



## I D C E X E C U T I V E S U M M A R Y

# Using Veeam in the New Race to Zero: Customer Survey Results

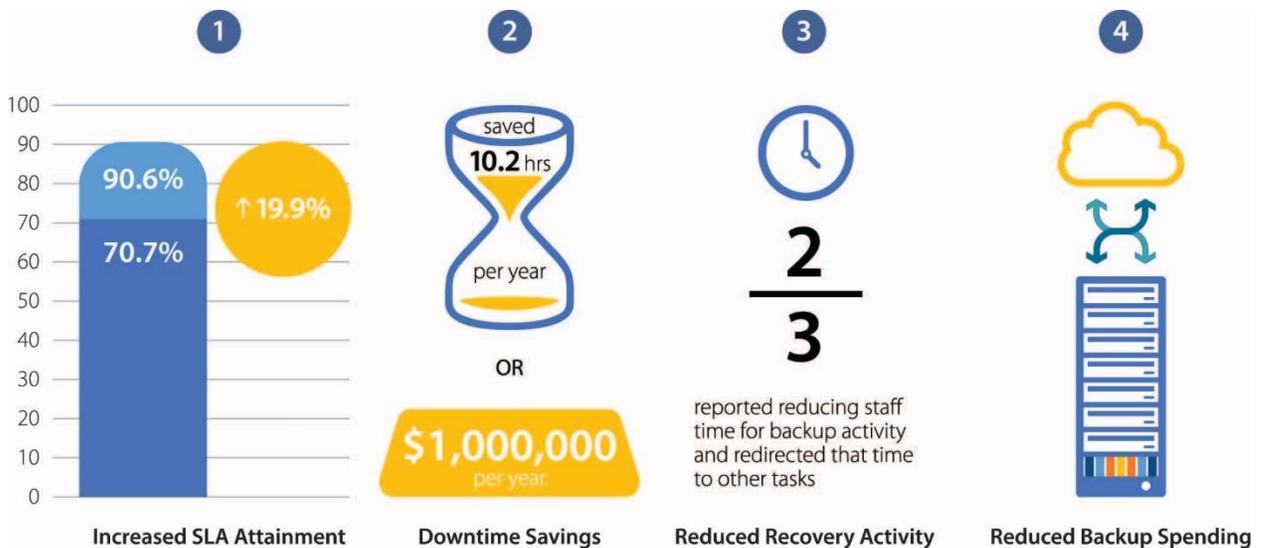
February 2017

Adapted from the Whitepaper: Using Veeam in the New Race to Zero: Customer Survey Results, by Phil Goodwin, doc # US42267117)

### IDC OPINION

In an ever-evolving market, one thing remains the same: Who will win the race? In this case, it's the race to zero. As data availability service-level agreements (SLAs) are forced to constantly shrink under the expectation of zero downtime and zero data loss, organizations are turning to the market in search of the data availability solution that will get them there.

IDC conducted a worldwide survey of Veeam customers, sponsored by Veeam, to measure the business results that Veeam's customers had achieved in using the Veeam product. The emphasis of the survey was on the "before" and "after" results of implementing Veeam, using definable metrics wherever possible. In total, 975 customers were surveyed with a focus on four particular business-oriented areas: SLA compliance (recovery point objective [RPO] and recovery time objective [RTO]) (see the Terminology section for details), solution reliability (backup/recovery [B/R] success), cost impact, and personnel efficiency. The key findings of the survey include improved SLA attainment, reduced downtime, improved personnel efficiency, and reduced spending on backup operations, as illustrated in the figure below.



Source: IDC, 2016

February 2017, IDC Executive Summary of #US42267117

## SITUATION OVERVIEW

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Veeam was founded in 2006 and has focused on data protection and availability in virtual computing environments. The core of the company is backup/recovery, although it has expanded over the years into a number of related capabilities.

During Veeam's relatively short existence, the company has accelerated its position among data protection and recovery software companies tracked by IDC. Currently, IDC tracks 33 specific vendors in the DP&R software market, with several other companies falling into the "other" category. Veeam achieved a 5.8% market share on 21.5% y/y revenue growth in 2015, surpassing a number of much larger, more established competitors. Veeam has done so by focusing on the needs of virtual machine recovery and data protection (see *Worldwide Data Protection and Recovery Software Market Shares, 2015: Steady On*, IDC #US41573316, July 2016).

Because Veeam is a relatively late entrant into the DP&R software market, in most cases the product is being purchased by companies that already have a DP&R product (or products) in place. As a result, users have experience with both the incumbent product and Veeam's product and are thus in a position to compare their experience with both products. Although the respondents are Veeam users and therefore likely to view the Veeam product favorably, they have no incentive to express anything other than their actual experience. IDC believes that this study is both statistically valid and a fair representation of the Veeam customer experience.

## CHALLENGES/OPPORTUNITIES

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The data protection and recovery software market remains highly dynamic, constantly evolving to meeting new application and business requirements. Storage architectures have evolved from SAN/NAS to include software-defined, hyperconverged, and object. Data types have extended from block and file to include NoSQL and containers. Datacenter architectures now include physical and virtual for on-premise, public cloud, and hybrid cloud. These permutations are leveraged by different application topologies, and most enterprise organizations use a combination of these technologies. No single backup product can address all of these application environments, thereby causing IT organizations to adopt multiple products to meet their data protection requirements.

Veeam has built its success by focusing on virtual environment backup and the small and medium-sized business (SMB) market. To continue its growth, the company must expand its appeal to larger enterprise organizations and additional technology platforms. Recognizing this need, the company has begun expanding its portfolio with support for Windows and Linux physical environments, Veeam Backup for Microsoft Office 365, as well as the introduction of the Veeam Availability Platform for the Hybrid Cloud, which includes new products like Veeam Availability Console and Veeam Availability Orchestrator, and Enterprise Scalability enhancements with Veeam Availability Suite 9.5.

## CONCLUSION

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If we were to summarize the conclusions from this study in a single sentence, it would be this: Veeam customers reported setting higher SLAs and achieving them more consistently while spending less money and staff time to do so compared with their prior solution. These benefits

resulted in better business outcomes and higher staff productivity for customers that have made an investment in Veeam.

IDC believes these results, representing the voice of the Veeam customer, are statistically significant; are highly relevant in today's information-centered business; and represent an overwhelmingly positive experience that users have with Veeam compared with their previous solutions. For organizations evaluating investments in virtual computing protection and availability solutions that will ensure they maintain their status in a disruptive, constantly evolving marketing, these results can serve as a positive reinforcement in selecting and deploying Veeam.

## About IDC

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## Global Headquarters

5 Speen Street  
Framingham, MA 01701  
USA  
508.872.8200  
Twitter: @IDC  
idc-community.com  
www.idc.com

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