

The Plan B Disaster Recovery Market Research Report April 2017

Executive Summary

Plan B's latest report addresses UK trends and attitudes towards IT availability and disaster recovery in 2017.

We delve into the adoption rates of different IT availability and disaster recovery methods to see whether there have been significant changes in the technologies used over the 3 years since starting our research reports. We assess how people prefer to manage their IT availability – whether running it in-house or outsourcing it - and decision makers' expectations in terms of recovery times and recovery points (data loss). Has the DR landscape changed with the emergence of new technologies and service providers' adoption of the improved functionality now available?

Finally, we review business continuity testing and performance. Testing is an element that has always been highlighted in previous reports with regards to needing significant improvement in order to increase the success rate of recoveries. Is the UK making any headway with better testing and if so, does this translate through to recovery success? Do the underlying drivers for buyers when sourcing

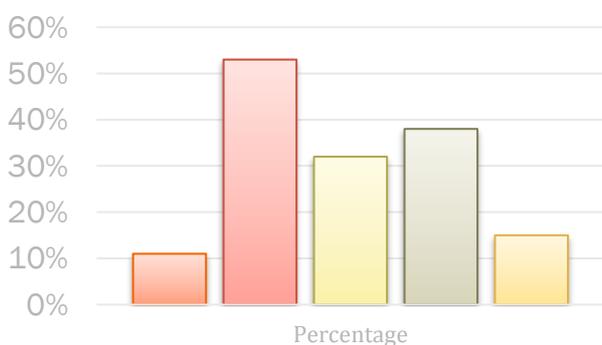
a disaster recovery solution show any correlation to the methods being adopted and the attitudes towards management of DR?

Research Demographics

Plan B's latest research report analyses results from a survey of 150 IT decision makers. Participants were from businesses of varying sizes and sectors, from SMEs up to Enterprises, including private and public sector organisations. The research was UK based, with all decision makers being accountable for UK markets, although some may have had remit for wider strategic IT decisions outside of the UK also.

1. Backup is used by over 50% of companies as a part of their disaster recovery strategy.

What method of DR do you have?



- None
- Offsite backup
- Offsite images
- Virtual standby
- Physical standby

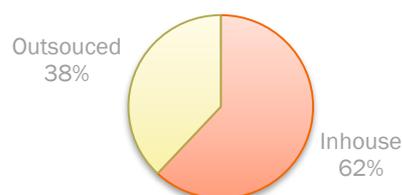
Backup is still the most popular disaster recovery tool, which is likely to be because it has its place within most businesses. At the low-cost end of disaster recovery table, it is suitable for less critical servers and protects against data loss, although it does not come with any recovery functionality, so strictly speaking it is not a method of DR in its own right, and requires an additional recovery strategy. Recovery from backup can be time-consuming and is frequently unsuccessful, so it should be considered for non-critical servers where recovery times of days or weeks can be afforded. Backups require regular testing to ensure that they are working – a key element for recovery success. If they are used for critical systems then there should be a documented method for recovery of IT systems to include the infrastructure, applications and networking which are essential to get users back to productivity.

Offsite images and virtual standby solutions are also highly popular methods of disaster recovery. Virtual standby is the second most highly adopted, which is encouraging because recovery from virtual standby should be much faster than from backups or images. The rise of replication technologies has increased virtual standby adoption, however it's important to note the differences between single virtual machine standby, and standby of entire systems. A virtual standby of a single VM will require more work to make it operational following a power outage for example, than a virtual standby of an entire IT systems which just requires booting on new infrastructure. Recovery times can therefore be slower than expected following a full systems failure.

Physical standby continues to be low in popularity, most likely because of the expense of maintaining a second set of IT systems, and the perceived waste in value of this equipment if it is only ever used in an emergency. With virtual standby options being more cost effective, it is hardly surprising that adoption rates are higher.

2. Nearly two thirds of companies prefer to manage DR in-house.

Do you manage your DR in-house or outsource it?



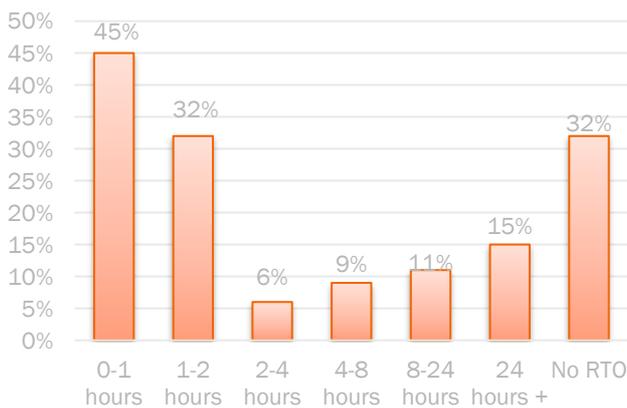


Surprisingly, nearly two out of every three companies still manage their disaster recovery in-house. This may be because of perceived cost-savings, or it could be due to increased automation of DR products, enabling businesses to benefit from simpler and more manageable DR in-house. It's important to note that even with automated and orchestrated failover capabilities, there is still a requirement for more in-depth testing. Whilst many DR and backup technologies have simple automated testing functions, these may only test the data integrity, a VM or a VPG. Companies should, in addition, test that their full IT systems can be brought up successfully – both physical and virtual servers together, within their RTO and RPO SLA's. It's also beneficial to test in an unprepared environment to practice the process and improve confidence during a true to life recovery situation.

Any changes made to production systems are likely to impact a business's recovery systems, so Plan B recommends completing a full recovery of all systems at least once every 3 months

3. RTO expectations are unrealistic based on recovery solutions.

What is your RTO?

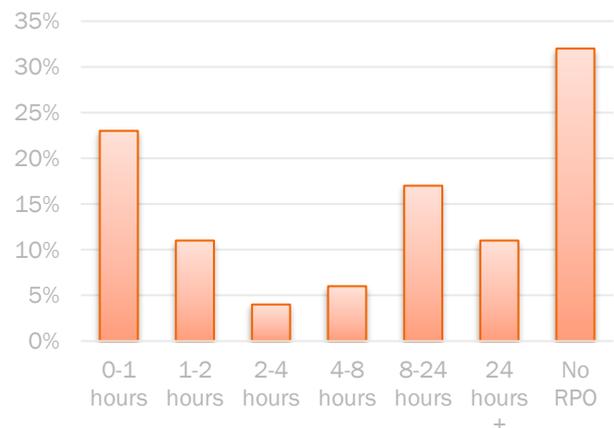


77% of companies expect to recover their IT systems within 2 hours. This is a significant increase over the 35% of companies who had the same RTO 3 years ago, however doesn't seem to accurately correspond with the DR methods being adopted. Given the high percentage of companies using backup systems, RTO's of under 2 hours are unlikely to be achieved in 77% of businesses. Backups will require a lot longer than 2 hours to recover from if hardware failures are encountered, as new hardware will need to be sourced, software and applications loaded and configured prior to the backup data being unpacked and finally tested. Depending on the amount of data this could take days for a single server. If entire systems fail due to a power cut, fire or flood then RTO could extend to weeks.

The fact that nearly one third of companies aren't aware of their RPO is also concerning, as this should be something at the forefront of IT decision makers' minds.

4. Businesses are becoming more conscious of data loss.

What is your RPO?



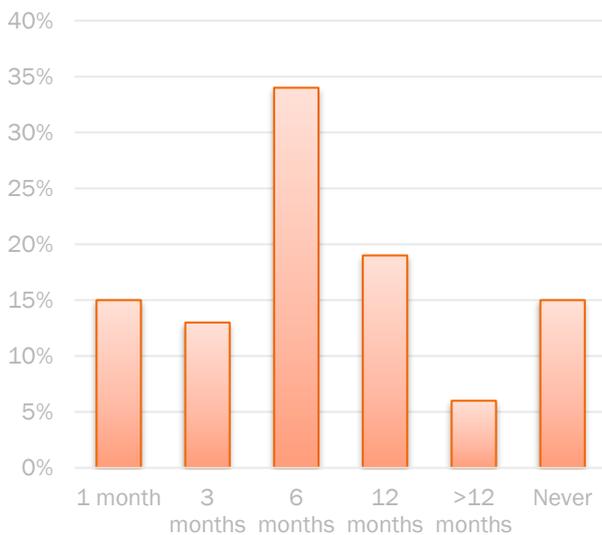


Nearly 1 out of every 4 companies has an RPO of less than 1 hour, meaning that they are replicating or backing up their data at least once every hour. Replicating this frequently demands high bandwidth and is therefore quite often only done with critical business systems where data loss is not tolerated.

At the other end of the spectrum replicating daily or less frequently is sufficient for non-critical business systems or where a day's worth of data loss can be tolerated.

3 years ago, more than one half of companies surveyed weren't aware of their RPO. Data loss has since become much more important to businesses, with less than one third having no RPO targets.

5. And testing their DR solution more frequently.



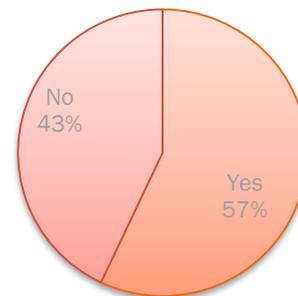
The frequency of testing of recovery systems has significantly improved over the past 3 years, with the majority of companies testing every 6 months now. Our research in 2014 concluded that only 36% of companies were testing at least every 6 months. In contrast, 61% companies are now

testing at least every 6 months. This could be due to the increasing in automated testing, however this doesn't necessarily address the quality of testing.

6. The quality of testing has improved.

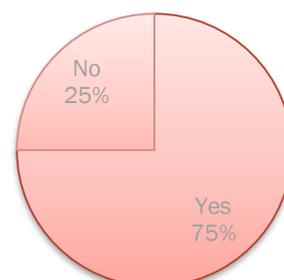
Over one half of companies test the full recovery of all systems when they run DR tests. This has more than doubled over the past 3 years, and demonstrates the market is more prudent in their DR testing.

Do you test full recovery of all systems?



7. Yet 1 in 4 tests still fail.

Was your last test completed successfully?





Even with more regular, and better quality testing, 1 out of every 4 disaster recovery tests still don't complete successfully. In a real-life disaster situation, that would equate to 1 in 4 recoveries failing and missing recovery RTO and/or RPO SLA's. This failure rate is still too high, and likely to be due to insufficient time managing DR solutions rather than failure of the technology itself.

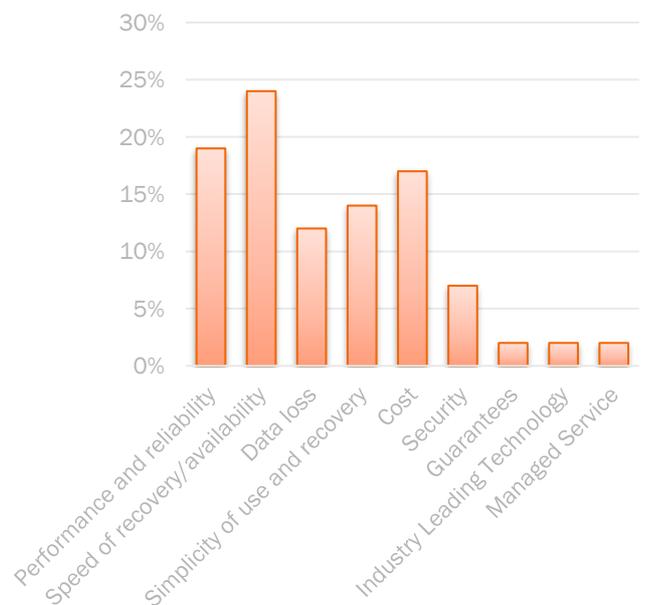
8. 30% of people are not confident in their DR solution.

70% of companies are confident that their DR solution will meet recovery time SLA's, with the other 30% either not confident or unsure as to whether their recovery time SLA's will be met. This is pretty much in line with the percentage of successful and unsuccessful DR tests, showing the correlation between a successful DR test and confidence in DR performance and reliability.

9. Speed of recovery is the most important feature of a DR solution.

Speed of recovery, performance and reliability, cost, ease of use and minimal data loss are the key features that buyers look for when buying a disaster recovery solution. Very few people prioritise technology brands and managed service levels which is understandable because performance and the ability to be recover is what is really important following an IT failure. Recovery guarantees feature low on the priority list because they aren't traditionally associated with disaster recovery and certainly won't be available for solutions managed in-house. The fact that recovery guarantees are available from outsourced providers should be considered as a benefit when deciding whether to manage DR in-house or externally.

What is your key priority when choosing a DR solution?



Conclusions

Perhaps the most noticeable discovery in this report is that despite a shift in the approach to DR testing over the last 12 months with more regular and better quality testing, still 1 out of every 4 IT systems tested are failing to recover. So, although we see an improvement in testing, the testing is only highlighting the issues that disaster recovery solutions are not as reliable as they should be. This could be down to the management of the solutions or the technology itself. Better understanding of why these failures are occurring would be of interest.

With RTO's reducing and companies expecting faster recoveries, companies only stand to be more disappointed with the performance of their solutions as recovery time objectives are not met; and 1 in 4 recoveries don't even work to deliver some level of productivity for users.

In order to drive the performance and reliability aspect that businesses are demanding from their disaster recovery solution, perhaps they should be seeking guarantees and more stringent consequences from suppliers if they don't meet SLA's. Of course, because over 50% of companies manage their DR in-house then guarantees and penalties will not be applied and DR performance may continue to fall behind objectives.

About Plan B Disaster Recovery

Plan B is a specialist Disaster Recovery provider, offering a range of recovery solutions and service options. Our hand-tailored solutions offer the benefits of a single supplier, and a single recovery solution which encompasses RTO's and RPO's to individual server level requirements.

Automated daily testing and certification guarantees immediate recovery with money-back clauses. Choose from managed or un-managed services and data loss from zero to 24 hours.

Plan B protect virtuals or physicals or hybrid mixes with our range of DR technologies.

For more information visit www.planb.co.uk
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