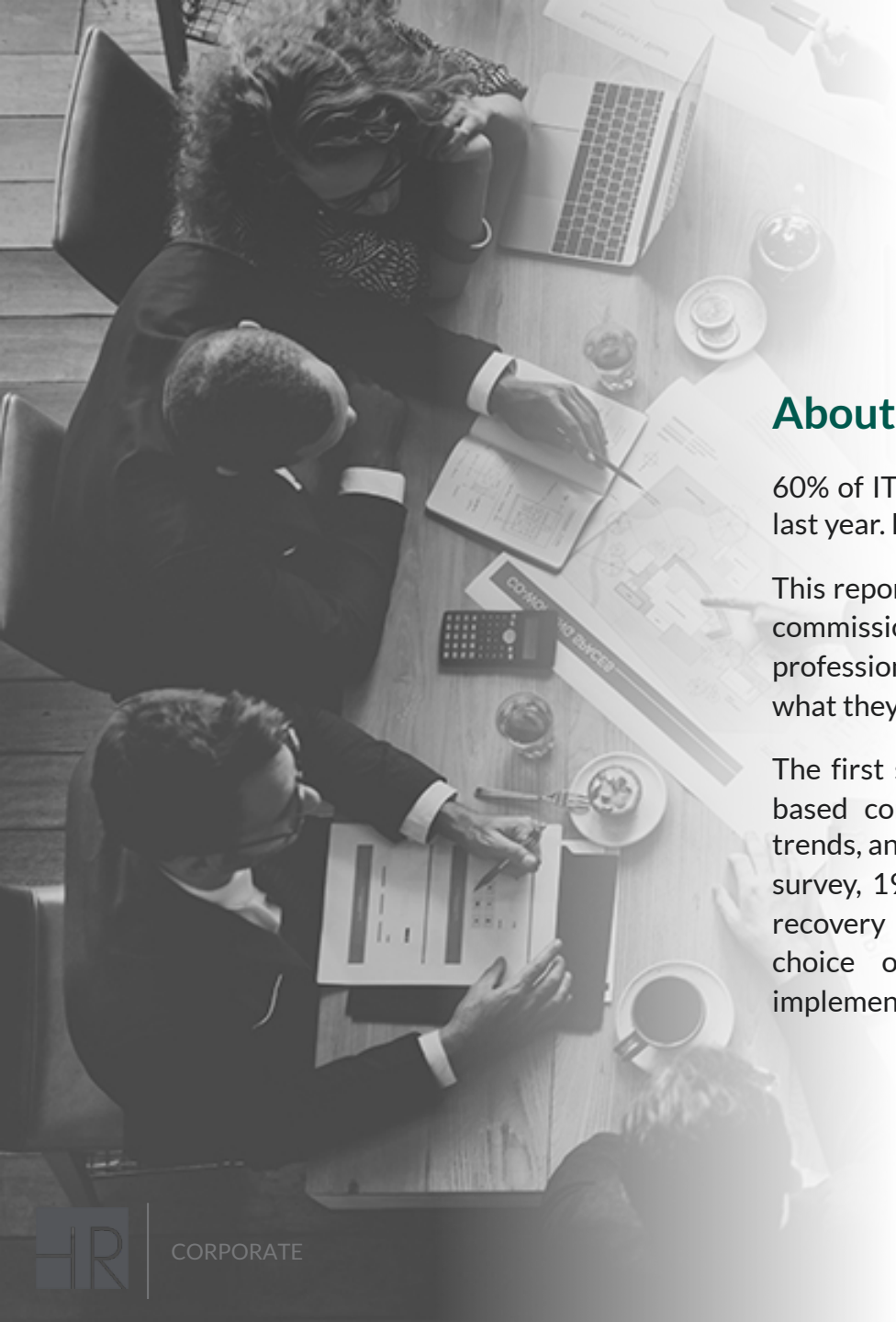
EXECUTIVE SUMMARY



About this report

60% of IT professionals surveyed changed their backup solution in the last year. **It's clear: backup and recovery is an IT priority today.**

This report by Hanover Research was built with data from two surveys, commissioned by Commvault and designed to understand IT professionals' experience with their backup solution, their pain points, what they value, and how they manage their solutions.

The first survey we used was a survey of 200 IT professionals in US-based companies of 500-2500 employees, focused on challenges, trends, and preferences in regard to backup and recovery. In a follow-on survey, 192 U.S. employees with decision-making roles in backup and recovery solutions were asked about the top factors that affect their choice of vendor, and about their greatest challenges when implementing data recovery and backup solutions.

KEY FINDINGS

- **More than half of IT professionals (60%) report switching backup and recovery solutions within the last 12 months.**
    - Some of the most common reasons for switching away from their previous backup solution involve it being too slow (38%) and having outdated features (38%).
- **Database and file recovery is necessary, but most IT professionals also report that recovery failures do occur.**
    - Most IT professionals report needing file recovery (72%) and database recovery (70%) often or very often, but two-thirds (64%) also report failing to recover data within the last year.
- **Despite ample bandwidth, one of the main pain points for IT professionals is their backup technology is too slow.** Most IT professionals agree that they experience bandwidth constraints during backup (76%).
    - The most commonly accessed reports are backup performance / speed / throughput (62%).
- **53% of IT professionals indicate they use both cloud and on premises data sources;** approximately half of those who use both, do so equally
- **MS Office 365 was cited as a cloud data source by (70%) of IT professionals**. Of those, OneDrive is used most frequently (86%), followed by SharePoint (62%) and Mailboxes (51%).

KEY FINDINGS (CONT'D)

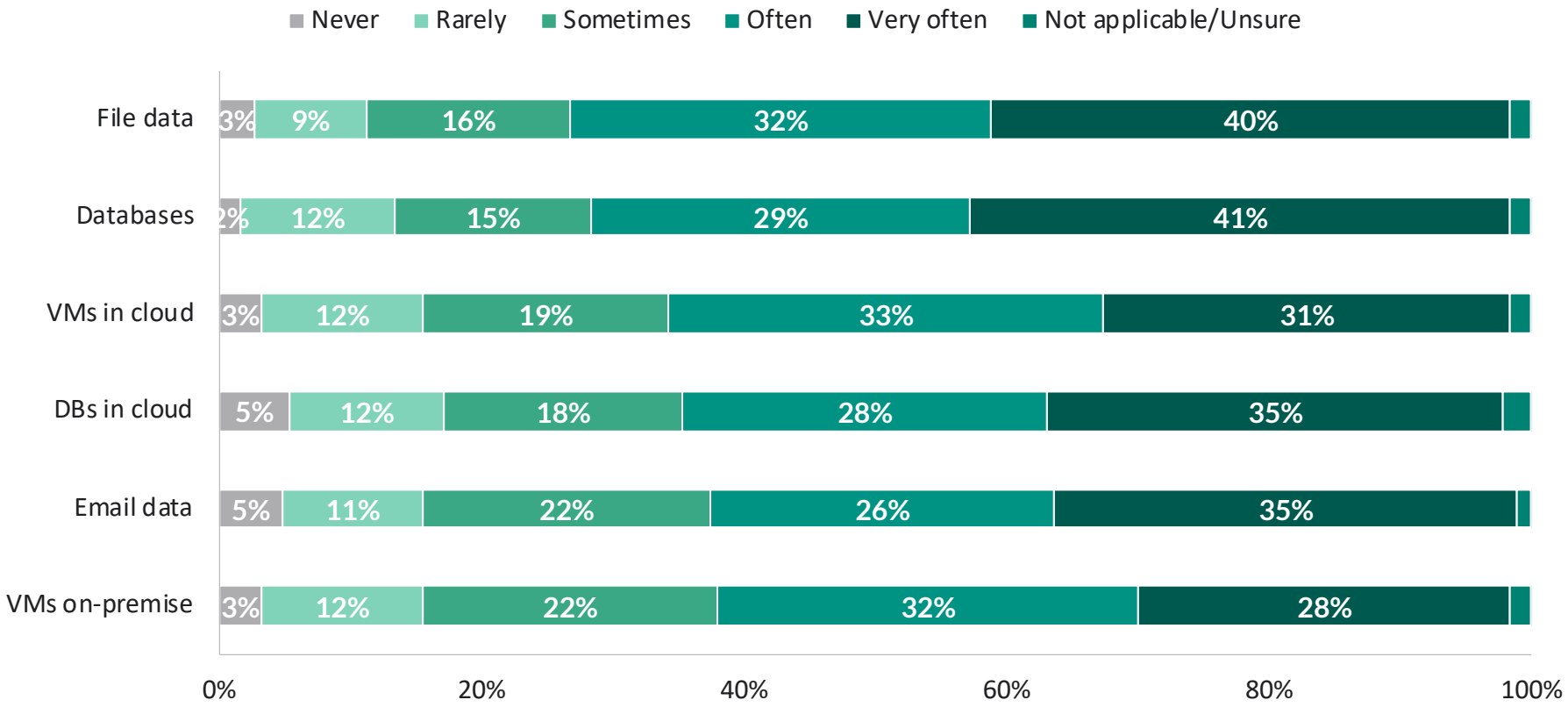
- **As for offsite copies of their data, IT professionals cited multiple preferences for where to keep their data** - in their backup vendor's cloud storage (60%), in their own offsite data centers (58%), and in their own public cloud account (53%). Retention policies ranged from less than one month to three years or more.
- **When selecting a backup vendor, ease of use is an important factor (90% of respondents).**
  - However, when asked to rate the **single *most* important** selection factor, ease of use ranks far behind the ability to backup and recover all data, knowledge of support, and technical excellence.
- **Nearly all IT professionals (88%) report conducting trial tests before purchasing a solution,** and more than half (52%) of those trial tests take more than one month.

DATA LOSS AND BACKUP CHALLENGES

IT PROFESSIONALS MOST OFTEN NEED TO RECOVER DATA FROM FILES AND DATABASES…

- Nearly three-quarters of IT professionals need to recover file data (72%) and databases (70%) “often” or “very often.”

Frequency of Data Recovery

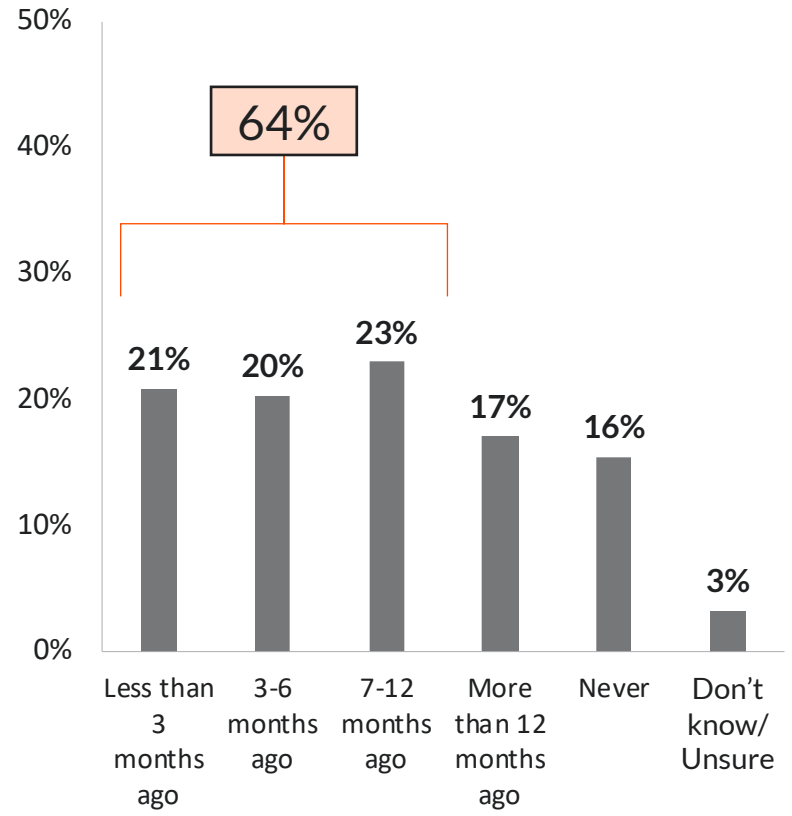


Q: How often has your organization needed to recover data of the following types over the last 12 months? (n=187)

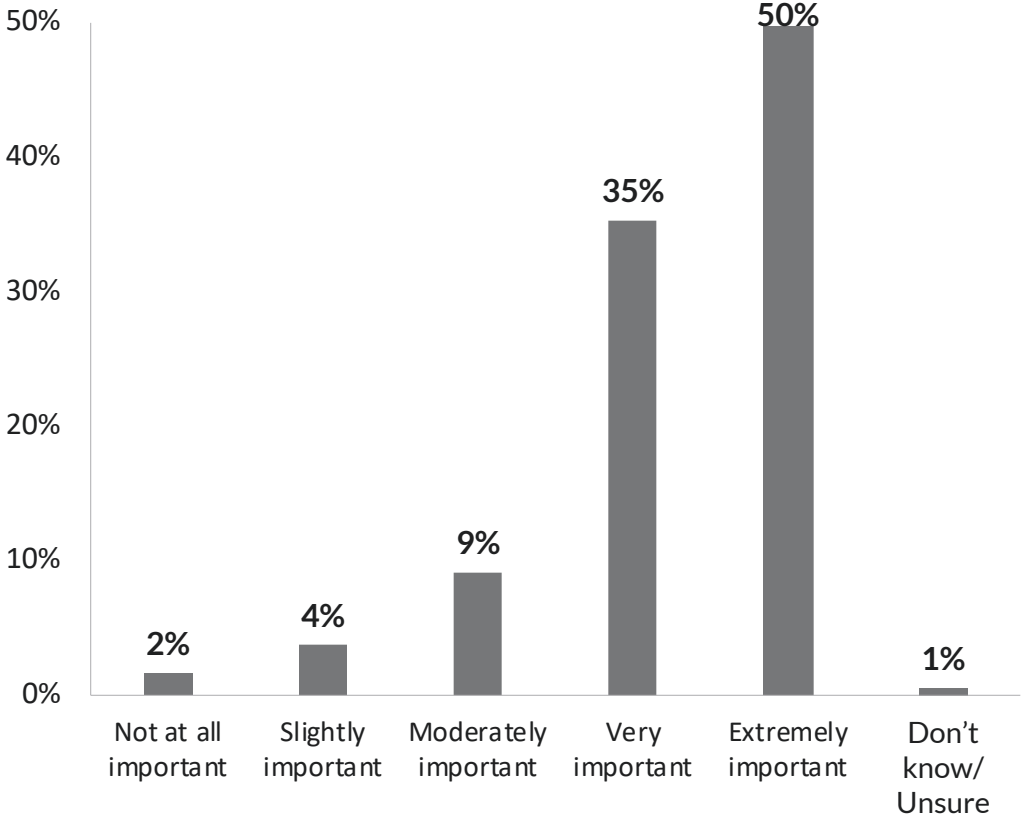
… BUT DATA IS OFTEN IMPOSSIBLE TO RECOVER.

- Two-thirds of IT professionals (64%) were unable to recover data some time within the last year.
- When they are recovering data, half of IT professionals consider recovery speed to be extremely important.

Last Time Unable to Recover Data



Importance of Recovery Speed

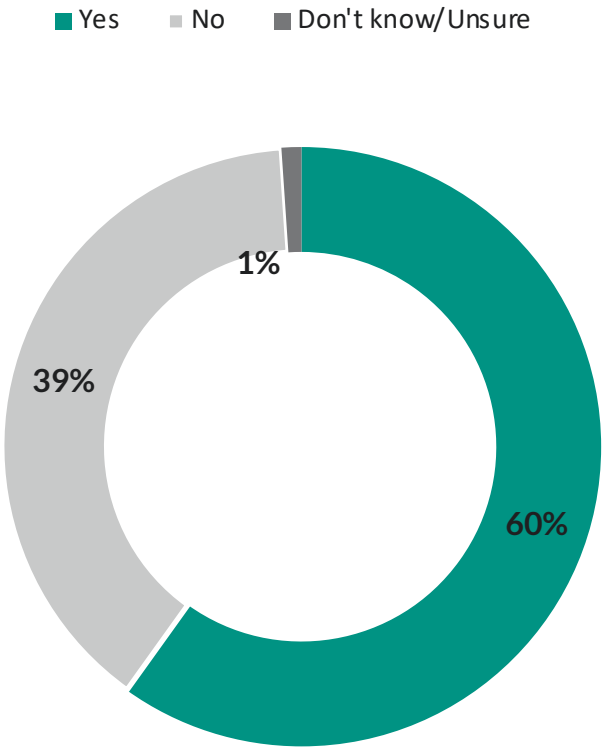


Q: How important is speed of recovery by using a local backup to disk copy? (n=187)
Q: When was the last time your organization was unable to recover data that was needed? (n=187)

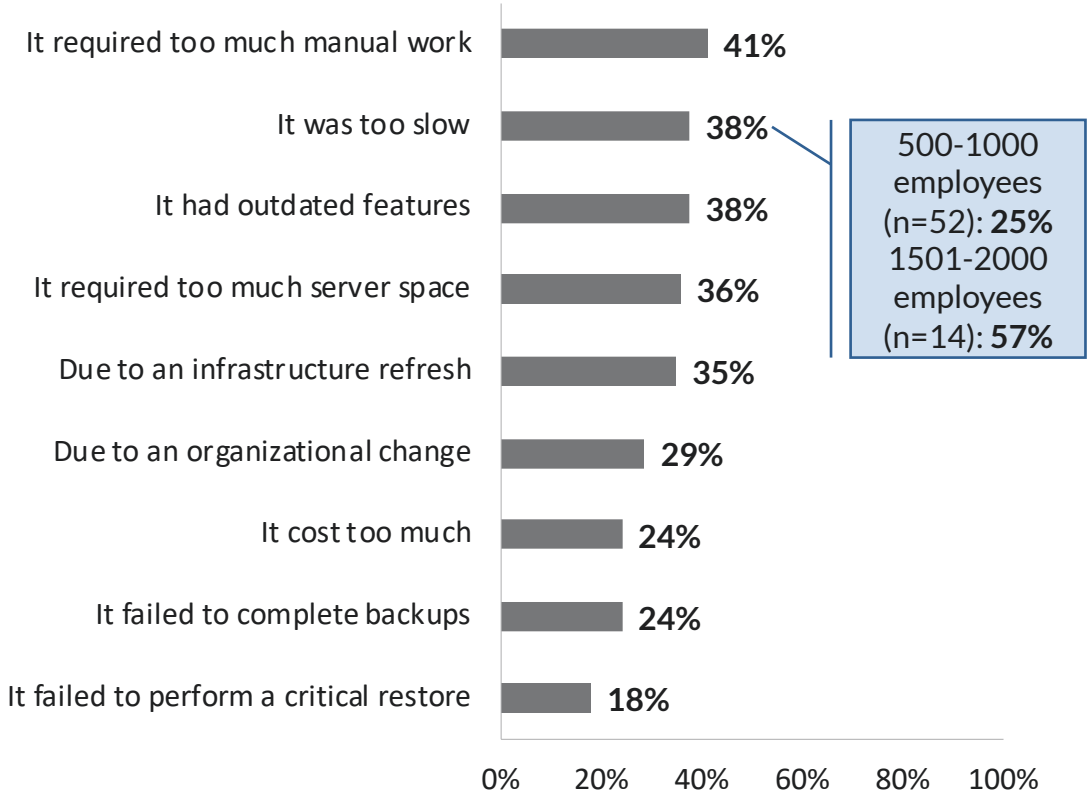
MOST HAVE CHANGED BACKUP SOLUTIONS DUE TO TOO MUCH MANUAL WORK OR OUTDATED SOLUTIONS.

- More than half (60%) of IT professionals' organizations have changed backup solutions in the past 12 months.
- Previous backup solutions most frequently required too much manual work (41%), were too slow (38%), or had outdated features (38%).

Changes in Backup Solutions



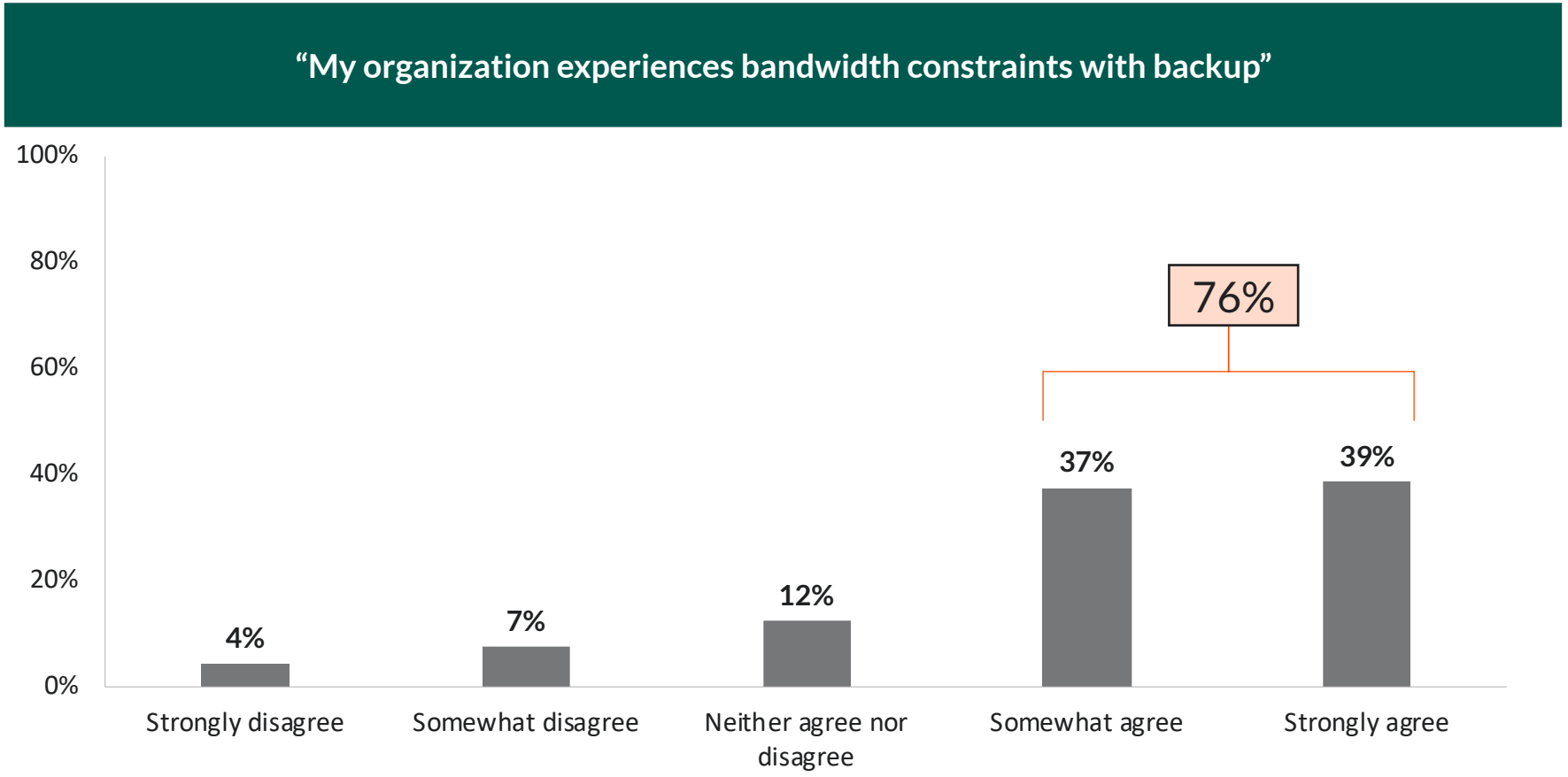
Reasons For Changes in Backup Solutions



Q: Has your organization changed backup solutions in the past 12 months? (n=187)
Q: Why did your organization stop using its former backup solution? Select all that apply. (n=112)

BANDWIDTH CONSTRAINTS ARE A COMMON CHALLENGE FOR BACKUP PERFORMANCE

- The majority of IT professionals agree that their organization experiences bandwidth constraints with backup (76%).



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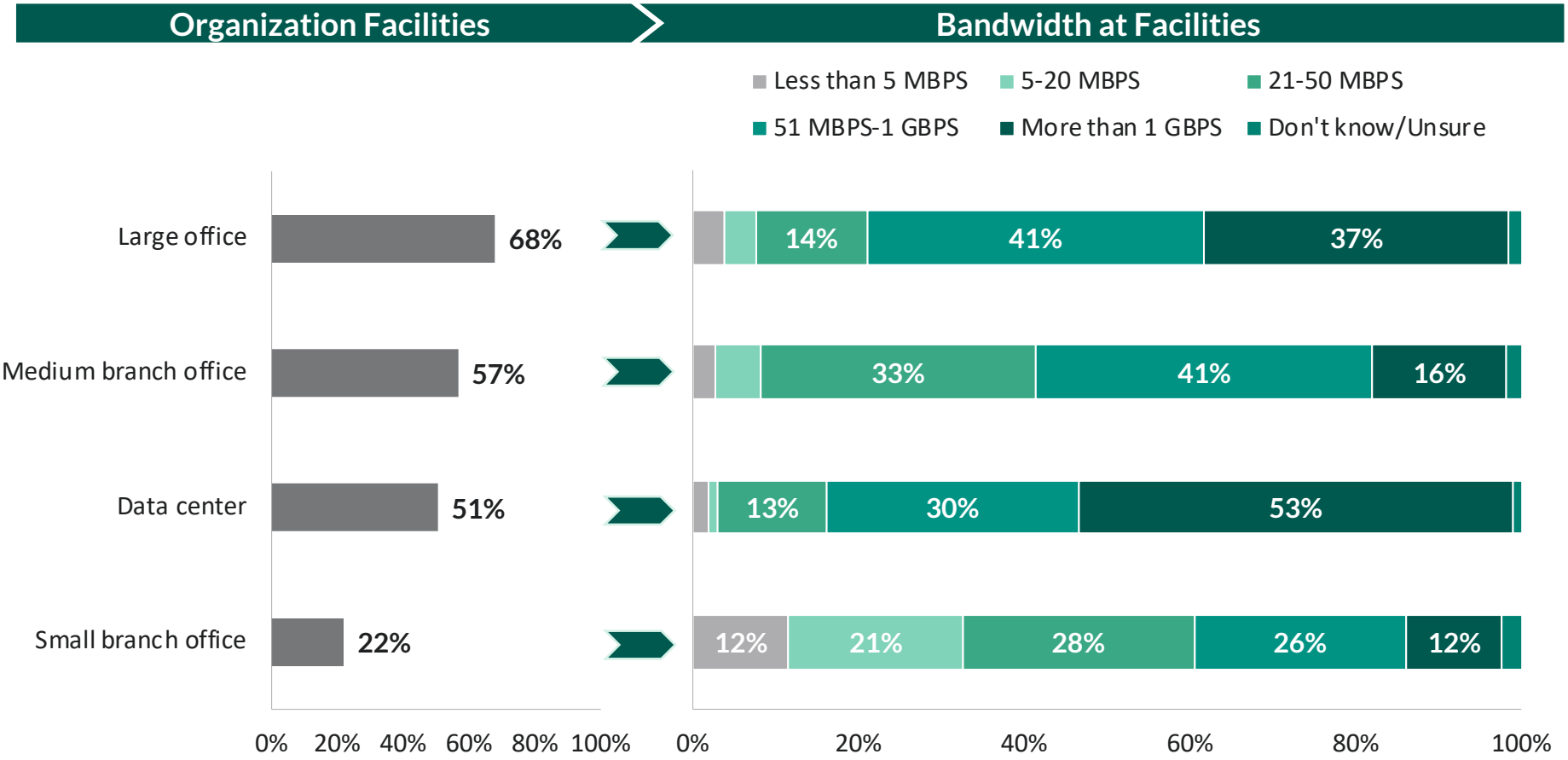
Q: Please rate the extent to which you agree or disagree with the following statements:
NOTE: (n=187) for "My organization experiences bandwidth constraints with backup.

ALTHOUGH BANDWIDTH IS REPORTED HIGH AT LARGE OFFICES AND DATA CENTER…

- Most IT professionals' organizations have large offices (68%), medium branch offices (57%), and data centers (51%).
- Bandwidth is over 1 GBPS at half of data centers (53%) and more than one-third of large offices (37%).



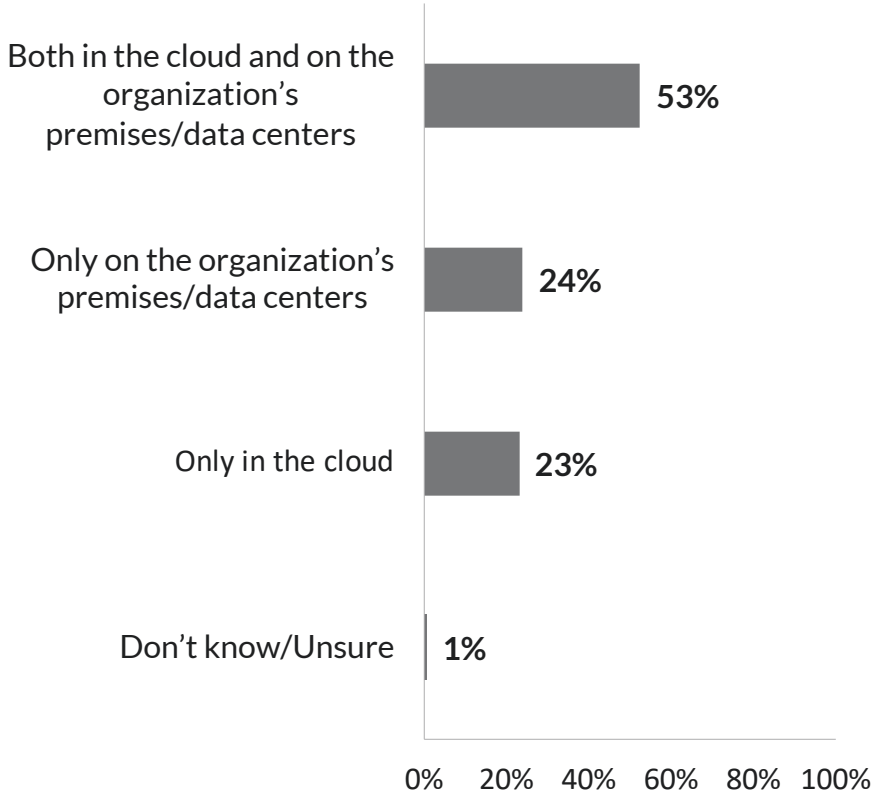
Q: Which of the following types of facilities does your organization have? (n=196)
Q: Please indicate how much bandwidth your organization has for each of the following facility types. (n=43-133)

DATA SOURCES, STORAGE, AND RETENTION

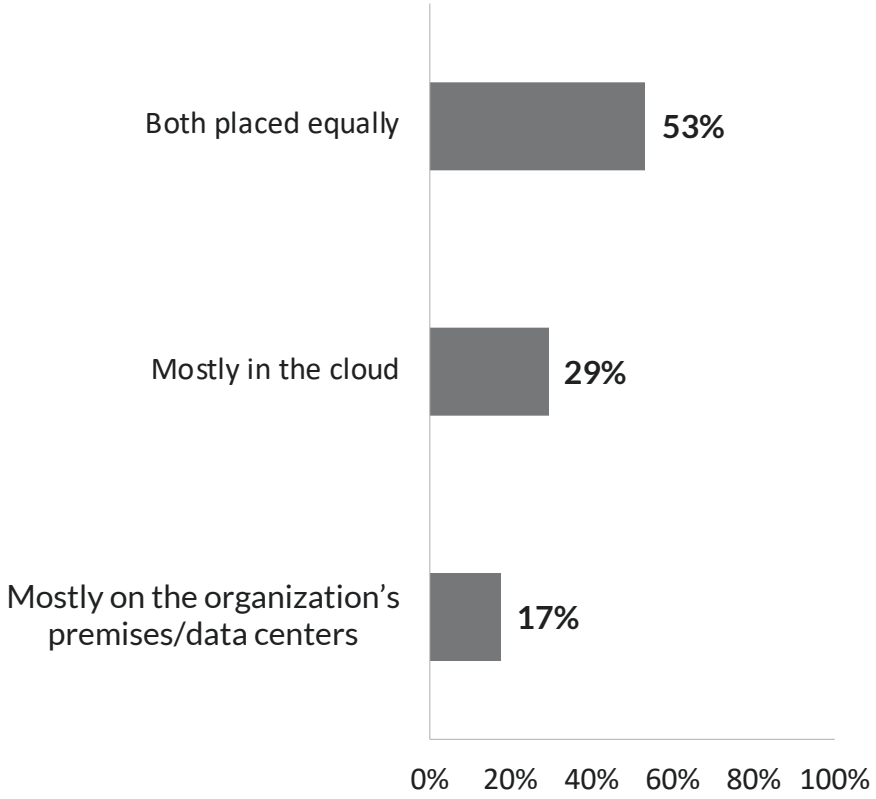
DATA SOURCES ARE SPLIT EVENLY BETWEEN THE CLOUD AND ON-PREMISE DATA CENTERS.

- Half (53%) of IT professionals indicate that their data sources are both in the cloud and on the organization's premises, and half of those who use both indicate that they are both placed *equally* (53%).

Where Data Sources are Located



Where Data Sources are Primarily Located

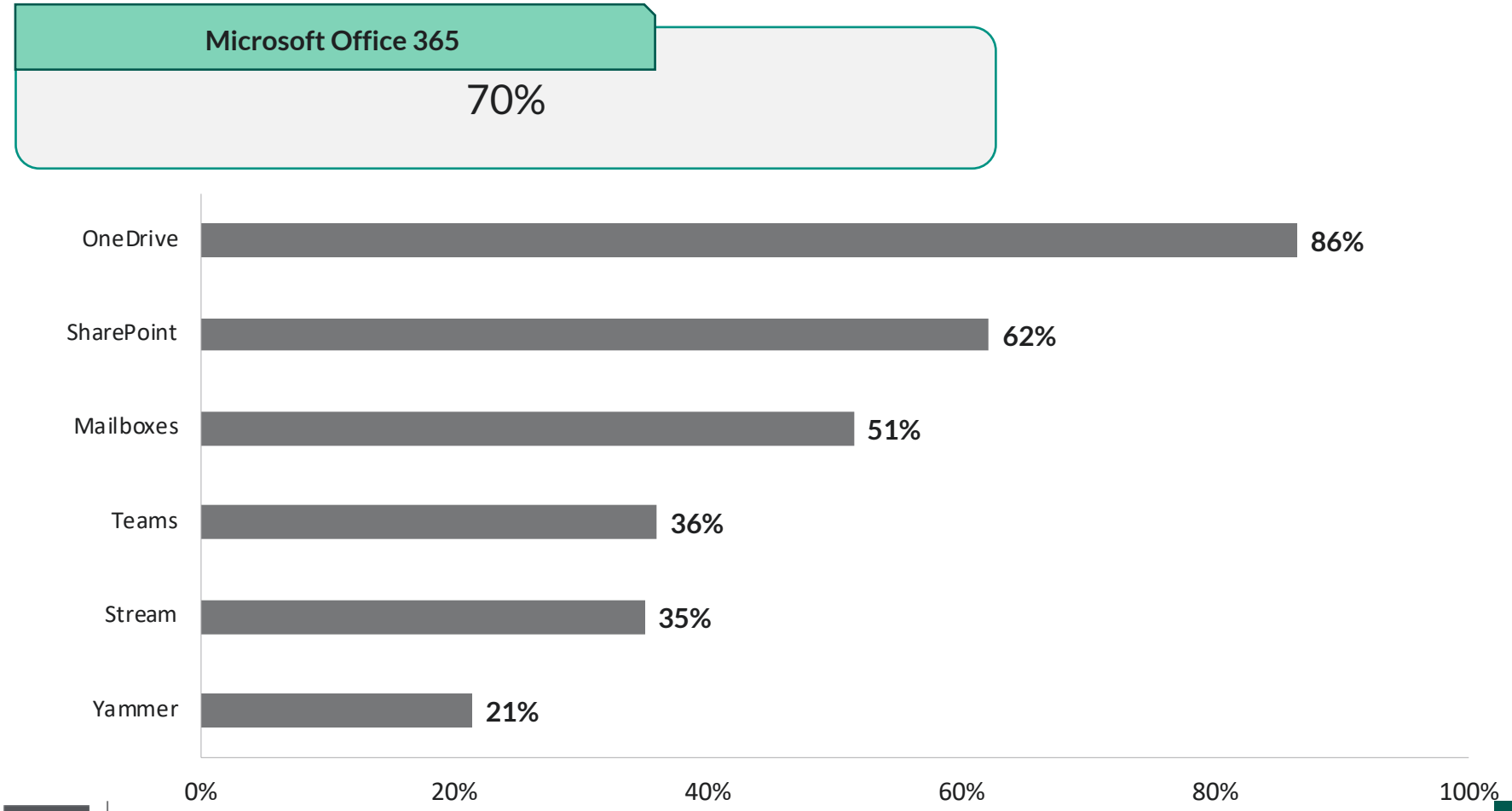


Q: Where are your organization's data sources? (n=196)
Q: Are your organization's data sources primarily in the cloud or on the organization's premises/data centers? (n=103)

MOST COMMON CLOUD DATA SOURCE IS OFFICE 365

- Overall, 70% of IT professionals report that their organizations have MS Office 365 in the cloud.
- In addition to OneDrive, common MS Office 365 sources include SharePoint (62%) and Mailboxes. (51%).

Types of Cloud Data Sources



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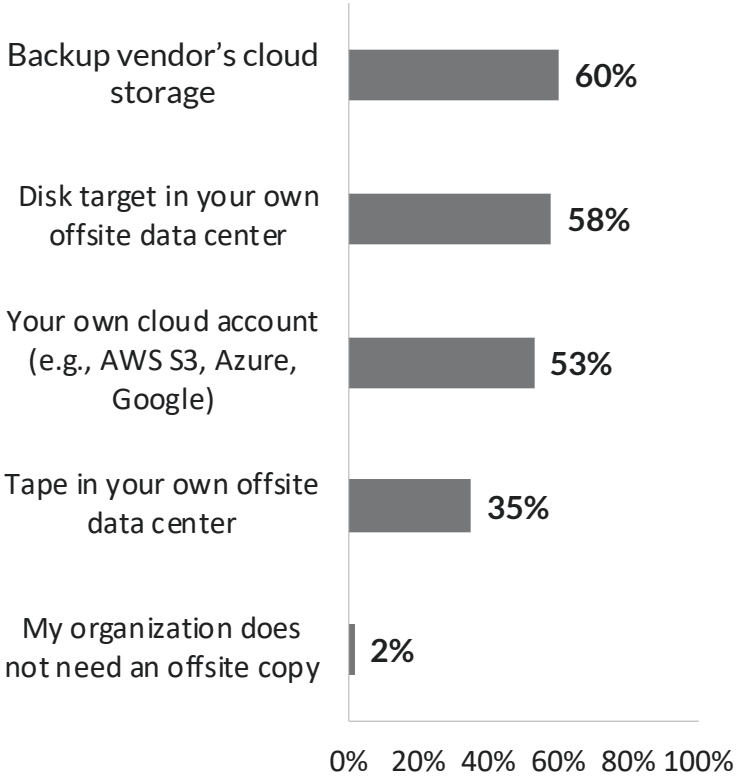
Q: What type of data sources does your organization have in the cloud? Select all that apply (n=148)
Q: Which of the following Microsoft Office365 data sources does your organization have in the cloud? Select all that apply (n=103)

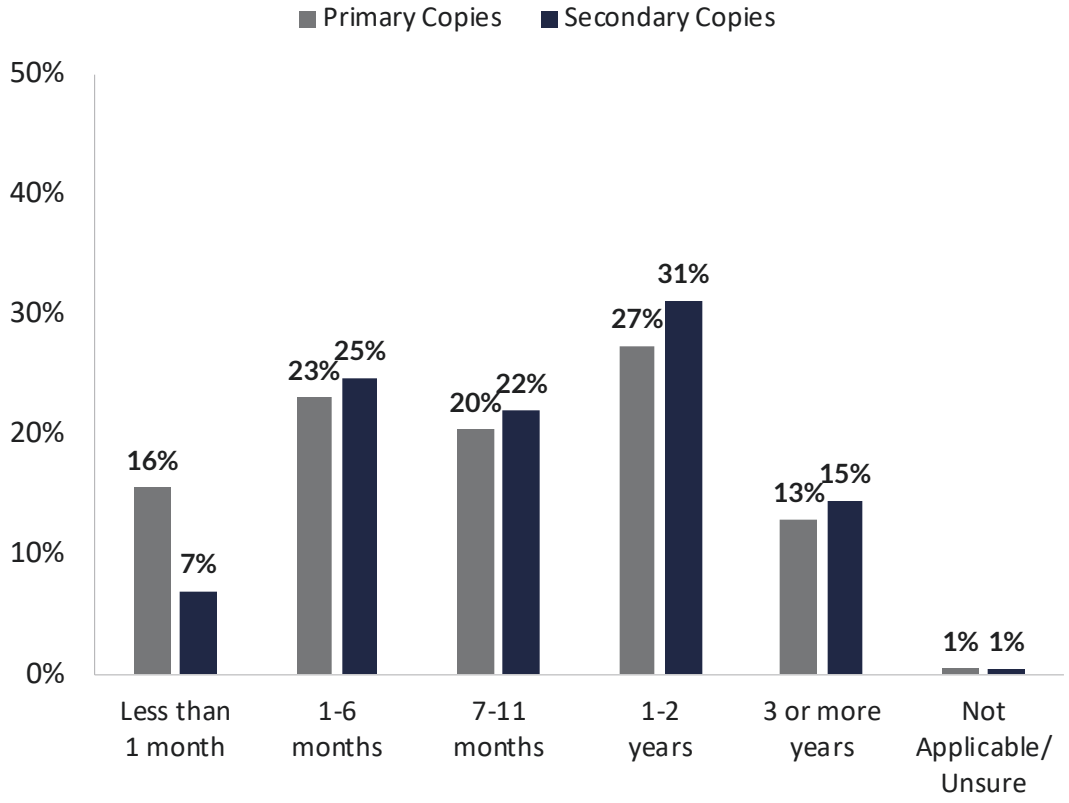
IT PROFESSIONALS CITE MULTIPLE PREFERENCES FOR STORING OFFSITE.

- The retention policy for both primary and secondary offsite copies ranges from 1-6 months to 1 or more years.

Preferred Type of Offsite Copies



Typical Retention Policy Timeframe

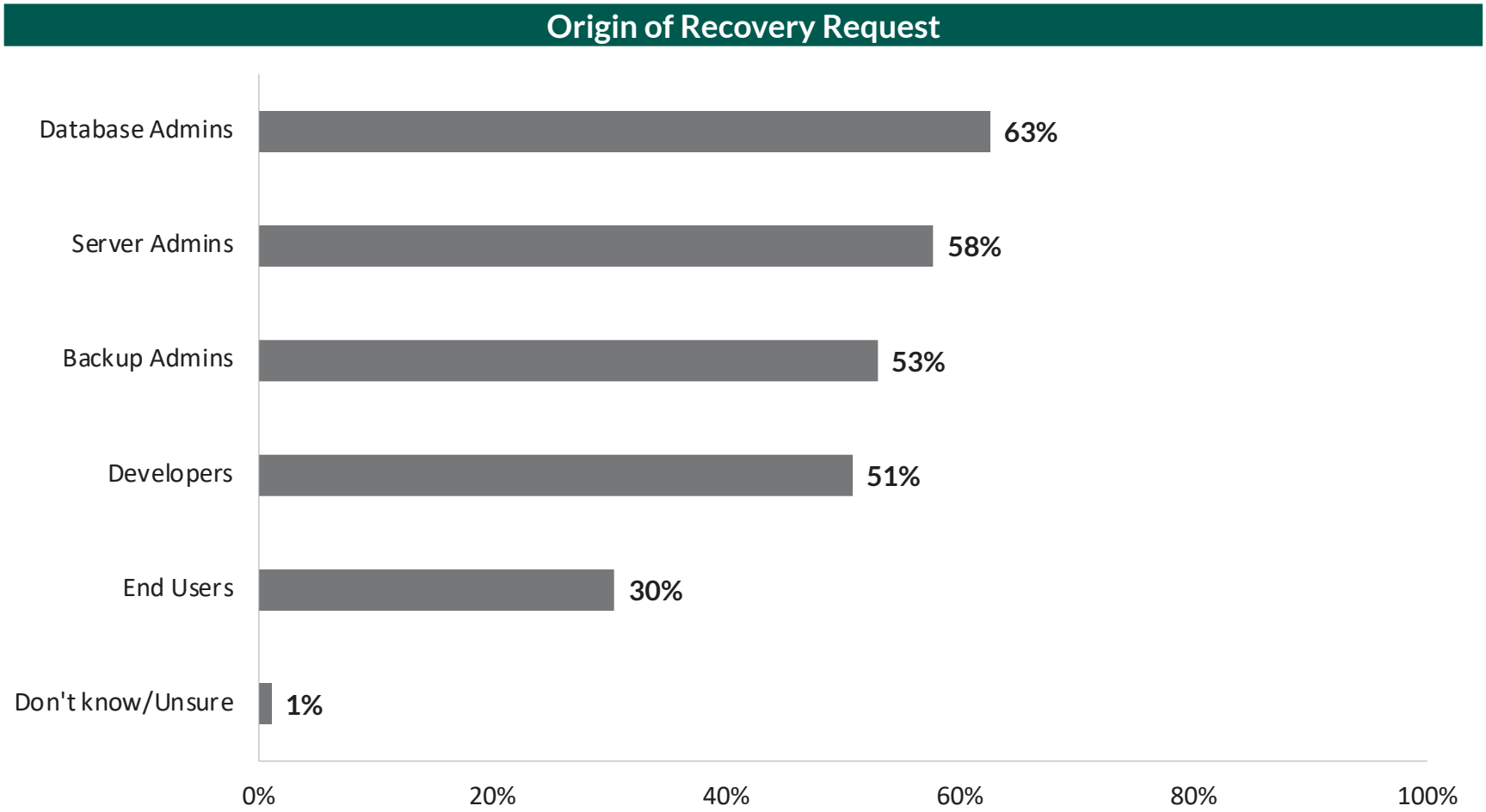


Q: What is your organization's typical retention policy for primary copy and secondary copies? (n=195)
Q: Which of the following types of offsite copies would you prefer for your organization? Select all that apply. (n=186)

ADMINISTRATION OF BACKUP AND RECOVERY

DATABASE ADMINISTRATORS ARE MOST LIKELY TO REQUEST DATA RECOVERY.

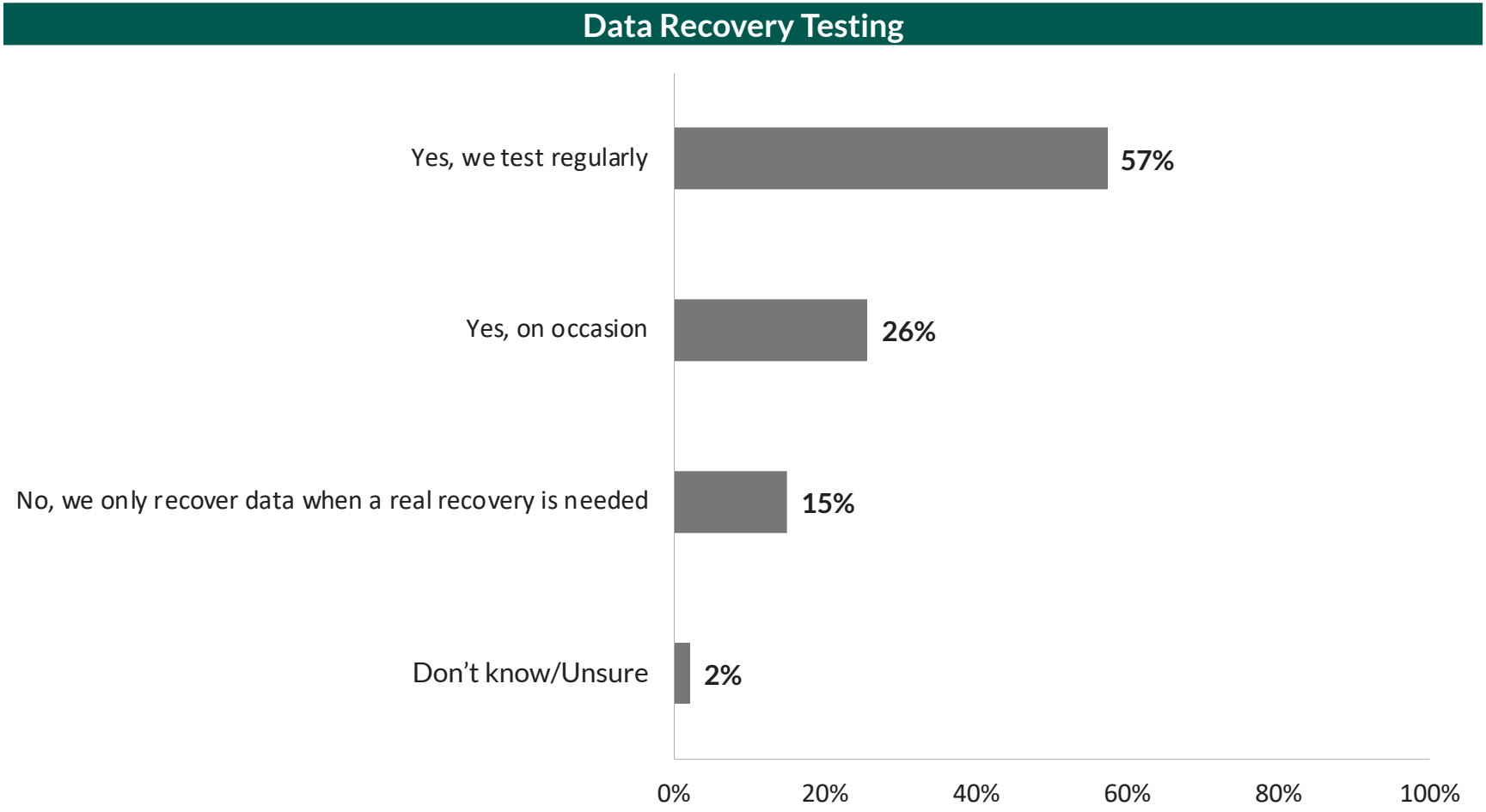
- Server admins (58%) are the next most likely group to make the request for data recovery.



Q: Who in your organization typically makes requests for data recoveries? (n=187)

MOST IT PROFESSIONALS REGULARLY TEST DATA RECOVERY FROM THEIR BACKUP PRODUCT.

- More than half (57%) test regularly, while one-quarter (26%) test on occasion.

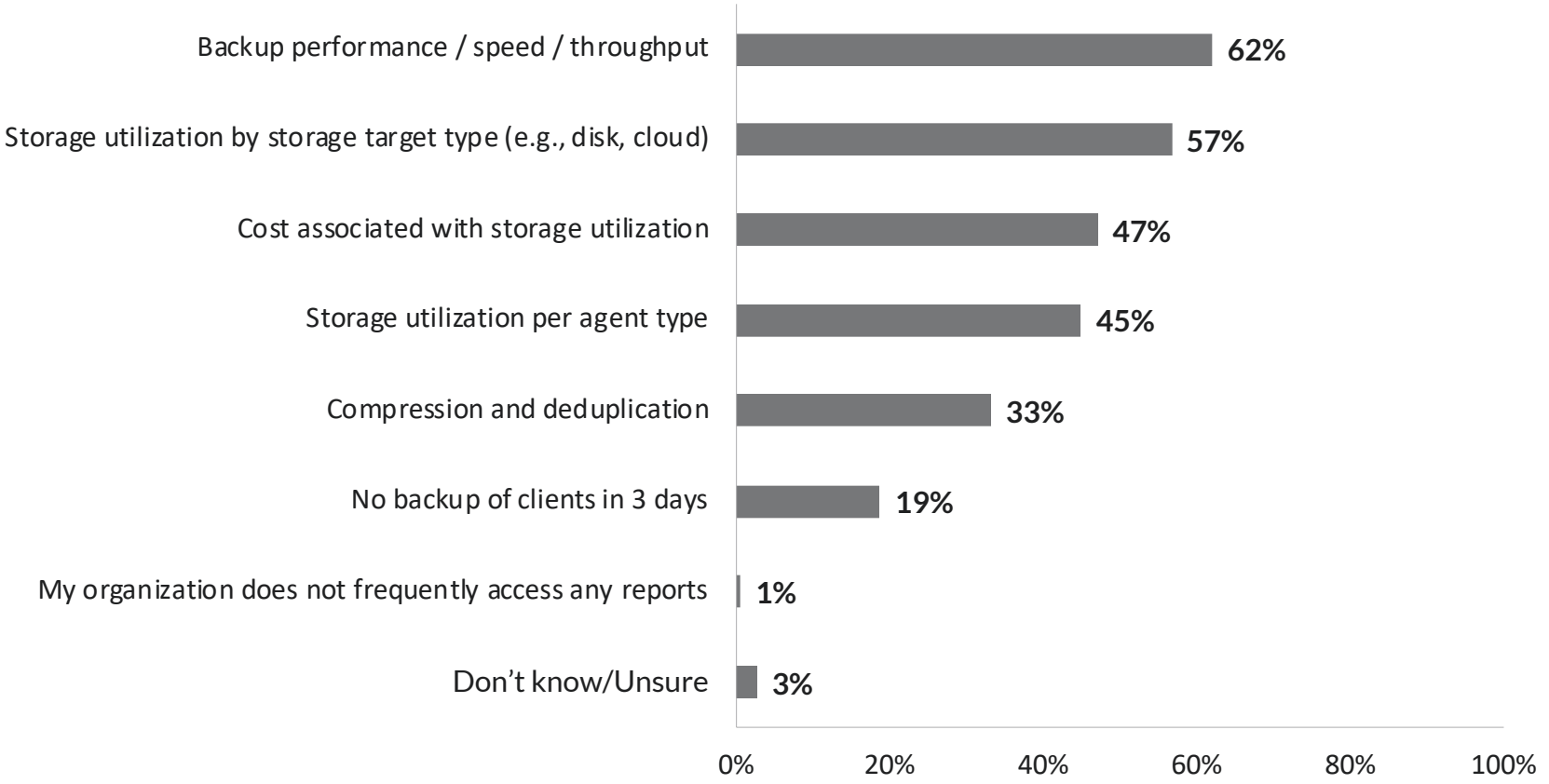


Q: Does your organization test data recovery from your backup product? (n=187)

MONITORING BACKUP PERFORMANCE AND STORAGE UTILIZATION ARE IMPORTANT GOALS FOR IT PROFESSIONALS.

- Nearly two thirds (62%) of IT professionals access reports on backup performance/ speed/throughput, making it the most commonly accessed report.

Most Frequently Accessed Reports

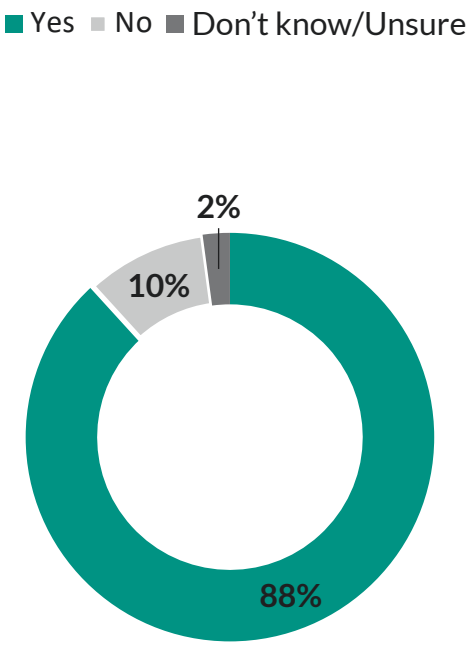


Q: Which of the following reports does your organization most frequently access? (n=187)

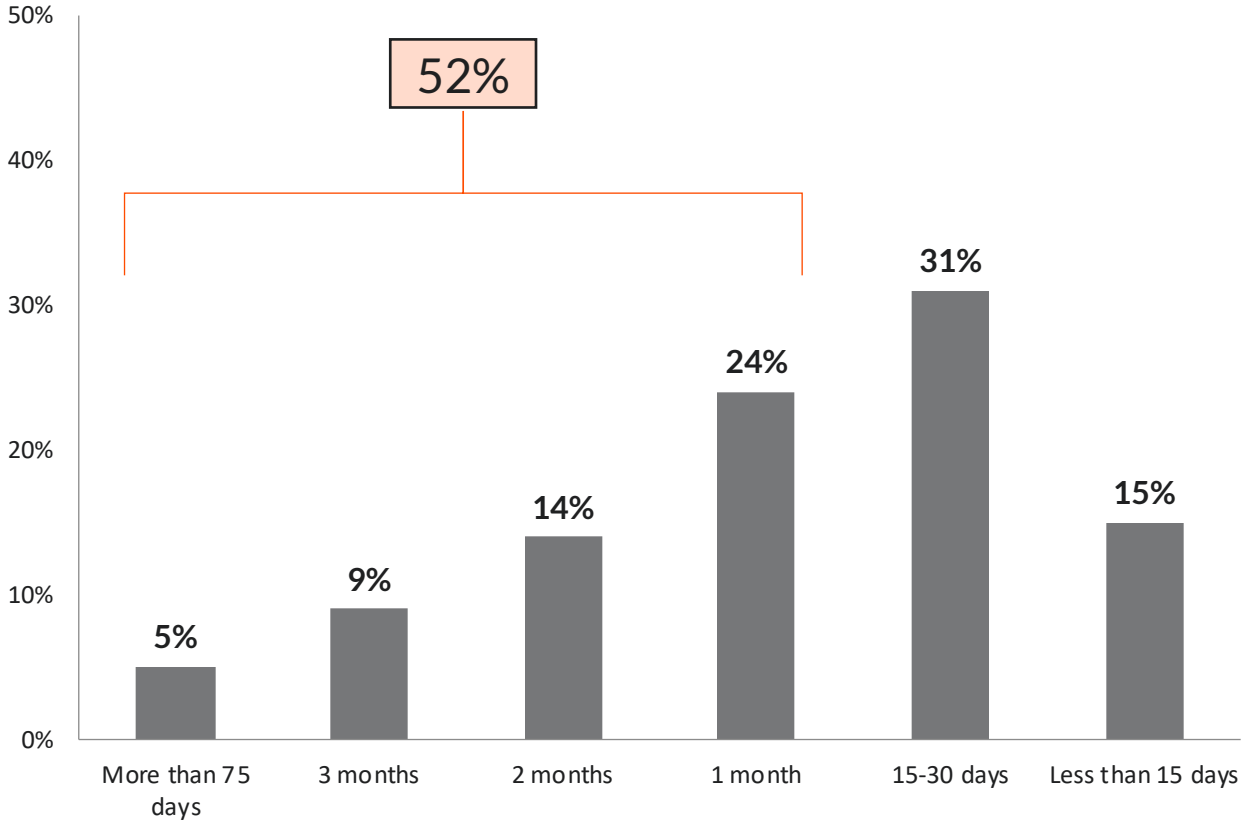
NEARLY ALL IT PROFESSIONALS RUN BACKUP TRIAL TESTING, 52% TAKING ONE MONTH OR MORE.

- Eighty-eight percent of IT professionals indicate that they perform trial tests of backup products before purchasing them, and nearly half (46%) of those that do indicate that it takes them less than 30 days.

Backup Trial Testing



Time Required for Backup Trial Testing



Q: Does your organization perform trial tests of backup products before purchasing? (n=187)
Q: Approximately how much time does your organization need to run a backup product trial? (n=169)

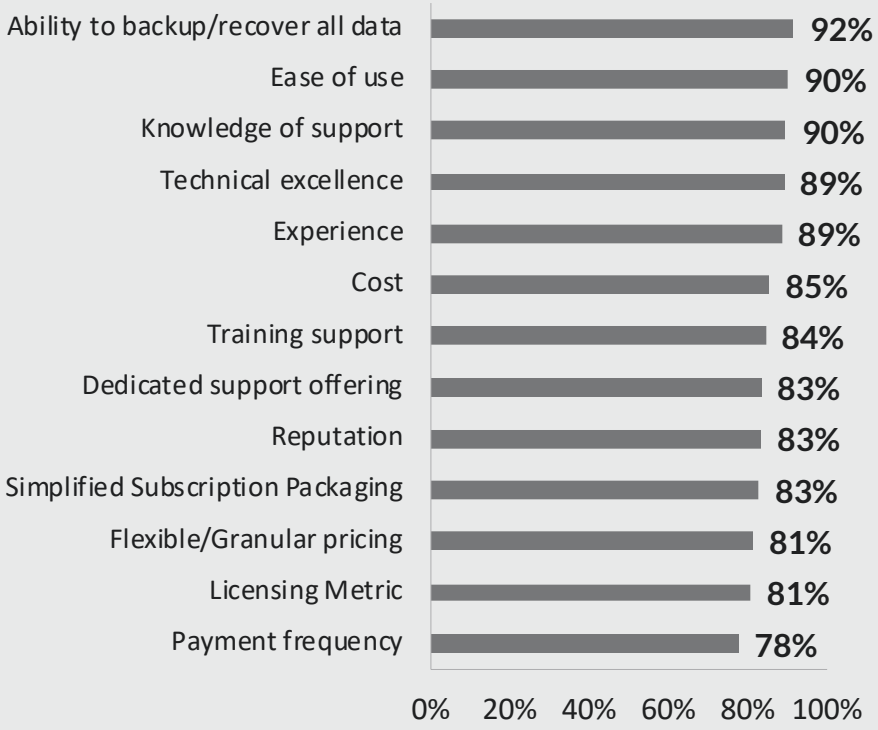
ADDITIONAL CONSIDERATIONS: SELECTING A BACKUP VENDOR

IT PROFESSIONALS SAY THE ABILITY TO BACKUP/RECOVER ALL INTERNAL DATA IS MOST IMPORTANT WHEN SELECTING A VENDOR.

- Of IT decision makers who consider multiple factors to be very important, approximately three-in-ten find the ability to backup/recover all internal data to be most important.

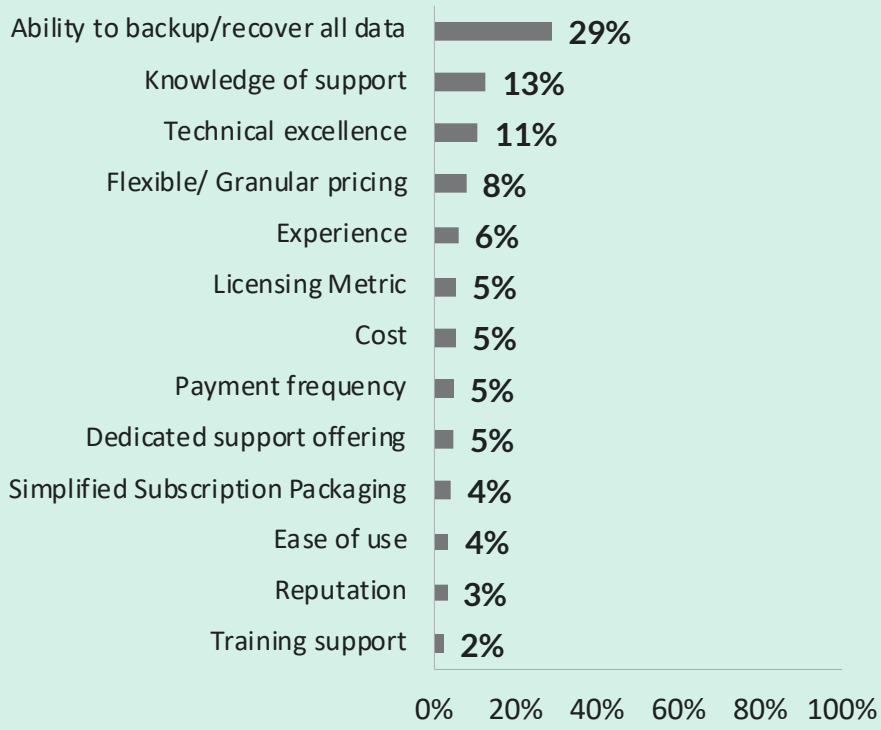
IMPORTANCE OF FACTORS WHEN SELECTING VENDOR

TOP 2: VERY IMPORTANT – EXTREMELY IMPORTANT
N=192



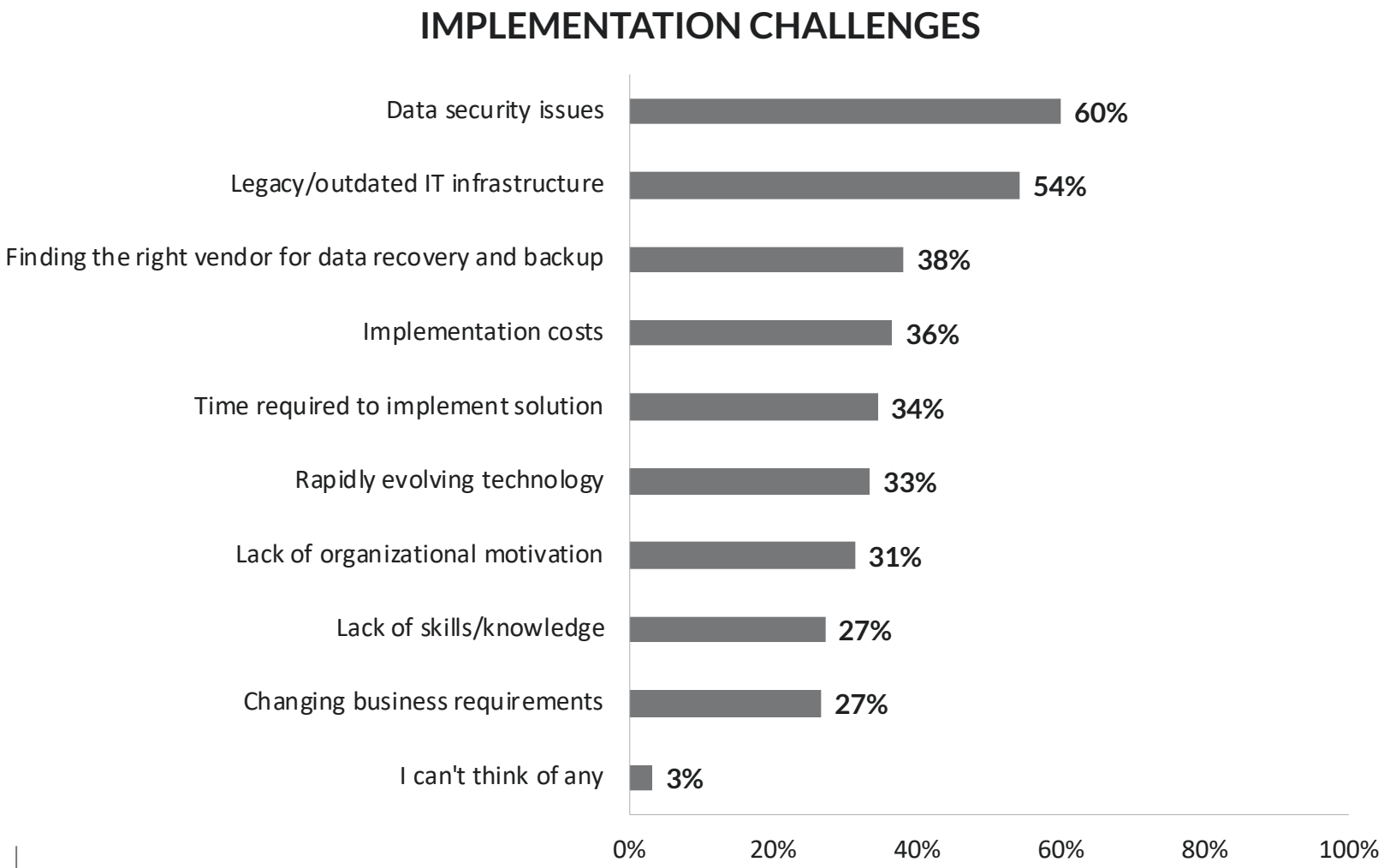
MOST IMPORTANT FACTOR

N=166



Q: How important are the following factors when selecting a vendor for data recovery and backup? (n=192)
Q: Which of the following factors is most important when selecting a vendor for data recovery and backup? (n=166)

DATA SECURITY ISSUES ARE THE BIGGEST CHALLENGE TO THE IMPLEMENTATION OF A DATA RECOVERY AND BACKUP SOLUTION.



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Q: Which of the following factors pose challenges to the implementation of a data recovery and backup solution? Please select all that apply. (n=192)
Note: * indicates significant difference between groups at a confidence interval of 95%

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