

Expanding into Europe

How SaaS businesses are navigating the data centre landscape

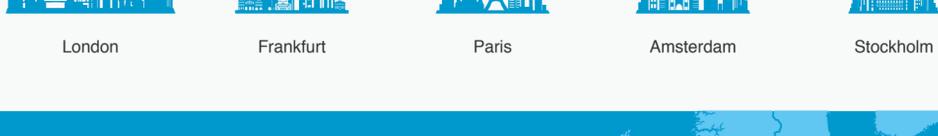
SaaS businesses have their sights on Europe. 9 out of 10 are already operating in Europe, and out of those polled everyone has plans to establish or increase their presence. More than half of SaaS businesses are already deployed in one or more locations in Europe, while 30% are deployed in multiple locations.

The following data within this infographic is taken from a field study of 250 US-based IT decision makers seeking expansion into or across Europe, conducted by 451 Research and commissioned by Interxion in April 2018. The below figures are taken from the 50 respondents within SaaS companies.



The five most popular destinations

SaaS businesses are most interested in leveraging the following locations to deliver services internally/for customers across Europe.



What locations are you already leveraging or interested in leveraging to deliver services for your organisation or for customers across Europe?

Top 1 Top 2 Top 3



How SaaS businesses plan to meet the demand for their services Team up or go solo?

33% will go it alone

60% up to 60% will use third-party colocation

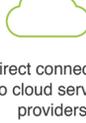
Top five selection criteria for SaaS colocation partners



Ability to understand business



Competitive pricing



Direct connection to cloud service providers



Capacity for expansion into other regions



Uptime and reliability

Data centre decisions

US SaaS companies are looking to increase their investment in Europe

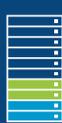
Performance and compliance are the biggest drivers



Performance 64%

34% SaaS businesses want sites close to their premises and customers to reduce latency

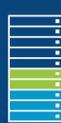
30% want to ensure delivery of rich media content to meet growing customer demand



Compliance 42%

24% identified the need for a local site to comply with GDPR

18% stressed the importance of compliance with specific industry regulations



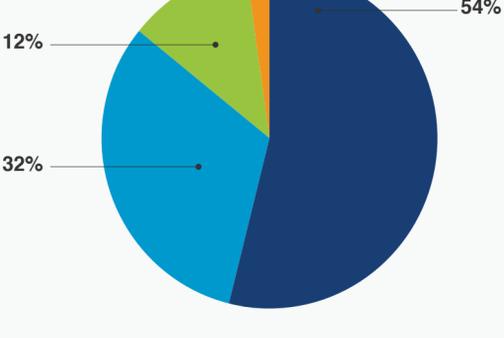
Other factors 58%

32% are looking for data centre consolidation

28% need a site for direct access to the cloud

How important are security and compliance considerations to your European expansion plans?

- Critically important - security and compliance is our first consideration
- Very important - security and compliance is necessary but we are flexible
- Important
- Meaningful, but security and compliance concerns are not an impediment to how we operate
- Not important at all



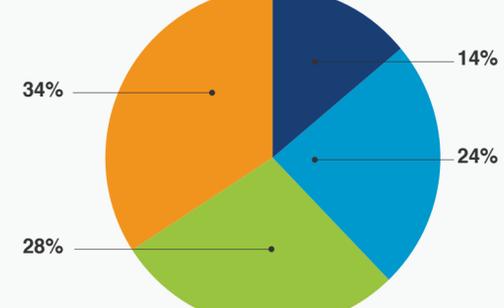
GDPR is not a major issue for many

GDPR applies directly to 46% of SaaS business and to 20% of end customers, but concern varies.



What is your overall sentiment to GDPR?

- We are greatly concerned by the potential impact of GDPR
- We are moderately concerned by the potential impact of GDPR
- We are only mildly concerned by the potential impact of GDPR
- We have done little as yet to identify the impact GDPR will have on our, or our customers' business



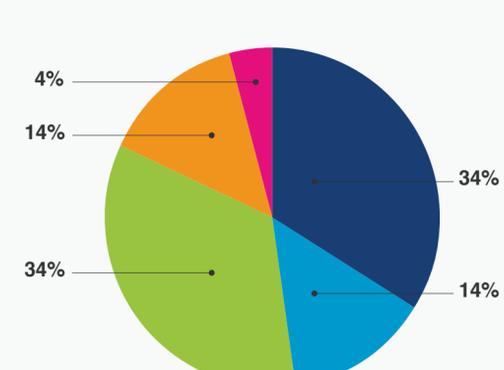
Cloud considerations

46% are cloud-first for all new applications, 28% are migrating existing applications unchanged into the cloud.



There's big variety in the intended use of cloud environments

- Primary focus on a single cloud environment
- Multiple cloud environments with seamless delivery (hybrid)
- Multiple cloud environments to migrate workloads or data between them
- Multiple different cloud environments, with little interoperability between them
- Don't know



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