



# Server Virtualisation Gains Momentum in Small Businesses, but Backup Adoption for Virtual Machines Still Lags

*Server virtualisation finally has been adopted by most small and medium-sized businesses in the Asia-Pacific region, according to a new survey. But results show that relatively few small businesses have done enough to back up data on virtual machines.*

## Contents

<b>Server Virtualisation Adoption Trends</b> . . . . .	2
<b>Key Trends in Backup for Virtual Servers</b> . . . . .	4
<b>Selecting Providers for Backup Solutions</b> . . . . .	6
<b>Conclusion</b> . . . . .	7
<b>Executive Summary</b> . . . . .	7
<b>India</b> . . . . .	7
<b>Australia/New Zealand</b> . . . . .	8
<b>ASEAN (Singapore, Malaysia, Indonesia)</b> . . . . .	8
<b>China</b> . . . . .	9

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Server virtualisation no longer is an up-and-coming trend — it's an established fact of life for IT teams and their business users. And importantly, virtual servers no longer are the standard only in large enterprises. A new research survey of IT and business decision-makers at small businesses in nine Pacific Rim nations points out that server virtualisation now is widely adopted among smaller organisations as well.

But even though server virtualisation adoption has reached critical mass with SMBs, those organisations still have a ways to go when it comes to taking sufficient precautions to back up critical data on their virtual servers.



Click to navigate ▼

**Server Virtualisation Adoption Trends**

**Key Trends in Backup for Virtual Servers**

**Selecting Providers for Backup Solutions**

**Conclusion**

**Executive Summary: India**

**Executive Summary: Australia/New Zealand**

**Executive Summary: ASEAN (Singapore, Malaysia, Indonesia)**

**Executive Summary: China**

Among the key findings of the survey:

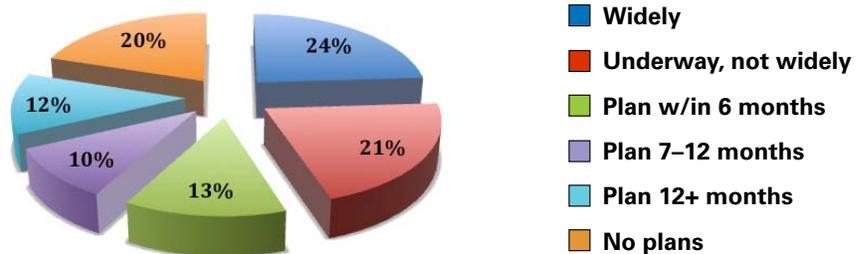
- Nearly one in four respondents said their organisation already has widely implemented server virtualisation.
- Even among respondents whose organisations do not yet have plans to adopt virtual servers, very few have failed to do so because of a perceived lack of benefits of server virtualisation.
- Unlike respondents to similar studies conducted in other geographies, IT and business decision-makers surveyed did not cite financial considerations as their primary motivation to adopt virtualisation, focusing instead upon business continuity and improving server management.
- Backup still has yet to be widely implemented for virtual servers, although it appears to be picking up momentum compared with results from a similar study of small businesses 18 months earlier.
- Cost to purchase and implement solutions, followed closely by customer service/support and product reputation, is the top evaluation criterion for selecting a supplier of backup solutions for virtual servers.

**Server Virtualisation Adoption Trends**

Data from the latest survey — conducted in January 2013 and based on responses of more than 1,200 IT and business decision-makers in organisations with fewer than 250 employees — points to impressive improvement in server virtualisation adoption. In a Symantec-commissioned study conducted among small businesses in mid-2011, 70 percent of respondents said they either had already implemented or were planning to implement server virtualisation. However, only 10 percent of those respondents indicated that server virtualisation was widely implemented in their business at that time.

In the new survey, however, 80 percent of the respondents said they either had already implemented or were planning to adopt virtual servers. And those that said they already had widely adopted virtual servers swelled to 24 percent.

**Extent of virtual server implementation**





Click to navigate ▼

Server Virtualisation Adoption Trends

Key Trends in Backup for Virtual Servers

Selecting Providers for Backup Solutions

Conclusion

Executive Summary: India

Executive Summary: Australia/New Zealand

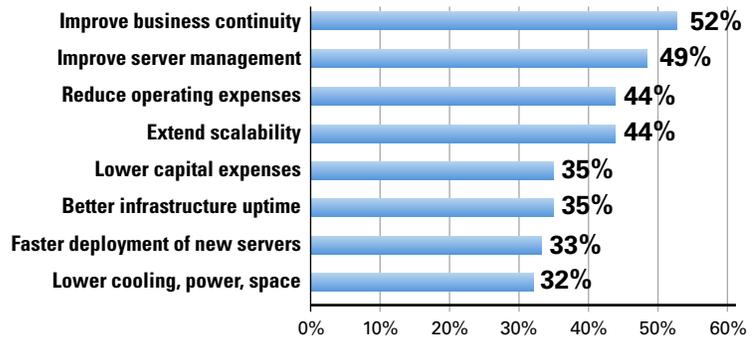
Executive Summary: ASEAN (Singapore, Malaysia, Indonesia)

Executive Summary: China

Only one in five (20 percent) respondents indicated that they had no plans to implement server virtualisation at this time, giving further credibility to industry projections that, within the next few years, the technology will be deployed at least at some level in nearly every organisation.

Market experts and IT decision-makers agree that server virtualisation is gaining significant momentum because the technology offers a wide variety of tangible benefits across a range of financial and operational requirements. Respondents to the new survey placed primary emphasis upon non-economic factors as key drivers for virtual server adoption.

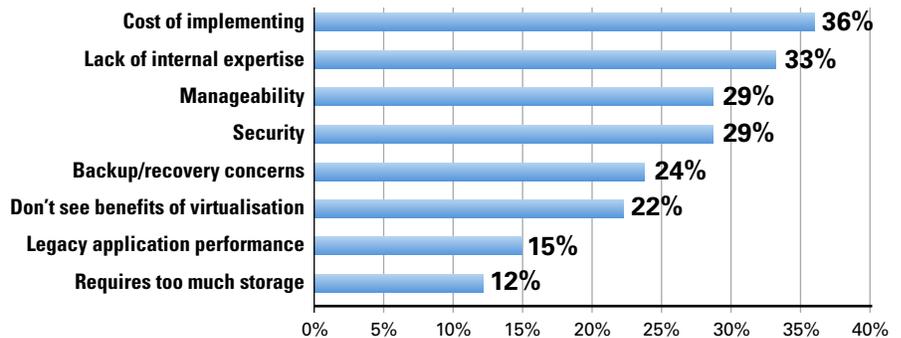
Significant factors in decision to implement server virtualisation



However, no single factor stood out in comparison with the other potential factors, supporting the notion that organisations are looking to achieve multiple goals in the adoption of server virtualisation. Across all respondents — including those that have no plans to implement any virtual servers — an average of 37 percent of all servers are virtualised. In fact, more than one quarter of respondents said that most servers in their organisations were virtualised already.

It's also worth noting that, among respondents that do not currently have plans to implement server virtualisation, very few seem to be holding off on their plans because they aren't sold on the benefits of the technology.

Significant factors in decision not to implement virtual servers





Click to navigate ▼

## Server Virtualisation Adoption Trends

### Key Trends in Backup for Virtual Servers

### Selecting Providers for Backup Solutions

### Conclusion

### Executive Summary: India

### Executive Summary: Australia/New Zealand

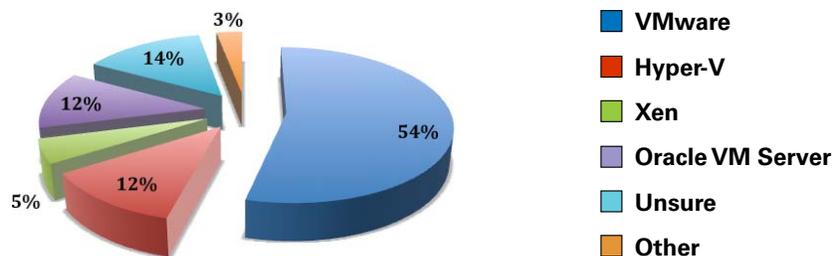
### Executive Summary: ASEAN (Singapore, Malaysia, Indonesia)

### Executive Summary: China

Importantly, in no case did even one quarter of the respondents cite any of the proposed challenges as a significant factor in their decision not to implement server virtualisation. In fact, fewer than one in four respondents (22 percent) said they didn't see the benefit in implementing server virtualisation. Even concerns about security and manageability — traditionally two key issues in adopting any new infrastructure solution like virtualisation — were far from big problems in the minds of the respondents. The top two gating factors — implementation costs and lack of internal expertise with virtual servers — would seem to point out that these respondents would be willing to adopt the technology if they could overcome budget and talent limitations.

When it comes to server virtualisation hypervisor software, VMware holds the enviable leadership position among survey respondents. However, there are two sides to that story: On one hand, VMware is far and away the top hypervisor platform, either in organisations where server virtualisation already has been deployed or among those planning an implementation. But on the other hand, VMware is not the primary platform in most cases.

### Primary virtualisation hypervisor (installed or planned)



With 54 percent of respondents indicating that VMware either already is or will be their organisation's primary virtualisation hypervisor, that platform holds a commanding lead over the next-closest competitors, Oracle VM Server and Hyper-V, each with 12 percent. But it also means that 46 percent of the respondents — or nearly the same level — do not consider or expect to make VMware their organisation's primary hypervisor.

### Key Trends in Backup for Virtual Servers

As more and more important data and business-critical applications are virtualised, organisations have to consider their strategies for ensuring the safety and security of information assets in a virtual setting. Two years ago, Symantec's study of small businesses indicated that only 15 percent of those surveyed said they were backing up their data in virtual server environments. In the latest survey, the backup numbers have certainly improved, but still represent a minority of the respondents.



Click to navigate ▼

Server Virtualisation Adoption Trends

Key Trends in Backup for Virtual Servers

Selecting Providers for Backup Solutions

Conclusion

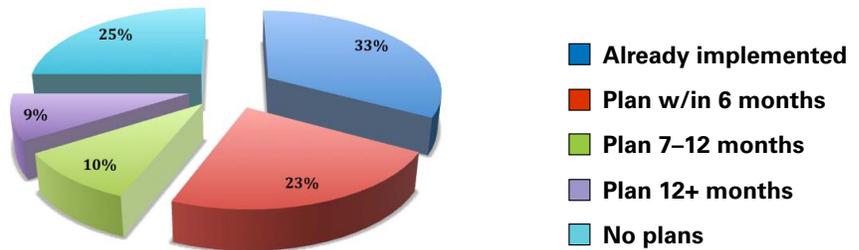
Executive Summary: India

Executive Summary: Australia/New Zealand

Executive Summary: ASEAN (Singapore, Malaysia, Indonesia)

Executive Summary: China

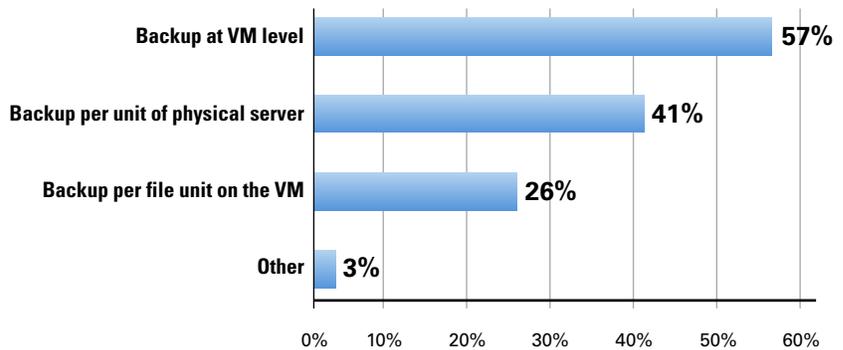
### Implementation of backup for virtual servers



The good news, however, is that if respondents follow through on their planned implementation of backup solutions for virtual servers, most small businesses will have taken important steps toward fortifying their newly virtualised server infrastructure. Even though only 33 percent of respondents said they have already implemented a backup solution for their virtual servers, another 33 percent said they plan to do so within the next 12 months.

Among those respondents that either have already deployed backup solutions for virtual servers or plan to do so, nearly all said they intend to back up critical data at the virtual machine (VM) level. But most of those respondents said they also intend to do per-unit backup of physical servers.

### How do you currently deploy, or intend to deploy, backup for virtual servers?



Among respondents that do not currently have plans to implement backup solutions for virtual servers, three factors stood out as challenges they must contend with: lack of technical skills or experience among their internal staff, uncertainty about the best way to implement virtual server backup, and perceived high costs for purchase and implementation of backup solutions.



Click to navigate ▼

Server Virtualisation Adoption Trends

Key Trends in Backup for Virtual Servers

Selecting Providers for Backup Solutions

Conclusion

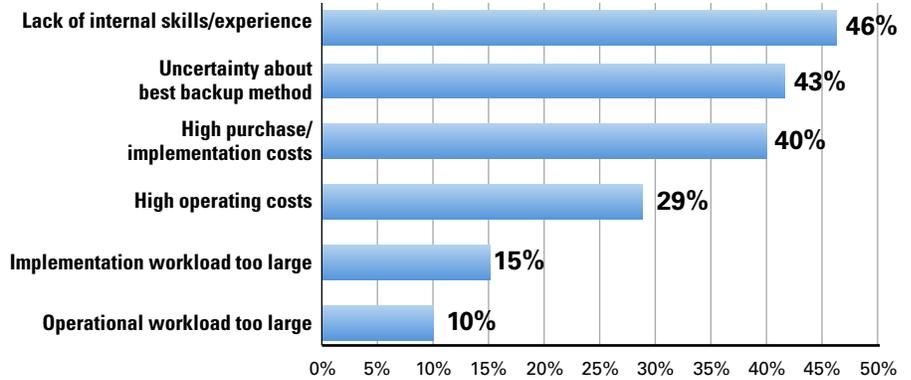
Executive Summary: India

Executive Summary: Australia/New Zealand

Executive Summary: ASEAN (Singapore, Malaysia, Indonesia)

Executive Summary: China

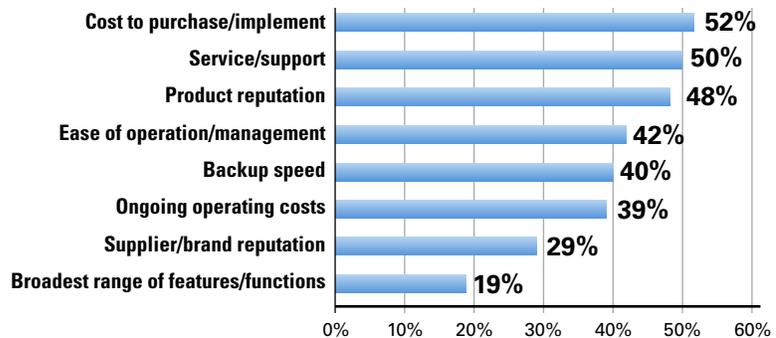
### Significant reasons in decision not to back up virtual servers



### Selecting Providers for Backup Solutions

When evaluating potential suppliers for backup solutions, respondents indicated that cost and service/support, respectively, are the most important factors in determining their selection. Also receiving significant attention as selection criteria were product reputation, ease of operation/management and backup speed. Each of these factors was cited by more than 40 percent of the respondents as a significant issue in the evaluation process, highlighting the need for suppliers to meet customers' economic, operational and technological requirements when it comes to backing up virtual servers.

### Significant factors in selecting supplier of backup solutions for virtual servers



It's worth pointing out that, while respondents placed a very high value on the reputation of the specific product, they didn't similarly value the reputation of the supplier itself. This indicates that the respondents are very knowledgeable about specific product solutions and hold strong opinions on those products, rather than simply defaulting to a specific branded supplier.



Click to navigate ▼

Server Virtualisation Adoption Trends

Key Trends in Backup  
for Virtual ServersSelecting Providers  
for Backup Solutions

Conclusion

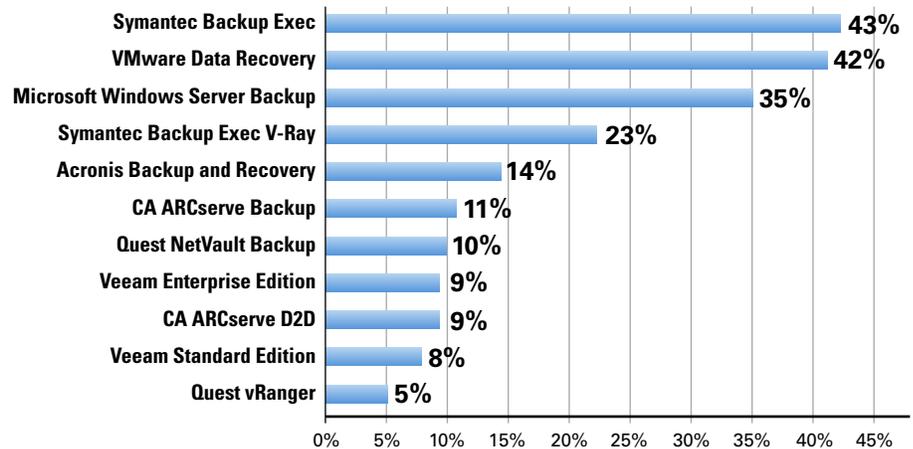
Executive Summary: India

Executive Summary:  
Australia/New ZealandExecutive Summary: ASEAN  
(Singapore, Malaysia, Indonesia)

Executive Summary: China

And when it comes to attitudes toward specific product brands as “market leaders,” respondents cited Symantec Backup Exec as the product brand with the highest position as a market leader. Backup Exec was followed by VMware Data Recovery, Microsoft Windows Server Backup, and then Symantec’s other backup solution for virtual servers, Symantec Backup Exec V-Ray.

### Considered “market leader” for virtual server backup solutions



### Conclusion

Virtualisation has taken the industry by storm, particularly with gathering evidence of the technology’s strengthening foothold in small and mid-sized organisations. Server virtualisation is on an impressive upward trajectory in SMB adoption, and a growing portion of those smaller organisations’ server workloads are being virtualised.

Still, more work needs to be done when it comes to backing up the essential data and mission-critical applications that reside on those virtual servers. But the trend is clearly headed in the right direction: Compared with just 18 months earlier, backup implementation for virtual servers has nearly tripled, and indications from responses to the latest survey paint a picture of IT teams’ desire to safeguard their virtualised environments with proven, feature-rich backup solutions.

### Executive Summary: India

When it comes to server virtualisation, IT organisations in India look remarkably like the average of all respondents to the survey taken by more than 1,200 decision-makers throughout the Pacific Rim. In general, enterprises in India mirror very closely the area averages when it comes to such issues as the extent of virtualisation in place, the reasons why they have — and haven’t yet — virtualised their servers, their backup strategies and the issues that are keeping them from putting in place backup plans for virtual servers.



Click to navigate ▼

## Server Virtualisation Adoption Trends

### Key Trends in Backup for Virtual Servers

### Selecting Providers for Backup Solutions

### Conclusion

### Executive Summary: India

### Executive Summary: Australia/New Zealand

### Executive Summary: ASEAN (Singapore, Malaysia, Indonesia)

### Executive Summary: China

Among respondents in India, 23 percent have widely virtualised their server infrastructure, compared with 24 percent of respondents across the Pacific Rim nations. Indian enterprises are slightly more likely to plan for server virtualisation over the next year than total respondents — 40 percent compared with 34 percent.

When it comes to having backup solutions in place for virtual servers, 27 percent of respondents in India said they already have deployed backup solutions, compared with 31 percent of all respondents. However, Indian IT respondents appear to be somewhat more likely to implement backup solutions for their virtual servers in the next year — 45 percent compared with 32 percent for all respondents.

### Executive Summary: Australia/New Zealand

Among all IT respondents in the nine Pacific Rim nations covered in the virtualisation survey, decision-makers in Australia and New Zealand are, far and away, the most advanced when it comes to adopting server virtualisation and having suitable backup plans in place.

IT respondents in Australia and New Zealand were more than twice as likely as the overall average to have widely implemented virtual servers: 50 percent versus 24 percent. Regarding reasons why they have adopted virtual servers, respondents in Australia and New Zealand were far more likely than their counterparts to cite the need to improve business continuity (64 percent versus 52 percent), shorten IT development time (44 percent versus 34 percent) and improve infrastructure availability (47 percent versus 36 percent).

On average, respondents in Australia and New Zealand said they have virtualised 54 percent of their servers, compared with an average of 37 percent for all respondents surveyed. Respondents in those two nations also were far more likely than their counterparts in other Pacific Rim nations to have backup solutions in place for their virtual servers — 54 percent compared with 31 percent for the average across all respondents.

### Executive Summary: ASEAN (Singapore, Malaysia, Indonesia)

In the ASEAN nations of Singapore, Malaysia and Indonesia, both server virtualisation and backup have yet to catch on as widely as they have in other Pacific Rim countries. Respondents in those ASEAN countries were less likely than most of their counterparts in other nations to have widely virtualised their servers or have backup solutions in place.

Respondents in the ASEAN nations were more likely than respondents in other countries to cite the need to reduce power, cooling and physical space costs as a driver for adopting server virtualisation. They also were considerably more likely to cite the cost of implementing virtual servers as an obstacle for widespread adoption of the technology — 51 percent compared with 36 percent on average across all nations.

Another difference among ASEAN respondents when compared with all respondents: They were by far the most likely to cite the lack of necessary internal skills as a key reason for not yet adopting backup solutions for virtual servers. Fifty-four percent of ASEAN respondents said their organisations lacked the internal talent required to successfully deploy backup solutions for virtual servers.



Click to navigate ▼

**Server Virtualisation Adoption Trends**

**Key Trends in Backup  
for Virtual Servers**

**Selecting Providers  
for Backup Solutions**

**Conclusion**

**Executive Summary: India**

**Executive Summary:  
Australia/New Zealand**

**Executive Summary: ASEAN  
(Singapore, Malaysia, Indonesia)**

**Executive Summary: China**

## **Executive Summary: China**

As China continues to update much of its computing infrastructure and approach to IT in general, it's clear that IT organisations throughout the country still have a ways to go when it comes to server virtualisation and backup. Among respondents in all nine nations where IT professionals were surveyed, those in China were the least likely to have widely adopted virtualisation or deployed backup solutions for their virtual servers. They also were the most likely to say they experience a lack of skills necessary to widely deploy virtual servers.

On average, IT respondents from China said they have virtualised only 29 percent of their servers, compared with an average of 37 percent among all respondents surveyed. Only 13 percent of IT professionals in China said their organisations have widely adopted server virtualisation, compared with 24 percent across the Pacific Rim.

Forty-five percent of respondents from China said lack of internal skills was a major challenge in widespread adoption of virtual servers, and another 52 percent said they were unclear of the best way to deploy backup solutions for virtual servers.